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# debates and issues

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## Better support for carer-employees in Canada: the development of standardised guidelines for the workplace

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In 2012, it was estimated that more than 5.6 million Canadian employees (35% of the workforce) had adult/elder care responsibilities (Fast et al, 2014). Lack of workplace support leads to consequences such as: carer-employees leaving the workforce/missing work; premature retirement; reduced productivity; health problems; and increased costs to employers (Peters and Wilson, 2017). In 2016, a partnership of committed stakeholders set out to develop a bilingual *Canadian Caregiver-Friendly Workplace Standard and Implementation Guide*. It is a gender-sensitive, accessible guide for employers and human resource professionals and is suitable for use in a wide range of workplaces.

**key words** carer-employee support • carer-inclusive employment tool  
• Canadian advocacy tool for employers

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### Introduction

The focus of this article is a description of the process of the development of a *Carer-Inclusive Organisational Standard* in Canada. An overview of the rationale for the standard is discussed first followed by an outline of the stages employed in its creation. Reflections on the process are also offered.

In Canada, in 2012, it was estimated that more than 5.6 million employees (approximately 35% of the workforce) had adult/elder care responsibilities (Fast et al, 2014). It is widely evidenced that the lack of workplace support has a number of negative consequences. These include carer-employees leaving the workforce or

missing work, retiring from the workforce prematurely, reduced productivity, health problems, and increased costs to employers (Peters and Wilson, 2017). Recognising that *all* Canadian workplaces will be affected by caregiving demands in the future means that it is pivotal for carers, and for economic productivity, that employers develop and implement caregiver-friendly workplace practices. Doing so will offer a number of advantages to carer-employees and employers, particularly given the current and upcoming shortages of skilled labour. Advantages include: a better work-life balance; workforce retention; fewer experienced skilled staff being forced to 'retire early'; and reduced health insurance costs.

In response to this need, in 2016, a partnership of committed stakeholders set out to develop a bilingual *Canadian Caregiver-Friendly Workplace Standard (The Standard)* and *Implementation Guide*. The partners included academics, government departments, non-government/non-profit agencies, private businesses, service providers such as home care agencies, trade unions and industry. It is a gender-sensitive, accessible guide for employers and human resource professionals and is suitable for use in a wide range of workplaces. Funding for this project was provided by the Canadian Institutes for Health Research (CIHR) and the Social Science and Humanities Research Council (SSHRC) through their Healthy Productive Work Strategic Partnership Development

**Figure 1: Introduction to The Standard**

B701-17

*Carer-inclusive and accommodating organizations*

## B701-17

### *Carer-inclusive and accommodating organizations*

#### **0 Introduction**

Worker-carers are found in all industries and all occupations, regardless of workplace size or sector. In Canada, for example, of the 8.1 million Canadians who provided unpaid caregiving in 2012, approximately 5.6 million were also engaged in paid employment. The majority of these workers work full-time while providing care to their family member or friend. Fifty percent (50%) of worker-carers are between the ages of 45–65, representing the most experienced workers in the paid labour market.

Carer-inclusive and accommodating workplace policies, otherwise known as “family-friendly workplace policies” or “work-family initiatives”, are defined as “deliberate organizational changes — in policies, practices, or the target culture — to reduce work-family conflict and/or support workers’ lives outside of work”.

While the implementation of limited government-mandated policies provide security and support for worker-carers, organizations provide another opportunity. Organizations who have recognized the importance of retaining skilled staff, and who are now facing the management of workers who are also responsible for unpaid care responsibilities, are finding creative solutions to keeping their staff employed and healthy. One strategy is through carer-inclusive and accommodating organization policies.

As one example, labour force participation (the percentage of working age people in an economy who are either employed or unemployed but actively looking for work) is significantly affected by the family/informal care needs of the growing ageing population. At the same time, family sizes are decreasing, more women are employed in the labour force, mobility is increasing, and the number of seniors requiring care is projected to continue to grow; in Canada, for example, the number of seniors requiring care is expected to double between 2012 and 2031. These trends are impacting the growing number of worker-carers, defined as family members and other significant people who provide care and assistance to individuals (e.g., parent, spouse or life partner, adult child, sibling, and/or friend) living with ongoing conditions such as physical, mental, and/or cognitive, while also working in paid employment.]

Grant Initiative.<sup>1</sup> By way of offering a flavour of the tone and nature of *The Standard* and who it is intended for, its *Introduction* is reproduced in Figure 1.

The creation of *The Standard* took place through an extensive consultative process, following a fixed Canadian Standards Association (CSA) protocol (see Phase 3 later). The CSA’s mission is ‘to represent the interests of its members in creating a better, safer, more sustainable world – primarily through standards development, technical research, and training in relevant fields’.<sup>2</sup> Following this protocol, a Technical Committee (TC) of stakeholders (noted earlier) was formed. The primary role of the TC was the development of *The Standard*. The CSA used a balanced-matrix approach to ensure a representative group of members. It is made up of four groups: general interest (eg researchers, non-governmental organisations [NGOs]); user interest (eg employers); labour (eg unions); and representatives of government and regulatory bodies. The TC was co-chaired by Dr. Allison Williams and Dr. Amin Yazdani. Members were required to commit to participating in six full-day meetings and four half-day teleconferences over the development period, in addition to regular communication via email and telephone.

## Standards development process

*The Standard* took 18 months to develop, following five sequential phases.

**Table 1: Standard Development Process**

| Development stage                  | Description  |
|------------------------------------|--|
| Stage 0 – Project definition stage | A request for the development of a new standards project is received for consideration.  |
| Stage 1 – Evaluation stage         | On receipt of a request, an evaluation is conducted and the project is submitted for authorisation. Public notice of intent to proceed with the project is published, and a TC is formed if an appropriate one does not exist. |
| Stage 2 – Drafting stage           | A working draft is prepared and a project schedule is established.   |
| Stage 3 – Consensus-building stage | The TC or TSC (facilitated by CSA staff) develops the draft.   |
| Stage 4 – Inquiry stage            | The draft is offered to the public for review and comment, the TC reaches consensus, CSA staff conduct a quality review, and a preapproval edit is completed.  |
| Stage 5 – Approval stage           | The TC approves the technical content by ballot or recorded vote. A second-level review verifies that procedures were followed.  |
| Stage 6 – Publication stage        | CSA staff conduct a final edit to verify conformity with the applicable editorial and procedural requirements of <i>Directives and guidelines, Part 3</i> , and the <i>CSA Standard</i> is published.                          |
| Stage 7 – Maintenance stage        | The <i>CSA Standard</i> is maintained with the objective of keeping it up to date and technically valid.   |

Notes: TC = Technical Committee; TSC = Technical Sub-Committee.

Source: Adapted from CSA-SDP-2.2-17 *CSA directives and guidelines governing standardization, Part 2: Development process*. For more information, see: [www.csagroup.org/codes-standards/standards-development/](http://www.csagroup.org/codes-standards/standards-development/)

### ***Phase 1: (a) project initiation and (b) project management***

The CSA managed the process using a designated project manager Cathryn Cortissoz to coordinate it. The project manager ensured that: administrative requirements were met; the project team was appropriately coordinated; internal reviews and procedures were followed; external reporting was completed; reference and contact lists were maintained; liaisons with other organisations were managed; the online committee members-only workspace was managed; the appropriate use of WebEx<sup>3</sup> and teleconference services; and that overall meeting logistics were communicated. The project team implemented CSA-established standards development procedures, as described in the following sections.

### ***Phase 2: seed document development***

A draft of *The Standard* began with a research-based seed document. Existing related provincial, national and international standards were considered in the development of the seed document. The seed document was then forwarded to the CSA TC.

### ***Phase 3: standard development***

Using consensual decision-making to ensure all stakeholder interests were represented, the standard development employed the following steps (these were informed by the stages outlined in Table 1):

- *Step 1:* the CSA issued a public notice of intent (NOI) to develop *The Standard*. The NOI was intended to solicit stakeholder engagement related to the need for, and scope of, *The Standard*. This process was also used to facilitate interest among additional partners/collaborators to join the initiative. The CSA also sought to identify other Canadian standard development organisations who may have expertise and interest in collaborating on this activity (eg Bureau de normalisation du Québec). No other Canadian standard development organisations came forward.
- *Step 2:* stakeholders were actively identified and recruited to the TC. The TC was made up of 19 members representing various geographical areas of Canada, as well as representation from four stakeholder categories: general interest (five); user interest (five); labour (three); and government regulatory (three).
- *Step 3:* using the seed document as a foundation, the TC developed the technical content of *The Standard*. The TC met face to face and via the Internet and collaborated using the online collaboration tools within the CSA committee members-only workspace. The CSA group project manager managed the committee and development process, and ensured that all procedural requirements were met (ie agendas, minutes, other documentation, etc).
- *Step 4:* *The Draft Standard* was made available for public review, meaning that it was open for critique by the public at large via the CSA's 'Communities of Interest' website. Further, a graduate student trainee undertook an enhanced public review, where a group of stakeholders (ie union representatives, non-profit organisations such as Carers Canada, human resource professionals) were interviewed about the relevance and applicability of *The Standard* (Patterson,

2018). The public review took place over a 60-day period, after which the committee reviewed and considered the comments received; these were then incorporated into the draft.

- *Step 5*: the draft was then approved by the TC and by CSA group staff.
- *Step 6*: *The Final Standard* was then submitted for editing, French translation and publication.
- *Step 7*: given that the CSA group maintains the copyright of *The Standard*, the CSA is now responsible for ensuring the appropriate ongoing maintenance of all related documentation.
- *Step 8*: following the development of *The Standard*, the CSA and McMaster University are now working towards putting it forward as an international standards organisation work item in order for it to become an international standard available on a global basis. This will begin the process of internationalising *The Standard*.

#### ***Phase 4: communication and outreach***

The TC and two partners – McMaster University and the CSA – continue to lead and implement communication and outreach regarding *The Standard*. This includes dissemination at conferences, workshops and meetings, providing online video-conferencing information sessions, undertaking a media launch, and carrying out an extensive marketing campaign with another partner, Carers Canada. Carers Canada's mission is 'to enhance the quality of life for carers through synergistic partnerships and strategic advocacy'.<sup>4</sup>

#### ***Phase 5: (a) creation of knowledge mobilisation tools and (b) dissemination***

A virtual media launch and panel discussion took place in the spring of 2018 to unveil *The Standard* and the *Implementation Guide*. Following the success of tools used to promote other standards, such as the National Standard of Canada Psychological Health and Safety in the Workplace,<sup>5</sup> a number of additional tools are planned, including: a number of podcasts about how best to integrate *The Standard* into different types of workplaces (ie service, manufacturing, retail, etc); video case studies of successful integration; posters/pamphlets; and a CSA group 'community space' where a dedicated page will be created for *The Standard*.

### **Next steps and challenges**

As Phases 4 and 5 are still being realised, the core partners – McMaster University and the CSA – continue to work together on these with the assistance of other partners, including Carers Canada. Further, we plan on conducting intervention testing and an economic evaluation of *The Standard* and associated knowledge mobilisation tools (eg webinars, fact sheets) in several workplaces in order to capture efficacy and variation across size and sector (Vuksan et al, 2012). This will provide the evidence-based research needed to roll out *The Standard* across Canada and potentially internationally (via the International Organisation for Standardisation). Doing this work will provide the evidence needed to meet the many challenges of incorporating *The Standard* into workplaces in Canada and beyond.

## Reflections

The process of creating *The Standard* has been complex, detailed and extremely thorough. It has made exceptional demands on members of the TC, who have given their time to the work on an unpaid basis. Members are all very supportive of *The Standard's* development; this reflects their commitment to the growing number of carer-employees. Although there was initially some concern about reaching consensus given the wide range of perspectives, the TC had minimal differences of opinion; this helped the development process to deliver on its goals in an efficient and timely manner. Thus far, *The Standard* has been received with mixed results by employers and employer organisations, such as human resources groups. More comprehensive implementation of *The Standard* will be the real test of its capacity to deliver on its aims and improve the health and well-being of carer-employees, as well as the health and wealth of their employers.

## Notes

- <sup>1</sup> Funding Reference Number: HWP – 146001 (CIHR); 890-2016-3018 (SSHRC).
- <sup>2</sup> See: [www.csagroup.org/about-csa-group/vision-mission-values](http://www.csagroup.org/about-csa-group/vision-mission-values)
- <sup>3</sup> Online meeting and video conferencing software.
- <sup>4</sup> See: [www.carerscanada.ca/about-us/](http://www.carerscanada.ca/about-us/)
- <sup>5</sup> CAN\_CSA-Z1003-13\_BNQ\_9700-803\_2013, see: <https://www.csagroup.org/article/canca-z1003-13-bnq-9700-803-2013-r2018/>

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