


A decorative bar in the top left corner, consisting of a large green rectangle and a smaller gold square at its bottom right corner.A large, thin, gold-colored arc that starts near the top right and curves down to the bottom right, framing the title area.

**AARP North Carolina
Caregiving in the
Workplace Survey**

A small gold square located at the intersection of a horizontal and vertical line.

June 2004



AARP North Carolina Caregiving in the Workplace Survey

Report Prepared by Erica Dinger

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AARP is a nonprofit, nonpartisan membership organization dedicated to making life better for people 50 and over. We provide information and resources; engage in legislative, regulatory and legal advocacy; assist members in serving their communities; and offer a wide range of unique benefits, special products, and services for our members. These include *AARP The Magazine*, published bimonthly; *AARP Bulletin*, our monthly newspaper; *AARP Segunda Juventud*, our quarterly newspaper in Spanish; *NRTA Live and Learn*, our quarterly newsletter for 50+ educators; and our Web site, www.aarp.org. We have staffed offices in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands.

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Background

As parents and loved ones age, many employees find themselves in the role of caregiver to their aging family members. This caregiving role may interfere with their role as employee—through absenteeism, early departure from work, late arrival to work, personal phone calls, and emotional distraction. The costs associated with this loss of productivity and with employee attrition are high; overall costs of caregiving to U.S. companies has been estimated at 11.4 billion dollars annually—or \$1,142 per employee per year¹. The total cost of unpaid caregiving is estimated to be \$257 billion dollars annually.²

In order to assess what resources and information is available in North Carolina to employees who are caring for an older relative, AARP North Carolina commissioned this study of 2,242 businesses in the State with at least two employees. The businesses' human resource departments were contacted via a mail survey, and 559 (25%) responded. Responses came from over 80 counties and more than 100 cities in North Carolina. This survey has a sampling error of plus or minus 3.5 percent.

Highlights

- Six in ten (62%) respondents say that their employees have provided care or assistance to an older person.
- Half (51%) say that an employee has asked for time off for caregiving, while 32 percent say an employee has requested time off under the Family Medical Leave Act.
- Funeral or bereavement leave (66%), job security (40%), and flexible work schedules (36%) are the most common services or programs offered to caregivers. However, 18 percent say they offer no programs or services for caregivers.
- Covering the employee's time (36%) is the biggest barrier to implementing caregiving programs or services.
- Over six in ten (62%) say that caregiving has a major or minor effect on employee performance.
- Seven in ten (71%) would be interested in learning more about resources available for caregiving employees.

¹ *The Metlife Study of Employer Costs for Working Caregivers*, 1997. Metlife Mature Market Group, Westport, CT.

² *Caregiving in the U.S.*, 2004, National Alliance for Caregiving and AARP, funded by Metlife Foundation.

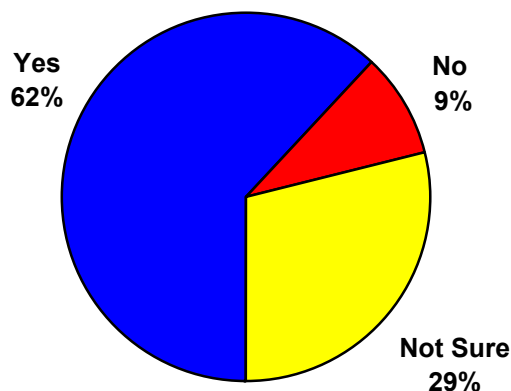
Findings

Employers believe their employees have provided caregiving services in the last two years.

Six in ten employers say that they have an employee who has provided care or assistance to an older person during the last two years.

Those respondents who said they had an employee who was a caregiver (N=348) were then asked to estimate what *percentage* of their employees were caregivers: 17 percent said 0-5 percent were caregivers, but the majority (82%) said they were not sure how many of their employees were acting as caregivers.

Are Employees Caregivers
(N=559)



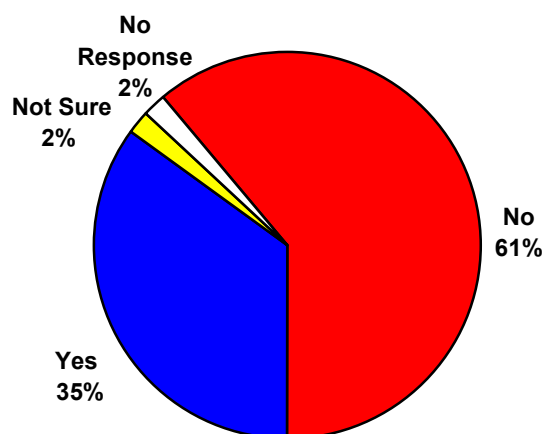
Nearly all companies offer benefits, but the majority do not offer an employee assistance program.

Nearly all North Carolina companies that were surveyed say they offer benefits to their employees, such as health insurance or paid time off. In addition, over a third provides an Employee Assistance Program (EAP). An EAP typically provides confidential short-term counseling to employees having difficulties in their personal and/or work life, as well as offering referral services.

Whether Employers Offer Employee Benefits
(N=559)



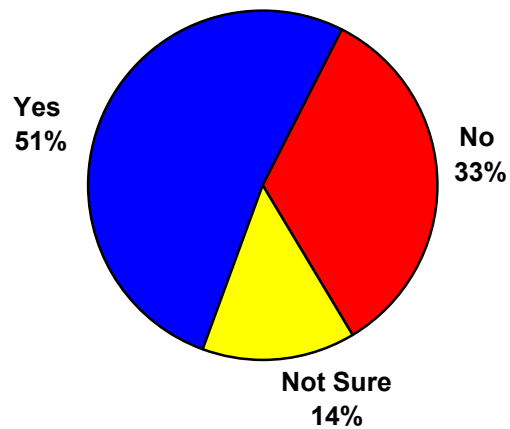
Whether Companies Have an EAP
(N=559)



Employers believe their employees would be comfortable asking for time off for caregiving, and more than half of employees have done so.

Eight in ten employers believe that their employees would be comfortable asking for time off for caregiving activities. Over half (51%) report that employees have asked for time off to assist an older person. Fewer (32%) have had employees request time off under the Family Medical Leave Act.

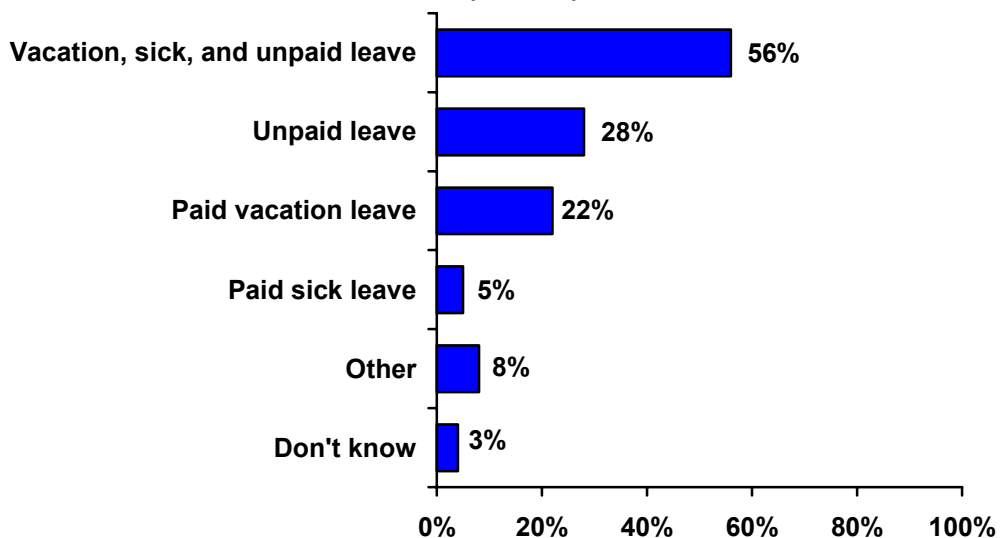
Whether Employees Have Asked for Time off for Caregiving (N=559)



North Carolina employees typically use paid vacation time, sick leave, and unpaid leave if they need time off for caregiving activities.

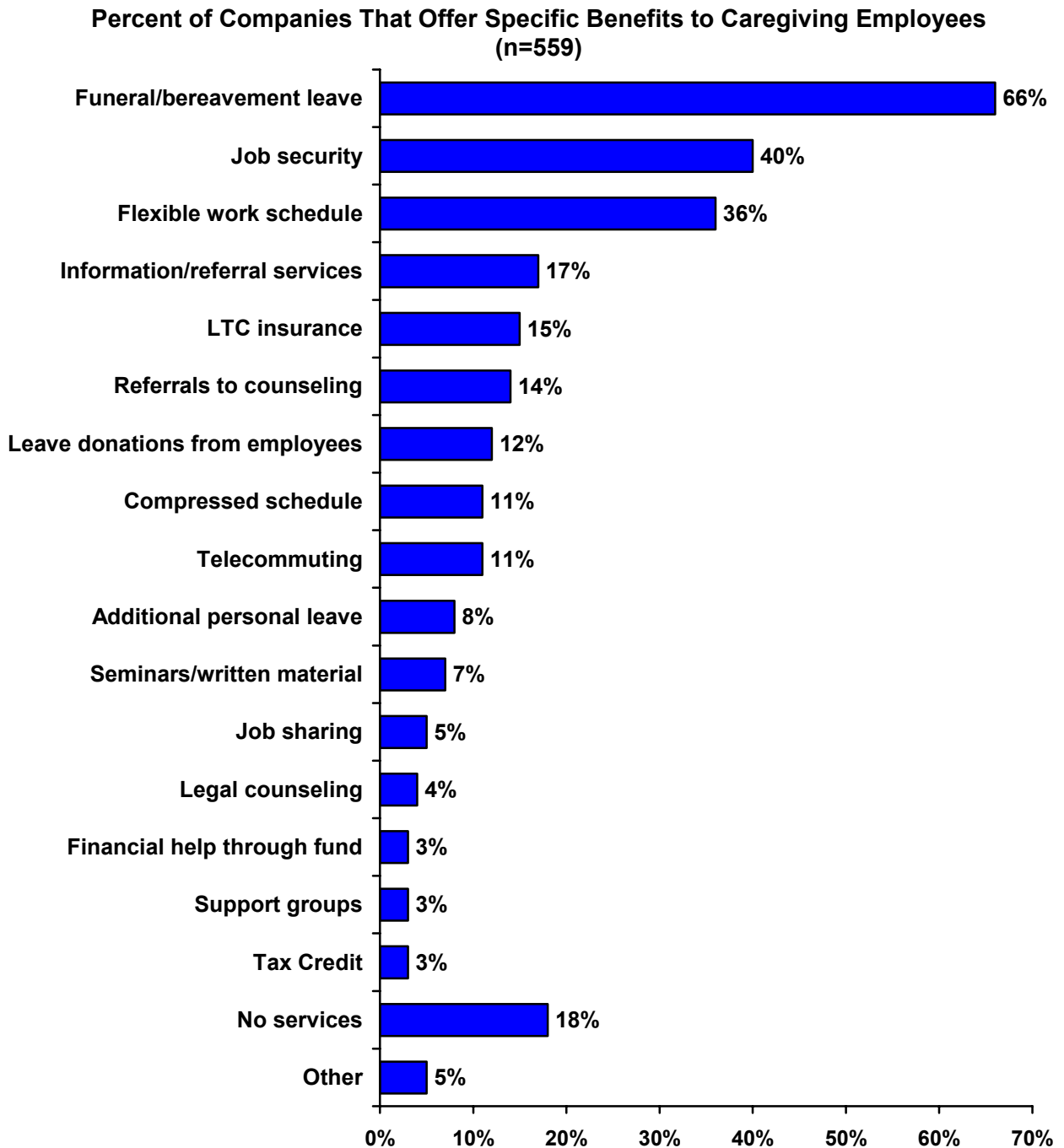
More than half of respondents said that if an employee took time off to take care of an older parent or relative they would use their paid vacation time, sick leave, and unpaid leave to do so. Almost three in ten said an employee would take unpaid leave.

Type of Leave Employees Would Use if They Took Time Off to Take Care of an Older Relative (N=559)



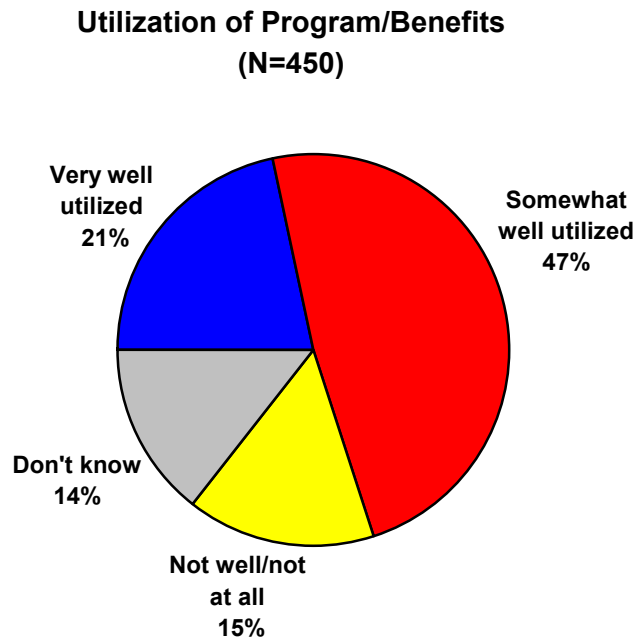
Six in ten companies offer funeral leave for caregiving employees.

Funeral/bereavement leave, job security, and flexible work schedules are the most commonly offered benefits for caregiving employees among companies in North Carolina. Some companies also offer more creative benefits, such as support groups, special funds, and allowing other employees to donate time to the caregiving employee. However, fully 18 percent offer no services to caregiving employees.



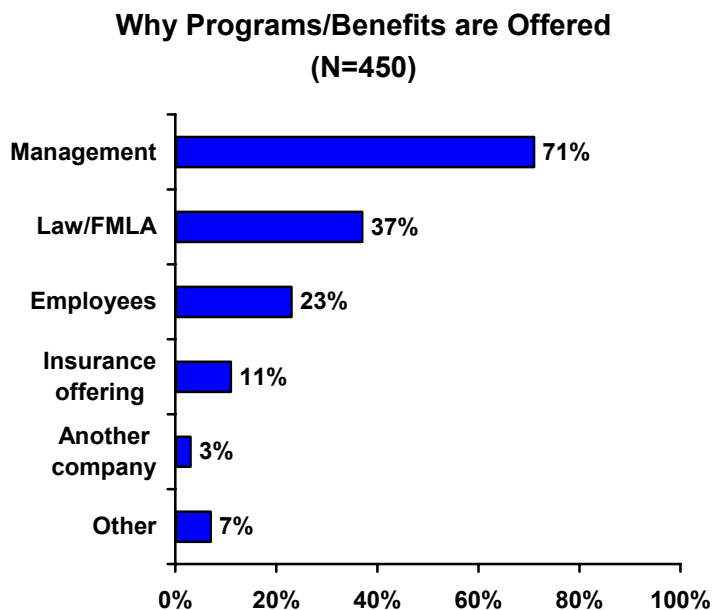
Most caregiving programs have been in place for five or more years and are well utilized.

More than half (54%) of companies that have a program or benefit for caregivers (n=450) say that the program or benefit has been in place for five years or more. A quarter (24%) say the program has been in place for two to five years. In addition, more than six in ten (68%) say the program or benefit is *very* or *somewhat well utilized*.



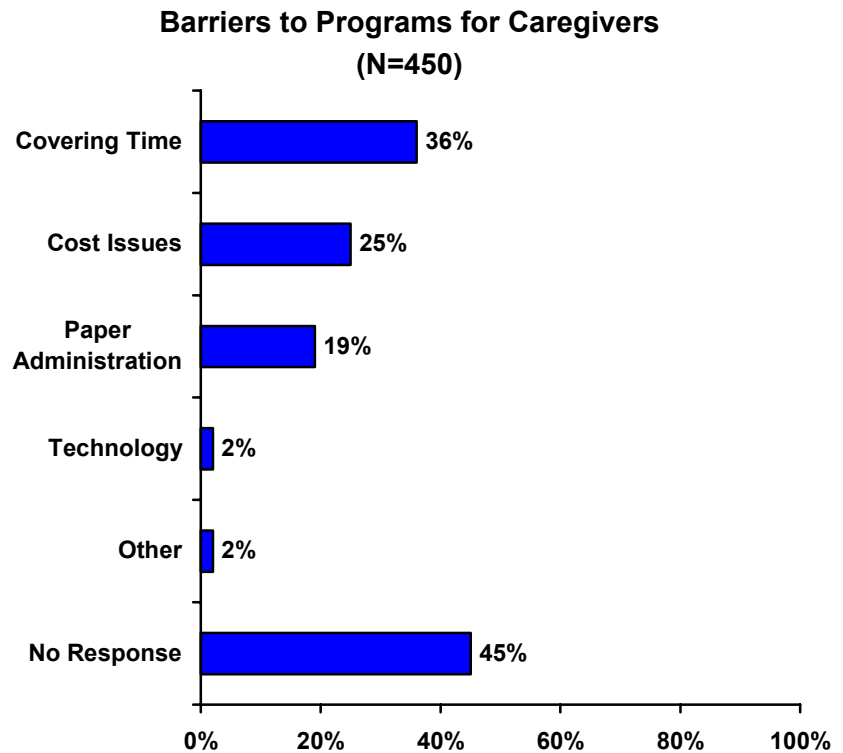
Programs and benefits are offered because management saw a need for them.

Seven in ten respondents that offer benefits say that programs and benefits are offered to caregivers because management saw a need for them. More than a third implemented programs because of the law or the Family Medical Leave Act, while over two in ten say that employees asked for such programs.



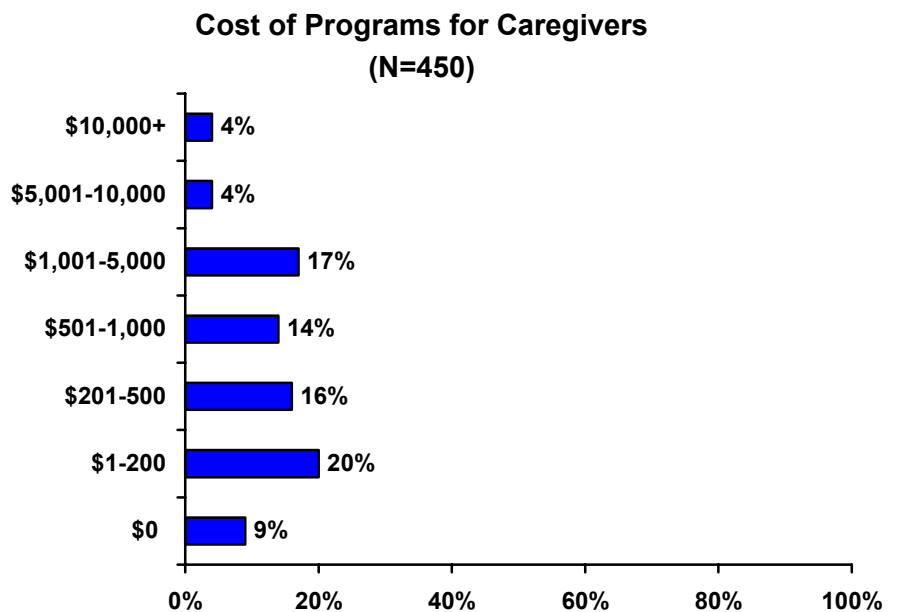
Covering employee’s time was the main barrier to implementing programs for caregivers.

Among companies that offer benefits, more than a third of employers say that covering the employee’s time while they are performing caregiving duties was the main barrier to getting programs and benefits for caregivers implemented. A quarter say that cost was a barrier, while two in ten cite increased paperwork or administrative issues. Over four in ten did not list a barrier for implementing such programs.



The cost of programs for caregivers varies.

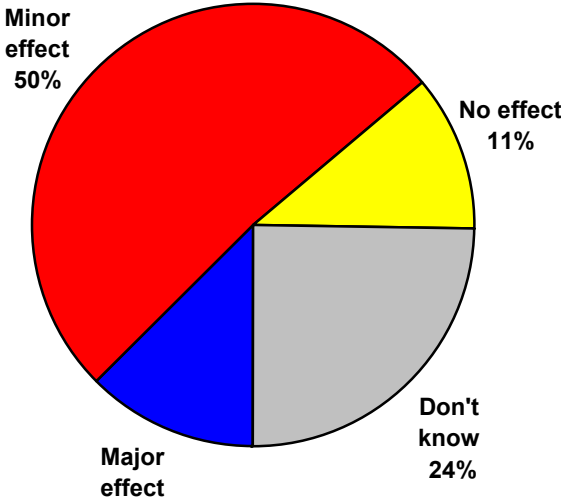
Employers with benefits or programs for caregivers give widely different responses to how much money it costs per year to provide the programs or benefits. The cost per person for these benefits is not affected by the size of the company or whether it is non-profit, for-profit, or a government agency. Rather, the cost is determined by the types of programs or benefits offered by the company and their choice of provider.



Employers recognize that caregiving affects employee performance.

Employers who provide benefits or programs for caregivers were asked how much providing caregiving to an older person affects employee performance. Over one in ten said it had a major effect, while fully half said it had a minor effect. A quarter said they did not know how much caregiving affected employee performance.

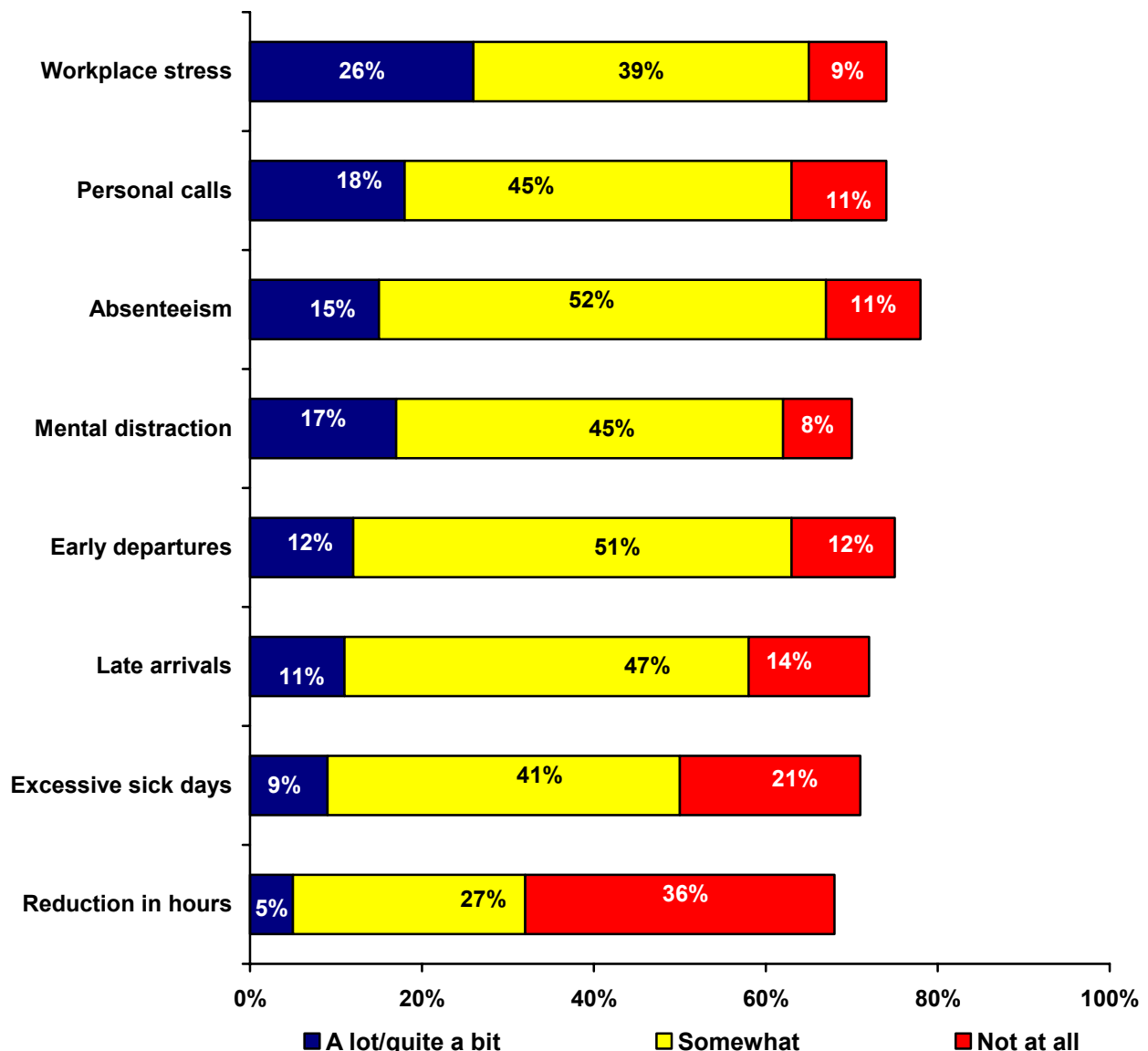
**Whether Employees are Caregivers
(N=450)**



Employers are aware that caregiving responsibilities influence employee performance factors.

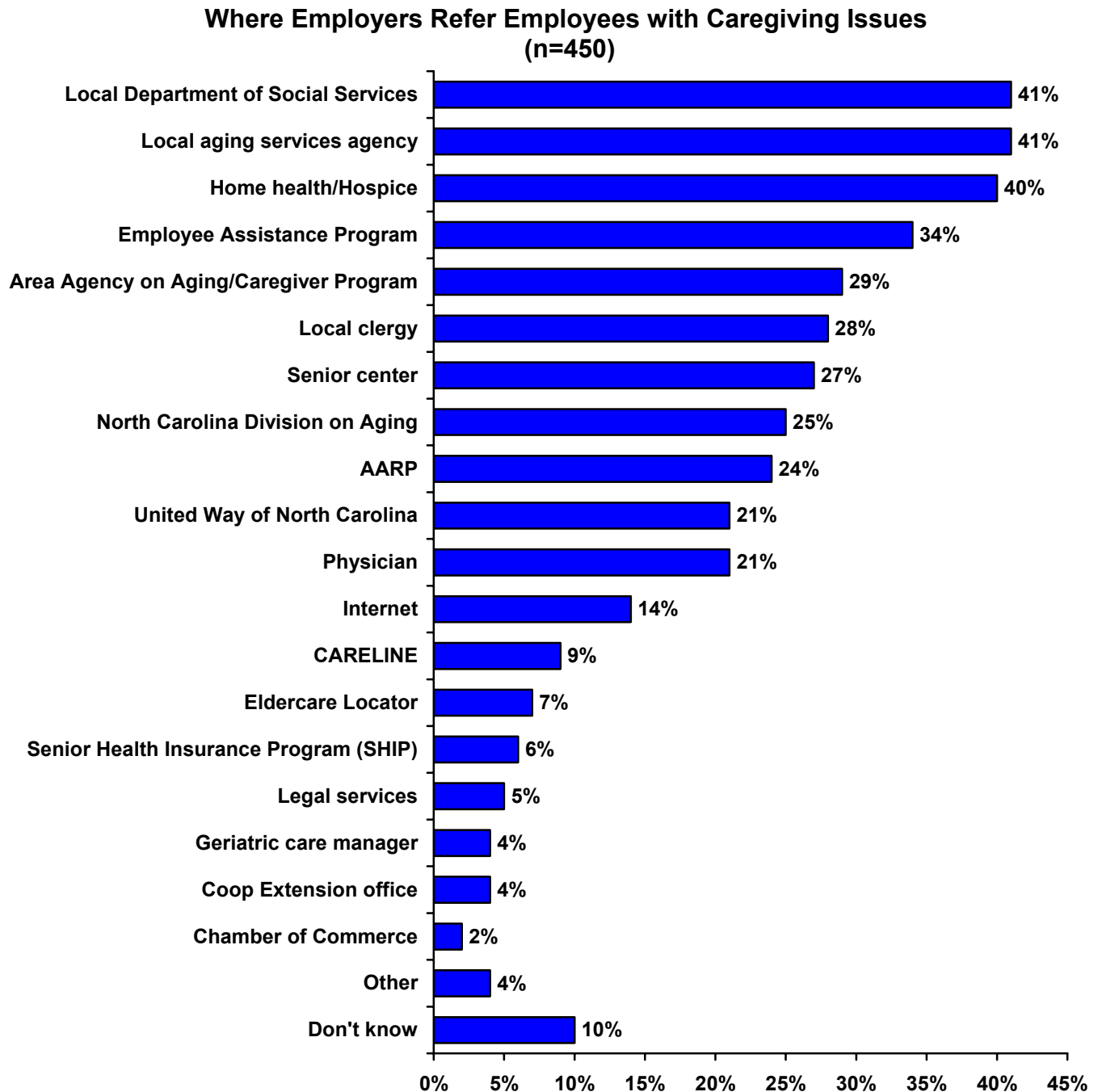
Employers show awareness of how caregiving responsibilities can influence performance factors such as early departures from work, absenteeism, and mental or emotional distraction. North Carolina employers cite workplace stress as the most common performance factor affected by caregiving duties. In addition, it should be noted that about a quarter (25%) of respondents were either not sure or gave no response to each of the factors listed (see Appendix A).

Extent That Employers Think Elder Care Responsibilities Influence Workplace Performance Factors (N=450)



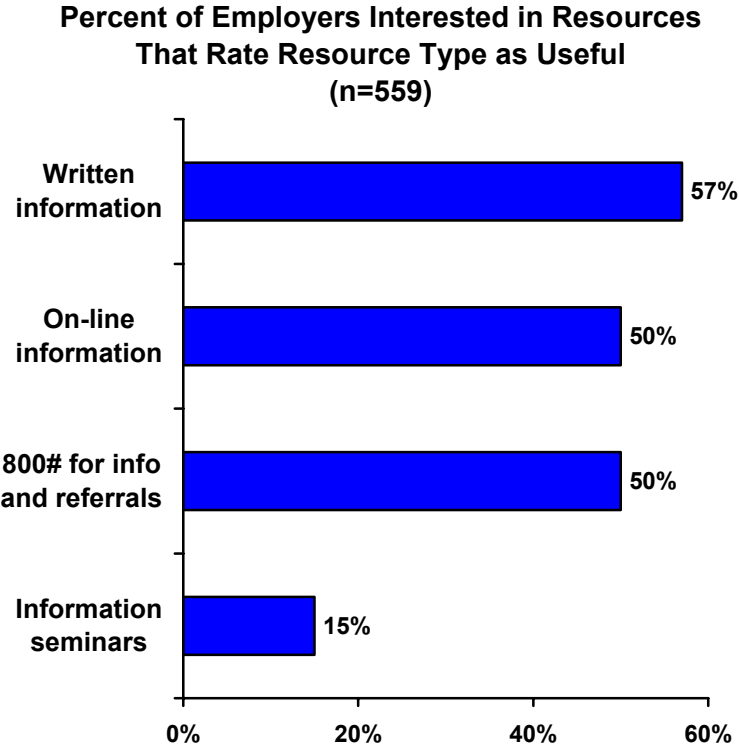
Employers would refer employees to a local Department of Social Services or aging services agency for help with caregiving issues.

Employers providing programs or benefits for caregivers say they are most likely to refer employees with caregiving needs to a local Department of Social Services or a local aging services agency. Employers say they would also refer employees to home health care or Hospice programs and Employee Assistance Programs.



Employers want information on caregiving and would prefer that information to be written.

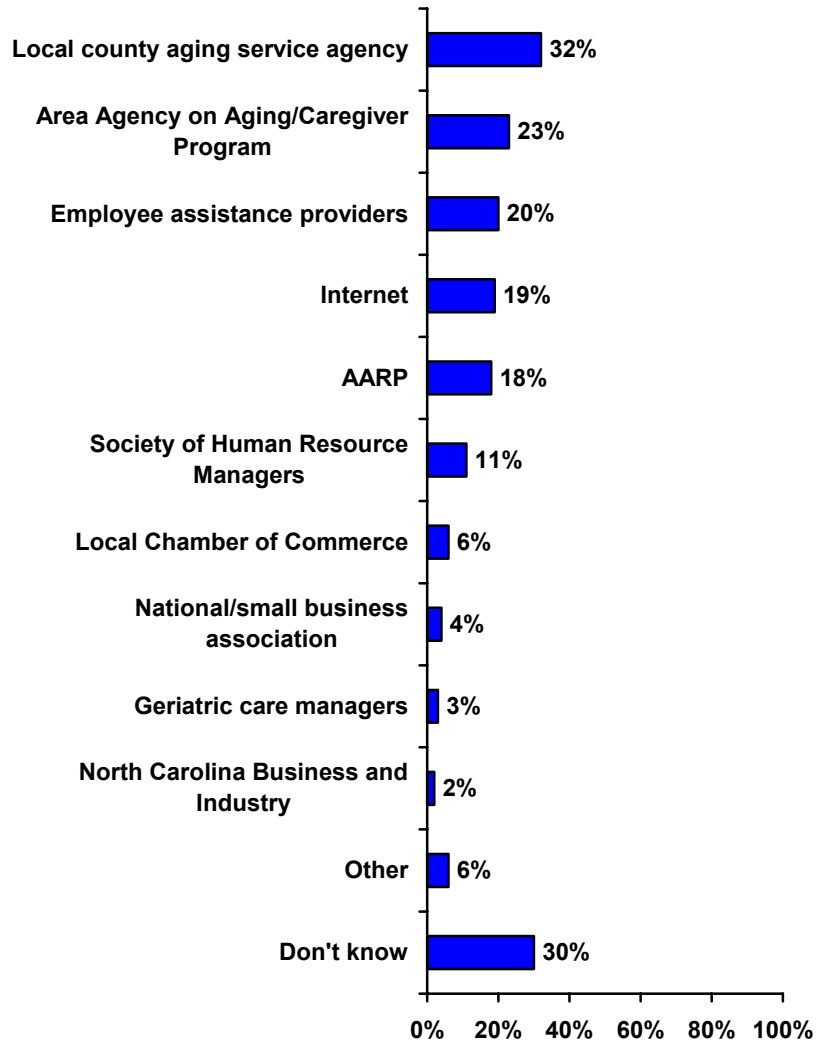
Seven in ten (71%) employers who responded to the survey want information on low- or no-cost resources available for caregivers. They are most often interest in written information, information provided on-line, or information and referrals through an 800 number. Relatively few employers are interested in information provided through a seminar format.



A third of employers say they would look the local county aging service agency for help in developing an eldercare program.

About a quarter of respondents say they would look to an Area Agency on Aging/Family Caregiver Program for assistance in developing a program, while two in ten would look to employee assistance providers for help. Fewer than two in ten employers say that they would go to AARP for help in developing an eldercare program to aid caregivers. Almost two in ten say they would turn to the Internet. However, more than three in ten say they don't know who they would turn to for help.

Percent of Employers Interested in Resources That Rate Resource Type as Useful (n=499)

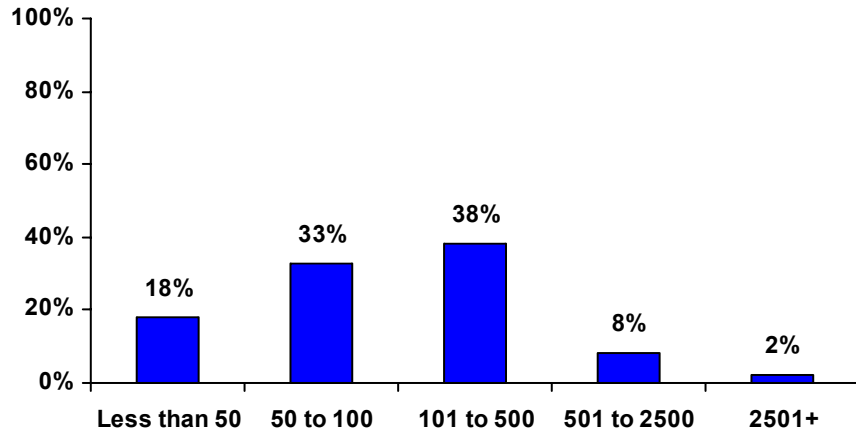


Company Characteristics

Most North Carolina companies that responded have over 50 employees.

The majority (71%) of companies that responded to the survey have between 50 and 500 employees. About two in ten have fewer than 50 employees, while ten percent have more than 500 employees.

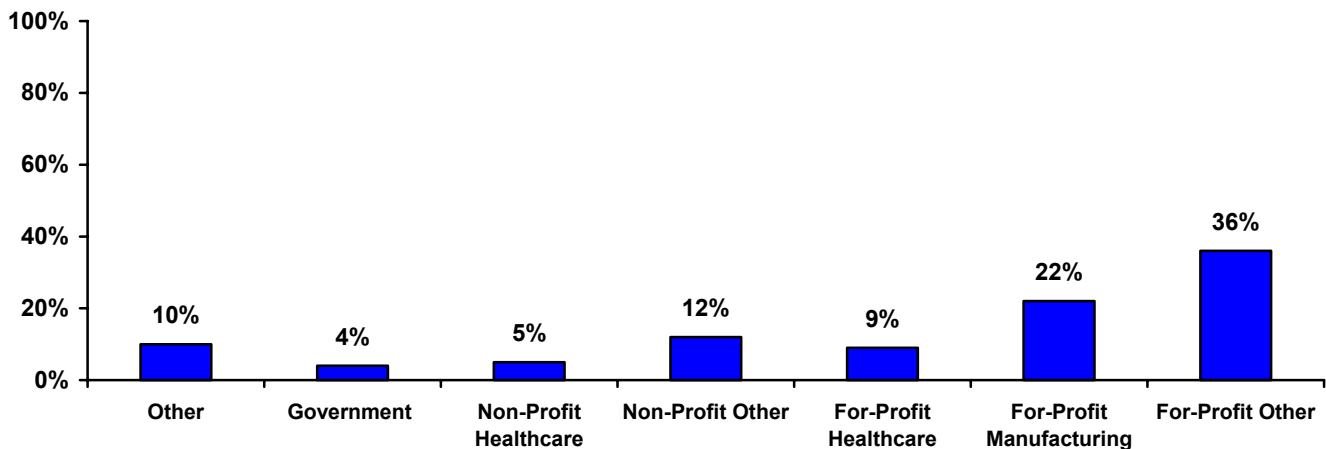
Number of Employees in North Carolina Companies (N=559)



More than six in ten of the companies that responded were for-profit, and many of those were in the manufacturing sector.

The majority (67%) of companies that responded to the survey were for-profit companies, such as construction or trucking companies, retail establishments, and restaurants. About two in ten were non-profit, such as churches and universities, while fourteen percent were for- or non-profit healthcare companies.

Types of North Carolina Companies (N=559)



Conclusions

Employers in North Carolina are aware that their employees are engaged in caregiving activities for family members and loved ones. In addition, employers recognize that caregiving activities affect their employees' work performance, including things like workplace stress, personal telephone calls during working hours, and absenteeism.

Nearly all employers offer some employee benefits, and many offer funeral or bereavement leave, flexible work schedules, and job security to aid those employees who are also caregiving. Fewer employers utilize innovative working arrangements, such as job sharing or support groups. However, employers recognize that more could be done and want information on no- or low-cost resources for caregiving employees.

With this increased awareness of the problem, AARP North Carolina has the opportunity to take the lead in educating employers on the issues of caregiving in the workplace. AARP North Carolina is poised to help employers across North Carolina develop programs for employees who are facing the difficult task of balancing their duties as employees with their duties as caregivers.

Methodology

Survey Sampling, Inc. provided a sample of employers with more than one employee for the state of North Carolina. A pre-notification letter was then sent to the human resources department of 2,242 businesses in the state of North Carolina with two or more employees. This was followed by the survey itself, a reminder postcard, and a second copy of the survey. 559 (25%) of the businesses contacted responded to the survey. This survey has a sampling error of plus or minus 3.5 percent.

ANNOTATED QUESTIONNAIRE

2004 Employers and Eldercare Survey

WEIGHTED N = 559, RESPONSE RATE =25%, SAMPLING ERROR = +/-3.5 %
(Percentages may not add to 100% due to rounding or multiple responses. A “*” means less than 1%.)

1. How many people work either full or part time in your company in the state of North Carolina?

<u>%</u>	
18	Less than 50
33	50-100
38	101-500
8	501-2500
2	2501 or more
0	Don't know
1	No Response

2. Are any of your employees offered any benefits (i.e. health and life insurance, holiday leave, vacation/sick leave, etc.)?

<u>%</u>	
97	Yes
3	No
0	Don't know
*	No Response

A caregiver can be anyone who provides unpaid help to a relative or friend who is ill, disabled, or elderly. This kind of help includes assistance with bathing, dressing, preparing meals, taking medications, doing household chores, taking care of finances, arranging for outside services, or regularly visiting the person needing care. The relative or friend you are helping may be someone who lives with you or somewhere else.

3. In the past two years, have any of your employees provided care or assistance to an older person (including a spouse, parent, other relative, or friend)?

<u>%</u>	
62	Yes
9	No [SKIP TO Q5]
29	Don't know [SKIP TO Q5]
1	No Response

4. Approximately what percentage of your employees do you think are providing care or assistance to an older person? (n=348)

<u>%</u>		<u>%</u>	
17	0-5%	0	50-69%
0	6-10%	*	70% or more
0	11-19%	0	Other: _____
0	20-29%	82	Not sure
0	30-39%	1	No Response
0	40-49%		

5. Have any of your employees asked for time off to assist an older person?

<u>%</u>	
51	Yes
33	No
14	Not sure
1	No Response

6. Have any of your employees requested time off under the Family Medical Leave Act to assist an older person?

<u>%</u>	
32	Yes
60	No
7	Not sure
1	No Response

7. Do you believe your employees would be *comfortable* asking for time off to take care of or assist an older person?

<u>%</u>	
80	Yes
5	No
14	Not sure
1	No Response

8. If an employee took time off to take care of or assist an older person, what kind of leave would they use? Would they use....

<u>%</u>	
22	Paid vacation leave
5	Paid sick leave
28	Unpaid leave
56	All of the above (vacation, sick, and unpaid leave)
8	Other (Please Specify _____)
3	Don't know
1	No Response

9. Does your company have an Employee Assistance Program (EAP)? EAPs provide employees with work-life consultation and referral, often assisting employees with a variety of personal, family, and work issues.

<u>%</u>	
35	Yes
61	No
2	Not sure
2	No Response

10. Does your company offer any of the following services or programs for employees who are caring for an older person? (CHECK ALL THAT APPLY)

<u>%</u>	
3	Financial help through a special fund that employees contribute to voluntarily
8	Additional personal leave to be used for eldercare
12	Allow employees the opportunity to donate their sick time to another employee who is caring for an older relative
36	Flexible work schedule to accommodate time needed to provide eldercare
3	Support groups
17	Information and referral assistance to help find eldercare providers and resources
40	Job security for employee who need to take time off to provide eldercare
11	Telecommuting or allowing employees to work from home
5	Job sharing
7	Information about eldercare through seminars or written materials
14	Referrals to individual counseling
11	Compressed workweek that allows employees to work longer hours but fewer days
66	Funeral/bereavement leave
*	Subsidized care or care vouchers
4	Legal counseling services (i.e., estate planning)
3	Tax credit/benefit
15	Long-term care insurance
5	Other (Please specify): _____
18	No services are offered [SKIP TO Q19]
2	No Response

11. On average, how well would you say the above program(s)/benefit(s) that are offered to caregivers are utilized? (n=450)

<u>%</u>	
21	Very well utilized
47	Somewhat utilized
11	Not well utilized
4	Not at all utilized
14	Don't know
3	No Response

12. On average, how long has the above program(s)/benefit(s) been in place? (n=450)

<u>%</u>	
*	Less than 6 months
2	Between 6-12 months
7	Between 1-2 years
24	Between 2-5 years
54	5 years or more
11	Don't know
3	No Response

13. What were the circumstances that led to the above programs(s)/benefit(s) being offered? (CHECK ALL THAT APPLY) (n=450)

<u>%</u>	
23	Employees asked for it
71	Management saw a need
3	Another company implemented program successfully
11	Insurance offering
*	Union/labor negotiation
37	Law/FMLA
7	Other:
4	No Response

14. Were there any barriers to getting the program(s)/benefit(s) mentioned in question 10 implemented? (CHECK ALL THAT APPLY) (n=450)

<u>%</u>	
25	Cost issues
19	Increased paperwork/administrative issues
36	Covering the employee's time
2	Technology issues
2	Other: (Please Specify _____)
45	No Response

15. About how much do you think it costs a year to provide the programs/benefits listed in Question 10 per employee?

<u>%</u>	
9	\$0
20	\$1-200
16	\$201-500
14	\$501-1,000
17	\$1,001-5,000
4	\$5,001-10,000
4	\$10,001 plus
16	No Response

16. To what extent do you think eldercare responsibilities influence the following performance factors in your company? (n=450)

	A lot	Quite a bit	Somewhat	Not at all	Not Sure	No Response
a. Workplace stress	7%	19%	39%	9%	21%	4%
b. Absenteeism	5%	10%	52%	11%	18%	5%
c. Late arrivals to work	3%	8%	47%	14%	21%	6%
d. Early departures from work	3%	9%	51%	12%	20%	5%
e. Mental/emotional distraction	5%	13%	45%	8%	23%	7%
f. The amount of personal calls made at work	4%	14%	45%	11%	21%	4%
g. Excessive sick days/call-offs	4%	6%	41%	21%	23%	6%
h. Early retirement/resignation/official reduction in hours	2%	3%	27%	36%	26%	6%

17. How much do you think providing care or assistance to an older person affects employee performance in your company or business? (n=450)

<u>%</u>	
12	Major effect
50	Minor effect
11	No effect
24	Don't know
3	No Response

18. If an employee was having difficulty caring for an older person and came to you for assistance, where would you refer the employee for help? (CHECK ALL THAT APPLY) (n=450)

<u>%</u>	
25	North Carolina Division of Aging
6	Senior Health Insurance and Information Program (SHIP)
9	CARELINE (State information/referral line)
24	AARP
41	Local aging services agency
29	Area Agency on Aging/Family Caregiver Program
4	County Cooperative Extension office
28	Family/friends
28	Local clergy
21	Physician
27	Senior center
2	Chamber of Commerce
40	Home health/Hospice agency
41	Local Department of Social Services
4	Geriatric Care Manager
5	Legal services
7	Eldercare Locator (national toll free information and referral line)
21	United Way of North Carolina
14	Internet
34	Employee Assistance Program/Eldercare work/Life benefits
4	Other: _____
10	Don't know
3	No Response

19. If there were low- or no-cost resources available for employees caring for older persons, would you be interested in having or knowing about these resources?

<u>%</u>	
71	Yes
9	No
18	Don't know
2	No Response

20. What kind of resources do you think would be useful?

<u>%</u>	
57	Written information
50	On-line information
15	Information seminars
50	An 800 number for information and referrals
*	Other: _____
10	Don't know
4	No Response

21. If you wanted to establish an eldercare program that provided assistance to those caring for an older spouse, parent, relative, or friend at your company, where would you go for assistance?

<u>%</u>	
32	Local county aging service agency
18	AARP
23	Area Agency on Aging/Family Caregiver Program
6	Local Chamber of Commerce
3	Geriatric Care Managers
20	Employee Assistance Providers
11	Society of Human Resource Managers (SHRM)
2	North Carolina Business and Industry (NCBI)
19	Internet
3	Small business association
1	National business education organization
5	Other: _____
30	Don't know
6	No Response

Demographic Information

The following questions are for classification purposes only

22. What best describes your company?

<u>%</u>	
5	Non-profit-Healthcare
12	Non-profit other: _____
9	For-profit-Healthcare
22	For-profit-Manufacturing
36	For-profit other: _____
4	Government agency
10	Other: _____
4	No Response

23. Are you part of a larger company or organization?

<u>%</u>	
20	Yes
76	No [SKIP TO Q25]
1	Don't know [SKIP TO Q25]
3	No Response

24. Approximately how many employees does your company or organization have nationwide? _____ (n=114)

<u>%</u>	
4	Less than 50
7	50-100
21	101-500
25	501-5000
16	5001 or more
27	No Response

25. Are employee benefit decisions made locally, at your location, or are they made somewhere else, such as company headquarters?

<u>%</u>	
80	On location
15	Somewhere else
*	Don't know
5	No Response

26. Approximately what percentage of your employees in North Carolina are female?

<u>%</u>		<u>%</u>	
14	0-10%	12	41-50
11	11-20%	10	51-60%
6	21-30%	10	61-70%
9	31-40%	23	71% or more
		5	No Response

27. Approximately what percentage of your employees in North Carolina are ethnic or racial minorities?

<u>%</u>		<u>%</u>	
28	0-10%	7	41-50%
19	11-20%	6	51-60%
14	21-30%	4	61-70%
13	31-40%	4	71% or more
		5	No Response

28. What would you say the average age for employees is at your company?

<u>%</u>	
6	18-29
76	30-45
14	45+
4	No Response

29. Approximately what percentage of your employees in North Carolina work less than 20 hours a week?

<u>%</u>		<u>%</u>	
70	0-10%	2	41-50%
13	11-20%	*	51-60%
6	21-30%	1	61-70%
3	31-40%	1	71% or more
		4	No Response

30. What area of North Carolina is your company located in?

<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>	
2	Fayetteville	1	Lumberton	<1	Whitsett	<1	Morehead City
2	Gastonia	1	Morrisville	<1	Southern Pines	<1	Rose Hill
2	High Point	1	Garner	<1	Dunn	<1	Kitty Hawk
2	Ashville	1	Jefferson	<1	Bryson City	<1	Smithfield
2	Rocky Mount	1	Morganton	<1	Laurinburg	<1	Murphy
2	Chapel Hill	1	Wilson	<1	Plymouth	<1	Franklin
1	Cary	1	Monroe	<1	Aberdeen	<1	Nebo
1	Burlington	1	Mount Airy	<1	Matthews	<1	Wadesboro
1	Statesville	<1	Canton	<1	Boone	<1	Taylorsville
1	Hickory	<1	Mount Olive	<1	Hildebran	<1	Pine Knoll Shores
1	New Bern	<1	Marion	<1	Granite Quarry	<1	Four Oaks
1	Salisbury	<1	Stokesdale	<1	Albemarle	<1	Williamston
1	Thomasville	<1	Valdese	<1	Cherokee	<1	Shalotte
1	Goldsboro	<1	Kannapolis	<1	Eden	<1	Mount Gilead
1	Concord	<1	Rutherfordton	<1	Newland	<1	Winterville
1	Shelby	<1	Fletcher	<1	Tarboro	<1	Silver City
1	Hendersonville	<1	Pineville	<1	Elizabethtown	<1	Yadkinville
1	Wilkesboro	<1	Clemmons	<1	Snow Hill	<1	Peekfor
1	Jacksonville	<1	Nags Head	<1	Lincolnton	<1	Lexington
1	Greenville	<1	Pinehurst	<1	Maiden	<1	Seven
1	Mooresville	<1	Kingston	<1	Columbus	<1	Calabash
1	Newton	<1	Blowing Rock	<1	McLeansville	<1	Lucama
1	Asheboro	<1	Reidsville	<1	Raeford	<1	Carrboro
1	Henderson	<1	Youngsville	<1	Alliance	<1	Stoneville

<u>%</u>		<u>%</u>	
<1	Sparta	<1	Spruce Pine
<1	Kenansville	<1	Bayboro
<1	Burnsville	<1	Mecklenburg
<1	Burgaw	<1	Eastbend
<1	St. Pauls	<1	Kings Mountain
<1	Graham	<1	Mocksville
<1	Southport	<1	Sylva
<1	Hillsborough	<1	Archdale
<1	Trinity	<1	Tabor City
<1	Oak Ridge	<1	Wrightsville Beach
<1	Zionville	<1	Dublin
<1	Ramseur	<1	Kiwston
<1	Fuguy	<1	Harrisburg
<1	Roxboro	<1	Pembroke
<1	Deep Run	<1	Windsor
<1	Lake Waccamaw	<1	Vass
<1	Robbinsville	<1	Beaufort
<1	Black Mountain	<1	Lowell
<1	Dallas	<1	Warsaw
<1	Marshville	<1	Farmsville
<1	Engelhand	<1	No Answer
<1	Brevard		
<1	Coats		
<1	Jonesville		

County: _____

<u>%</u>		<u>%</u>	
12	Mecklenburg	1	Rockingham
11	Wake	1	Onslow
10	Guilford	1	Ashe
4	Forsyth	1	Swain
3	Durham	1	Craven
3	Gaston	1	Lee
3	New Hanover	1	Lenoir
3	Catawba	1	Wilkes
3	Buncombe	1	Wilson
2	Cumberland	1	Vance
2	Iredell	1	Carteret
2	Henderson	1	Mcdowell
2	Randolph	1	Brunswick
2	Orange	1	Scotland
1	Rowan	1	Surry
1	Alamance	1	Beaufort
1	Nash	1	Halifax
1	Cabarrus	1	Harnett
1	Moore	1	Watauga
1	Wayne	1	Duplin
1	Davidson	1	Columbus
1	Cleveland	1	Johnston
1	Union	1	Yadkin
1	Burke	1	Edgecombe
1	Pitt	10	All other counties that has less than 1%
1	Robeson	3	No Response

31. Describe your job title

<u>%</u>	
45	Director of Human Resources
18	Human Resources Staff Member
4	Office Manager
4	Controller
3	Administrative Manager
2	President
2	Owner
2	Vice President
2	Chief Financial Officer
1	Secretary
1	Accountant
1	Director
1	Payroll
1	Benefits Representative
1	Chief Executive Officer
1	Human Resource Benefits
1	General Manager
1	Bookkeeper
1	Finance Officer
1	Business Manager
1	CSR
1	Safety Director
1	Account Manager
7	Other: _____
1	No Answer

Thank you for completing this survey. Please use the postage-paid envelope and return it to State Member Research, AARP, 601 E Street, NW, Washington, DC 20049, by **March 20, 2004.**

AARP
Knowledge Management
For more information contact Erica Dinger (202) 434-6176