



Diversity, Equity & Inclusion **Report**



# Table of Contents

- 1** Introduction and Report Methodology
- 3** Cariloop's DEI Philosophy
- 4** Educating and Empowering Our Workforce
- 9** Supporting All Caregivers
- 13** Looking Forward
- 14** Appendix: Cariloop Demographics



## Introduction + Report Methodology

Thank you for reading Cariloop's 2023 DEI Report!

The purpose of our DEI Report is to constructively reflect on Cariloop's intentional efforts to create a safe, fair and inclusive work community. The honest feedback of our Loopers' (internal employees) unique experiences—along with transparent company data—help us embody our DEI philosophy and remain committed to an inclusive foundation of life at Cariloop and to the encouragement of equitable opportunities for all caregivers.

### Cariloop's DEI Data Sources:

Cariloop conducts biannual, anonymous DEI Surveys for our employees to provide feedback on Cariloop's DEI strategy and environment. All employee demographic information comes from an annual, anonymous demographic survey that was most recently conducted in November 2023. Cariloop notifies employees that information from both of these surveys will not be used for identification purposes and that their honest feedback is vital for a successful DEI program.

External data for the general caregiver population is sourced from published original research reports from various organizations within the caregiving, employee benefits, and health and wellbeing industry. Each data source is given credit in this report.





# Cariloop's DEI Philosophy

Together we will work to embrace and uplift each other through **education, empathy, empowerment** and our shared mission. We are committed to taking personal and corporate responsibility in our roles, responsibilities, and mission to support DEI initiatives that help to create the global standard for the way we support caregivers, families and each other.

## Our Internal DEI Mission

To create a safe, fair and inclusive environment where people can be their true, authentic selves.

### Educate:

provide regular DEI learning opportunities for all Loopers (employees) and specific learning opportunities that are role-specific

### Empathize:

build empathy through regular opportunities for connection and mutual understanding

### Empower:

take action to pursue our DEI Mission through annual all-company and role-specific DEI goals and initiatives, evaluated annually in our DEI report

## Our External DEI Mission

To reduce and remove barriers for caregivers, particularly caregivers who are not provided equitable, fair or inclusive opportunities due to their caregiving status.

### Educate:

provide materials and resources to educate the world on the stress and burden felt by caregivers

### Empathize:

dedicate ourselves to collective and personal research and learning to determine the most effective and meaningful ways to support caregivers

### Empower:

provide resources to support caregivers who are not provided equal opportunities due to their caregiving status



# Educating and Empowering Our Workforce

At Cariloop, we believe the unbiased, inclusive and empathetic way we strive to serve caregivers is a reflection of how we serve our employees. During the past two years, Cariloop has focused on building our DEI philosophy and internal DEI mission to drive an effective strategy of educating and empowering our workforce to be empathetic leaders. This starts by understanding the needs of our workforce to create a safe, fair and inclusive environment where every employee can be their true, authentic self. The following are examples of how Cariloop has committed to empowering and educating our workforce to work toward our DEI mission.

## Biannual DEI Surveys

Regular feedback from our Loopers drives our company's DEI initiatives. Loopers have the opportunity to anonymously provide their feedback biannually in our DEI Survey. These metrics are tracked, measured and reviewed with necessary stakeholders to determine how we take action to continuously improve. Below are a few questions that we ask on our survey. Loopers are asked to score their responses from a 1 (Disagree Completely) to a 7 (Agree Completely):



Below are a few actions Cariloop has taken based on Looper’s feedback from these surveys:



**Regular opportunities to meet with senior leadership:**

Loopers requested a consistent space to meet with senior leadership to build relationships and ask questions. In 2023, we launched quarterly “office hours” in which Loopers could submit questions in advance for senior leadership to answer. Moving forward, we are integrating office hours into our monthly all-company meetings to respect our employees’ time and commit our leadership to transparency and openness.



**Psychological safety training for leaders:**

per Loopers’ suggestion, all leaders of people attended a required training on creating psychological safety on their teams. Leaders were taught actionable steps to create psychologically safe environments and given collaborative time to incorporate these actions into team-based DEI initiatives.



**Regular connection opportunities:**

as a remote workforce, Loopers desired regular connection opportunities with fellow employees. In 2023, we started bimonthly cross-team lunches so Loopers could regularly interact with employees they don’t traditionally work with on a day-to-day basis.

**DEI Calendar:**

The traditional workforce calendar is not representative of the cultural holidays and traditions of a diverse population. Cariloop instead creates its own inclusive DEI Calendar through Loopers’ input on holidays and traditions that are important in their diverse cultures. Cariloop recognizes each of these holidays or traditions with either education, a conversation and/or a day off of work.

**Monthly Voluntary DEI Education:**

Cariloop provides Loopers with monthly educational opportunities to build empathy, connection and deeper learning for others’ experiences. Our goal is to provide Loopers with a variety of perspectives so they are given the tools to contribute to a safe, fair and inclusive environment and to develop a vocabulary and perspective for empathy and understanding. The speakers for these opportunities range from our Impact Manager to employees with specific expertise to guest expert speakers. Below are a few of Cariloop’s 2023 DEI educational opportunities:

<b>Mental Health and Youth Caregivers Lunch and Learn with Dr. Feylyn Lewis</b>	Dr. Feylyn Lewis, who has spent her research career understanding and advocating for the needs of youth caregivers, taught us the effects caregiving can have on the mental health of youth. There are more than 5.5 million youth caregivers in the U.S. Dr. Lewis walked us through the experience of youth caregivers and how we can support this overlooked and underserved population. You can learn more about Dr. Lewis’ research on her <a href="#">website</a> .
<b>How to Apologize Lunch and Learn</b>	Creating a safe, fair, and inclusive environment at Cariloop commits us to being a learning organization that sees mistakes as opportunities for improvement and growth. Knowing that mistakes will happen, this lunch and learn prepared Loopers to take responsibility for mistakes and how to give a genuine, empathetic apology.
<b>Microaggressions Lunch and Learn</b>	Microaggressions can occur every day for marginalized populations. If they are not named, they can easily persist. This lunch and learn defined microaggressions, how to spot them and how to address them to create a psychologically safer environment for all.
<b>LGBTQ+ Healthcare Experiences Lunch and Learn</b>	In this lunch and learn, one of our experienced team members provided their expertise to help Loopers gain a deeper understanding of the healthcare experiences of LGBTQ+ adults and our role in creating a supportive environment for our members and each other.





# Supporting All Caregivers

At Cariloop, our vision is to set the global standard for the way we support all caregivers. Understanding that caregivers are often overlooked and undervalued—especially in the workplace—our mission becomes even more important when considering the layers of diversity and marginalization that affect caregivers’ experiences. Below are some examples of how Cariloop works to provide equitable, fair and inclusive opportunities for caregivers.

## Loopers as Caregivers

The way we support caregivers is reflected in the way we care for caregivers within our own company. We hope to set the standard for how companies support caregivers and keep them in the workforce.

At Cariloop, 70% of our employees are caregivers. Every employee has access to Cariloop’s services as a benefit, and every employee is offered Caregiving Time Away. These benefits help remove barriers for caregiving populations and build an acceptance of the harmony of caregiving and work. In 2023, Loopers took more than 300 hours of Caregiving Time Away and opened 122 cases using their Cariloop caregiver support benefit.

Additionally, a workforce that reflects the caregiving population helps us to better serve our members. The typical caregiver, according to the Family Caregiver Alliance, is a 49-year-old woman, with 66% of caregivers being female. In addition, the University of Michigan estimates there are approximately 2.5 million Americans who are “sandwich generation caregivers,” meaning they provide care to older family members while also raising children under 18. At Cariloop, Loopers who identify as female make up more than 76% of our workforce, and 55% of our workforce are sandwich-generation caregivers.



Removing Barriers for Working Caregivers

When considering who is a caregiver and if they are feeling they are receiving adequate support, it is important to consider the definition of a caregiver. At Cariloop, to be as inclusive as possible, we define caregivers as anyone who is providing physical, emotional, mental or financial support to another individual. This could look like a working parent, an employee caring for a sibling, a grandparent caring for a grandchild, or even an individual helping out their elderly neighbor.

As we encourage our customers and partners to widen their view of caregivers, the reality becomes clear that caregivers are a majority of any workforce population and should be an employee population group that deserves equitable, fair and inclusive opportunities.

Oftentimes, caregivers have to make career sacrifices or feel they are not able to give the same amount of effort as their non-caregiver counterparts. They may need to sign off early from work or transition from full-time to part-time. In fact, women are three times as likely as men to quit their jobs to take care of a family member, and more than 80% of employees with caregiving responsibilities admit that caregiving affects their productivity, according to the Pew Research Center. In addition, Harvard Business School reports that 32% of employees have voluntarily left a job during their careers due to caregiving responsibilities.

On average, we save 73 hours for each employee per case. That is time they do not have to spend balancing work and their caregiving responsibilities, which allows them more opportunities to show up as their best selves at work. One employer we partner with said it best:

“In offering Cariloop to our employees, we are creating a safe environment for them to not feel shame or that they need to hide their caregiving responsibilities. In a way, it evens the playing field as now all employees, regardless of their personal situation, have an opportunity to get the support they need outside of the office.”

Director of Benefits

Educating Employers to Create Safe Environments

As we work with employers to remove those barriers within their workplaces, we also work to help educate them on creating safe environments for employees to share they are caregivers.

Nearly 40% of caregivers say their supervisors are not aware of their caregiving responsibilities, according to the Society for Human Resource Management. Last year at Cariloop, we began working with employers to reduce this statistic. Our Customer Success team created a new manager training program and conducted sessions about how to talk about caregiving responsibilities with direct reports, tips to open the lines of communication and how to help caregiving employees feel supported by pointing them to the right resources. The more we talk about caregiving within the workplace, the more normalized it will become.

In addition, we work with employers to think outside of the box on how they can create an inclusive environment for their employees. For example, one employer with a predominately onsite workforce realized its employees were facing childcare challenges. Together our Customer Success team and Care Coaches got creative to solve this problem and researched options for that employer to reserve spots at nearby daycares for their employees, ultimately removing the challenge of employees not being able to show up for work due to not having adequate childcare. This created a truly equitable, fair and inclusive environment where those caregivers felt they were properly supported by their employer.

“Nearly 40% of caregivers say their supervisors are not aware of their caregiving responsibilities”





2024

## Looking Forward

Though we are proud of where we have come in our DEI work at Cariloop, we look forward to continual growth and learning. Below are a few areas we will increase our DEI efforts in 2024:



### Team and Individual DEI Initiatives:

We believe that DEI is only successful when every employee has an active hand in its progress. In 2023, Cariloop launched team-based DEI Initiatives. Every team leader led their team in creating DEI initiatives that are team-specific to their industry and team needs. Leaders were provided training on creating these initiatives and had a check-in with the Impact Manager on progress. In 2024, we plan to dig deeper into these initiatives to give every employee a voice in determining how they want to work toward our company's DEI Philosophy both individually and as a team.



### Inclusion Council:

To give more Loopers a voice in Cariloop's DEI direction, we will introduce an Inclusion Council in 2024 to regularly discuss and drive our company's DEI strategy. The Inclusion Council will be voluntary and open to all Loopers who would like to participate.



### Equitable Recognition Program:

To build on our culture of belonging, we are creating a Looper recognition program that will highlight the diverse skills, experiences and contributions of our team. This program will recognize Loopers by highlighting the impact their role has on caregivers, showcase the behaviors, actions and decisions that embody our core values, and create opportunities to celebrate as a collective team. The goal of the recognition program will be to ensure every individual at Cariloop feels valued and to create a community of understanding for how each Looper plays an integral role in advancing our mission and vision.

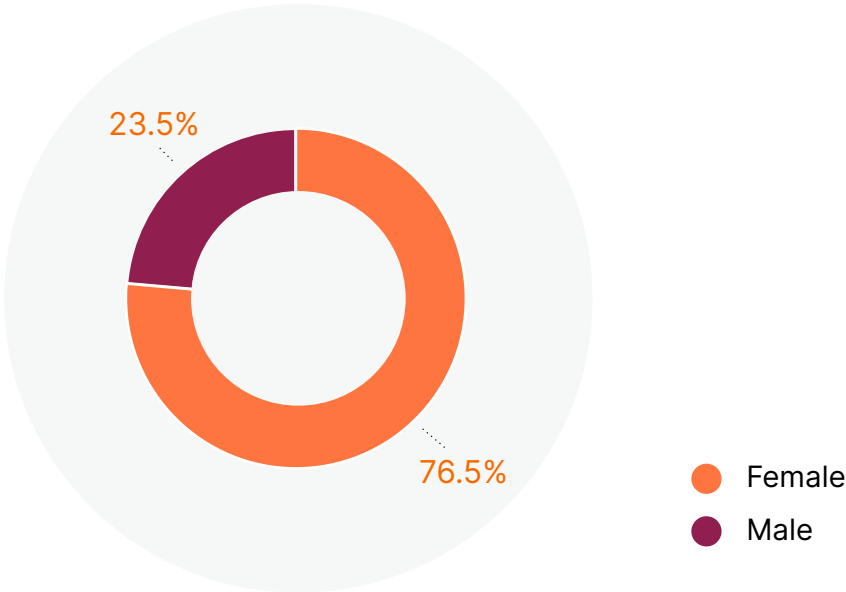
We are proud that DEI is an ongoing conversation at Cariloop, and we are committed to courageously pursuing our DEI Mission with the understanding that we will always be learning, growing and adapting.

# Appendix: Cariloop Demographics

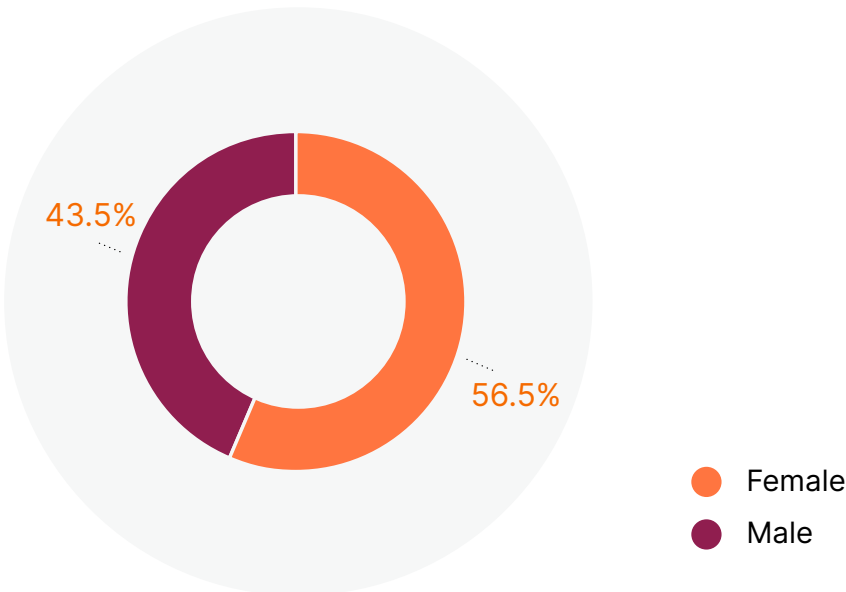
The following is the data from the Demographic Survey in which Loopers anonymously self-select their demographic information. 89% of Loopers responded to the Demographic Survey that was conducted in November 2023. We define Leadership as anyone who has a direct report(s).

Representation by Gender:

Company:



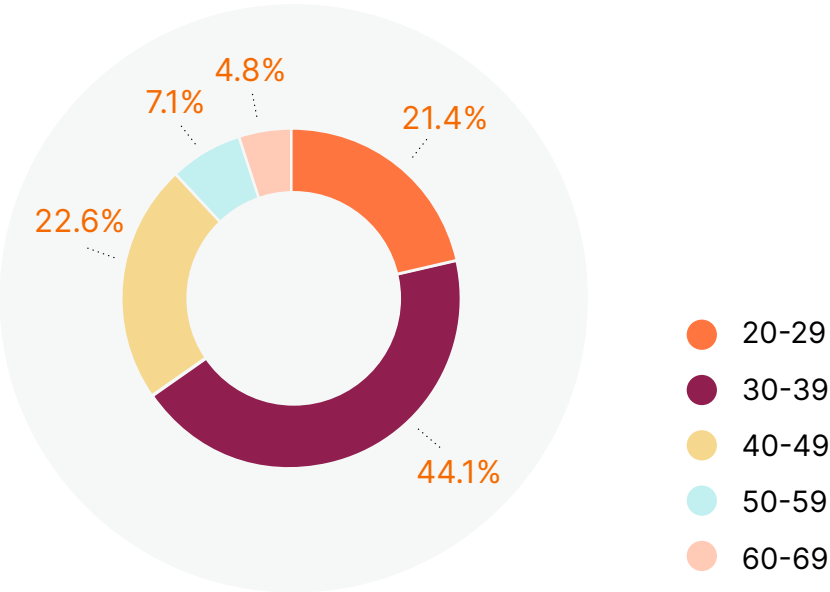
Leadership:



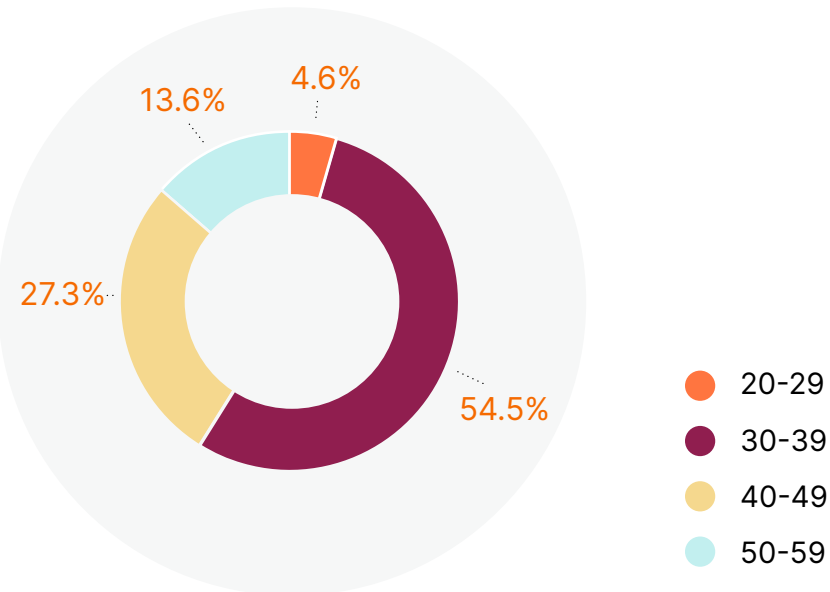


Representation by Age:

Company:

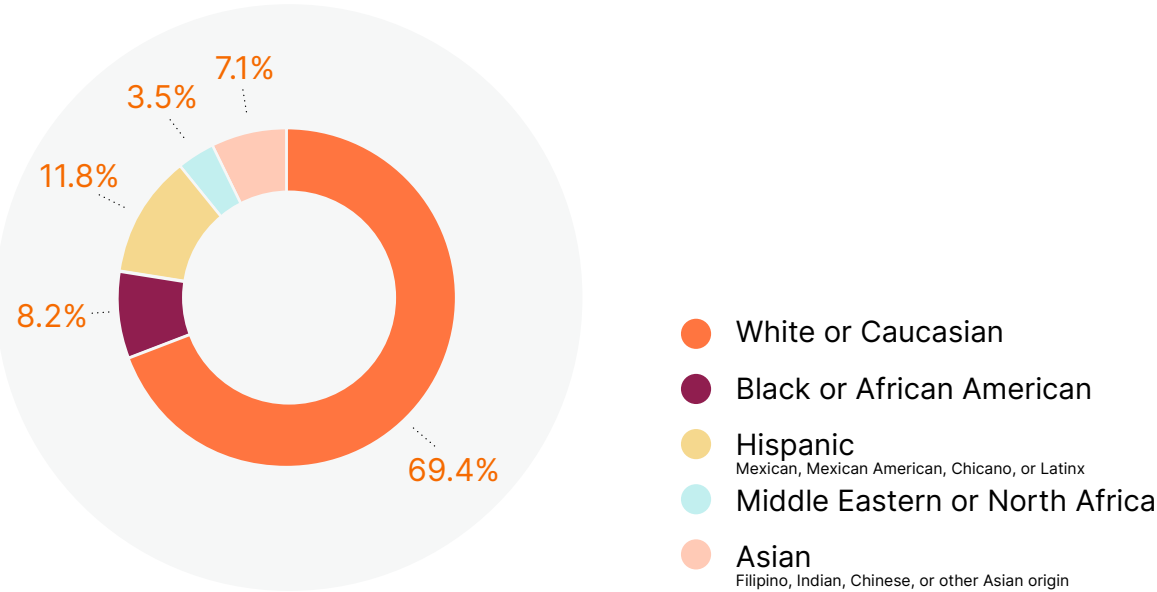


Leadership:

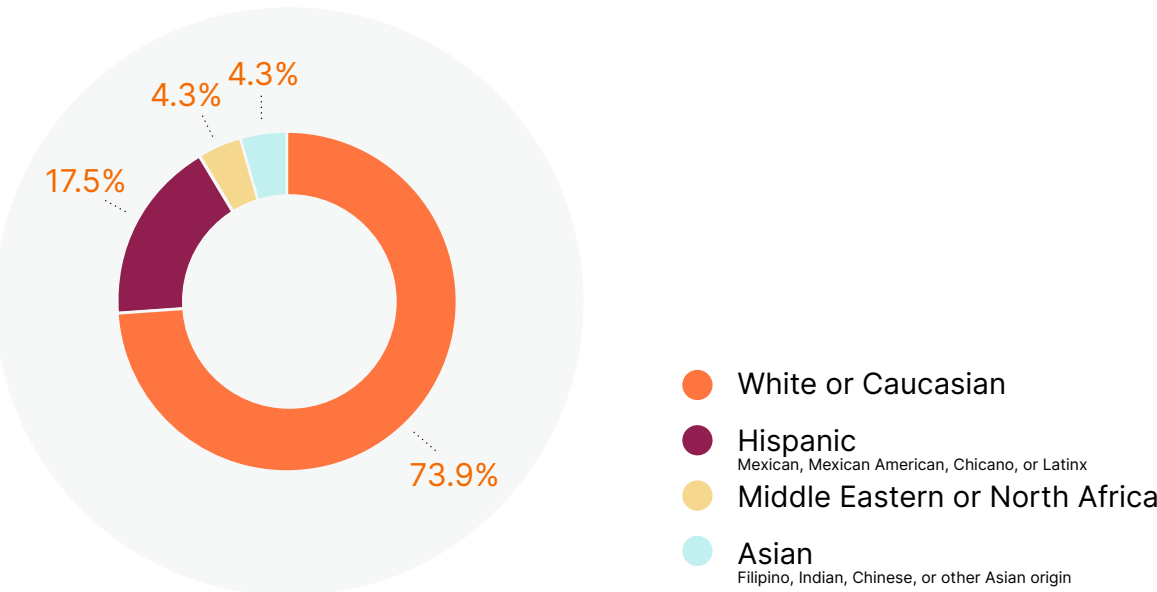


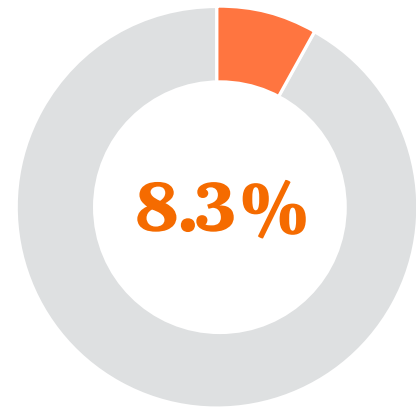
Representation by Race/Ethnicity:

Company:

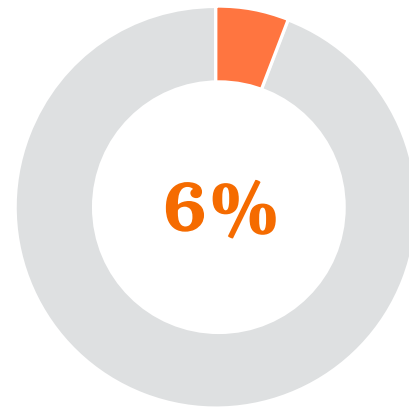


Leadership:

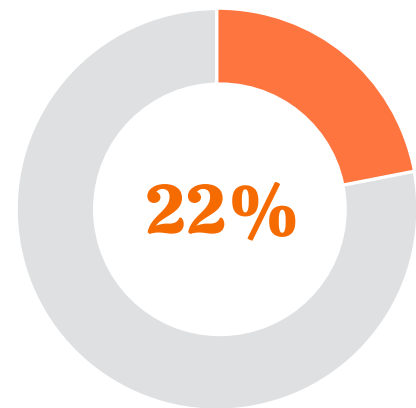




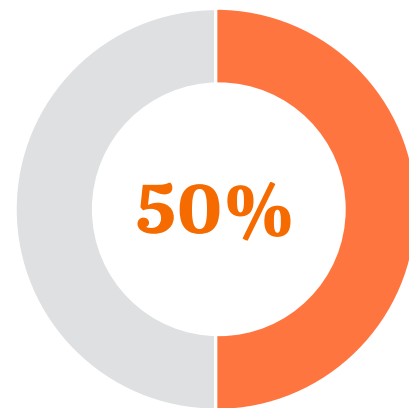
of Loopers are LGBTQ+



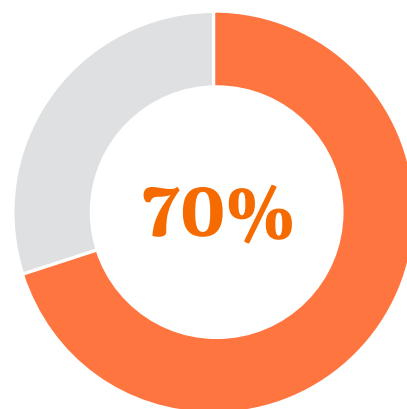
of Loopers have a disability



of Loopers have a special need  
or learning difference



of Loopers are parents and/or  
primary guardians



of Loopers are or have  
been caregivers





cariloop

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