

Carers Policy

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Brief Summary of Document:	This policy sets out the approach of the Hywel Dda University Health Board to support employees who have caring responsibilities.
Scope:	The Carers policy is for all employees under a contract of employment with the health board who have caring responsibilities fitting the definition of an unpaid Carer. It provides advice for managers on how to support staff with caring responsibilities and information for staff on options available to create a work/life balance.
To be read in conjunction with:	126 Work Life Balance Flexible working policy 131 Flexi time policy 582 Term Time Working 122 Special leave policy and guidance 111 Annual Leave policy Leave purchase scheme 245 Employment Break Scheme 127 Parental Leave

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	129 Time Off For Medical/Dental Appointments During Normal Working Hours Policy 768 NHS Wales Managing Attendance at Work Policy 931 Bereavement Policy including death in service 133 Equality and Diversity Policy
Patient information:	

Owning Committee/ Group	Employers for Carers Task and Finish Group
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Executive Director:	Lisa Gostling	Job Title	Director of Workforce and OD
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Reviews and updates		
Version no:	Summary of Amendments:	Date Approved:
1	New Policy	17/12/2020

Glossary of terms

Term	Definition

Keywords	Caring, Flexible Working, Flexibility, Work Life Balance
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1. Introduction

This document describes Hywel Dda University Health Board's approach to supporting employees who have caring responsibilities.

'Carers are employees with significant caring responsibilities that have a substantial impact on their working lives. These employees are responsible for the care and support of older, disabled or ill family and friends who are unable to care for themselves' (Carers UK definition).

This policy also contributes to our responsibilities under the Equality Act 2010 and Social Services and Well-being Wales Act, 2014 and supports our commitment to the national Employers for Carers Scheme.

The Health Board is committed to creating an environment that supports employees with caring responsibilities, assisting them to manage their work/life balance whilst meeting the needs of our organisation. The organisation's statement of intent can be accessed on the following link:

<https://hduhb.nhs.wales/about-us/governance-arrangements/policies-and-written-control-documents/policies-appendices1/statement-of-intent-supporting-our-staff-who-are-juggling-work-and-looking-after-a-family-member-or-friend-pdf-312kb/>

2. Policy Statement

This Carers policy sets out a vision for providing a supportive working environment for staff in Hywel Dda University Health Board who are looking after a family member or friend in their personal lives. Our Health Board values include people striving together and as a caring employer we want to support our staff who are juggling work and their caring responsibilities outside of work. The intention is to create an organisational culture which allows staff to be open about their situation and to create a workplace that is supportive to Carers enabling them to continue to work and care.

3. Scope

This Carers policy is for all employees under a contract of employment with the Health Board who have caring responsibilities fitting the definition of an unpaid Carer. It provides advice for managers on assisting staff with caring responsibilities and information for staff on options available to create work/life balance.

4. Aim

The Aims of this policy are to:

- Support employees to remain in work, fulfil their career potential and meet their caring responsibilities at the same time.
- Support employees balancing work with their caring responsibilities by outlining a range of existing policies and employee support.
- Increase awareness of managers and all employees of the needs of Carers to ensure a sympathetic response to caring responsibilities/need.
- Work in partnership with employees in exploring all viable options to enable them to remain effective workers.
- Help to remove the feeling of isolation and lack of support often experienced by

5. Objectives

The Health Board is committed to supporting Carers in accordance with the following aims:

- **Identification as a Carer:** Proactively encourage individuals with caring responsibilities to come forward for support as part of an open and positive workplace culture.
- **Recognition of Carers:** Employees from across the Health Board recognise the valuable role that unpaid Carers play in our families and communities and are proactive in identifying or responding to requests for support from colleagues who are Carers.
- **Offers of and request for support:** Where a member of staff has identified themselves as a Carer, guidance will be provided by their line manager on the employment support available to them. Managers will also advise on how staff can access information, advice and assistance from external support agencies relevant to their needs. Carers are encouraged to request specific support where required, in accordance with this policy. Sympathetic consideration will be given where support is requested by Carers in accordance with this policy, based on a shared understanding of the situation, its impact on the Carer's work and the consistency of treatment with other staff in a similar position.
- **No unfair treatment:** Staff who have identified themselves as a Carer and/or requested support in accordance with this policy will not be treated unfairly or disadvantaged as a result.
- **Confidentiality:** A staff member's identification as a Carer and support requested will be disclosed no wider than is necessary to ensure the effective day-to-day running of Health Board business.

6. Identification as a Carer

The Health Board values the contribution of all its employees and acknowledges the valuable role that employees with caring responsibilities have for their families and communities. It is estimated that 1 in 7 Carers are in employment and the number of Carers is growing each year.

Not everyone recognises themselves as Carers; the care of an ill, older or disabled loved one is often just considered a part of everyday life for many people. Employees providing this care may not even identify as a Carer themselves, remaining unaware that support is available to them both inside and outside of work.

By raising awareness of Carers within the Health Board we aim to help employees to identify themselves as Carers so that they can become more aware of the support available to them.

7. Recognition of Carers

The Health Board will support employees and managers to access Carer awareness training in order to increase the recognition of the valuable role that Carers play within families and communities. Carer Awareness training is available in a range of formats including:

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- Carer Aware e-learning (see useful links section).
- During the Health Board's corporate induction session.
- Through bespoke training for teams and departments.
- During the Health Board's Management training programme 'Managers Passport' and other equivalent programmes.
- Via the Investors in Carers Scheme.

For information about how to access training, email CarersTeam.hdd@wales.nhs.uk

8. Support for employees with Caring responsibilities

Staff who identify themselves as a Carer and who have agreed a 'Carers Passport' with their line manager will be entitled to 5 days unpaid leave per annum in addition to their paid leave entitlement and any other unpaid leave granted in line with other policies.

There are also a range of employment policies which can support employees with caring responsibilities. These include:

8.1 Flexibility of working hours/pattern

Policy Title	Link to access the Policy	How it can help
Work Life Balance Flexible working policy	http://www.wales.nhs.uk/sitesplus/documents/862/126-WorkLifeBalanceFlexibleWorkingPolicyV5.pdf	Option to discuss and request a variation in working hours and/or working pattern.
Flexi time policy	https://hduhb.nhs.wales/about-us/governance-arrangements/policies-and-written-control-documents/policies1/flexi-time-policy-and-procedure/	Option to discuss working a flexible working pattern whilst remaining on the same contractual hours.
Term Time Working	http://www.wales.nhs.uk/sitesplus/documents/862/582-TermTimeWorkingPolicy.pdf	Option for those with responsibilities including caring for children to request term time working.
Home Working Policy	Under development	

8.2 Time off work to deal with unforeseen emergencies

Policy Title	Link to access the Policy	How it can help
Special leave policy and guidance	https://hduhb.nhs.wales/about-us/governance-arrangements/policies-and-written-control-documents/policies1/all-wales-special-leave-policy/	Support where time off work is needed in unforeseen circumstances and at short notice.

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8.3 Time off work to deal with planned requirements

Policy Title	Link to access the Policy	How it can help
Annual Leave policy	http://www.wales.nhs.uk/sitesplu/documents/862/111-Annualleavepolicy-v6.pdf	Confirms contractual entitlement to annual leave.
Leave purchase scheme	http://nww.working4us-hduhb.wales.nhs.uk/leave-purchase-scheme	Option to purchase up to 4 weeks unpaid leave pro rata where applicable (with no detrimental impact on pension).
Employment Break Scheme	http://www.wales.nhs.uk/sitesplu/documents/862/245-AllWalesEmploymentBreakSchemeV4.pdf	Option to request an extended unpaid period of absence from the workplace.
Parental Leave	http://www.wales.nhs.uk/sitesplu/documents/862/127%20-%20Ordinary%20Parental%20Leave%20Policy-v4.pdf	Option to request parental leave.

8.4 Time off work to attend Medical/Dental/Hospital Appointments

Policy Title	Link to access the Policy	How it can help
Time Off For Medical/Dental Appointments During Normal Working Hours Policy	http://www.wales.nhs.uk/sitesplu/documents/862/129-TimeOffforMedicalorDentalAppointmentsDuringNormalWorkingHours-18.6.pdf	Clarifies Health Board policy on time off needed to attend Medical/Dental/Hospital appointments in planned and emergency circumstances.

8.5 Managing Attendance

Policy Title	Link to access the Policy	How it can help
NHS Wales Managing Attendance at Work Policy	http://www.wales.nhs.uk/sitesplu/documents/862/768-ManagingAttendanceAtWorkPolicy-V1.pdf	Sets out the provision to support the health and wellbeing of employees in the workplace.

8.6 Bereavement

Policy Title	Link to access the Policy	How it can help
Bereavement Policy	Policy 931 (link to be inserted once approved)	Provides compassionate guidance on process and support following a bereavement.

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8.7 Occupational Health Services

The Occupational Health Service is an impartial, confidential service providing advice and guidance to both managers and staff. Occupational Health can offer help, advice and assessment on keeping well at work. This may be through access to leaflets, counselling or simply having a contact name that Carers know they can turn to if needed. Managers are also encouraged to contact Occupational Health so they can support staff with caring responsibilities.

Staff can refer themselves to Occupational Health by completing a self referral form and returning it to Occupational.health.hdd@wales.nhs.uk.

8.8 The Employee Assistance Programme (EAP)

Delivered by Care First, EAP is a confidential, bilingual service, which provides comprehensive advice, counselling, information and articles covering personal and work related issues; to help employees deal with a variety of issues such as wellbeing, family matters, relationships, debt management, workplace issues and much more.

This 24/7 service is in total confidence and offered free of charge to all Hywel Dda employees. Contact 0800 174319.

8.9 Staff Psychological Well-Being Services

The Staff Psychological Wellbeing Service is available to all Hywel Dda University Health Board employees. A range of services is available to promote organisational health and psychological wellbeing. This includes access to confidential one to one psychological support and counselling for any issue, work or home related. These appointments are offered by our team of professional counsellors and can be accessed on a video call, on the phone and face to face (when this is safe to do so). Telephone WHTN: 01720 2527, External: 01437 772527
E-mail Wellbeing.hdd@wales.nhs.uk.

8.10 Carers networks / Carer leads

The Health Board recognises the important role that staff networks can play as they provide an opportunity for staff to connect, socialise, support one another, and discuss issues of relevance to them in accordance with their shared characteristics and common experiences. Teams and departments participating in the Investors in Carers scheme also have identified Carer Leads who are local workplace champions and have a role in proactively identifying and supporting Carers. For information on carer networks and Carer leads, email the Strategic Partnership, Diversity and Inclusion Team for further information: CarersTeam.hdd@wales.nhs.uk

8.11 Access to facilities to make private telephone calls

The Health Board will provide reasonable access to a telephone where possible to enable the employee to check on the person that they are caring for, or to arrange appointments, if necessary in relation to urgent care needs. It would be seen as best practice that any requests to use the telephone be agreed in advance with the line manager. It is also recommended that

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where possible, an indication of the likely frequency of requirement be discussed, where the likelihood of frequent, regular or long-term use may be anticipated.

8.12 Support to return to work following a period of caring

Some employees may be going through a particularly distressing time and will need to be supported by their manager to return to the work place if their caring role comes to an end. During the employee's period of absence from the workplace the manager has a responsibility to ensure that they maintain contact with the employee to keep them informed of any workplace developments and other information the employee may need to ensure that they still feel part of the team. This will ensure that employees do not begin to feel isolated and will help to make the return to work easier. Many Carers may feel they have lost their skills and their self-confidence, this would be addressed by the Carer and the manager on or prior to their return to work. Training and development needs can be identified through the Health Board's PADR or one to one supervisory sessions.

8.13 Support with career development and progression opportunities

Carers are encouraged to discuss during one to one supervision and/or PADR any barriers they feel they may be facing in accessing training and development opportunities to support career development opportunities.

8.14 Carer's Passport

The purpose of the Carers Passport is to enable a Carer and their manager to hold a supportive conversation and document the flexibilities needed to support the Carer in combining their caring role and work. The aim is to minimise the need to re-negotiate these flexibilities every time an employee moves post, moves between departments or is assigned a new manager, although the passport does not guarantee that the previously agreed arrangements will remain in place. The Passport is designed to be a living document to be reviewed every year and in response to any changes in the nature or impact of the caring responsibilities.

Completion of the Carers Passport is voluntary and the employee retains ownership of the form. The Health Board recognises that employees may find it difficult to explain their personal circumstances, issues and challenges. Therefore, it is not a mandatory requirement. See Appendix 1 – Carer's Passport Guidance and Appendix 2 – Carers Passport Template.

8.15 Support externally

In addition to employment support, some Carers may need additional support from third sector or other support organisations to enable them to maintain their caring role. The Health Board jointly commissions information and advice services in each of our three counties and these services can be contacted on the details below.

Carmarthenshire Carers Information Service, 0300 0200 002.

Email: info@carmarthenshirecarers.org.uk Website: www.carmarthenshirecarers.org.uk

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Ceredigion Carers Service, 01545 574000. Email: contact-socservs@ceredigion.gov.uk
Website: www.ceredigion.gov.uk/carers

Pembrokeshire Carers Information and Support Service, 01437 611002. Email: pciss@hafal.org Website: www.hafal.org/crossroads

Further information on support available for staff internally and externally is available in a guide for staff see link <https://hduhb.nhs.wales/healthcare/services-and-teams/carers-information/carers-documents/info-for-staff-who-are-carers-update-10-september-2020/>

9. Responsibilities

Chief Executive

The Chief Executive holds overall responsibility for the effective management of organisational policies.

Director of Workforce & Organisational Development

The Director of Workforce & OD has responsibility for ensuring that all employment policies are developed in line with employment legislation and practice and are reviewed and updated as appropriate.

Line Manager

Managers have the responsibility to familiarise themselves with this Policy and to work within its parameters as follows:

- Ensure that employees are familiar with this policy and aware of the support that is available for Carers.
- Support employees to fulfil their potential in work and to meet their caring responsibilities.
- Give sympathetic consideration to requests for support from employees with caring responsibilities, with due regard to issues of confidentiality and based on a shared understanding of the situation and the impact it is having.
- Ensure reasonable adjustments are considered for employees who are Carers.
- Deal with requests in a confidential manner and only share information when the Carer has requested that this happens.
- Be aware of and adhere to relevant legislation and Health Board organisational policies.
- Be aware of and understand the range of options available to support leave and working hours.
- Support staff with completion of the Carers Passport in line with guidance provided.
- Operate the policy fairly and reasonably, considering the wellbeing of the employee and facilitating measures that enable them to feel valued and able to contribute to the workplace.

Employee's responsibilities

Employees are not obliged to disclose to their managers that they are caring for someone but are encouraged to do so in order to benefit from the support available from the Health Board. In this way the manager can work with the employee to ensure that, wherever possible, they can effectively balance their work and care commitments.

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In requesting any change to their working arrangements, either short or long term, the employee must:

- Be as open with their manager as they feel able about their caring responsibilities to enable them to provide appropriate support utilising the Carers Passport within the guidance provided.
- Work together with managers in exploring all viable options to remain effective workers to balance work and caring commitments.
- Communicate with colleagues and involve them where possible in decisions which may have an impact on their work.

Workforce and OD

- Provide support and guidance to managers on the application of this policy including the Management Passport.
- Support the employee with any redeployment options if available.
- Communicate policies / provisions for Carers to all levels and members of staff.
- Ensure that managers are trained and kept updated on this policy and the issues facing staff who may have caring responsibilities through management training offered by the Health Board.
- Monitor the use and effectiveness of the policy and review on a periodic basis with Carers.
- Ensure recruitment campaigns include promotion of support for staff who are unpaid Carers to encourage a diverse workforce.

10. Source of Evidence base and References

The source of our evidence base includes:

Juggling Work and Unpaid Care (2019), Carers UK

http://www.carersuk.org/images/News_and_campaigns/Juggling_work_and_unpaid_care_report_final_0119_WEB.pdf

Supporting Working Carers, The University of Sheffield, June 2020

http://circle.group.shef.ac.uk/wp-content/uploads/2020/06/8008-Supporting-working-carers_WEB-1.pdf

NHS Terms and Conditions of Service Handbook (considered in policy development)

Employers for Carers www.employersforcarers.org

Carers Trust www.carers.org

Carers UK www.carersuk.org

11. Useful links

Our Statement of Intent

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<https://hduhb.nhs.wales/about-us/governance-arrangements/policies-and-written-control-documents/policies-appendices1/statement-of-intent-supporting-our-staff-who-are-juggling-work-and-looking-after-a-family-member-or-friend-pdf-312kb/>

Staff Fact sheet <https://hduhb.nhs.wales/healthcare/services-and-teams/carers-information/carers-documents/info-for-staff-who-are-carers-update-10-september-2020/>

Carer Aware E Learning

NHS staff with access to ESR (Electronic Staff Record):

- Log into your ESR and go to your Learner Home page.
- Using the search function ensure the first box is showing “Course” and in the second box type 000%Wales%Carer and click go.
- You now have the option to choose to complete the course in English or Welsh. Click on the version you wish to enrol on and then “play” to go through the programme.
- When completed you have the option to please print your certificate.

12. Appendix 1 – Carers Passport Guidance for Managers

If a member of staff identifies themselves as a Carer, their manager should arrange a confidential one to one meeting to discuss the details. The meeting will give both parties the opportunity to discuss the issues and talk through the following questions, which are provided as guidance rather than an exhaustive list:

- What are your caring responsibilities?
- How do they affect your work?
- What impact does work have on your caring responsibilities?
- Do you already receive any support in work to help combine caring with work?
- Do you need to apply for flexible working to continue your caring responsibilities?
- How would you prefer to communicate with your manager if you are unable to come to work?
- What would help ensure that the needs of the team / Health Board continues to be met?
- Do you need any support from psychological wellbeing / occupational health or external organisations?
- How do you expect your caring responsibilities to change in the future?

It is up to the employees to decide how much information to share, it is important that employees give their manager enough information for them to understand the issues and challenges faced by the employee.

Any actions and a review date should be recorded on the Carers Passport, see Appendix 2. Employees will need to follow relevant Health Board procedures e.g. flexible working policy for formal requests. Employees who require support will be provided with guidance on the options available to them in line with Health Board policies. The manager will need to look at all options and seek, wherever possible and reasonable, to accommodate a long or short-term caring need. Each case needs to be reviewed on an individual basis.

If an employee moves department the Passport provides a framework for discussion with the new manager, but does not guarantee that the previously agreed arrangements will remain in place.

13. Appendix 2 – Carers Passport Template

Carers Passport

(to be completed by the employee)

Employee Name:

Name of Manager:

Overview of your caring responsibilities

This section should include:

- A summary of your caring responsibilities
- The impact this has on your working life
- Any further information that may help your manager understand the impact your caring responsibilities have on you and your work

Overview of your role and team:

Flexibilities which would be helpful:

This section deals with flexibilities specific to your current job which would help you combine caring and work. These are intended to inform your discussion with your manager.

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Flexibilities agreed between you and your manager:

This section deals with flexibilities specific to your current job which would help you combine your caring responsibilities and work commitments. Set out agreed actions with dates for implementation. Reviews should take place every 12 months.

Action Agreed	Date of Implementation	Date to Review Action

Any other actions agreed at the meeting:

This section might include for example contacting the Occupational Health Team, Staff Psychological Services or Employee Counselling Service, Carers Assessment or Signposting Services.

I consent to my manager keeping a copy of the passport.
It is important to remember that the passport belongs to the employee involved and is confidential. Should the manager or employee move to another post, the manager should not pass the form to the next manager without permission of the employee concerned.
Only with the employee's consent should a copy be saved in the employee's file.

Employee Signature:	Date:
Manager Signature:	Date:
Date of Next Review Meeting:	