



# *WHAT REALLY HAPPENS WHEN A CO-WORKER TAKES EXTENDED LEAVE?*

PERSPECTIVES FROM 538 EMPLOYEES

PRODUCTIVITY IMPLICATIONS FOR EMPLOYER LEAVE STRATEGIES

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## EXECUTIVE SUMMARY

Several states and municipalities appear poised to adopt leave laws that extend paid time off not just for an employee's own serious health issue, but also to bond with a new child or to care for a sick family member. These laws follow an increased interest in corporate paid parental leave (PPL) and paid family leave (PFL) policies in recent years and anticipates the potential for a federal paid leave law. To help employers design leave policies that sustain productivity with minimal impact to staff workloads, morale, and personnel costs, IBI surveyed U.S. employees about their experiences with co-workers' extended leaves of any type.

The survey results indicate that while expansions of PPL and PFL—or other policies such as sick leave or temporary disability leave—greatly benefit employees who need time off, increased stressors on co-workers who cover absent workers' responsibilities may impose challenges to employers.

- Three in four employees worked as part of a team or work group. Among these employees, three in five experienced a co-worker's extended absence (two weeks or more) for a health, bonding, or family leave reason in the previous 12 months.
- Nearly half of employees who experienced a co-worker's extended absence reported at least one associated personal or business consequence. One in five reported more than one consequence. The most common consequences were personal, such as increased stress or difficulty completing one's own work.
- More than half of employees who experienced a co-worker's extended absence reported that staff took on the absent employee's responsibilities. One in three reported that staff put in more overtime or spent more time at work than usual. Obtaining extra help such as the use of temporary replacements or outsourcing work was reported infrequently.
- Adaptations such as having staff spend more time at work or perform an absent worker's responsibilities were significantly associated with greater personal consequences. More time at work and outsourcing were significantly associated with greater productivity consequences. These outcomes may undermine other company priorities such as retention and emotional well-being.

## Introduction

Paid leave laws—such as temporary disability insurance (TDI), paid family leave (PFL) and paid parental leave (PPL)—ensure that employees receive part of their normal wages while on leave from work for their own illness, to bond with a newborn, adopted, or foster child (i.e., bonding leaves), or to care for a family member with a serious health condition (i.e., family leaves). In 2018, 17% of U.S. civilian workers had access to PFL.<sup>1</sup> As of this writing, only California, Hawaii, New York, New Jersey, Puerto Rico, and Rhode Island have TDI laws. California, New Jersey, New York, and Rhode Island were the only states with PFL laws. Washington, the District of Columbia and Massachusetts have passed laws covering both family and medical leaves—though benefits in DC and Washington state are not payable until 2020, while benefits in Massachusetts are not payable until 2021.

Despite increased access since 2010, paid leave benefits still cover a minority of workers. For example, only 30% of the highest decile of earners have PFL or PPL benefits.<sup>1</sup> Coverage in firms with more than 500 employees (25%), and those in high-performing industries such as information (41%) and finance and insurance (38%) also falls below 50%.<sup>1</sup> These figures will undoubtedly increase as more states and municipalities are poised to require access to paid leave for most employees.<sup>2</sup> This follows an increased interest in corporate PPL and PFL policies in recent years<sup>3</sup> and anticipates the potential for a federal paid leave law.<sup>4</sup>

Paid leave certainly benefits employees who receive income protection during extended work absences. While some research indicates that the availability of paid time off encourages greater use of leaves (especially among new fathers),<sup>5,6</sup> thus far, studies have found few negative business impacts of paid leave on employer outcomes such as wages or productivity losses.<sup>7-12</sup> This itself warrants further investigation. Theory and research suggests increased productivity losses from absences where employees work as part of a team.<sup>13,14</sup>

The lack of additional costs associated with increased leave rates partly reflects employers' primary strategy for maintaining productivity during extended absences: nearly two-thirds of California employers studied in 2010 temporarily assigned hourly leave-takers' responsibilities to other workers and nearly all assigned salaried leave-takers' responsibilities to other workers.<sup>10</sup> This corroborated a national pattern found in both 1995 and 2000.<sup>12</sup>

Viewed in this light, the relatively benign financial impact of paid leave to employers may mask longer-term strains on co-workers who are asked to perform absent employees' work as well as their own. Sustained job demands and work overload have been associated with higher risks of job dissatisfaction, burnout, work absence and turnover intentions.<sup>15-17</sup> Increased access to paid leave may exacerbate these strains if employers continue to shift leave-takers' responsibilities to other employees rather than hire temporary replacements—a likely scenario for the near future if historically low unemployment rates continue.<sup>18</sup> This could undermine other leadership priorities such as retention—identified by corporate Chief Financial Officers as among the most important goals of their health-related benefits<sup>19</sup>—an employees' emotional well-being.

Understanding how extended leaves impact co-workers' well-being and workgroups' effectiveness will help employers recognize the need to develop policies that sustain productivity with minimal impact to staff workloads, morale, and personnel costs. To inform this effort, IBI surveyed U.S. employees about their experiences with co-workers' extended leaves. We set out to answer four main questions from the employee's perspective:

1. How many employees experienced a co-workers' extended leave for reasons that generally would be covered by TDI, PPL, PFL or the Family and Medical Leave Act (FMLA)?
2. What consequences (if any) did the employee and their workgroup experience because of a co-worker's extended leave?
3. How did the workgroup adapt during a co-worker's extended absence?
4. How do organizational adaptations impact the consequences of extended absences?

## Data

To answer these questions, IBI surveyed employed adults in the U.S. using the Qualtrics Omnibus qBus survey<sup>\*</sup>. The qBus is a monthly survey of American adults that is nationally representative in terms of five primary demographics: gender, age, race, household income, and U.S. Census region. The survey also includes secondary demographics such as employment status and education. IBI provided additional survey questions pertaining to the research interests described above. Data collection occurred from March 18, 2019 until March 25, 2019 and yielded 1,032 responses.

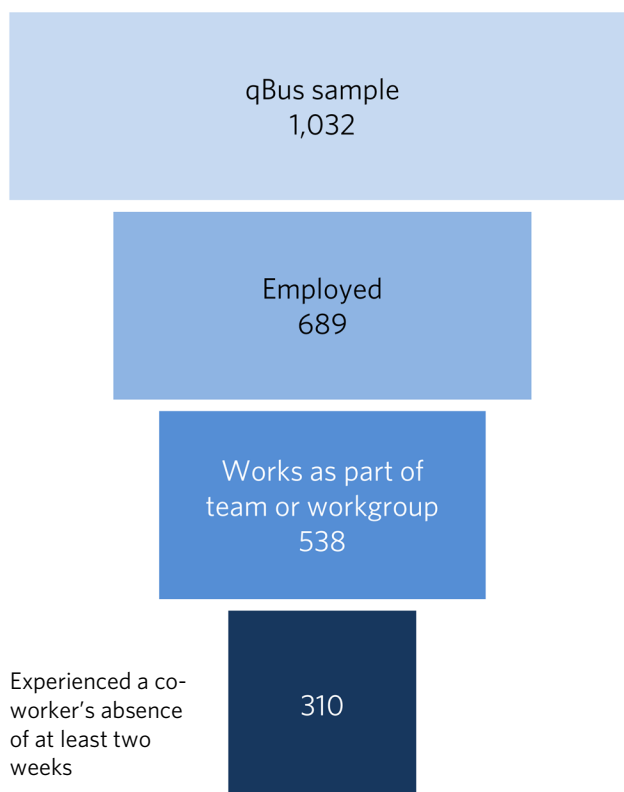
### QUALIFIED RESPONDENTS

Upon completion of the primary demographic questions, respondents were asked: **“At your main job, do you usually work as part of a team or workgroup?”**

Respondents who answered “no” or indicated that the question did not apply because they were self-employed or not employed were excluded from further questions. Figure 1 shows that 689, or 67% of respondents reported they were employed. Of these, 538 respondents indicated that they worked as part of a team or workgroup—52% of the entire sample and 78% of employees.

### Co-workers’ absences

**Figure 1: Survey response flow**



Respondents who worked as part of a team or workgroup were asked: **“At your main job during the past year, has any co-worker in your team or workgroup been absent for at least two weeks for a health issue, to welcome a new child into their home, or to care for a family member?”**

Two weeks was indicated to establish a duration that employees could reasonably recall but which would exclude incidental absences for illness or appointments. The leave reasons described generally correspond with the types of leaves afforded job protection under the federal FMLA law (including health issues that overlap with disability leaves in the case of pregnancies but also reflect statutory requirements for temporary disability insurance in the states that currently require PFL). They were included in the question to differentiate between scheduled vacations, but without the expectation that respondents would have full knowledge of their co-worker's actual reasons at the time of leave or when taking the survey. Figure 1 shows that 310 respondents (58% of employees in teams or workgroups [ $\pm 4\%$ ], 45% of all employed respondents [ $\pm 4\%$ ]) recalled experiencing a co-worker's extended absence.

<sup>\*</sup> < <https://www.qualtrics.com/online-sample/omnibus/> >

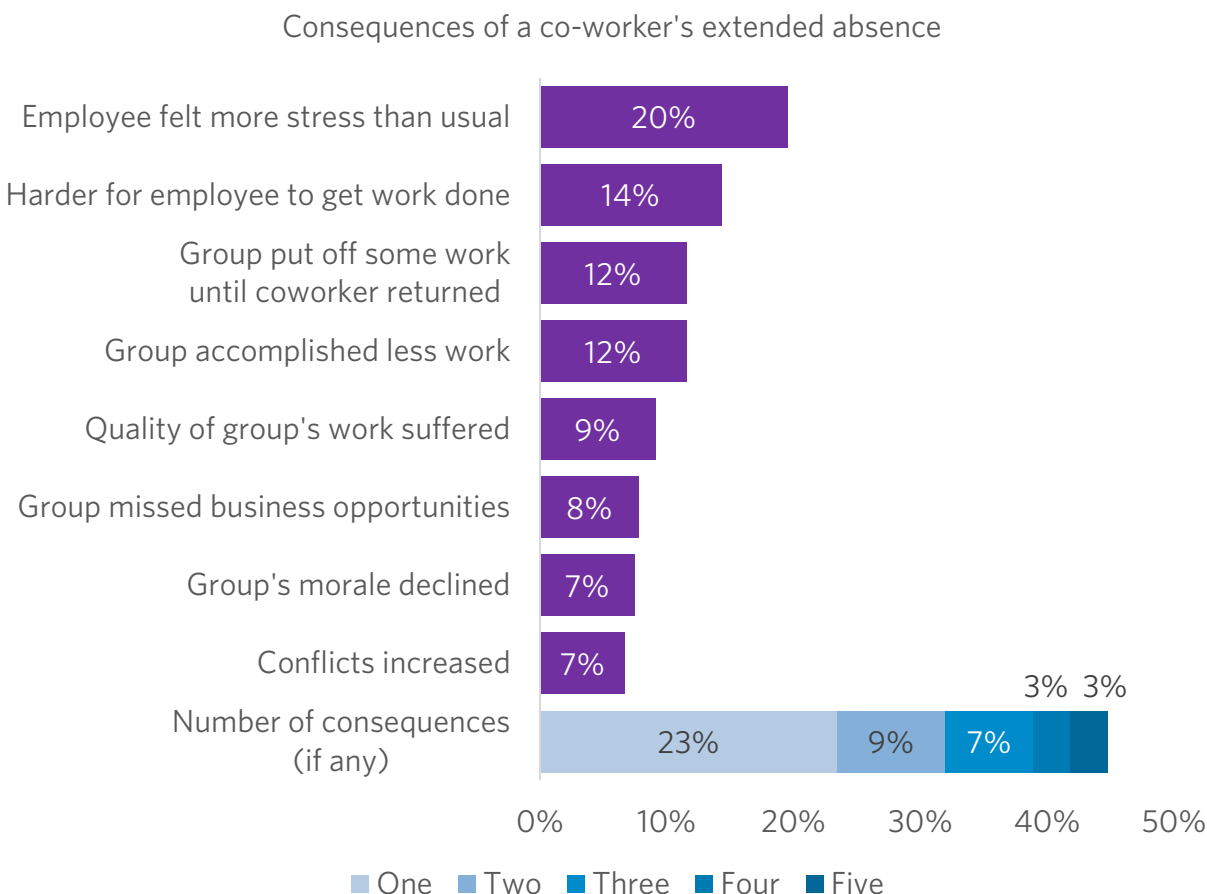
## Consequences of co-workers' extended absences

Respondents who recalled experiencing a co-worker's extended absence were asked to indicate whether specific business or personal consequences occurred. The consequences included in the survey are reported as percentages of employees in workgroups in Figure 2.

The exhibit shows that nearly half of employees in teams or workgroups reported at least one consequence of a co-worker's extended absence (45%,  $\pm$  4%). More than one in five (21%,  $\pm$  3%) reported more than one consequence.

The most commonly reported consequences were personal: one in five (20%,  $\pm$  3%) reported more stress than usual and one in seven (14%  $\pm$  3%) reported that it was more difficult for them to get their own work done. Consequences for productivity or business outcomes were reported by between one in twelve respondents ("group missed business opportunities") and one in eight respondents ("group put off some work", "accomplished less work"). Consequences for group morale and interpersonal conflict were the least often reported (one in 14 respondents).

**Figure 2: Nearly half of all employees in workgroups reported at least one consequence of a co-worker's extended absence**



Note: Among 538 respondents who reported working as part of a team or workgroup. The survey wording for the item "group missed business opportunities" referred to "missed opportunities to make sales, get new business, or take on additional projects." The survey wording for the item "conflicts increased" referred to "conflicts between managers or co-workers." A "none of the above" response was also included. 55 respondents selected this option, or roughly four out of five respondents who did not identify any consequence.

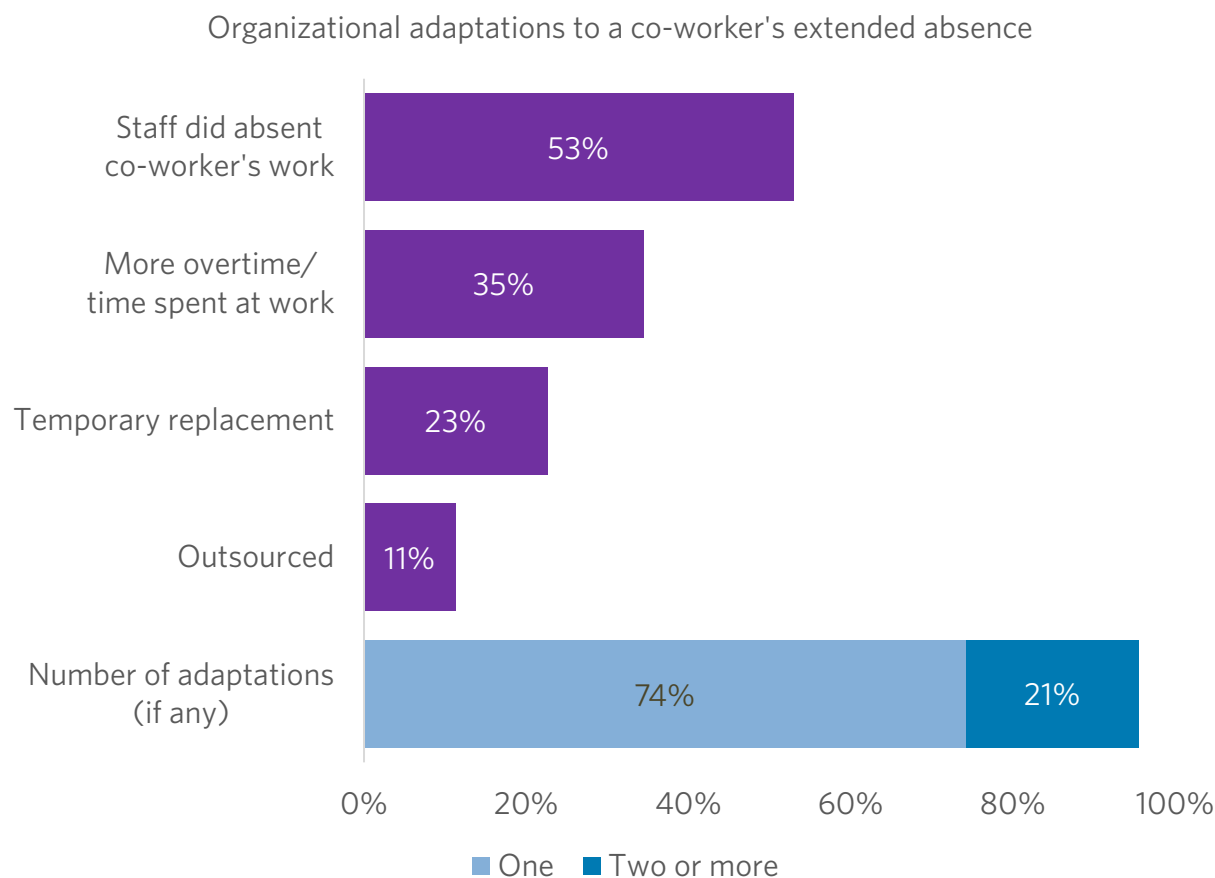
## Adaptations to co-workers' extended absences

Respondents who recalled experiencing a co-worker's extended absence were asked how the team or workgroup adapted during the absence. The adaptations included in the survey are reported as percentages of employees who experienced a co-worker's extended absence (which is a precondition for an organizational response).

Figure 3 shows that nearly all employees who experienced a co-worker's extended absence ( $95\% \pm 2\%$ ) reported some organizational or workgroup adaptation. Three in four respondents reporting any adaptations reported only one.

The most commonly reported adaptations indicated that employees or managers picked up the slack during a co-worker's extended absence. More than half ( $53\% \pm 6\%$ ) reported that staff (i.e., managers and other co-workers) took on the absent employee's responsibilities. One in three ( $35\% \pm 6\%$ ) reported that staff put in more overtime or spent more time at work than usual. Nearly three in four ( $73\% \pm 3\%$ ) reported at least one of these adaptations (not shown). Independently, obtaining extra help such as the use of temporary replacements or outsourcing work was reported relatively infrequently. However, one in three ( $32\% \pm 5\%$ ) reported at least one of these adaptations (not shown).

**Figure 3: Half of workers who experienced a co-worker's extended absence reported that managers and other co-workers took on the absent employee's responsibilities.**



Note: Among 310 respondents who reported experiencing a co-worker's extended absence. The survey wording for the item "more overtime/time spent at work" was "managers or co-workers put in more overtime or spent more time at work than usual." A "none of the above" response was also included. All respondents who did not select any adaption (14 respondents) selected the none of the above response.

## Do adaptations minimize the consequences of extended absences?

A reasonable question is whether organizational adaptations to extended absences mitigated any personal or productivity consequences. A factor analysis<sup>\*</sup> indicated that consequences items measured two underlying types of outcomes: personal and productivity. This allowed us to combine responses into two scales and measure the associations with specific types of organizational adaptations.

The productivity consequences scale includes the items “quality of group’s work suffered,” “group accomplished less work,” “group put off some work until co-worker returned”, and “group missed business opportunities”. The personal consequences scale includes the items “employee felt more stress than usual”, “harder for employee to get work done”, “group’s morale declined” and “conflicts increased”. Both scales range from 0 consequences reported to 4 consequences. Among employees who experienced a co-worker’s extended absence, the average productivity scale was 0.7 consequences ( $\pm 0.1$ ). The average personal scale was 0.8 consequences ( $\pm 0.1$ ).

We measure the association between adaptations and aggregate consequences using a bivariate regression approach<sup>†</sup>.

Figure 4 shows that having co-workers or managers perform an absent worker’s responsibilities, or having employees spend more time at work, is significantly associated with an average of 0.3 additional personal consequences. More time at work and outsourcing are significantly associated with an average of 0.3 additional productivity consequences.

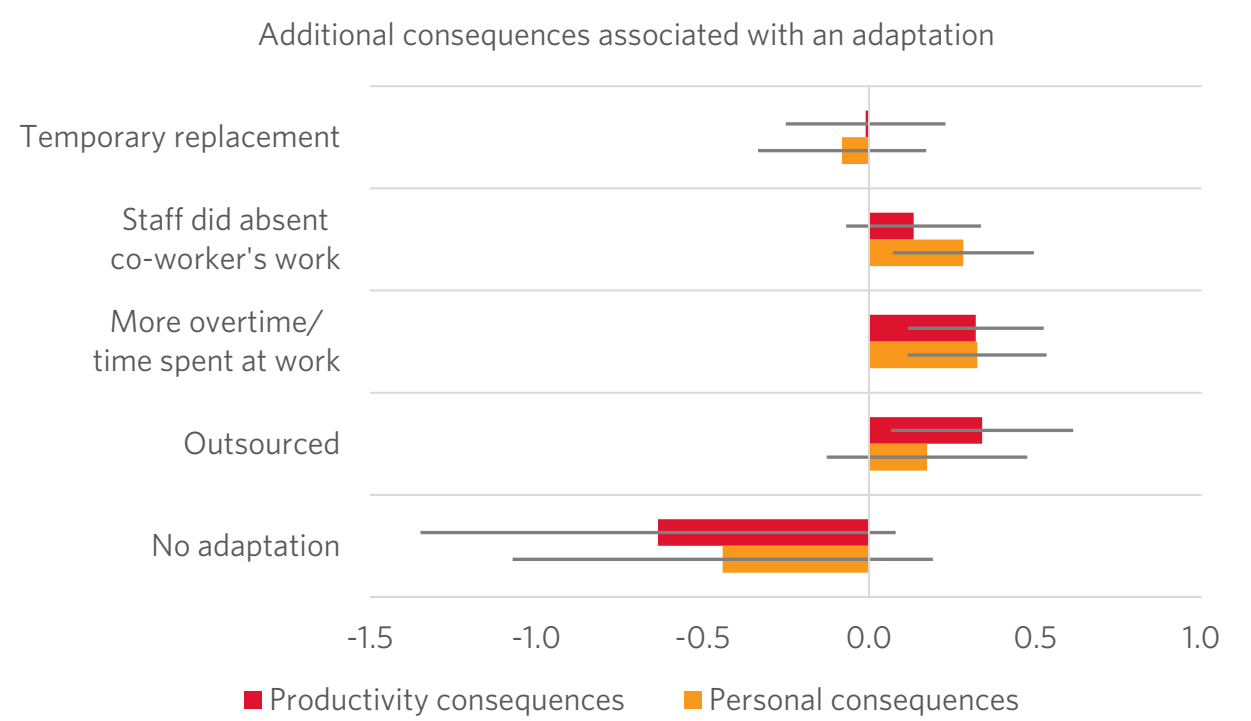
Because the analysis is correlational, the productivity findings do not imply that companies would be better off doing nothing during an employee’s extended absence. Instead, they suggest that some employers make adaptations in order to mitigate productivity consequences but are only partially successful. A reasonable speculation is that extended absences trigger both organizational adaptations and personal consequences in high-tempo, time-sensitive work environments. The large (though statistically non-significant) negative association between making no adaptations and productivity consequences reinforces this interpretation.

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<sup>\*</sup> Information on the factor analysis is included in the appendix.

<sup>†</sup> We report the marginal (i.e., additional) counts of consequences obtained from negative binomial regression to represent the results. Ordered logistic regression, ordinary least squares regression, and chi-squared analysis produced substantively similar results.

**Figure 4: Having managers and co-workers take up the slack caused by extended absences is associated with more personal consequences. Outsourcing and having employees spend more time on the job may only partly mitigate the productivity consequences of extended absences.**



Note: Results obtained are the predicted marginal consequences from negative binomial regression. Grey bars represent the 95% confidence interval around the estimated margin. Bars that overlap with zero on the horizontal axis indicate that the estimate is not statistically significant at the 0.05 level.

### Implications for employers

Data limitations prevent a detailed look at how extended leaves impact business operations for different types of workplaces or workers. Nonetheless, the findings from this analysis indicate that while PFL—and other policies such as sick leave or temporary disability leave—greatly benefit employees who need time off, increased stressors on co-workers who cover absent workers’ responsibilities may impose challenges to employers. The conventional economic focus on wage and turnover costs may obscure this relationship. Other productivity aspects such as underperformance on the job (presenteeism) and diminished operational performance more generally may also be overlooked.

Many companies will need to adapt their leave policies in response to new PFL and sick leave regulations—or to attract and retain talent at a time of historically tight labor markets.<sup>18</sup> To help employers develop leave strategies that sustain productivity with minimal impacts to staff workloads, morale, and personnel costs, IBI sought input from experts at leading healthcare, benefits and absence management firms. A summary of their guidance follows.

**IBI THANKS THE FOLLOWING INDIVIDUALS  
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Absence

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Management and Life, Willis Towers Watson

Rich Fuerstenberg, Senior Partner, Mercer

Phil Lacy, Health AND Productivity Practice  
Leader, Trion Group

Jenny Merrithew, VP, Cigna Group Solutions

Marjory Robertson, AVP and Senior Counsel, Sun  
Life Financial

Dawn Simmons, Director of Marketing, Sun Life  
Financial

Leston Welsh, Head of Disability and Absence  
Management, Prudential Group Insurance

Karen M. White, AVP, Health and Exchange  
Solutions, Sun Life Financial

**MAKE TEAM PRODUCTIVITY A PRIORITY**

Employers need leave policies that not only conform to applicable laws regarding leave-takers, but that also address the continuity of business operations. This means formally considering the impact of extended leaves on team productivity when adopting new policies, and working with HR, benefits professionals, legal counsel, and leaders of different business units to develop standing continuity plans. The intent is to prepare managers and supervisors prior to any leave requests, but also to give senior leaders a realistic view of how benefits decisions may impact business operations. Continuity plans will differ from unit to unit, but at a minimum should spell out:

- Mission critical roles that have a high risk of disruption by team members' extended absences.
- A staffing plan for maintaining mission critical operations first and covering absent employees' tasks secondarily (when these are not mission critical) for scenarios that correspond to different leave policy durations (e.g., 8 weeks for a family leave, 6 months for the maximum short-term disability duration, etc.).
- A clear statement on the feasibility of temporary substitutes and an assessment of the existing or potential talent sources when these are deemed necessary (e.g., in time-sensitive environments such as call centers or health care facilities). Temporary talent source could include contract labor, but also cross-training across business functions as a form of temporary job-sharing.
- A discussion of the opportunities for mutually beneficial accommodations as allowed (or required) under the Americans with Disabilities Act (ADA).

Periodic assessments of continuity plans (e.g., in the aftermath of a few leaves after the adoption of a new policy, and annually thereafter) will allow adjustments to be made with the benefit of experience and in recognition the future demands for time off.

**DEVELOP A COORDINATED BENEFITS STRATEGY**

A holistic review of an employer's benefits package and administration practices can strengthen a coordinated benefits strategy designed to serve multiple priorities—from complying with laws and regulations, to talent management, to supporting employees in times of need. It affords an opportunity to close gaps in coverage, minimize overlapping benefits, and assess whether leave policies serve intended goals without working at cross-purposes with other priorities (for example, running company and statutory paid leaves concurrently to conform with laws and support employees' needs without granting more time off than was intended).

A coordinated benefits strategy also has at least three additional advantages for developing standing continuity plans. First, an employer's own leave experiences provide realistic foundations for continuity planning—accounting for seasonal scenarios based on past leave and vacation requests, for example. Second, successful



adaptations to extended leaves by specific key personnel can also be shared throughout an organization as case studies for maintaining productivity. These could emphasize the critical nature of the leave-taker's role in the business unit, how managers shared the continuity plan with the team, the process of making adjustments in business operations, and how management obtained ongoing feedback from co-workers. Third, employers' existing benefits can be explicitly worked into continuity plans to minimize disruptions from extended leaves. For example:

- A team member's impending leave provides an opportunity to remind co-workers of available Employee Assistance Programs (EAP) to help manage stress, avoid employee conflict and develop time management strategies. Delivered as part of a team's routine work plan, this message may find a more receptive audience than when delivered to individual employees at a time of stress or crisis.
- Assistance with childcare or elder care may be critical for some employees who find themselves working more hours than usual during a co-workers' extended absences.
- Flexible work policies—allowing work from home or adjusting work schedules—may also alleviate stress among teams that are temporarily understaffed due to a co-worker's extended leave.
- Granting short sabbaticals to team members on a rolling basis can allow time to recharge after a co-worker's extended leave.

### **REMEMBER THAT ABSENT EMPLOYEES ARE STILL TEAM MEMBERS**

With few exceptions, most employees will return from extended leaves. Engaging them in planning for their return to work before and during their leave may be just as important in engaging them in planning the handoff of their responsibilities to others.

Insofar as is possible and permissible, share information about the absent employee's return-to-work (RTW) plan—such as gradual or part-time returns, the absent employee's continued access to internal systems and the timeline for return—with the entire team. This will help reassure team members that their extra efforts will not become permanent assignments. Knowing that supporting one another is a routine part of a team's business—rather than an occasional crisis to managed—may also contribute to team cohesion.

Routine information sharing may also facilitate discussions with the employee about appropriate ways to keep them engaged with the team as their return nears—particularly as mutually beneficial accommodations allowed under the ADA are concerned.\* Insurers and absence management partners that offer accommodation services may be particularly helpful in these discussions.

### **CLEARLY COMMUNICATE HOW LEAVE POLICIES WORK—IN BOTH DIRECTIONS**

Clear lines of communication are critical throughout the development and implementation of leave policies. Establishing processes to keep employees informed about their rights and responsibilities under both the law and company policy can help avoid confusion when they find themselves in times of need. An employee's impending leave also provides a particularly opportune moment to review these policies with other team members when the topic is front of mind. Reviewing formal leave rules and clearly defining expectations for employees going on leave, their supervisors, and their team members can help increase a leave program's effectiveness.

It is also important keep managers, supervisors and HR up to date about leave laws governing who can take job protected leave, under what circumstances, for how long, and the company and employee's respective

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\* While legal counsel should be involved in drafting or reviewing standing continuity plans, their consultation on specific arrangements with individual employees regarding RTW and working while on leave is still advised.

responsibilities. Managers and supervisors also need to understand that the company takes seriously laws designed to prevent discrimination and retaliation against leave takers.

Management should check in regularly with employees who remain on the job during a co-worker's extended leave. This will help alert managers to issues before problems emerge and keep them informed of any need for additional staff resources. Simply acknowledging team members' efforts and sacrifices also sends a clear signal that the company cares about employees' welfare and goes a long way towards countering stress or negative feelings.

## Appendix

### SAMPLE SUMMARY

Table 3 shows the demographics for the employed sample. Compared to employees that did not work as part of a team or workgroup, workgroup employees tended to be younger and better paid (results not shown). Other demographic differences were not statistically significant.

**Table 1: Summary demographics for the qBus sample of employed adults (N = 689)**

<u>Sex</u>		<u>Income*</u>	
Male	51%	Less than \$25,000	8%
Female	49%	\$25,000-\$49,999	22%
<u>Age*</u>		\$50,000-\$74,999	20%
18-34	43%	\$75,000-\$99,999	16%
35-54	40%	More than \$100,000	34%
55+	17%	<u>Education</u>	
<u>Race/ethnicity</u>		Less than high school	0%
White	67%	High school graduate/GED	16%
African-American	11%	Some college	20%
Hispanic	15%	2-year degree	12%
Asian	3%	4-year degree	33%
Other	3%	Masters degree	14%
<u>Region</u>		Doctorate	2%
Northeast	21%	Professional Degree	2%
Midwest	20%		
West	21%		
South	38%		

Note: \* indicates statistically significant differences between employees who worked as part of a team or workgroup and those who did not.

### FACTOR ANALYSIS

Factor analysis is a statistical method for reducing the number of variables used in an analysis without losing substantive information.<sup>20</sup> The approach identifies underlying “latent variables” (factors) based on the interrelationships between variables, permitting the construction of meaningful scales. To create scale variables that characterize consequences of extended absences, we conducted a principal components factor analysis, employing a polychoric correlation matrix to account for the dichotomous measurement of the survey items<sup>21</sup>. We then used the regression method to predict respondents’ scores for each of the retained factors based on the varimax rotated solutions. Table 4 shows that the procedure identified two unique factors that cumulatively account for about 59% of the observed variation in the 8 variables. Based on the identification of factor loadings with an absolute value of at least 0.6, Factor 1 is defined primarily by the variables indicating productivity or business outcome consequences. Factor 2 is defined primarily by personal or interpersonal consequences.

**Table 2: Rotated (varimax) factor loadings and proportions of observed variance**

	Factor		Uniqueness
	1	2	
Quality of group's work suffered	0.769		0.359
Group accomplished less work	0.764		0.393
Group put off some work until co-worker returned	0.729		0.467
Group missed business opportunities	0.684		0.530
Employee felt more stress than usual		0.648	0.296
Harder for employee to get work done		0.609	0.488
Group's morale declined		0.721	0.452
Conflicts increased		0.857	0.264

Proportion of observed variance	0.426	0.168	
Cumulative	0.426	0.594	

Note: Uniqueness summarizes the amount of variance not shared with other variables. Generally, higher values of uniqueness indicate variables that are of less relevant to the factor model.

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Suzanne Wilson	RSLI/Matrix Absence Management

## About IBI

Founded in 1995, the Integrated Benefits Institute (IBI) is a national, nonprofit research and educational organization focused on workforce health and productivity. IBI provides data, research, tools and engagement opportunities to help business leaders make sound investments in their employees' health. IBI is supported by more than 1,000 member companies representing over 20 million workers.

IBI's Board of Directors includes the following leaders in health and productivity:

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