



# Instructions for Implementing the Employed Caregiver Survey

## 1. Objectives:

The employed caregiver survey was developed to help employers:

- Understand the effects of adult caregiving on their workforce.
- Become aware of community resources needed by employed caregivers within their organization or company.
- Identify ways they can support employed family caregivers through changes in organizational policies and procedures.

## 2. Getting Started:

- Review the example of the Employed Caregiver Survey and reports.
- This survey has been approved through the Institutional Review Board (IRB) of the University of Nebraska. Determine if additional IRB approval must be obtained through your institution prior to distributing the survey at an employer in your community.

## 3. Initial Contact with Business/Company:

- Identify key individuals within the targeted organization with whom you will be working (i.e. Human Resource Director, CEO, or other management) and determine the appropriate protocol for making an initial contact regarding the Employed Caregiver Survey.
- At the initial meeting, explain the purpose of the Employed Caregiver Survey, which was developed by Cooperative Extension Educators and is available on the eXtension.org website.
- Show Employed Caregiver Survey and report. This may be an opportunity to share available caregiver education program materials as well.
- Stress the importance of offering a total package of outreach efforts to employed caregivers, in addition to the survey. Based on the results of the survey, educational resources should be made available to employees within the organization. Attempt to have the employer commit to developing an action plan addressing results from the survey which would include offering educational programs.
- Share that the employee survey and analysis are available at no cost. However, the employer should factor in costs such as employee time to complete the survey, staff time to input survey data if needed, and duplication of the reports if they are not distributed via e-mail. There may be additional costs associated with educational programs that result as follow-up to the survey.
- Discuss with the employer that the survey data from their organization will become part of a national data base, and that it may be used in writing academic papers. The employer may be identified, but survey data will only be shared at the county, state, or national level. Their workplace survey data will never be shared in any other form than the results graphs.

- Explain that the results of the survey will be shared with all levels of management, Human Resources staff, and the employees. Ask the employer if they would give permission for the results to be shared with local media and / or other employers in the area.
- Seek permission to conduct the Employed Caregiver Survey and complete the Responsibility Form (see Appendix A).

#### 4. Survey Logistics:

- Allow adequate time to secure the necessary consents within the organization you to ensure that management is supportive of their employees completing the survey and are committed to acting on the results. This may include meetings with Human Resource staff and presentations at management meetings.
- Determine which employees within the organization will receive the survey. The recommendation is to include all employees and management.
- The survey is distributed via e-mail and includes a link to an online survey site. If there are employees who do not have access to e-mail, determine how these employees will be surveyed. Options include providing a computer with internet access that is available to employees in a common area or distributing paper copies of the survey. If paper copies are distributed, they could be mailed, completed by employees in a group meeting, or completed by employees individually. To ensure confidentiality, surveys must be returned to you (and not a member of management within the organization).
- A paper copy of the survey can be found at [http://fyi.uwex.edu/balancingcare/files/2012/11/final\\_nov\\_2012\\_-Employed-Family-Caregiver-Survey-2.pdf](http://fyi.uwex.edu/balancingcare/files/2012/11/final_nov_2012_-Employed-Family-Caregiver-Survey-2.pdf)
- If paper surveys are used, determine who will input the data into the data base. Again, to ensure confidentiality, data entry should not be completed by an employee within the organization. The employer may have to cover costs for staff time to input data from paper surveys if this cannot be done by you or your staff. Another option is to secure a volunteer through volunteer organizations in your community.

#### 5. Accessing the Survey:

- Once the employer has consented to distributing the survey, you must to register the organization in order to access the Employed Caregiver Survey. You will need the following information to complete the employer registration form:
  - 1.) Your name and contact information
  - 2.) Name and contact information for an alternate contact within your organization (in case there is some trouble getting in touch with you—the primary contact)
  - 3.) Name and contact information for the employer
  - 4.) Number of individuals employed by the organization
  - 5.) Anticipated number of respondents to the survey (consider this number carefully because the survey will only allow that many responses before closing).
- Access the employer registration form at <http://articles.extension.org/pages/73386/employed-family-caregiver-survey-registration-form>  
Note that **All** fields are required. This information is used to create a unique URL for the employer (which is the link to the survey).
- Within one week, you will receive an e-mail with the unique URL for the employer. You will send this unique link to employees so they can complete the survey.

## 6. Survey Distribution:

- To achieve the best results, management should support the completion of the survey by employees **on work time using work computers** (if available). This information must be relayed to employees in the e-mail sent with the survey link. Employees also must be told that their responses are confidential and will not impact their employment in any way.
- Surveys may be distributed in one of two ways. A list of email addresses can be provided by the employer and messages will be sent via the survey software.
  - OR –
- The employer may send the unique survey link to employees via e-mail, along with an explanatory message noting that it has been approved by administration and is confidential. See example below.
  - Send the first reminder via e-mail to complete the survey after one week to all employees. See example below.
  - Send second reminder via e-mail to complete the survey after two weeks to all employees, and a third/final reminder may also be necessary. See sample below.
- The survey can remain open for up to 6 weeks.
- If paper copies are distributed, you or a representative from the employer should be present to distribute and collect the surveys for better response rate. Again, the data from paper copy surveys needs to be input into the data base system.

### **Example of introductory e-mail to send with survey link:**

Eighty percent of care provided to older adults is done by family and friends. As the nation grows older, the need for adult caregiving will be as common as the need for child care. We'd like to find out how adult caregiving is affecting \_\_\_\_\_ employees, and what resources would be helpful to plan for caregiving needs. \_\_\_\_\_ administration supports you using work time and work computers to complete an online survey. It should take less than 10 minutes. All responses will be confidential, and results will only be shared as a summary, not by department or individual. Just click on the link below, and follow the instructions. It's easy! Thank you!

### **Example of first reminder e-mail:**

We've already had \_\_\_\_ responses to the Employed Caregiver Survey. Thank you to all who have already completed the survey. If you have not completed the survey, please take the time to provide this very important information. The survey will only be available until \_\_\_\_\_. All responses will be kept completely confidential. Results from the survey will be shared only as a summary, and not by department or individual. It should take less than 10 minutes. The responses will help us find out how adult caregiving is affecting \_\_\_\_\_ employees and identify educational resources that can help employed caregivers. As a reminder, management supports your using work time and work computers to complete the survey. Just click on the link below, and follow the instructions. It's easy! Thank you!

### **Example of second reminder**

This is another reminder to complete the Employed Caregiver Survey. A BIG thank you to the \_\_\_\_\_ employees who have responded to the survey thus far. Help us reach our goal of having all employees complete the survey. Take 10 minutes to complete the survey by clicking

the link below. The survey is only available until \_\_\_\_\_, so there is not much time left for you to respond. Remember that responses are confidential and will be used to identify ways caregivers here at \_\_\_\_\_ can be helped.

### **Third reminder example**

This is your last reminder about completing the Employed Caregiver Survey as it closes in \_\_\_\_\_ days! We need you to take 10 minutes to complete the survey. By completing the survey, you'll have a say in determining the programs and resources brought into \_\_\_\_\_ to assist caregivers. So, please take 10 minutes to complete the survey which you can get to by clicking on the link below.

## **7. Reports**

When the survey is completed, you will receive an e-mail with all the data in an easy to read format with bar charts for each question. There will be an information sheet with general statistics for your use as well.

## **8. Time Needed for Survey.**

- Time needed to complete the survey varies depending on how long it takes to obtain the various permissions required through the employer.
- You will need two days to obtain the unique survey link to mail out to employees
- Once survey is distributed, it should remain open for 6 weeks to obtain the highest participation rate possible.
- Allow adequate time to input any paper survey data.
- Remember you are sending your own email, you will need time to send out the first, second and third reminders.

## **9. Presenting the Data:**

- Determine the protocol for sharing the results with management, Human Resources staff, and employees. If previous permission was obtained, the survey data can also be shared with local media and other employers. This is covered on the Coordinator / Employer Responsibility Report.

## **10. Follow-up with Employer and Employees:**

*In a follow-up meeting with the employer review and discuss the results of the survey:*

- Schedule a time to meet with the employer's representative; that is, the person with whom you worked to register the employer for the Survey. Others may be invited to join the discussion as well.
- During this meeting, review and discuss the results of the Survey. You may want to particularly discuss the sections of the Survey's results that focus on topics of interest to working caregivers, and the format in which working caregivers would prefer to receive additional information. If, for example, one of the topics identified was, "coping with caregiving responsibilities, including stress management, and if seminars was identified as a desired format for receiving this information, you may want to discuss offering the Powerful Tools for Caregivers curriculum (web address) to employees involved in caregiving. If "fact sheets' and/or newsletters were identified as a preferred format for delivering information, consider adapting materials from the website sponsored by the National Alliance for Caregiving (web address), or website from the Family Caregiver Alliance/National Center on Caregiving. (web address)

*Assessing the impact(s) of participation in the survey:*

- Conduct an immediate follow-up interview.  
One of the most important things to do after you have discussed the Survey's results with an employer is to assess the initial impact of having participated in the Survey. This is done by conducting a follow-up interview. The interview questions can be downloaded from the UW Extension FYI website page: (<http://fyi.uwex.edu/balancingcare/for-use-with-employers/>)  
Immediate Follow-up Interviews with an Employer.  
When the survey result are ready to share, schedule a time to meet with the employer's representative. Use this survey to conduct the in-person interview.

The complete Follow-up Interview should be sent to:

Teri Zuege-Halvorsen, MS  
Family Living Educator  
Manitowoc County UW- Cooperative Extension  
4319 Expo Drive  
P.O. Box 935  
Manitowoc, WI 54221  
Phone: (920) 683-4168  
Email: [teri.zuege-halvorsen@ces.uwex.edu](mailto:teri.zuege-halvorsen@ces.uwex.edu)

*Conduct Follow-up interview one year after the completion of the survey:*

- Approximately one year after you have shared the initial Survey results with the employer, schedule another meeting for the purpose of assessing longer-term impacts.
- During one-year follow-up meeting, collect impact information by asking the question from the UW Extension FYI website: (<http://fyi.uwex.edu/balancingcare/for-use-with-employers/>) or on page 30 and 31 in manual.  
[One Year Follow-up Interview with an Employer](#)  
Approximately one year after you have shared the initial Survey results with the employer, schedule another meeting for the purpose of assessing longer-term impacts. During the one-year follow-up meeting, collect impact information using this survey.
- Responses should be sent to the same address as the initial interview.

Teri Zuege-Halvorsen, MS  
Family Living Educator  
Manitowoc County UW- Cooperative Extension  
4319 Expo Drive  
P.O. Box 935  
Manitowoc, WI 54221  
Phone: (920) 683-4168  
Email: [teri.zuege-halvorsen@ces.uwex.edu](mailto:teri.zuege-halvorsen@ces.uwex.edu)

*The Employed Caregiver Survey and corresponding materials were developed by University of Wisconsin-Extension Faculty Jane Jensen, Faye Malek, Kathy Miller, Peggy Nordgren, Molly Spaulding, Dianne Weber, Heidi Ungrodt, and Teri Zuege-Halvorsen, UW-Extension Program Specialists in Aging Mary Brintnall-Peterson, Ph.D., and Clifton Barber, Ph.D., and Texas AgriLife Extension Specialist Andrew B. Crocker. May 2010*

# **Appendix A:**

## **Employed Caregiver Survey Coordinator/Employer Responsibility Form**



## Employed Caregiver Survey Coordinator/Employer Responsibility Form

The employed caregiver survey creates an awareness of the number of family caregivers in an organization as well as their needs. To ensure success, the survey coordinator and employer need to work together to discuss the responsibilities and expectations of each other. The chart below can guide that discussion.

Survey Coordinator's Name \_\_\_\_\_ Institution \_\_\_\_\_

Phone # \_\_\_\_\_ Email address \_\_\_\_\_

Employer's Business/Company \_\_\_\_\_

Name of Employer's Contact Person \_\_\_\_\_

Phone # \_\_\_\_\_ Email address \_\_\_\_\_

Date of Survey Implementation \_\_\_\_\_

Survey address on eXtension: [https://www.extension.org/pages/Employed\\_Family\\_Caregiver\\_Survey](https://www.extension.org/pages/Employed_Family_Caregiver_Survey)

Coordinator Responsibilities	Employer Responsibilities
Describe the intent of the Employed Caregiver Survey developed by UW-Extension, and the potential benefits for employees and employers. Provide examples of the survey, reports, etc.	Invite administrators and others to a meeting to learn about the Employed Caregiver Survey.
Explain the survey data becomes a part of a national data base and might be used for academic papers. The employer might be identified, but survey data will be in a composite form, never identified by individual unless approved by the employee (i.e. a direct quote).	The Institutional Review Board (IRB) has given the Coordinator approval to administer the survey. Determine if additional approval must be obtained through the company/business.
Explain the details of the Employed Caregiver Survey: needed time, confidentiality of the survey and its findings, cost, preferred distribution methods, and the data collection process.	Ask questions for clarification as needed.
Explain that the Survey results should be shared with all levels of management and the employees.	Ask questions for clarification as needed.
Determine if the Survey results can be shared with the media and/or with other employers in the area.	Provide an answer.

Coordinator Responsibilities	Employer Responsibilities
<p>Request permission to conduct the Employed Caregiver Survey.</p> <p>Design a method for survey distribution and data entry.</p>	<p>Get necessary consents within the organization to ensure support for employees to complete the survey.</p> <p>Work with the Coordinator to determine which employees will receive the survey, preferably all.</p> <p>Determine how and when the coordinator or designated employee can address employees to explain the reason for the survey.</p>
<p>Determine how employees will receive and complete their survey online.</p> <p>If some paper copies are distributed, determine where employees will place their completed surveys to ensure confidentiality.</p>	<p>Discuss ways employees can get access to a computer and get help to complete the survey if needed.</p> <p>It is important that the surveys not be collected by an employee in the business for confidentiality.</p>
<p>Keep the survey process open for up to six weeks. Monitor the response rate and inform the contact person of progress. Together, provide reminders for maximum survey returns.</p> <p>Determine how the data from hand written surveys will be entered online.</p>	<p>Determine how employees will be encouraged to complete the surveys by the deadline date.</p> <p>Because of confidentiality, it is not recommended to have a company employee enter the data from paper copies.</p>
<p>After the survey is closed and hand written surveys entered, you will receive results by email. Print these for the employer. Set a date, time, and place with the employer's contact person to share the findings. Provide copies for all in attendance.</p> <p>In addition to sharing the Survey result at the meeting, download the "follow-up Interview" document found on page 26 of the "What Every Employer Needs to Know" guide for educators at (add web address. Record responses, keep a copy for your files and send a copy to person designated on page 25 of the guide.</p>	<p>Invite administrators and others to a meeting to learn about the Employed Caregiver Survey results.</p>
<p>Summarize the needs identified by employed caregivers, and their preferred methods of meeting those needs.</p>	<p>Work with the Coordinator to develop a plan of action that addresses employer requests. Determine dates, times, and preferred delivery methods. Collaborate with the Coordinator to determine how best to initiate the plan of action.</p>
<p>Provide educational programs on identified needs.</p>	<p>Review after-session evaluations to determine satisfaction of educational content. Determine additional requests. Inform the Coordinator of employee needs.</p>

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