



# Balancing Work and Care

Experiences of Working Caregivers  
and Evidence Informing Caregiver  
Friendly Workplaces

July 2022



## Project Partners

**Carers Canada** is a national coalition working to enhance the quality of life for caregivers through synergistic partnerships and global advocacy that strengthen and honour the voice of caregivers. Carers Canada has led National Caregiver Day Awareness Campaigns (first Tuesday in April) since 2009 and has successfully raised awareness of caregivers, facilitated actions to support caregivers and informed government policy. <https://www.carerscanada.ca>. Carers Canada is a priority program of the **Canadian Home Care Association**. <https://cdnhomecare.ca>

**McMaster University's Gender, Health and Caregiver Friendly Workplaces'** (<https://ghw.mcmaster.ca/>) research program's goal is to improve, promote and sustain health for employee caregivers by providing the evidence needed by employers, labour organizations and society to enact meaningful change in the workplace. The Canadian Home Care Association, through Carers Canada, led the first 4 years of the knowledge mobilization activities for the multi-sectorial research program '*Carer-Inclusive and Accommodating Organizations*' Standard (CSAB701-17). Under the direction of the Primary Investigator, Dr. Allison Williams, Principal Investigator of the CIHR/SSHRC Healthy Workplace Partnership Program entitled '*Mobilizing a Caregiver Friendly Workplace Standard: A Partnership Approach*' at McMaster University, the project worked to increase awareness of the standard across Canada; evaluate readiness to change; determine feasibility and cost benefit; embrace cultural competency and indigenous perspectives; and, create an international carer standard for employers. <https://ghw.mcmaster.ca>

## Project Sponsor

The **PetroCanada CareMakers Foundation™** creates awareness and understanding of the issue of family caregiving in Canada and inspires Canadians to help. They work to raise funds that can be used to enable and amplify the work of charitable organizations in Canada that currently support family caregivers. They convene and collaborate with others in the sector to create innovative new programs, resources and tools. Established in 2019, the Foundation's purpose is to support family caregivers, while inspiring other organizations to do the same. The Foundation believes that supporting caregivers is a societal responsibility that should be championed by the public, along with the non-profit/charitable and private sectors. <https://www.caremakers.ca/en/about>

This project was supported by a funding contribution from the Petro-Canada CareMakers Foundation. The views expressed herein do not necessarily represent the views of the Petro-Canada CareMakers Foundation.

© The Canadian Home Care Association, July 2022 [www.cdnhomecare.ca](http://www.cdnhomecare.ca)

The use of any part of this publication reproduced, stored in a retrieval system, or transmitted in any other form or by any means, electronic, mechanical, photocopying, recording or otherwise, without proper written permission of the publisher and editors, is an infringement of the copyright law.

# Table of Contents

PREFACE .....	2
EXECUTIVE SUMMARY .....	3
DRIVERS FOR CHANGE .....	7
Caregiving in Canada .....	7
Demographic Pressures .....	8
Aging Population .....	8
Global Pandemic .....	9
PILLARS FOR ACTION .....	10
<b>1. POLICY</b> .....	11
Reconciling Work & Caregiving .....	11
COVID-19: A Domino Effect .....	11
Shifting Political Landscape .....	12
A Global Priority .....	13
Strong Leadership from Governments .....	14
<b>Evidence to Action Summary: POLICY</b> .....	15
<b>2. CULTURE</b> .....	17
Creating a Caregiver Friendly Culture .....	17
COVID-19: A Quandary for Employers .....	18
<b>Evidence to Action Summary: CULTURE</b> .....	20
<b>3. LEADERSHIP</b> .....	21
Post-Pandemic Outlook .....	21
Underpinning Values .....	22
Certification and Standards .....	22
<b>Evidence to Action Summary: LEADERSHIP</b> .....	23
<b>4. MOTIVATION</b> .....	24
Articulating a Value Proposition .....	24
Benefits of Supporting Employee Caregivers .....	24
WAY FORWARD .....	27
A Vision for Change .....	28
Building a Strong Foundation .....	29
Increasing Awareness and Recognition .....	29
Engaging Employees .....	29
Measuring Success .....	29
<b>Evidence to Action Summary: Advancing Inclusive and Accommodating Organizations</b> .....	30
APPENDIX A – Accreditation in Australia & the United Kingdom .....	31
APPENDIX B – CSA Group & ISO Standard .....	32
Endnotes .....	33

# PREFACE

Carers Canada, a priority program of the Canadian Home Care Association (CHCA), has prepared this paper for the Petro-Canada CareMakers Foundation/Fondation proches aimants Petro-Canada to help advance the work of the Foundation. Our intent is that this paper will add to the awareness of working caregivers and provide suggestions to help organizations create flexible and accommodating workplaces that meet the need of individuals balancing paid work and unpaid caregiving responsibilities.

## ➤ Caregivers who are employed are called employee caregivers, also referred to as working caregivers.

This paper uses a reflective methodology to enhance the understanding, application and mobilization of evidence and knowledge toward action. The adaptive knowledge translation approach involves a process of continuous learning based on research evidence, storytelling, lived experiences and catalyst conversations. The personal perspective of those with lived experiences enables a deeper understanding of how to support the development of flexible, caregiver friendly workplaces.

The construct for the paper focuses on the findings and experiences of caregivers who are working while managing their unpaid caregiving responsibilities. It synthesizes the key findings from national and international research conducted under the direction of the primary investigator, Dr. Allison Williams, Professor at McMaster University. The report highlights the work arising from the CIHR/SSHRC Healthy Productive Work Partnership Grant, *Mobilizing a Caregiver Friendly Workplace Standard: A Partnership Approach*.<sup>1</sup>

Through Carers Canada, the CHCA led the knowledge translation (KT) process for the grant over a four-year period beginning in 2018. In the fourth and final year of the KT work, the CHCA developed and launched a strategic awareness campaign based on the lived experiences of employee caregivers. The campaign leveraged National Caregiver Day, themed “Balancing Work & Care,”<sup>2</sup> to amplify the messages.

In addition to featuring over 30 caregiver stories and employer testimonials, two catalyst conversations were held on April 5, 2022, to engage experts in a discussion about opportunities, challenges, and future strategies to support working caregivers.

The report also draws upon the findings related to caregiver friendly workplaces from the 2021 Global State of Caring report.<sup>3</sup> Recognizing the global effort toward the United Nations Sustainable Development Goals (Global Goals) and the impact caregivers have on numerous goals in the quest to “achieve a better and more sustainable future for all,”<sup>4</sup> the report flags the goals in which working caregivers can be situated.<sup>5</sup>

## ➤ While this report focuses on employee caregivers, we acknowledge the full scope of caregivers’ priorities, including recognition, minimizing financial burden, safeguarding caregiver health and well-being, and access to information and supports for caregivers of all ages.

# EXECUTIVE SUMMARY

 *It is not if you will be a caregiver, it is when.* 

Nadine Henningsen, Carers Canada

There is no way of knowing when caregiving responsibilities will arise—for some it will be sudden because of an accident or illness, while for others it will build gradually as needs increase. For many people, taking on caregiving responsibilities will occur while they are employed.

Over 6 million Canadians are balancing work and unpaid caregiving responsibilities, accounting for 35% of the workforce.<sup>6</sup> If not supported, these individuals face difficult, life-altering choices, such as reducing their work hours, turning down job opportunities, taking a leave of absence or leaving the labour market.

The increasing care needs of our aging population, coupled with the unprecedented impact of COVID-19, have heightened awareness of employee caregivers and the need for inclusive and accommodating workplaces. The future workplace must recognize that work and caregiving are a part of life, and employers will be compelled to adapt and accommodate the unique needs of employees who are juggling both work and caregiving responsibilities. To do otherwise will negatively impact the organization's bottom line; estimated costs to employers in Canada are \$1.3 billion in lost productivity per year.<sup>7</sup> The impact of this loss is compounded by the competitive labour market where potential workers are seeking a culture of inclusion and compassion.

Using an adaptive knowledge translation approach, this report further aligns with the evidence gained through the multi-year research project “CIHR/SSHRC Healthy Productive Work Partnership Grant” and experiences of employers and employee caregivers across the country. This alignment is the foundation for the “evidence to action” abstracts provided in this report. The vision statement in each abstract reflects the lived experiences and voices of employee caregivers and employers, while the “knowledge accelerator” section provides key learnings that inform the potential opportunities.

*“Employees are drawn to organizations that understand the challenges of things like caregiving.”*

**Employee caregiver,  
National Caregiver Day interview, 2022**

Through the lens of adaptive knowledge translation and the evidence-to-action framework, we have identified four fundamental pillars and vision statements that will accelerate the creation of caregiver friendly workplaces across Canada. These vision statements are exciting and serve as a call to action. **The future state concepts are:**



## 1. POLICY

Canada will rank first among the G7 in caregiver supports, which include financial programs that provide the means for employee caregivers to modify their employment while caregiving.

### ***Actions***

---

Adopt an interest-free government loan to support employee caregivers to take a partial leave of absence.

---

Permit tax-free withdrawals from RRSPs for a caregiving leave with a time-limited repayment period.

---

Enable pension unlocking for working caregivers.

---

Work towards making the voluntary CSA B701-17 *Carer-inclusive and accommodating organizations* Standard<sup>8</sup> a requirement in all Canadian workplaces; this would ensure access to workplace accommodations for all employee caregivers.



## 2. CULTURE

Work and life will be meaningfully integrated and normalized so that caregiving responsibilities can be equitably accommodated.

### ***Actions***

---

Implement employee caregiver policies and practices that explicitly apply to anyone providing care to another individual without the need to disclose details of the relationship.



### 3. LEADERSHIP

Employers will engage employees in the creation of caregiver friendly and supportive workplaces as part of their core organizational operating procedures.

#### *Actions*

---

Generate momentum for pan-Canadian employer participation in the creation caregiver friendly workplace.

---

Include caregiver friendly policies and programs in continuous quality improvement initiatives and as part of third-party accreditation specific to caregiving.



### 4. MOTIVATION

Employers across Canada will have access to independent, applied research to inform their policies and practices for employee caregivers.

#### *Actions*

---

Establish a national caregiver centre of excellence for adaptive knowledge translation, similar to the observatory recently announced in Quebec<sup>9</sup>.

---

Provide employers with access to reliable and validated data that incorporates research and caregivers' lived experiences.

---

Promote caregiver policy and practice outcome evaluations that are shared through an agreed-upon host centre to facilitate benchmarking across the country.

Attaining the vision of workplace accommodations and inclusion of employee caregivers as a universal practice will require that public and private sector organizations commit to providing exemplary caregiver friendly workplaces.

As organizations individually and collectively work to become more caregiver friendly, the goal is to embed accommodating and inclusive policies and practices into organizational culture and procedures that are universally accessible and transparent for all employees.

Ultimately, society benefits from helping caregivers to remain in the labour market and stay connected to the workplace. Those who work pay taxes and contribute to the growth of the economy. The demographic imperative demands that we encourage and support people to keep working. Employers must therefore determine how to respect choices about how to integrate work and personal time.

Human capital is one of the most valuable components of any business. This is why investment in human resources becomes a necessary step to ensuring prosperity, competitiveness and adaptability to changing market and labour conditions. This report outlines a roadmap for employers to invest in their current and future employees who are balancing work and unpaid caregiving responsibilities.

*In addition to making good business sense, there is an ethical imperative for workplaces to support their carer-employees.*

**Dr. Allison Williams, PhD**



# DRIVERS FOR CHANGE

## Caregiving in Canada

Caregivers are individuals (i.e., family members, neighbours, friends, and other significant people) who take on a caring role to support someone with a diminishing physical ability, a debilitating cognitive condition or a chronic life-limiting illness.<sup>10</sup> Caregivers are also referred to as carers or family caregivers, and sometimes as unpaid caregivers. Caregivers who are employed are called employee caregivers, also referred to as working caregivers.

➤ **Employee caregivers are labour force participants who also take on an unpaid caring role for someone in need.**

Approximately 6.1 million people in Canada<sup>11</sup> combine work with some level of unpaid care. Employee caregivers—workers who also provide care to a family member or close friend—make up 35% of the total Canadian workforce,<sup>12</sup> representing one in every three employees.

Caregiving is unpredictable and can be hard to fit around a paid job. In 2018, the average number of **hours of care provided per week** by employed caregivers aged 19 to 70 was 13.8 hours for women and 10 hours for men—nearly two full workdays per week, in addition to their paid work responsibilities.<sup>13</sup> And the reality is that the caregiving responsibility can last for years, taking a high personal toll on individuals.

Half of employee caregivers in Canada are between 45 and 65 years—the peak earning years.<sup>14</sup> Many employee caregivers worry about their ability to contribute at work and opt to stop working, reduce their work hours, change jobs, or accept a lower income to balance their work and care responsibilities. This can have far-reaching implications personally and organizationally, and more broadly for the health of the community.

On average  
**2.2 million**  
**hours of work**  
are lost per week every  
year due to caregiving,  
the equivalent to  
**157,000 lost**  
full-time employees.<sup>15</sup>

## Demographic Pressures

Providing unpaid care has historically been considered women's work, however a growing number of men and children are now caring for friends and family members. Governments and societies around the world expect that caregivers will provide care for those who need it. In Canada, the convergence of an aging population and the impact of COVID-19 has contributed to greater awareness of caregivers. The current labour market shortage across the country has also brought to light the challenges of employees who are juggling paid work and unpaid caregiving responsibilities.

## Aging Population

“Population aging—the increase of the share of older individuals in a society due to fertility declines and rising life expectancy—is an irreversible global trend with far-reaching economic and socio-political consequences.”<sup>16</sup> “Virtually every country in the world is experiencing growth in the size and proportion of older persons in their population,”<sup>17</sup> and Canada is not an exception. By 2026, Canada is expected to become a “super-aged”<sup>i</sup> society as the share of people aged 65 and older will exceed 21% of the total population.<sup>18</sup> Compared with the rate of growth for the overall senior population, the older senior's population—the subset of older adults aged 75 and older—is growing at a faster pace.<sup>19</sup>

The importance of the aging population globally is supported by the United Nations declaration in December 2020 of the Decade of Healthy Aging 2021–2030. Aging reflects our success as a society due to public health policies, medical advancements, and economic and social development over diseases, injuries, and early deaths. However, as people age there are greater demands on family and friends to fulfill a caregiving role for an older person, or persons, in their lives. About 50% of caregivers provide care for parents or parents-in-law.<sup>20</sup>

And yet the context for caring in Canada has shifted over time. Families are smaller and more dispersed; there are more women in the formal workforce and demand for workers is rising; marriage and childbearing occur later in life; retirement is delayed. Today's reality is that it is and will continue to be challenging for the formal and informal systems for caring to meet the needs of Canadians to receive care as they age.

<sup>i</sup> The UN defines “super-aged” as a society where more than 20% of the total population is aged 65 years or older.

**People over age 65** are more likely to have one or more **chronic health conditions.**<sup>21</sup>

## Global Pandemic

The disruption caused by the COVID-19 pandemic highlighted the shortfalls in policies and practices pertaining to care of older persons and to caregiving in general around the world. In Canada, the pandemic brought to light the critical role that caregiving plays in the well-being of persons who live in the community and for those who live in long-term care homes.<sup>22</sup> Some were not able to provide their usual caregiving activities, and others had to increase their level and amount of caregiving given the lack of other support available during the pandemic.<sup>23</sup>

Widespread business closures and mass layoffs occurred world-wide.<sup>24</sup> Statistics Canada reported in June 2020 that 12.4% of Canadian workers had been laid off monthly since February 2020, although the number of permanent layoffs was unclear.<sup>25</sup> The strain on essential services increased and contributed to worsening mental health, particularly among health care workers.<sup>26</sup>

Many businesses adopted a model for employees to work from home, which led to the blurring of boundaries between the workplace and home. Furthermore, demands for eldercare were heightened and establishing a balance between providing care and working from home was challenging. The uncertainty of the COVID-19 pandemic exacerbated the existing strain faced by employee caregivers. In Canada, the effects on employment, health care and isolation, among other things, put substantial stress on the financial, physical, and mental well-being of employee caregivers.<sup>27</sup> One of the biggest challenges identified by employee caregivers in this country was difficulty in juggling their paid job and being a caregiver (29%).<sup>28</sup>

The COVID-19 pandemic accelerated the collective experience with remote work. As demonstrated by the ubiquity of Zoom, the pandemic also fast tracked the adoption of technology in the workplace. Within health care, barriers to remote consultations and monitoring were abolished and adoption of these practices shattered previous assumptions by clinicians about uptake by clients, residents, and patients. Social service organizations, including those that support family caregivers, renewed outreach through telephone and the Internet.

*“COVID took a massive toll on everything. Services for my grandparents and mom were removed.”*

Employee caregiver,  
National Caregiver Day interview, 2022

Among Canadians who worked at least half their usual hours, **the number working from home increased by nearly 700,000 to 5.4 million** in January (2021).<sup>29</sup>

# PILLARS FOR ACTION

Through the lens of adaptive knowledge translation and the evidence-to-action framework, we have identified four fundamental pillars for action that will accelerate the creation of caregiver friendly workplaces across Canada.



# 1. POLICY

---



- **Proposed Vision: Canada will rank first among the G7 in caregiver supports, which include financial programs that provide the means for employee caregivers to modify their employment while caregiving.**

## Reconciling Work & Caregiving

The *Canadian Human Rights Act* prohibits discrimination on the basis of family status, meaning that employers have a legal obligation to accommodate employee caregivers. However, employers have yet to fully integrate work and caregiving to support people in employment to manage their paid work alongside a caring role.<sup>30</sup> Indeed, there is no clear consensus in society on how to best combine the dichotomies of paid employment and unpaid care responsibilities.

In Canada, there is an underlying expectation of employees and employers that it is the family's responsibility to provide the requisite care for a family member (however defined), and to do so around employment. The notion of the paid work environment accommodating employee caregiving responsibilities was, and to an extent still is, an anomaly, considered a perk or gift from employers. The need for flexibility and workplace accommodation for employees with childcare responsibilities is more readily understood and accepted by employers than for employees who are providing necessary care for adults with a diminishing physical ability, a debilitating cognitive condition or a chronic life-limiting illness.

*"I thought I could do the meeting while caring for Dad, but I was not attentive to either and felt bad."*

Employee caregiver,  
National Caregiver Day interview, 2022

## COVID-19: A Domino Effect

The workplace challenges experienced during the COVID-19 pandemic highlight this widespread cognitive bias toward caregiving and work. The restrictions imposed to manage the pandemic meant that employee caregivers took on greater care duties that often conflicted with paid work. To manage, employee caregivers had to reach out to their employers to request accommodations. Many of the caregivers we interviewed found their supervisors to be supportive. However, we also heard of employees not being comfortable disclosing their



caregiving responsibilities as they were concerned about negative repercussions, such as being overlooked for special projects and promotions. Conversely, employers reported wanting to support their workers yet being uncertain of how to help.

In our interviews for national Caregiver Day, 2022, some employers stated that they permit flexibility in working hours within “certain parameters” and on the condition that workers “put in their 7.5-hour day.” Employers offered a variety of flex hours to “allow workers to be successful at work and in their caregiving.” However, flexibility can drive burnout. With the overall aging population and the complexity of care needs, many employee caregivers require, and are beginning to insist on, structured solutions that formally recognize the breadth of their responsibilities.

The current underlying expectation is that employee caregivers can manage two jobs: paid employment and unpaid caregiving. Employees reinforce this notion, with many employee caregivers expressing gratitude for being able to work from the loved-one’s bedside or for being able to juggle their time between caregiving and paid work so they did not let down their employer. Some employee caregivers commented that they should have taken time off work or at least cut back their hours.

## Shifting Political Landscape

Since 2017, the Prime Minister of Canada, and more recently all political parties, have publicly acknowledged the contribution of caregivers on National Caregiver Day. This day was proclaimed by Parliament as the first Tuesday of April. Several provinces also recognize caregivers throughout the year. This recognition is an important step by political leaders and helps boost awareness and action.

The federal General Social Survey (GSS) was established in 1985 to provide information on specific social policy issues.<sup>31</sup> Data on caregiving was first collected in 1996 and has been a theme in the subsequent surveys.<sup>32</sup> The 2018 GSS covered an expanded examination of the impact of caregiving on the lives of caregivers providing national data about people across the country who provide family and friend caregiving, as well as individuals receiving this care.<sup>33</sup> Canada is one of the few countries that has national census data about caregiving.

*“If you’re a caregiver, you are often being pulled in five different directions at the same time.”*

**Employee caregiver,  
National Caregiver Day interview, 2022**



Two federally funded research agencies, the Social Sciences and Humanities Research Council (SSHRC) and the Canadian Institutes of Health Research (CIHR) supported the creation of a national standard for *carer-inclusive and accommodating organizations*, led by McMaster University in partnership with the Canadian Standards Association (CSA) Group. The Canadian standard was launched in 2018 and has experienced a steady increase in interest from and use by employers across the country.

Building on this success, the federal granting bodies funded and supported lobbying for the creation of an international carer-inclusive standard through the ISO (International Organization for Standardization). The international standard was launched in December 2021.<sup>34</sup> This is the first international standard for employee caregivers and provides an opportunity for change in workplaces around the world. The creation of a standard for employers highlights the importance of caregiving as one of the most important social and economic issues worldwide.

➤ **Caregiver friendly workplace policies are deliberate organisational changes—in policies, practices, or the target culture—to reduce work–family conflict and/or support employees’ lives outside of work.<sup>35</sup>**

## A Global Priority

The Government of Canada is working with the provinces and territories to advance Canada’s contribution to the United Nations 2030 Agenda for Sustainable Development. Supporting employee caregivers is an important component of several goals, namely:

### **SDG #1 – NO POVERTY**

Most unpaid caregivers are female. Because females provide significantly more caregiving hours than males, females experience a greater impact on their paid employment and are therefore more prone to poverty. Employment is the primary way out of poverty as well as the primary way to prevent poverty.



### **SDG #3 – GOOD HEALTH & WELL-BEING**

Employment provides not only income for sustenance, but the resources, such as vaccinations, health services and medicine, to achieve good health and well-being for employee caregivers and their families.

### **SDG #5 – GENDER EQUALITY**

Achieving gender equality and empowering all women and girls is central to the achievement of all other goals. Within this goal, target 5.4 is to value unpaid care and promote shared domestic responsibilities.

### **SDG #8 – DECENT WORK & ECONOMIC GROWTH**

Women comprise close to 40% of the labour market internationally. If they are no longer able to be employed due to the demands of their caregiving, economic growth will suffer. Caregiver friendly workplace accommodations are central to decent work.

### **SDG#11 – SUSTAINABLE CITIES AND COMMUNITIES**

Employee caregivers need to juggle employment and caregiving and do so more successfully when supported in resilient, inclusive, sustainable cities and communities.<sup>36</sup>

## **Strong Leadership from Governments**

The challenge now is to normalize and integrate caregiver friendly workplace policies across all organizations. Governments need to take the lead to ensure sustainable approaches through various actions such as corporate tax credits, employee benefits programs and targeted research funding. Finally, it is important to recognize employee caregivers and help them self-identify without fear of negative repercussions.



*The complimentary CSA B701-17 Carer-inclusive and accommodating organizations Standard and associated CSA B701HB-18 Helping worker-carers in your organization Handbook provide ready tools for workplaces to use to realize this important work-life balance advantage.*

**Dr. Allison Williams, PhD**





## Evidence to Action Summary: POLICY



**CURRENT ISSUE:** Among the G7 countries and Australia, Canada dropped in ranking in terms of support for family caregivers during the COVID-19 pandemic, yet Canada led the development of an ISO standard for caregiver friendly workplaces.

**VISION:** Canada will rank first among the G7 in caregiver supports, which includes financial programs that provide the means for employee caregivers to modify their employment while caregiving.

### **POTENTIAL OPPORTUNITIES:**

- What if Canada adopted Germany's practice of providing an interest-free government loan to support employee caregivers to take a partial leave of absence?
- What if Canada made the voluntary CSA B701-17 *Carer-inclusive and accommodating organizations* Standard a requirement in all Canadian workplaces, ensuring access to workplace accommodations for all employee caregivers?
- What if employee caregivers could draw on their RRSPs tax-free for a caregiving leave with a repayment period of 10 years? Employers could consider a benefit that assists with the repayment as a tool to support retention and high standards.
- What if federal, provincial, and territorial governments added pension unlocking for working caregivers to the approved list of circumstances so employee caregivers can afford to modify their employment?<sup>37</sup>

### **KNOWLEDGE ACCELERATORS:**

**Financial Measures** – While there is a federal, non-refundable caregiver tax benefit in Canada, prior to COVID-19 most employee caregivers in Canada had never received support, financial and/or non-financial, from the government or their employers.<sup>38</sup> The only countries where over half of all employee caregivers reported having received support at some point, both financial and non-financial, from either the government or their employers were Australia, China and India.<sup>39</sup> During COVID-19, the percentage of employee caregivers receiving support from governments and employers increased across all countries.<sup>40</sup> Canada moved from 5<sup>th</sup> to last of the G7 countries and Australia for employee caregivers receiving employer support during the pandemic.<sup>41</sup> During COVID-19, the federal government introduced the Canada Recovery Caregiving Benefit.<sup>42</sup>

➤ **Germany offers family caregivers a partial leave of absence for up to 24 months with the option of wage top up with an interest-free government loan.<sup>43</sup>**



**Labour Market Attachment** – A strong economy, the motivation of most governments, is achieved by having as many people employed as possible. The challenge is in managing the conflict of interest between maintaining high employment rates and supporting those who have family caregiving responsibilities.<sup>44</sup> Absences from work, refusal of promotions or relocations and/or resignations can significantly impact the economy at large, organizational well-being and the long-term financial health of the employee caregiver, which in turn draws on the public system.

**Government Action** – Given the demographic changes, people will work later in life. This will compel governments and employers to generate policies that describe how they support employees in their caregiving responsibilities while engaging in paid work.<sup>45</sup> Human resource executives from Canada's largest firms have proposed that the government do the following:

- Provide public education about work and caregiving.
- Strengthen legislation to support employee caregivers, such as making the voluntary CSA B701-17 *Carer-inclusive and accommodating organizations* Standard a requirement in all Canadian workplaces; this would ensure access to workplace accommodations for all employee caregivers.
- Expand existing policies and programs to better support employee caregivers.
- Set employee caregiving support as a policy priority.
- Support more research.<sup>46</sup>

## 2. CULTURE

---



- **Proposed Vision: Work and life will be meaningfully integrated and normalized so that caregiving responsibilities can be equitably accommodated.**

### Creating a Caregiver Friendly Culture

Culture is the joint attitudes, values, beliefs, and behaviours of the organization, or what is universally understood for employees to “fit in.”<sup>47</sup> Culture, leadership and role modelling are essential to ensuring a workplace that respects and upholds the importance of self-care, well-being and taking leaves to care for family. Without these essential elements, employees will be conflicted about disclosing their personal caring situations, particularly if they feel vulnerable in terms of inclusion, such as due to gender, race or religion.

Employers understand that to attract and retain workers, they need to demonstrate a culture of kindness, compassion and understanding. Employers shared their experiences in shifting corporate values and recognizing employee wellness, physical and mental well-being, along with family health. Employee caregivers expressed that more than ever, they are looking to do more than just balance work and care responsibilities—they want to integrate them. They want to be where they need to be for work or for life depending on the situation or priority. As one employee caregiver said, “work must accommodate [one’s] life.”

- **Awareness of caregiver friendly workplace programs is shown to positively impact the amount of support received, which sequentially improves workplace experience, and ultimately workplace culture.**<sup>48</sup>

In our interviews, some employee caregivers felt that asking for help because of caregiving responsibilities would be a potential threat to their continued employment and/or advancement. Even where policy states otherwise, they hesitated to seek help. Employee caregivers reported using vacation time, sick days and sometimes the goodwill of colleagues to cover for them when a caregiving emergency arose.

*“What the boss does, gets copied.”*

Caroline Walters, Equality & Human Rights Commission, UK



Employers, on the other hand, expressed the importance of supporting their workers with caregiving responsibilities. They expressed need was for assistance with implementation of support for balancing competing demands of customers and employees. Some indicated that “accommodation is easier in a white-collar business.”

## COVID-19: A Quandary for Employers

Experiences throughout the pandemic drew attention to employee caregivers and the dual responsibilities of work and care. The research examined a variety of employee caregivers, including Indigenous caregivers, transnational caregivers, double duty caregivers and Two-Spirit, lesbian, gay, bisexual, transgender, and queer (2SLGBTQ+) caregivers. The perspectives of these groups were very similar in that they all are reluctant to discuss their personal situation with their employer and are uncertain as to their rights or entitlements. Some employees indicated that they had to expose and justify their relationship and rationale for caregiving. They said they relied on, and were grateful for, supervisor compassion. But, overwhelmingly for the 2SLGBTQ+ community, the need to disclose details about their personal relationship to get support for their caregiving responsibilities was too much.

There should not be an obligation for employees to define the nature of their relationship with the care recipient or justify the merits of the caregiving responsibilities for which they are seeking support. Doing so puts the organization’s good intentions at risk.

➤ **The COVID-19 pandemic has changed the structure of both work, thus impacting many sandwich generation caregivers who were challenged with maintaining a healthy balance between working from home, personal commitments, and caring for parents and children.**

The reluctance to talk about caregiving responsibilities is complicated by a sense of duty and love for the care recipient. Many caregivers believe that it is easier to speak about childcare responsibilities. The COVID-19 pandemic shone a light on the tension between work and care and family and colleagues. It also accelerated awareness of the need for employee caregiver supportive workplace policies. However, some employee caregivers feel that “COVID amplified the voice of parents better than caregivers.”

*“Having a supportive workplace culture is good for everyone—not just caregivers.”*

Dr. Janet Fast, University of Alberta,  
National Caregiver Day 2022  
catalyst conversation panelist

*“We’ve shifted to wellness as a core value and provide staff with time to address physical, mental or family health concerns.”*

Employer champion,  
National Caregiver Day interview, 2022



➤ According to UC Berkeley's Haas School of Business, work-life integration is “an approach that creates more synergies between all areas that define ‘life’: work, home/family, community, personal well-being, and health.”

Both work-life balance and work-life integration are cultural goals to support employees achieving an equilibrium between professional and personal lives. Work-life balance focuses on making life and work exist separately, while work-life integration looks for both parts to coexist and seeks to bring them closer together. Shifting organizational culture from work-life balance to work-life integration takes time and employee engagement. Advancing this goal is incremental as opposed to a distinct event. It is often most effective when this goal is integrated into routine organizational activities, such as recruitment, onboarding, performance reviews and team meetings.

Workplaces are important to the well-being of their employees and to helping them establish meaningful contributions. Work can be respite for employees. The adoption of caregiver friendly workplace programs (CFWPs) that are responsive to the needs of employee caregivers has been shown to be effective.<sup>49</sup>

*“I was lucky my boss was so understanding...”*

Employee caregiver,  
National Caregiver Day interview, 2022

# Evidence to Action Summary: CULTURE



**CURRENT ISSUE:** Accommodation needs for employee caregivers differ based on the type and intensity of care, as influenced by cultural norms, gender and sexuality; the nature of the work, such as for double-duty caregivers; and the distance of caregiving as experienced by transnational carer-workers.

**PROPOSED VISION:** Work and life will be meaningfully integrated and normalized so that caregiving responsibilities can be equitably accommodated.

## POTENTIAL OPPORTUNITIES:

- What if employers adopted policies and practices of offering caregiving leaves that explicitly apply to anyone providing care to another individual without the need to disclose details concerning the relationship?
- What if all employers strove to achieve work-life integration for all employees?

## KNOWLEDGE ACCELERATORS:

**Awareness** – Transnational carer-employees (TCE) are immigrants or Indigenous populations who reside and work in Canada while simultaneously providing care to parents, adults living with a disability or children who live in their home country. None of the study participants were aware of caregiver friendly workplace policies.<sup>50</sup>

*My manager  
was super  
understanding.”*

Employee caregiver,  
National Caregiver Day interview, 2022

**Bias Perception** – The caregiving needs of Two-Spirit, lesbian, gay, bisexual, transgender, and queer (2SLGBTQ+) employee caregivers are compounded by the perception that caregiving supports seem to them to be aimed at a heterosexual and cisgendered audience.<sup>51 52</sup>

**Prioritize Health Care Workers** – Double duty caregivers (DDC) are individuals who provide care both at work and at home. Notwithstanding that the majority of DDCs are health care service providers, their employers were not aware of the available resources to support their staff. Nevertheless, they believed that DDCs would have no reluctance in sharing their situation and needs.<sup>53</sup>

**Workplace Socialization** – Colleagues can help employee caregivers modify depressive symptoms, strain, and feelings of isolation.<sup>54</sup> Work can be respite, and efforts by employers to include employee caregivers are crucial to overall well-being and arguably to the health of the organization.

## 3. LEADERSHIP



- ▶ **Proposed Vision: Employers will engage employees in the creation of caregiver friendly and supportive workplaces as part of their core organizational operating procedures.**

### Post-Pandemic Outlook

The COVID-19 pandemic and subsequent lockdowns disrupted lives on multiple levels. In addition to the stresses of job insecurity, employee caregivers faced increased caregiving demands. The pandemic increased awareness and normalization of family caregiving responsibilities. It also accelerated the adoption of tolerance for work from various settings, particularly for non-essential workers. While described as being helpful to employees, the motivation was the pandemic restrictions.

The pandemic changed the meaning of “home” as employee caregivers juggled paid work, caregiving, and personal obligations. This arrangement provided opportunities and benefits, such as increased temporal flexibility, schedule control, a lack of commute time, privacy, and comfort. However, drawbacks included increased care burden, loss of connection with peers and mentoring opportunities, loss of external caregiver supports and greater work disruptions.<sup>55</sup>

Employee caregivers spent more time, on average, caregiving during COVID-19 than prior to the pandemic,<sup>56</sup> with 68% reporting that caregiving was more difficult.<sup>57</sup> This is probably related to the reduction in formal and informal resources to support caregiving, general extracurricular activities and schooling. Just over one-third (35%) reported having more difficulty balancing their paid job and caring responsibilities.<sup>58</sup> In addition, 71% of employee caregivers felt their mental health had worsened during the pandemic.<sup>59</sup>

As COVID-19 related restrictions have eased, the “return to work” narrative perpetuates the bias that family activities, including caregiving, are not work and are secondary. One employer referenced a conscious decision to plan for “return to the office” rather than “return to work.” Although subtle, this is the leadership that is required to help generate a widespread change in attitudes and beliefs.

*“[During COVID] people needed to learn how to integrate work and personal life, especially since our homes became our offices.”*

Employer caregiver,  
National Caregiver Day interview, 2022

### **23% of hiring decision-makers in Canada**

said one of their company’s most important priorities right now is updating programs to accommodate employees who are caregivers.<sup>60</sup>



## Underpinning Values

Employers tend to approach supporting employee caregivers on an individual, case-by-case basis. This risks inconsistencies, confusion, and frustration. Caregiving is a workplace issue and will become more so in the future. While many expressed that a “one size fits all approach is difficult to formulate and implement,” the prevalence of caregivers is increasing. Leadership must therefore take the next steps to find balance as they develop and adapt corporate policies and procedures that support caregivers. For example, an organizational structure that offers a mix of paid and unpaid leave, flexible hours, use of technology and access to in-house programs must take care to have consistent criteria. Leaders must ensure processes are in place for all managers to use as a resource when supporting caregivers and that training is available for supervisory and management personnel to clearly communicate the values of the organization.

## Certification and Standards

There is global support for caregivers to have the right to combine caring with paid employment, be supported by their employers and “have equal opportunities to remain in and return to work.”<sup>61</sup> As mentioned earlier, Canada and ISO have a standard for “carer-inclusive organizations” (see Appendix B). In Australia and the United Kingdom, leading employers choose to be assessed by an independent third party for their progress toward achieving full accreditation as a caregiver friendly organization (see Appendix A). These third-party resources support employers who want guidance and feedback on building a supportive and inclusive workplace for all staff who are, or will become, caregivers.

The accreditation programs in the United Kingdom and Australia arose from consultations with employers who wanted to create a supportive and inclusive workplace for all employees. These employers are motivated to continuously learn and improve and to heighten their profiles as employers of choice. Employers with the accreditation inspire others to follow. They are also beacons for employees who are looking for a culture of empathy.

*“Smart employers need to recognize the implications of the changing social, economic and health environment”*

**Employer champion,  
National Caregiver Day interview, 2022**

*“Supporting our staff is the socially responsible change we want to see as a new standard for all employers in Canada.”*

**Employer champion,  
National Caregiver Day interview, 2022**





**CURRENT ISSUE:** Employers believe themselves to be supportive of their employee caregivers and yet there is a disconnect with employees who feel vulnerable and reluctant to admit their personal obligations. The COVID-19 pandemic highlighted this perception.

**PROPOSED VISION:** Employers will engage employees in the creation of caregiver friendly and supportive workplaces as part of their core organizational operating procedures, as proposed in the CSA B701-17 *Carer-inclusive and accommodating organizations* Standard

### **POTENTIAL OPPORTUNITIES:**

- What if all employers across Canada started the journey to create a caregiver friendly workplace?
- What if employers included caregiver friendly policies and programs as part of their continuous quality improvement initiatives and as part of accreditation through a third party?
- What if employers engaged with the CSA B701-17 *Carer-inclusive and accommodating organizations* Standard, ensuring access to workplace accommodations for all employee caregivers?

### **KNOWLEDGE ACCELERATORS:**

**Employer and Employee Relations** – Workplaces are key to supporting or hindering their employees in achieving personal balance between caregiving and work.<sup>62</sup> However, some evidence suggests that employers are not in tune with their employee caregivers. Research involving health care employers and interviews with employee caregivers highlighted the disconnect. Employers believed that they were sensitive to the needs of working caregivers and that they accommodated requests for time off or flexible work schedules. Employees, however, reported fearing stigmatization and were aware of the need for a supervisor who understands them.

**Continuous Education** – Interventions such as education about the effects of caregiving and resources available lead to improvements in employee well-being.<sup>63</sup> Study participants reported less work family conflict, along with better supervisory and co-worker support, after the educational intervention. The impact was greatest close to the intervention and suggests the need for regularly scheduled educational sessions.<sup>64</sup>

**Benchmarks and Standards** – Validation supported by standards and implementation guides enables measurement to benchmark performance and better understanding of where there are gaps requiring improvement. It also serves to heighten employer reputation. For example, the government of New Zealand (NZ), in collaboration with Carers NZ, launched Care Wise,<sup>65</sup> a program to help employers build caregiver friendly workplaces.<sup>66</sup>

## 4. MOTIVATION

---



- **Proposed Vision: Employers across Canada will have access to independent, applied research to inform their policies and practices for employee caregivers.**

### Articulating a Value Proposition

Employers are best served when they retain their talent. Many recognize the changing demographics and evolving social norms that include the increasing prevalence of caregivers as part of their workforce. Employers dealing with the post-pandemic environment are facing retention issues and risk losing skilled employees. Increased employee turnover and a diminished workforce affect both operational productivity and costs.<sup>67</sup> By treating the needs of employee caregivers seriously and implementing caregiver friendly workplace practices, organizations have a competitive advantage in recruitment and retention. A caregiver-supportive workplace has reduced turnover, increased productivity, decreased presenteeism and enhanced employee health, satisfaction and well-being.

Not supporting caregivers at work impacts the bottom line. Employers lose an estimated \$1.3 billion in productivity per year because they are not supporting their employee caregivers.<sup>68</sup> Employees without employer support often reduce their work hours, take a leave of absence and experience mental and physical stress. In addition, unsupported employee caregivers are more likely to leave the workforce. The reality is that employers need to create workplaces that acknowledge and adapt to the demands facing employee caregivers.

### Benefits of Supporting Employee Caregivers

Employee caregivers who were interviewed consistently spoke of the retention benefits for their employers. They experienced increased commitment to their organization and heightened productivity because of supportive employers.

*“Be patient, this takes time. It’s not going to be an overnight thing, but you will get a return on investment.”*

Employer caregiver,  
National Caregiver Day interview, 2022



The needs of employee caregivers in the workplace should be treated as seriously as organizations' efforts to provide goods and services and generate revenue. The goal is for all workplaces to value and respect all employees.

➤ **Organizations that do not appropriately accommodate employee caregivers experience impacts to their bottom line, such as recruitment and retention costs, and benefit costs due to burnout and other negative health outcomes.**

What is measured, matters. Tracking, acknowledging, and evaluating the ways that various organizational policies and behaviours support employee caregiver will capture the extent of accommodation and support of workers. Employers across Canada need access to independent, applied research to deliver insights in policy and practice for caregivers.

The business case for supporting employee caregivers is becoming increasingly indisputable. With a national standard, an international standard and various programs provided through caregiving associations within Canada and around the globe, options are available to meet the needs of different types of employers.

*"If you have people that are understanding of caregiving, or family leave of any kind, then you have a compassionate, understanding, modern organization that many people would be interested in working for and will be looking for more in the future."*

**Employee caregiver,  
National Caregiver Day interview, 2022**

## Evidence to Action Summary: MOTIVATION



**CURRENT ISSUE:** The business case for adopting caregiver friendly workplaces is being built in Canada; consequently, it is not always well understood or broadly accepted.

**PROPOSED VISION:** Employers across Canada will have access to independent, applied research to inform their policies and practices for employee caregivers.

### **POTENTIAL OPPORTUNITIES:**

- What if Canada had a national caregiver centre of excellence for adaptive knowledge translation, similar to the observatory recently announced in Quebec?<sup>69</sup>
- What if employers could easily access reliable and validated data, based on adaptive knowledge translation that incorporates both research and caregivers' lived experiences?
- What if employers incorporated outcome evaluations into their caregiver policies and practices and shared this data through the research centre to facilitate benchmarking across the country?

### **KNOWLEDGE ACCELERATORS:**

**Cost of Absenteeism** – One in two employed caregivers (between the ages of 19 and 70 years who provided at least two hours of care per week) reported absenteeism, missing 8.4 days per year on average because of caregiving.<sup>70</sup> Workplaces may expect to lose \$8,674 per employee caregiver if caregivers are unsupported by the workplace.<sup>71</sup>

**Outcome Evaluation** – The history and context of a country impact the nature of supports for caregivers, which range from recognition to financial payments to legislative support.<sup>72</sup> Research has shown that many countries have tested various strategies to support working caregivers, but generally these have not been rigorously evaluated.<sup>73</sup> “Take-up, awareness, cost-benefits and other details are needed to assess which aspects of policies are most important or least effective, and to guide policy modifications.”<sup>74</sup>

**Investment in Human Resources** – Employee caregivers who do not have support experience mental and physical stress and are economically impacted by time and space constraints between caregiving, work and nonwork.<sup>75</sup> A short-term (six-month) study on the financial impact of a workplace intervention to generate a caregiver friendly workplace culture had mixed results, finding cost savings in some areas and increased expenses in others.<sup>76</sup> Further study with a longer observational period and greater number of participants is needed.

# WAY FORWARD

## A Roadmap for Advancing Inclusive and Accommodating Organizations

The research evidence and the experience of experts, employee caregivers and employers set a clear path toward action. The next step is simply to begin—to start with one department, one team or one location. Numerous resources are available and many employers are leading the way and willing to work together.



## A Vision for Change

Through the lens of adaptive knowledge translation and the evidence-to-action framework, we have identified four fundamental pillars and vision statements that will accelerate the creation of caregiver friendly workplaces across Canada. These are:



**POLICY:** Canada will rank first among the G7 in caregiver supports, which include financial programs that provide the means for employee caregivers to modify their employment while caregiving.



**CULTURE:** Work and life will be meaningfully integrated and normalized so that caregiving responsibilities can be equitably accommodated.



**LEADERSHIP:** Employers will engage employees in the creation of caregiver friendly and supportive workplaces as part of their core organizational operating procedures.



**MOTIVATION:** Employers across Canada will have access to independent, applied research to inform their policies and practices for employee caregivers.

### Our challenge is where to begin?

➤ **“Measures to support work and care do not have to be expensive or onerous.”<sup>77</sup> They “should contribute to making life easier and better for caregivers and avoiding unnecessary costs for employers either through absenteeism or presenteeism.”<sup>78</sup>**

Implementing a caregiver friendly workplace requires the alignment of both long-term and immediate actions. The first step is engaging corporate leadership. Executive-level leadership is imperative for creating a culture where caregivers feel comfortable discussing their work-life balance concerns.<sup>79</sup> Indeed, supervisors and managers should recognize the often sudden and unexpected need for employees to take on caregiving responsibilities with contingency planning.

*“We recognized that we had a whole host of existing EAP that could benefit caregivers that our employees may not be aware of. So, we bundled them and made them more targeted to those with care responsibilities and used email, information sessions, etc. to raise awareness about existing programs that might benefit them.”*

**Employer champion,  
National Caregiver Day interview, 2022**

## Building a Strong Foundation

An immediate action for employers is the creation of formal and transparent policies and procedures that provide “no hassle” support for caregivers. Examples of practical support that should be documented and communicated include:

- Flexible working arrangements such as job sharing, a compressed work week and remote work.
- Protected job leaves.
- Caregiver specific benefits through Employee Assistance Programs (EAPs).
- Caregiver Information and navigation support for services internally and for access to external community resources.
- Extended health insurance coverage.

## Increasing Awareness and Recognition

Education, training and workshops for managers, supervisors, and employees on caregiving and on the policies and rationale for supporting caregivers must be routinely conducted. It was noted in the research that the effect is strongest immediately after the training, suggesting that a repeat of the educational intervention after six months would be useful.<sup>80</sup> Educational interventions in workplaces are also relatively low-cost and often make use of existing infrastructure, such as human resource staff, to minimize costs while maximizing benefits.

## Engaging Employees

Regular communication is vital to increasing awareness about the organization’s commitment to caregivers. It also helps reduce barriers and improve access; issues highlighted in several studies.

## Measuring Success

Finally, it is essential that employers measure and evaluate the programs and support provided to employee caregivers. There was widespread lack of information pertaining to the numbers of employee caregivers in all organizations and the impact of the methods used within organizations to specifically educate and support employee caregivers and their teams.

*“We believe that our Carer Confident benchmark and carer friendly working practices help us recruit and retain the high calibre employees we need.”*

**Employer champion,  
National Caregiver Day interview, 2022**

# Evidence to Action Summary: Advancing Inclusive and Accommodating Organizations



**CURRENT ISSUE:** Employers across Canada do not widely address accommodating caregivers in the workplace.

**PROPOSED VISION:** Workplace accommodations and inclusion for employee caregivers will be a universal practice that is documented and transparent.

## **POTENTIAL OPPORTUNITIES:**

- What if all employers (public and private sector) strove to provide exemplary caregiver friendly workplaces?
- What if Canada made the voluntary CSA B701-17 *Caregiver-inclusive and accommodating organizations* Standard a requirement in all workplaces.
- What if governments widely recognized employee caregivers' contributions and employer champions?

## **KNOWLEDGE ACCELERATORS:**

**Caregiver Leave** – Currently in Canada there are three leaves available to employed caregivers who meet eligibility criteria: Family Responsibility Leave (3–12 days, often unpaid), Compassionate Care Leave and Critical Illness Leave and associated benefits.<sup>81</sup>

**Evidence-informed Actions** – Four practical and effective workplace accommodations to address the stigma and challenges of employee caregivers are: 1) review current HR policies and practices; 2) engage senior leaders as champions; 3) co-design with employees; 4) communicate and raise awareness.<sup>82</sup>

**Public Education** – The federal government's caregiver readiness campaign video provides basic awareness about planning for caregiving responsibilities.<sup>83</sup> A page addressing caregiving and work provides information about the benefit to employers for supporting employee caregivers. It also describes what employee caregivers need and how employers can support them.<sup>84</sup>

**Government Action** – Leadership is needed in the form of standards that both governments and employers can use to measure and evaluate the overall success of programs, services and supports to meet the needs of employee caregivers.<sup>85</sup>

*“Look for what other employers are doing and use the resources that are available.”*

**Employer champion, National Caregiver Day interview, 2022**



## APPENDIX A – Accreditation in Australia & the United Kingdom

Both Australia and the United Kingdom launched accreditation programs in 2019. In Australia, the program is called Carers + Employers. In the UK, the program is called Carer Confident. Both programs benchmark the performance of organizations to support caregivers and to identify areas for improvement. Employers and other key stakeholders developed the programs.

The criteria by which employers are assessed in both countries are:

- Recognition
  - The extent to which caregivers are supported to identify and recognize themselves.
- Policy & guidance
  - Policies and procedures are formalized and the support for caregivers is transparent.
- Capacity building within the organization
  - Education, training and development are available and routinely conducted.
- Communication and awareness
  - Established and regular communication increases awareness and improves access.
- Practical workplace support
  - Provisions and arrangements are made for employees and available for everyone.

Each program has three tiers, or levels, of achievement reflecting the progression of change. Organizations can proceed at their own pace.

UNITED KINGDOM CARER CONFIDENT <sup>86</sup>		AUSTRALIA CARERS + EMPLOYERS <sup>87</sup>	
Employer Designation		Employer Designation	
<b>Active</b>	In <i>addressing</i> caregiver support	<b>Activate</b>	Beginning to develop caregiver friendly workplace policies and practices
<b>Accomplished</b>	In <i>providing</i> carer support	<b>Commit</b>	Clear actions and pathways to improve caregiver friendly workplace practices
<b>Ambassador</b>	For caregiver support both internally and externally	<b>Excel</b>	Embedded caregiver friendly practices

## APPENDIX B – CSA Group & ISO Standard

The complimentary CSA Group standard *B701-17 – Carer-inclusive and accommodating organizations*<sup>88</sup> and implementation guide, *B701HB-18 – Helping worker-carers in your organization*,<sup>89</sup> lead organizations through the process of becoming caregiver friendly. The ISO standard, ISO 25551:2021(en) *Ageing societies – General requirements and guidelines for carer-inclusive organizations*,<sup>90</sup> is a similar option with global reach.

Both the CSA Group and the ISO standards specify requirements and provide guidelines for an organizational program for employee caregivers. The standards are applicable to any organization, regardless of size, sector, or community setting. The standards can be used in conjunction with an organization's management systems, human resource programs and/or diversity, equity, and inclusion programs. The standards can also be used on their own in the absence of a formal workplace program to support employee caregivers.

Components of both standards include:

- Conducting an environmental scan of the workplace and employee pool to determine numbers and needs.
- Addressing and ensuring confidentiality for workers to avoid stigmatization of caregivers.
- Increasing awareness of organizational culture and becoming more caregiver friendly
- Providing management training, particularly for frontline supervisors and managers, and human resource staff.
- Conducting awareness campaigns for workers and management.
- Offering accommodation tailored to the specific workplace.<sup>91</sup>

## ENDNOTES

- 1 Williams, A. (2022). Stream B: Healthy, Productive Work Partnership Grant Mobilizing a Caregiver Inclusive and Accommodating Workplace Organizations Standard: A Partnership Approach. Gender Health and Caregiver Friendly Workplaces. <https://ghw.mcmaster.ca/projects/healthy-productive-work-partnership-grant/>
- 2 Carers Canada. (2022, April 5). National Caregiver Day. Balancing Work & Care. Campaigns <https://www.carerscanada.ca/national-caregiver-day-campaigns/> (accessed May 4, 2022).
- 3 International Alliance of Carer Organizations. (n.d.) Global State of Caring. Projects Global Strategy. <https://internationalcarers.org/global-strategy/> (accessed May 10, 2022).
- 4 United Nations. (n.d.) Sustainable Development Goals. United Nations. <https://www.un.org/sustainabledevelopment/sustainable-development-goals/> (accessed May 5, 2022).
- 5 Williams, A., Banks, J. "International – ISO 25551 – General requirements and guidelines for carer-inclusive organizations". IACO Work and Care Session. April 26, 2022 . Via Zoom.
- 6 Statistics Canada. (2012). Portraits of Caregivers, 2012. Statistics Canada. <https://www150.statcan.gc.ca/n1/pub/89-652-x/89-652-x2013001-eng.htm#a13>
- 7 Ibid.
- 8 CSA Group. (n.d.). B701-17 – *Carer-inclusive and accommodating organizations*. [https://www.csagroup.org/article/b701-17?utm\\_source=carers-canada&utm\\_medium=web&utm\\_campaign=b701-17\\_free\\_download%20](https://www.csagroup.org/article/b701-17?utm_source=carers-canada&utm_medium=web&utm_campaign=b701-17_free_download%20)
- 9 CIUSS. (2022, May 20). Observatoire québécois de la proche aide. <https://www.ciuisswestcentral.ca/about-us/academic-affairs/observatoire-quebecois-de-la-proche-aide/> (accessed May 25, 2022).
- 10 Carers Canada. (n.d.) Carers Canada, About Us. <https://www.carerscanada.ca/about-us/> (accessed May 25, 2022).
- 11 Infographic. (2020). Caregiver Facts, It's not if, it's when you will be a caregiver. Canadian Home Care Association. <https://www.carerscanada.ca/caregiver-facts/>
- 12 Carers Canada. (n.d.) Quick Start Implementation Guide Carer Friendly Workplace Standard. <http://www.carerscanada.ca/wp-content/uploads/2021/03/Quick-Start-Implementation-Guide--Carer-Friendly-Workplace-Standard-Final-2.pdf>
- 13 Fast, J. "**Balancing Work and Care: Strategies for Meaningful Employment.**" Carers Canada. April 5, 2022. Zoom
- 14 Carers Canada. (2020). "Infographic: Caregiver Facts, It's not if, it's when you will be a caregiver." Canadian Home Care Association. <https://www.carerscanada.ca/caregiver-facts/>
- 15 Gender Health and Caregiver Friendly Workplaces. (n.d.) Fostering a Carer Friendly Workplace. [https://ghw.mcmaster.ca/app/uploads/2021/04/training\\_template.pdf](https://ghw.mcmaster.ca/app/uploads/2021/04/training_template.pdf)
- 16 Nikolova, M. (2016, May 2). Two Solutions to the Challenges of Population Aging. Brookings. <https://www.brookings.edu/blog/up-front/2016/05/02/two-solutions-to-the-challenges-of-population-aging/>
- 17 United Nations. (n.d.) Global Issues Ageing. United Nations Peace dignity and equality on a healthy planet. <https://www.un.org/en/global-issues/ageing> (accessed May 22, 2022).
- 18 Rochone, P., Kalia, S. (2022, January 3). Canada Needs a National Aging Strategy that Includes Older Women. Toronto Star Opinion Contributors. <https://www.thestar.com/opinion/contributors/2022/01/03/canada-needs-a-national-aging-strategy-that-includes-older-women.html>
- 19 Canadian Institute for Health Information. (n.d.). "Canada's Seniors Population Outlook: Uncharted Territory." Infographic. <https://www.cihi.ca/en/infographic-canadas-seniors-population-outlook-uncharted-territory>
- 20 Sinha, M. (2013). Portrait of caregiver, 2012: Statistics Canada. <http://www.statcan.gc.ca/pub/89-652-x/89-652-x2013001-eng.pdf> (accessed May 19, 2022).
- 21 Statistics Canada. (2011). Seniors. Canada Year Book 2011: Catalogue no. 11-402-X. <http://www.statcan.gc.ca/pub/11-402-x/2011000/pdf/seniors-aines-eng.pdf> (accessed May 19, 2022).
- 22 Statistics Canada. (2022, January 14). Differences in the characteristics of caregivers and caregiving arrangements of Canadians, 2018. Statistics Canada. <https://www150.statcan.gc.ca/n1/daily-quotidien/220114/dq220114c-eng.htm> (accessed May 19, 2022).
- 23 Ibid.
- 24 Bartik, A.W., Bertrand, M., Cullen, Z., Glaeser, E.L., Luca, M., & Stanton, C. (2020). The impact of covid-19 on small business outcomes and expectations. Proceedings of the National Academy of Sciences, 117(30), 17656–17666. <https://doi.org/10.1073/pnas.2006991117>
- 25 Winnie, C.P.C., Morissette, R., & Qiu, H. (2020, June 19). COVID-19 and Job Displacement: Thinking about the longer term. Statistics Canada. <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2020001/article/00030-eng.htm> (accessed May 5, 2022).
- 26 Statistics Canada. (2021, March 11). COVID-19 in Canada: A One-year Update on Social and Economic Impacts. Statistics Canada. <https://www150.statcan.gc.ca/n1/pub/11-631-x/11-631-x2021001-eng.htm>
- 27 Wu, J. (2022, January 24). Impacts of the COVID-19 on carer-employee well-being: a 12-country comparison. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/jeremy-wu-12-country-comparison/>

- 28 Carers Canada. (n.d.). "Global Carer Well-being Index: Canada Overview." Infographic. <https://internationalcarers.org/wp-content/uploads/2021/07/Carer-Well-Being-Index-Canada-Infographic-April-6-2021-FINAL-ENGLISH.pdf>
- 29 Statistics Canada. (2021). Labour Force Survey, January 2021. Statistics Canada The Daily. <https://www150.statcan.gc.ca/n1/daily-quotidien/210205/dq210205a-eng.htm>
- 30 Yeandle, S., et al. (2017) Work-care reconciliation policy: Legislation in policy context in eight countries. <http://circle.group.shef.ac.uk/wp-content/uploads/2018/11/yeandle-WCR-v2.pdf>
- 31 Statistics Canada. (2019, February 2) The General Social Survey: An Overview, 2019. Statistics Canada 89F0115X. <https://www150.statcan.gc.ca/n1/pub/89f0115x/89f0115x2019001-eng.htm> (accessed May 30, 2022).
- 32 Ibid.
- 33 Statistics Canada. (2018) General Social Survey – Caregiving and Care Receiving (GSS). Statistics Canada, Definitions, data sources and methods, Surveys and statistical programs. <https://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&SDDS=4502> (accessed May 30, 2022).
- 34 ISO. (2021). ISO 25551:2021(en) Ageing societies – General requirements and guidelines for carer-inclusive organizations. <https://www.iso.org/obp/ui#iso:std:iso:25551:ed-1:v1:en> (accessed May 10, 2022).
- 35 Kelly, E.L., Kossek, E.E., Hammer, L.B., Durham, M., Bray, J., Chermack, K., Murphy, L.A., & Kaskubar, D. (2008). Getting there from here: Research on the effects of work-family initiatives on work-family conflict and business outcomes. *The Academy of Management Annals*, 2, 305–349.
- 36 Williams, A., Banks, J. (2022, April 26). Presentation - IACO Work and Care session: Carer-Friendly Workplaces: Standards and Certification. Agenda at <https://ghw.mcmaster.ca/app/uploads/2022/04/April-26-2022-IACO-Work-and-Care-Session-Description-with-Link.pdf>
- 37 Office of the Superintendent of Financial Institutions. (2022, January 7). Unlocking funds from a pension plan or from a locked-in retirement savings plan. Government of Canada. <https://www.osfi-bsif.gc.ca/Eng/pp-rrr/faq/Pages/ulfp-lrsp.aspx>
- 38 Wu, J. (2022, January 24). Impacts of the COVID-19 on carer-employee well-being: a 12-country comparison. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/jeremy-wu-12-country-comparison/>
- 39 Ibid.
- 40 Ibid.
- 41 Ibid.
- 42 Government of Canada. (2022, March 16). Canada Recovery Caregiving Benefit (CRCB). Government of Canada <https://www.canada.ca/en/revenue-agency/services/benefits/recovery-caregiving-benefit.html> (accessed May 10, 2022).
- 43 International Alliance of Carer Organizations. (2021). Global State of Caring, Germany, Work & Care. <https://internationalcarers.org/wp-content/uploads/2021/07/IACO-Global-State-of-Caring-July-13.pdf>
- 44 Independent Advisory Board on Work-Care Reconciliation. (June 2019). First Report of the German Independent Advisory Board on Work-Care Reconciliation. <https://www.wirstiftung.org/forum/sites/default/files/media/First%20Report%20of%20the%20Independent%20Advisory%20Board%20on%20Work-Care%20Reconciliation.pdf>
- 45 Williams, A. (2022, January 24). Availability of caregiver friendly workplace policies (CFWPs): an international scoping review. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/allison-williams-international-scoping-2/>
- 46 Duxbury, L. (2022, March 3). Examining motivation of companies to adopt caregiver friendly policies. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/linda-duxbury-examining-motivation-of-companies-to-adopt-caregiver-friendly-policies/>
- 47 Stewart, A.M. (2022, January 22). Why Organizational Culture Matters. HRD. <https://www.hcamag.com/ca/specialization/corporate-wellness/why-organizational-culture-matters/211099>
- 48 Dardas, A., Williams A., Wang, L.. "Evaluating changes in workplace culture: Effectiveness of a caregiver-friendly workplace program in a public post-secondary educational institution". PLOS ONE. May 14, 2021, <https://doi.org/10.1371/journal.pone.0250978>
- 49 Chair in Gender, Health, and Caregiving Studies. (n.d.) Evaluation of a Caregiver-Friendly Workplace Program (CFWP) Intervention of the Health of Caregiver-Employees (CEs). Research Brief. School of Geography & Earth Sciences, McMaster University. [https://ghw.mcmaster.ca/app/uploads/2020/04/ResearchBrief\\_WebsiteUpload.pdf](https://ghw.mcmaster.ca/app/uploads/2020/04/ResearchBrief_WebsiteUpload.pdf)
- 50 Sethi, B. (2022, February 17). Visible minority immigrants as transnational carer-employees amidst COVID-19. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/bharati-sethi-visible-minority-immigrants-as-transnational-carer-employees-amidst-covid-19/>
- 51 Geffros, S. (2022, March 24). Carer-employee inclusivity – gender neutral and respectful of 2SLGBTQ+ employees. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/sophie-geffros-carer-employee-inclusivity-gender-neutral-and-respectful-of-2slgbtq-employees/>
- 52 Geffros, S., Wang, Li., Williams, A. (2022, March). *The Carer-Inclusive and Accommodating Organizations Workplace Standard and 2SLGBTQ+ Carer - and - Employees*. Research Brief. Environment and Society McMaster University. <https://ghw.mcmaster.ca/app/uploads/2022/03/Research-Brief-Stream-B-Project-8-Final.pdf>
- 53 Mehta, S. (2022, January 24). Are healthcare employers in tune with their caregiver employees? Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/sakshi-mehta-are-healthcare-employers-in-tune-with-their-employee-caregivers-2/>

- 54 Wang, L. (2022, February 17). Social participation and depressive symptoms of carer-employees of older adults in Canada: a cross-sectional analysis of the Canadian Longitudinal Study on Aging. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/li-wang-social-participation-and-depressive-symptoms-of-carer-employees-of-older-adults-in-canada-a-cross-sectional-analysis-of-the-canadian-longitudinal-study-on-aging/>
- 55 Ding, R. (2022, February 13). Caregiving and work-from-home during COVID-19. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/regina-ding-caregiving-and-work%E2%80%90from%E2%80%90home-during-covid%E2%80%9019/>
- 56 Wu, J. (2022, January 24). Impacts of the COVID-19 on carer-employee well-being: a 12-country comparison. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/jeremy-wu-12-country-comparison/>
- 57 Ibid.
- 58 Ibid.
- 59 Ibid.
- 60 Harris Poll. (2021 May, 12). *Survey: Employees Want Help Balancing Caregiving Responsibilities, But Companies Say They Don't Have the Resources*. <https://www.globenewswire.com/news-release/2021/05/12/2228245/0/en/Survey-Employees-Want-Help-Balancing-Caregiving-Responsibilities-But-Companies-Say-They-Don-t-Have-the-Resources.html> (accessed May 24, 2022).
- 61 International Alliance of Carer Organizations. (n.d.). Principles for Carers. Principle 5: Employment. Projects Global Strategy. <https://internationalcarers.org/global-strategy/> (accessed May 10, 2022).
- 62 Ding, R. (2022, February 10). Does educating working caregivers save employer costs? Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/regina-ding-does-educating-working-caregivers-save-employer-costs/>
- 63 Ding, R. (2022, February 3). The impact of the workplace on the lives of carer-employees. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/regina-ding-the-impact-of-the-workplace-on-the-lives-of-carer-employees/>
- 64 Ding, R. (2022, February 3). The impact of the workplace on the lives of carer-employees. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/regina-ding-the-impact-of-the-workplace-on-the-lives-of-carer-employees/>
- 65 Carers NZ. (2022). CareWise. CareWise. <https://carewise.org.nz> (accessed May 20, 2022).
- 66 International Alliance of Carer Organizations. (n.d.). Global State of Caring. New Zealand. Projects Global Strategy. <https://internationalcarers.org/global-strategy/> (accessed May 10, 2022).
- 67 Carers Canada. (n.d.) Supporting Working Caregivers, Facts & Figures. <https://www.carerscanada.ca/wp-content/uploads/2022/02/Supporting-Caregivers-at-Work-Key-Facts-and-Figures-final.pdf>
- 68 Gender Health and Caregiver Friendly Workplaces. (n.d.) Fostering a Carer Friendly Workplace. [https://ghw.mcmaster.ca/app/uploads/2021/04/training\\_template.pdf](https://ghw.mcmaster.ca/app/uploads/2021/04/training_template.pdf)
- 69 CIUSS. (2022, May 20). Observatoire québécois de la proche aide. <https://www.ciuisswestcentral.ca/about-us/academic-affairs/observatoire-quebecois-de-la-proche-aidance/> (accessed May 25, 2022).
- 70 Fast, J. **"Balancing Work and Care: Strategies for Meaningful Employment." Carers Canada. April 5, 2022. Zoom**
- 71 Mofidi, A., Tompa, E., Williams, A., Yazdani, A., Lero, D., & Mortazavi, S.B. (2019). Impact of a caregiver-friendly workplace policies intervention: a prospective economic evaluation. *Journal of Occupational and Environmental Medicine*, 61(6), 461–468.
- 72 Yeandle, S., et al. (2017). Work-care reconciliation policy: Legislation in policy context in eight countries. <http://circle.group.shef.ac.uk/wp-content/uploads/2018/11/yeandle-WCR-v2.pdf>
- 73 Ibid.
- 74 Ibid. p 39
- 75 Ding, Regina et al. "Evaluation of a Caregiver-Friendly Workplace Program Intervention on the Health of Full-Time Caregiver Employees: A Time Series Analysis of Intervention Effects." *Journal of occupational and environmental medicine* vol. 62,10 (2020): e548-e558.
- 76 Ding, R. (2022, February 10). Does educating working caregivers save employer costs? Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/regina-ding-does-educating-working-caregivers-save-employer-costs/>
- 77 Jungblut, J.-M. (2015) *Working and Caring: Reconciliation measures in times of demographic change*, Euro- found, Publications Office of the European Union. Luxembourg. [www.eurofound.europa.eu/sites/default/files/ef\\_publication/field\\_ef\\_document/ef1534en.pdf](http://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef1534en.pdf) (accessed January 2022).
- 78 Ibid.
- 79 Carers Canada. (n.d.) Supporting Working Caregivers, Facts & Figures. <https://www.carerscanada.ca/wp-content/uploads/2022/02/Supporting-Caregivers-at-Work-Key-Facts-and-Figures-final.pdf>
- 80 Ding, R. (2022, February 3). The impact of the workplace on the lives of carer employees. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/regina-ding-the-impact-of-the-workplace-on-the-lives-of-carer-employees/>
- 81 International Alliance of Carer Organizations. (2021). Global State of Caring, Canada, Work & Care. <https://internationalcarers.org/wp-content/uploads/2021/07/IACO-Global-State-of-Caring-July-13.pdf>

- 82 Carers Canada. (n.d.). Is your human resource strategy addressing the unique profile of your employees? Infographic. <https://ghw.mcmaster.ca/app/uploads/2021/05/W-and-C-Standards-Educational-brief-B-1.pdf>
- 83 ESDC, FPT Ministers Responsible for Seniors Forum. (2016, October 25). Caregiver Readiness. Government of Canada. <https://www.canada.ca/en/employment-social-development/corporate/seniors/forum/caregiver-readiness-video.html> (accessed May 25, 2022).
- 84 ESDC, FPT Ministers Responsible for Seniors Forum. (2022, April 21). Helping employees balance work and caregiving responsibilities. Government of Canada. <https://www.canada.ca/en/employment-social-development/corporate/seniors/forum/tips-employers.html> (accessed May 25, 2022).
- 85 National Institute on Ageing. (2018). Why Canada Needs to Better Care for Its Working Caregivers. Toronto, ON: National Institute on Ageing White Paper.
- 86 Carers UK. (2019). Carer Confident.** [https://www.employersforcarers.org/images/CUK\\_Carer\\_Confident\\_CRITERIA\\_WEB.pdf](https://www.employersforcarers.org/images/CUK_Carer_Confident_CRITERIA_WEB.pdf)
- 87 Carers NSW. (n.d.). Supporting Carers in the Workplace, Works for Everyone.** <https://carersandemployers.org.au>
- 88 CSA Group. (n.d.). B701-17 – *Carer-inclusive and accommodating organizations*. [https://www.csagroup.org/article/b701-17/?utm\\_source=carers-canada&utm\\_medium=web&utm\\_campaign=b701-17\\_free\\_download%20](https://www.csagroup.org/article/b701-17/?utm_source=carers-canada&utm_medium=web&utm_campaign=b701-17_free_download%20)
- 89 CSA Group. (n.d.). B701HB-18 – Helping worker-carers in your organization. [https://www.csagroup.org/article/b701hb-18/?utm\\_source=carers-canada&utm\\_medium=web&utm\\_campaign=b701hb-18\\_free\\_download](https://www.csagroup.org/article/b701hb-18/?utm_source=carers-canada&utm_medium=web&utm_campaign=b701hb-18_free_download)
- 90 ISO. (2021). ISO 25551:2021 Ageing societies – General requirements and guidelines for carer-inclusive organizations. <https://www.iso.org/obp/ui/fr/#iso:std:iso:25551:ed-1:v1:en>
- 91 Williams, A. (2022, January 24). A carer-inclusive standard for the workplace goes international. Examining Caregiver-Friendly Workplace Practices. <https://www.carerscanada.ca/allison-williams-a-carer-inclusive-standard-for-the-workplace-goes-international/>