

The experiences of working carers of older adults

Employers are increasingly aware of the need for 'family-friendly' policy and practice in order to support workers who have caring responsibilities for older adults. Judith Phillips, Miriam Bernard and Minda Chittenden, of the Centre for Social Gerontology at Keele University, investigated how working carers and managers in public sector organisations employing large numbers of women (a Social Services Department (SSD) and a National Health Service (NHS) Trust) combined these roles and responsibilities. Both organisations had a variety of family-friendly policies and were in the process of developing and implementing others. The study found that:

-  As many as one in ten employees were caring for older adults in an informal capacity and commonly looked after mothers, mothers-in-law or fathers.
-  Many carers had multiple caring roles and were juggling work with caring for both adults and children. However, there was a lack of openness and a silence about elder care in comparison with childcare.
-  Very few carers lived with the people they cared for, although one in three lived within a ten minute drive. Two out of three carers spent under 10 hours per week looking after others. Help with shopping and transport, giving emotional support and checking up on people, were the most commonly performed tasks. Few working carers provided very 'heavy' personal or physical care.
-  Managers were aware that working carers often did not know what was available to them, and that access to policies and benefits depended on the grade and nature of individual jobs.
-  Managers found knowledge of their staff's caring and work histories particularly helpful when implementing policy.
-  Very few of the designated family-friendly policies in these organisations were used routinely. Carers tended to use policies that did not publicly identify them as in need of help, such as annual leave.
-  Managerial discretion and flexibility were of particular help to carers, together with having earned the trust of their manager.
-  Carers were highly committed to their jobs but inflexible work schedules and the pressures of the job made juggling competing responsibilities difficult.
-  The 'long hours' culture in both organisations, combined with a belief that people need to be 'seen to be coping', helped create a climate which worked against carers asking for help.

The context of work and family life

Existing 'family-friendly' schemes and services are still primarily designed for working parents of young children and rarely address the needs of employees who care for older or disabled adults. Yet 2.7 million people combine work with informal care for another adult (Department of Health, 1999). In addition, caring for older adults can be protracted and unpredictable. As the population ages and the pool of people who have traditionally provided care is shrinking and changing, there is an urgent need for employers to understand what actually works for carers if they are to adequately address their recruitment and retention problems, and have sustainable workforces.

This study was conducted in two public sector organisations: a SSD and a NHS Trust. The two organisations provide health and welfare services for a range of people and their carers in both institutional and community settings. The large, diverse and unionised workforces are predominantly female (over 80 per cent), with a mix of both part-time and full-time employees.

Family-friendly policies and practices

Recruitment and retention issues were the main reasons these organisations had developed family-friendly policies. In line with national trends, they face shortages of trained staff in particular; their workforces are ageing; and many employees in their forties and fifties are increasingly likely to have informal caring responsibilities for older adults.

Managers acknowledged that the development of family-friendly policies was good employment practice; they defined it in terms of 'balancing' the conflicting demands of work and home life. Carers perceived work-life issues as a more complex 'juggling' act between the competing demands on their time and energy that requires a range of both formal and informal supports.

Managers communicated the existence of policies to staff through a variety of channels but were also aware that working carers often did not know what options were available until they needed to use them. However, access was often conditional on what level the individual was in the organisation, the type of job they did and the nature of their work.

In times of crisis, and for regular caring responsibilities, people tended to make most use of familiar and easy to access policies: annual leave and time off in lieu were clear examples. In contrast,

employees were wary of using counselling and carers' leave because they feared being labelled as in need of help. Also, policies specifically designed with carers in mind were often difficult to access.

Working and caring

The initial questionnaire indicated that as many as one in ten employees in each of these workforces had informal caring responsibilities for older adults.

203 working carers completed a longer questionnaire. Two out of three were working full-time. The majority were very committed to their work, saying it was important for their own self-esteem and identity.

In terms of informal caring responsibilities, most were caring for one older adult. These were most commonly mothers, followed by mothers-in-law or fathers. Two out of five said they were the primary carer. Very few lived with the people they cared for although one in three lived close by (within ten minutes). Two out of three spent under 10 hours per week looking after their care recipient(s). Helping with shopping and transport, giving emotional support and checking on the care recipient(s) were the most common tasks. Few carers provided very 'heavy' personal or physical care and few made extensive use of formal support services.

The demands of working and caring were felt most forcefully on family life and carers' own health, rather than on work. A majority of carers said they used annual leave to accommodate caring responsibilities. Some chose to forego the 'rewards' of work, such as further training or seeking promotion, rather than let their caring responsibilities interfere more severely. Carers coped primarily by using their own professional expertise and experience, talking with others, and ensuring they had time for interests beyond caring.

What helps working carers?

From the interviews, it is apparent that the ways people are enabled to juggle work and caring is a complex interplay of formal and informal support, and of practical, attitudinal and experiential influences. In addition to helpful formal policies, such as time off in lieu and annual leave, carers and managers identified a number of other crucial factors including:

- *The personal touch* - The importance of a supportive, flexible and sympathetic manager and the support of colleagues were seen as crucial.

- **The 'bank of trust'** – Knowledge of staff, their caring and work histories were particularly helpful to managers when implementing policy. Establishing trusting relationships enabled working carers to feel comfortable asking for specific forms of help or time off.
- **'Being a professional'** - working in health and social care settings provided working carers with information and knowledge of what services were available and how to access them, as well as helping them deal with competing demands.
- **Help from friends and family** - was also important: both on a practical and an emotional level.
- **Organisational pressures and culture** - the 'long hours' culture, combined with a belief that people need to be 'seen to be coping', worked against carers revealing details about their situations or asking for help.

Partnership: developing joint initiatives for carers

Most carers had professional networks that they could call upon to assist them in their personal situations. They also saw professional knowledge of other agencies as helpful in enabling them to juggle their roles and responsibilities. However, partnership arrangements between public, private and voluntary agencies were non-existent and this is an area ripe for development.

What hindrances do working carers face?

Both managers and carers talked far less about the hindrances they faced but did identify the following:

- **Unhelpful attitudes of family** – could be very difficult for carers to cope with.
- **Distance dilemmas** - the amount of travelling involved was problematic for some carers.
- **Multiple demands** - juggling care of an older adult with other family responsibilities (for children, grandchildren etc), as well as with work, could be very demanding.
- **Work and workload pressures** - inflexible work schedules and the pressures of the job were hindrances to juggling competing demands and responsibilities.
- **Unsupportive managers and colleagues** - were seen as a hindrance by managers themselves; carers were more inclined to say that managers and colleagues might 'make things difficult' rather than directly refusing to help.
- **Staff overload and health concerns** – carers were finding it increasingly difficult simply to keep up-to-date with the latest policies and guidance on family-friendly issues as well as being concerned about the effects of working and caring on their own health.

Recognising difference within, and between, organisations

The nature of both formal and informal care-giving in the two organisations varied enormously. However, regardless of individual circumstances, everyone was aware that caring was not a predetermined, permanent or unchanging activity, nor was it just a simple choice between caring and working. Its unpredictability and its intermittent nature mean that generalised solutions common in the childcare arena, and a 'one size fits all' response from employers, are likely to be inappropriate. Organisations like these, which espouse the need for responsive and flexible services for clients and patients, have to grapple with the paradox that this in turn can impose considerable constraints on employees with caring responsibilities.

Policy implications

The researchers highlight the following issues for policy:

- **A different kind of care** - The study highlights some of the differences between the care of older people and childcare: notably the difficulties of disclosing and talking about such responsibilities to managers; the unpredictability of elder care in terms of time commitment; and the considerable distances travelled by some carers. Juggling work and care can be extremely difficult, given that most carers are married, have demanding jobs and are often balancing multiple responsibilities, including care of dependent children (and sometimes grandchildren). This suggests that in

some cases training for managers, better communication channels and cultural change is required.

- **A 'whole system' approach?** In developing a 'whole system' approach, there is a balance to be struck between generalised solutions (which are more common in the childcare arena) and the more customised, tailor-made solutions which might be needed to address the very diverse needs of working carers of older adults. However, a sharing of ideas and practices between childcare and eldercare - such as the day care vouchers co-funded by government and employers - could also be useful. Moreover, the approach adopted by the DTI and the Work and Parents Taskforce has something to offer working carers of older adults because it gives employees a right to ask for flexibility, and places a duty on employers to give their request serious consideration.
- **Practical responses** – Managers wanted informality and flexibility, but within clearer structures. They would like regular monitoring and reviews of policies and practices, an assessment of the 'fairness' or not with which these are being applied to staff, and stern repercussions for those who abuse the system but with the right to appeal. There is also a need for greater sharing of information across departments and between managers. Overt discussion and exploration of the differences between managers may help raise awareness of carers' needs and lead to more sensitive responses.

Few carers in the study had extensive networks of services and benefits they could call upon for support, but would particularly welcome access to personal home care. Other practical suggestions revolve around the provision of advice and information about what is available in the workplace and the wider community, training and awareness-raising, better induction materials and regular updating of policy and information. Developing telephone help lines, putting carers in touch with each other, and introducing them to carers' networks were some of the other practical suggestions made by managers and working carers. More flexible interpretation of compassionate leave, a framework and ethos that allow working at and from home, time off with pay, and

counselling services, were advocated as well. There is also a role for trade unions in information giving, creating a sense of entitlement and a culture of understanding.

About the project

The study adopted a multi-method approach involving five phases of data collection: compiling a profile of the two organisations; a screening questionnaire to all employees; a postal survey of carers; in-depth interviews both with working carers of older adults and with senior and middle managers.

How to get further information

The full report, **Juggling work and care: The experiences of working carers of older adults** by Judith Phillips, Miriam Bernard and Minda Chittenden, is published for the Foundation by The Policy Press as part of the Family and Work series (ISBN 1 861 34 443 0, price £10.95).