



# **Checklist for Employers**

# Coalition to Transform Advanced Care

During advanced illness, employees and employee caregivers have significant needs, including planning for a health crisis, caregiving, and support for grief and bereavement. Each year, millions of employees must navigate between caring for their ill loved ones, their household duties and workplace responsibilities, leading to emotional distress and billions in lost productivity to employers.

The mission of the Employer Committee of the *Coalition to Transform Advanced Care* (C-TAC) is to empower employers to take positive steps toward supporting employees on all levels, including caregiving responsibilities, advanced illness planning and individual care planning, advanced illness issues and grief and bereavement.

The single most powerful intervention for employers is training for supervisors to help employed caregivers to balance work and caregiving. There are many individuals and organizations already tackling this issue in unique and innovative ways. However, it is clear that more must be done to meet the needs of working caregivers.

To that end, the **C-TAC Checklist for Employers** puts forward four categories of action items your organization can use to assist employee caregivers. C-TAC recognizes that organizational capacity to accomplish these goals varies greatly and has built flexibility into the checklist. Even small steps can make a large difference to those dealing with advanced illness and caring for loved ones.

The four categories of caregiving support listed below are merely guidelines, presented in the order intended to best break down barriers and yield results. Still, even accomplishing a few of the many suggestions listed here will be invaluable to organizations and employees. The four categories are:

- Informal Resources
- Individual Care Planning
- Administrative Support
- Evaluation and Metrics

“The efforts of C-TAC promote the best-practice delivery of health care, while empowering individuals to make informed choices for themselves and their family members, thus limiting the distractions that interfere with their overall well-being and the productivity in their work.”

**-J. Brent Pawlecki, MD**

Chief Health Officer,  
The Goodyear Tire & Rubber  
Company

# Informal Resources

Informal Resources can also be described as grassroots resources, that one or more proactive employees can use to take the lead and to help change the organization's culture and approach to employee caregivers. Examples of the support resources can be simple, like a brown bag lunch presentation, or more expansive, like a Caregiving Fair.



## National Healthcare Observance Efforts

April 16<sup>th</sup>. National health efforts and observances such as the *National Healthcare Decisions Day*, *Engage with Grace*, and *The Conversation Project* serve as catalysts to inspire, educate & empower the public and providers about the importance of advanced care planning.



## Educational Seminars

Educational guides, podcasts and webinars on caregiving issues (For example Lunch-time education seminars—in person, online or dial-in)



## Caregiving Fairs

Regular health and wellbeing fairs that encompass advanced illness and eldercare.



## Employee Volunteer Support

A volunteer program organized and managed by employees. A program is a grass-roots effort developed by employees.



## Support Groups

Support groups open to employees and the community provides a forum for information sharing and support for employee groups.

# Individual Care Planning

Individual Care Planning involves preparation for one's own care. Facing issues such as advanced illness and caregiving can be difficult. Encouraging employees to plan for their own individual care acknowledges this challenging topic and opens the door for additional discussions and efforts in planning.

Promote patient and family awareness and understanding of the benefits of advanced illness planning and management.

## Family Awareness

## Planning for Future Care

Planning for future care involves thinking about and making decisions such as where you will be cared for, who will be your caregiver and if, at any point, you may want palliative or hospice care.

Advance directives are written instructions regarding your medical care preferences. These may include living wills, health care power of attorney/health care surrogate and do not resuscitate orders.

## Advance Directives

## Long-Term Care Insurance

Long-term care is not covered by traditional Medicare and can generally cover help with home care, assisted living, adult daycare, respite care, hospice care, nursing home and Alzheimer's facilities.

Written documentation of all home, personal accounts and resources helps surviving loved ones identify and maintain the ongoing finances and household activities that will become their responsibility.

## Personal Information Toolkits

# Administrative Support

Administrative Support is that which comes directly from the employer. This includes Human Resources support and formal policies directed at supporting and retaining employee caregivers.

Referral service, include links to statewide information, community resources, or to professional geriatric care managers.



**Care and Information Referrals**

EAPs are intended to help employees deal with personal problems that might adversely impact their work performance, health, and well-being.




**Employee Assistance Programs**

Care management services and programs are designed to assist individuals with certain long-term health conditions to better manage their overall care and treatment (for example, visiting nurse programs).



**Care Management**

A Geriatric Care Manager is a specialist who guides families who are caring for older relatives and who is experienced in several fields of care management. These include nursing, gerontology, social work, or psychology with a specialized focus on issues related to aging and elder care. Care Managers conduct home visits, assess the needs of the older person and family, and develop a care plan.



**Geriatric Care Consultants/Managers**



**Options for Leave**

This includes, but is not limited to, personal leave, sick leave, short- and long-term disability, leaves of absence and paid family leave, Life Event Leave, and Elder Emergency Time Off. Most leave is unpaid.



**Flexible Workplace Schedules**

Possibilities for flexible workplace schedules include changing the number of hours worked through job sharing, phased retirement, Paid Time Off, and telecommuting options.

# Evaluation and Metrics

The most important part in designing an effective program is tailoring it to the needs of employees. This can be achieved through work-life audits, comprehensive needs assessments, environmental scans and unification of existing programs. Evidence based programs are important and should be completely confidential.

Work-Life Evaluations gauge employee wellbeing, work-life balance and are important tools to inform what services employees need and want.



**Work-Life  
Evaluations**

A dedicated survey of employees to assess the impact that caregiving plays in their lives and how it might impact their abilities at work.



**Employee Caregiver  
Surveys**

A survey of employees to assess the impact of employer support programs and to gauge unmet needs and employee satisfaction.



**Employee Satisfaction  
Surveys**

Formal quantitative or qualitative evaluations gauge utilization of employee support programs, employees' satisfaction and room for growth.



**Formal  
Evaluations**

Feedback mechanisms resulting in evidence-based programming and the basis for program modifications.



**Feedback  
Mechanisms**

# Glossary

## **Employee Caregiver**

An employee who in the last 12 months provided unpaid care to a relative or friend. Unpaid care may include help with personal care or household chores, which might include managing a person's finances, arranging for outside services, or visiting regularly to see how they are doing. This person need not live with you.

## **Presenteeism**

The practice of an employee coming to work despite illness or injury, often resulting in reduced productivity. The ability of an employee to focus on work tasks while at work and not be distracted.

## **National Healthcare Decisions Day (NHDD)**

National health efforts and observances such as the *National Healthcare Decisions Day*, *Engage with Grace*, and *The Conversation Project* serve as catalysts to inspire, educate and empower the public and clinicians about the importance of advance care planning.

[www.nhdd.org](http://www.nhdd.org)

## **Educational Seminars**

Educational guides, podcasts and webinars on caregiving issues. (For example, Lunch-time education seminars—in person, online or dial-in)

## **Caregiving Fairs**

Regular health and wellbeing fairs that encompass advanced illness and eldercare.

## **Employee Volunteer Programs**

Volunteer programs organized and managed by employees. A program is a grass-roots effort developed by employees.

## **Support Groups**

A group of employees, family members or members of the community who meet regularly to support each other and discuss caregiving issues.

## **Family Awareness**

Promote patient and family awareness and understanding of the benefits of advanced illness planning and management.

## **Living Wills**

This written, legal document spells out the types of medical treatments and life-sustaining measures you want and don't want, such as mechanical breathing (respiration and ventilation), tube feeding or resuscitation.

## **Planning for Future Care**

Planning for future care involves thinking about and making decisions on where you will be cared for, who will be your caregiver and if, at any point, you will want palliative or hospice care.

## **Engage With Grace**

An initiative designed with one simple goal: to help get the conversation about end of life experience started.

[www.engagewithgrace.org](http://www.engagewithgrace.org)



# Glossary

## **The Conversation Project**

An initiative dedicated to helping people talk about their wishes for end-of-life care.

[www.theconversationproject.org/](http://www.theconversationproject.org/)

## **Advance Directives**

Advance directives are written instructions regarding your medical care preferences. These may include living wills, health care power of attorney/health care surrogate and do not resuscitate orders. Examples include: Five Wishes and Put it In Writing

[www.agingwithdignity.org](http://www.agingwithdignity.org)

[www.putitinwriting.org](http://www.putitinwriting.org)

## **Long-Term Care Insurance**

Long-term care is not covered by traditional Medicare and can generally covers home care, assisted living, adult daycare, respite care, hospice care, nursing home and Alzheimer's facilities.

## **Personal Information Toolkits**

Written documentation of all home, personal accounts and resources helps surviving loved ones identify and maintain the ongoing finances and household activities that will become their responsibility.

## **Care Information Referrals**

Referral service, include links to statewide information, community resources, or to professional geriatric care managers.

## **Hospice**

A model of care that focuses on relieving symptoms and supporting patients with a life expectancy of six months or less. Hospice involves an interdisciplinary approach to provide medical care, pain management and emotional and spiritual support. The emphasis is on comfort, not curing. It can be provided in the patients home as well as freestanding hospice facilities, hospitals, nursing homes and other long-term care facilities.

[www.nahc.org/haa](http://www.nahc.org/haa)

## **Palliative Care**

The goals of palliative care are to improve the quality of a seriously ill person's life and to support that person and their family during and after treatment.

[www.nhpco.org](http://www.nhpco.org)

## **Physician/Medical Orders for Life-Sustaining Treatment (POLST/MOLST)**

Honoring patient preferences is a critical element in providing quality end-of-life care. To help physicians and other health care providers discuss and convey a patient's wishes regarding cardiopulmonary resuscitation (CPR) and other life-sustaining treatment, POLST/MOST are orders to facilitate end-of-life medical decision-making.



# Glossary

**Do-Not-Resuscitate (DNR)**

A legal order written either in the hospital or on a legal form to respect the wishes of a patient not undertake attempts to revive him or her in event of cardiac or respiratory failure.

**Employee Assistance Programs (EAPs)**

EAPs are intended to help employees deal with personal problems that might adversely impact their work performance, health, and well-being.

**Care Management**

Health care services and programs designed to help individuals with certain long-term conditions better manage their overall care and treatment i.e. visiting nurse programs

**Geriatric Care Consultants/Manager**

A Geriatric Care Manager is a specialist who guides families who are caring for older relatives and who is experienced in several fields of care management. These include nursing, gerontology, social work, or psychology with a specialized focus on issues related to aging and elder care.

**Options for Leave**

This includes, but is not limited to, personal leave, sick leave, short- and long-term disability, leaves of absence and paid family leave, Life Event Leave, and Elder Emergency Time Off.

**Flexible Workplace Schedules**

Possibilities for flexible workplace schedules include changing the number of hours worked through job sharing, phased retirement, PTO, work from home options, and telecommuting options.

**Employee Caregiver Surveys**

A dedicated survey of employees to assess the impact that caregiving plays in their lives and how it might impact their abilities at work.

**Employee Satisfaction Surveys**

A survey of employees to assess the impact of employer support programs and to gauge employee satisfaction.

**Work-Life Evaluations**

Work-Life Evaluations gauge employee wellbeing, work-life balance and are an important tool to inform what services employees need and want.

**Formal Evaluations**

Formal, quantitative or qualitative evaluations, gauge utilization of employee support programs, employees satisfaction and room for growth.

**Feedback Mechanisms**

Feedback mechanisms resulting in evidence-based programming and the basis for program modifications.

# Additional Resources

The C-TAC Employer Committee would like to thank its members for their generous contributions to this checklist. For additional resources and to learn more about what you as an employer can do to provide support and resources for caregivers and those dealing with advanced illness, please consider the following:

The Coalition to Transform Advanced Care

[www.thectac.org](http://www.thectac.org)

ReACT: Best Practices in Workplace Eldercare

[www.caregiving.org](http://www.caregiving.org)

The National Business Group on Health's Impact of Advanced Illness on the Workplace Toolkit

[www.businessgrouphealth.org/](http://www.businessgrouphealth.org/)

Caring Connections It's About How You LIVE – At Work. Offering the **[Employer's Guide to Work-Life Programs and Policies](#)** and brochures for managers and employees facing end-of-life issues.

[www.caringinfo.org](http://www.caringinfo.org)

National Alliance for Caregiving Online Resources

<http://www.caregiving.org/resources/>

Engage with Grace [www.engagewithgrace.org](http://www.engagewithgrace.org)

The Conversation Project

<http://theconversationproject.org/>

Aging With Dignity, Five Wishes

[www.agingwithdignity.org](http://www.agingwithdignity.org)

Put It In Writing

[www.putitinwriting.org](http://www.putitinwriting.org)

The Eldercare Locator. Free information and referral services funded by the government (1-800-677-1116) [www.eldercare.gov](http://www.eldercare.gov)

The MetLife Caregiving Cost Study: Productivity Losses to U.S. Business

[www.metlife.com](http://www.metlife.com)

The MetLife Study of Working Caregivers and Employer Health Care Costs

[www.metlife.com/assets](http://www.metlife.com/assets)

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