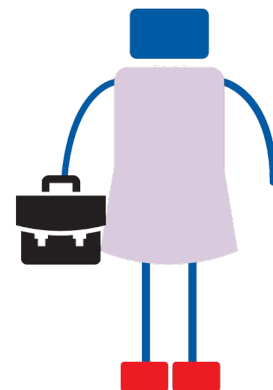


Carer Passport guide:

Employment



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Employment

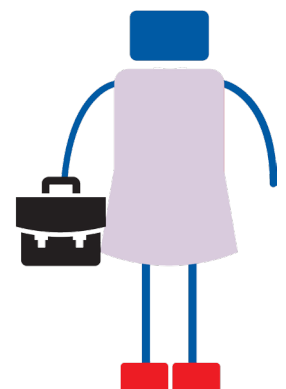
1. Key facts about carers



- Around three million people in the UK combine work with unpaid caring responsibilities, including two million who work full-time and one million part-time. (Census, 2011)
- While part-time working is much more common amongst carers than non-carers, carers are also more likely to stop working altogether as they struggle to switch to part-time hours. Over two million people have given up work at some point to care for loved ones, and three million have reduced working hours. (Caring and Family Finances Inquiry, Carers UK, 2014)
- The majority of carers are of working age and the peak age for caring (50–64) often coincides with the peak of an individual's career. One in five people in this age bracket are carers, including one in four women and one in six men. (Census, 2011)
- The number of working age carers is set to increase as our population and workforce ages, with an estimated 40% rise in the number of carers needed by 2037, meaning the carer population in the UK will reach 9 million. (It Could Be You, Carers UK, 2001)
- Younger carers in work aged 20–21 are more likely to be in lower skilled occupations than their peers. (Hidden from View: The experiences of young carers in England, Children's Society, 2013)
- Out of a sample group of 77 carers, 32 young adult carers in work informed their managers of their caring role. Just under half of these reported that their managers were not supportive. (Young Adult Carers and Employment, Sempik and Becker, Carers Trust, 2014).

3million

Around three million people in the UK combine work with unpaid caring responsibilities





2. What is a Carer Passport in employment?

Today, one in nine people in any workplace are juggling work with caring for older, ill or disabled loved ones.

While employers in England are starting to realise the impact of caring on their own employees and their business, only a few are currently providing a Carer Passport as part of a wider package to identify and support carers and ultimately avoid losing carers from their workforce.

Many carers worry about their ability to continue to do their job for their employer, about the impact which caring has on them on a daily basis and on their career prospects. One explains, 'My employer is very supportive and subscribes to fair employment, but there have been times when I have had to let them down. Records of my attendance reflect on my employment history'.

Many carers have had to leave work altogether because of their caring role, with some being forced to choose between work and caring – and choosing to care for a parent to ensure that they have what they need. If their employer can support them and not view with suspicion the need to occasionally leave work early if they are called as the first point of contact in an emergency, then work can offer respite from their caring role. With support, it's something they are keen to continue to do.

A tool such as a Carer Passport can help to create a supportive working culture where staff feel that they have 'permission' to talk about their circumstances in a safe environment. It can also help communicate existing workplace support for carers and encourage managers to apply policies more consistently across the organisation.

A Carer Passport in an employment setting is essentially a conversation about the flexibility needed to combine work and care. This conversation involves balancing the needs of the individual with the needs of the business, within existing company policies.

The Carer Passport also provides a straightforward way to document flexibility and support so it can be carried into an employee's future roles, without having to repeat the same conversations.

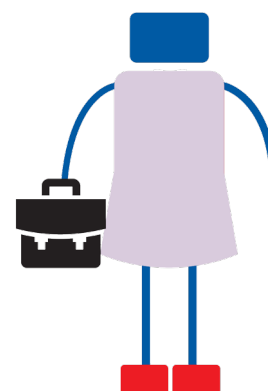
Consistency

One of the key issues for carer support in the workplace is that policies and provisions, where they do exist, are not always promoted to line managers and staff, or understood or applied consistently. This can have a particular impact when a staff member moves to a different team, or when a line manager changes.

Carers often report that having to explain their caring situation several times and/or to different people can make an often difficult situation even more challenging. A change of line manager can also make all the difference between a situation where carers feel supported to combine work and caring with one where they feel isolated,



My employer is very supportive and subscribes to fair employment, but there have been times when I have had to let them down. Records of my attendance reflect on my employment history



unsupported and potentially at risk of having to reduce hours or leave work.

Communication

We know that many carers struggle to communicate their caring role to their colleagues and line manager. They fear a negative response, worry about the person they care for being judged, and that they will miss out on promotions. They report low levels of awareness about caring, feeling unsure when they can talk about their caring role and any adjustments that may need to be made. If their employer cannot give them any flexibility to cope with the unpredictable nature of caring, they can feel unable to continue in their job.

Awareness

Carers report being unaware of their rights to request flexible working, or lack the confidence to approach the topic. They may face the daily pressure of needing to maintain a reasonable level of contact with the person they care for, but find this difficult to agree with their employer.

Carers may struggle to find out about a carers policy in the workplace, or indeed there may not be one. This can result in an employment history which has a number of short-term roles. For younger adult carers, there can be the added challenge of not being familiar with the world of work, how workplaces function and what workplace policies exist, and what they have to offer. If they receive careers advice, they may find themselves encouraged to enter low-paid 'caring professions' with little acknowledgement of the wider skills and knowledge they have developed as a carer.

The format of the Passport itself, and the approaches taken to its use, should enable supportive communications between employer and employee. This is a proactive activity which acknowledges the impact of caring and promotes understanding, not just a reactive activity which responds to crisis. The document itself should be designed in an engaging, user-friendly way.

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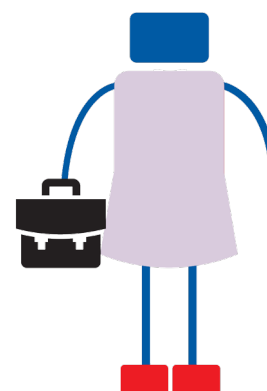
3. What examples are there?



The work of Employers for Carers highlights a number of models already in place within workplaces or currently being established.

One of the earliest models of a Carer Passport was developed by The Charity for Civil Servants to support all Civil Service employees in the workplace. The Charity has worked with many government departments to introduce it to senior and middle managers and since 2010 it has benefited thousands of employees.

A survey by the Charity in 2013 reported major improvements in wellbeing following the issue of a Carer Passport, such as reduced stress levels. In a follow-up survey in May 2017 of 848 people who had received a Carer Passport, in a 20% response rate (167), 65% reported their stress levels before receipt of the Passport as quite or very high,



reducing to 24% after receipt.

The Charity for Civil Servants feels that their impartial stance encourages people to apply. Part of the value is in the carer taking time to reflect on how their situation impacts their working life.

For current, former and retired civil servants, the Charity has developed a new initiative, the Carer's Statement. This sets out the carer's responsibilities outside the workplace, and is used to communicate to health and social care professionals the need for access to support and services, for example a GP diagnosis, a Care Needs Assessment or a Carer's Assessment.

Another early model was developed by BT, whose Carer Passport can be completed by any BT employee who has caring responsibilities which they believe could have an impact on their ability to work currently or in the future. It is supported by a factsheet produced by the Communication Workers Union.

Business in the Community (BITC) in Northern Ireland developed a model Carer Passport which has been used by a number of different employers.

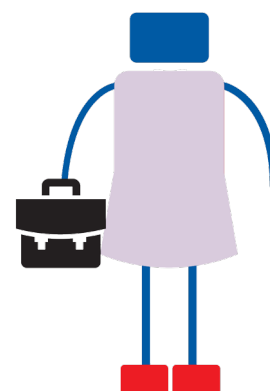
The Department for Transport (DfT) offers the Charity for Civil Servants' Carer Passport to its employees, reporting that staff turnover has been reduced from 11.1% to 9.3% due to the retention of older workers. The Passport allows employees to leave their workplace to carry out urgent caring responsibilities without the need to take annual leave and sick days. The Department reports that its policies around carers have significantly improved unplanned absenteeism.

Examples of Passports can also be found in several sectors, for example in national and local government, NHS Trusts and other health service providers, the police force, the voluntary sector, carers associations, and in the private sector. The Financial Ombudsman Service and Age UK are further examples of organisations which are developing policy and practice in this area.

These existing models are often presented as largely a communication tool, enabling an informal conversation between employee and employer. They may bring caring onto a manager's radar for the first time. The Passport allows the employee to explain their circumstances in their own words, the difficulties they experience, and any help they may require in the workplace. It provides the opportunity to share information about the individual's caring responsibilities, and to record any actions or adjustments agreed between carer and line manager. When an employee is suddenly thrown into a caring role, it can help people to find short-term solutions.

In some workplaces which are already using a Carer Passport, this is a more formal arrangement and there is a clear framework in place, overseen by the HR department. However, the employee is under no obligation to share information about their caring responsibilities, or for these to be formally recorded on their personal file.

Where this does take place, employer and employee may begin with an informal conversation, but there is a formal record of what has been agreed and this will be regularly reviewed if circumstances change. It seeks to be a robust system for employees already using it, and encouraging others to engage. However, some Passports make it explicit that they are not a legally binding or mandatory document. It is a 'statement of caring



circumstances and needs', but provides no guarantees.

One employer describes their policy document as 'a prompt' for carers and line managers to consider appropriate support, leading to specific conversations with individuals about what is best for their particular situations. The policy states that the senior management team and Board of Trustees are committed to supporting and championing it. Directors, heads of department and managers are responsible for ensuring that a culture of openness and support for carers is fostered and maintained, giving staff confidence that support will be provided wherever possible.

Line managers are seen to have a key role in creating a carer friendly culture, through developing an open and respectful relationship, and maintaining ongoing dialogue about the employee's caring circumstances and any changes to them. They can then maintain their caring responsibilities alongside their work commitments.

Where models are in place and working effectively, employers and employees recognise that they both benefit. The employee has been given 'permission' to talk about their caring role, and the result is an improved working relationship.

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The Passport has made a difficult conversation with managers easier, it has allowed me to be honest and start to talk about what I needed as a carer and employee
”**

4. What difference does it make?



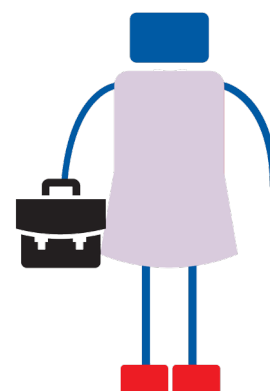
To carers?

'The Passport has made a difficult conversation with managers easier, it has allowed me to be honest and start to talk about what I needed as a carer and employee.'

To employers?

'If carers are willing to share information about their personal circumstances, the employer is on the road to becoming a high trust organisation with a good workplace culture. It's about valuing your workforce.' (Rachael Saunders, Age at Work Director, Business In The Community)

'Caring is a growing issue in the workplace and the business case for supporting employees who are juggling work and care is becoming ever more apparent. We know that several employers successfully use a Carer Passport to help as part of an overall support package for carers which counts towards improving health and well-being and employee resilience, productivity and retention.' Katherine Wilson, Head of Employers for Carers





5. Introducing a Carer Passport in employment

The benefits and business case

Employers currently using a Carer Passport scheme report the benefits of having a practical tool which values and recognises people. BITC describes the importance of clearly demonstrating support for carers, being open to making relatively small adjustments, and the loyalty which employers win back through this approach. Where a constructive conversation is held between employee and line manager, this is simply an efficient way of doing things. It avoids the pitfalls of delaying the conversation until a situation reaches crisis point, or multiple conversations being held with different managers. It makes business sense.

The introduction of a Carer Passport within the workplace may be integrated with wider initiatives around embracing the opportunities and challenges of an ageing workforce, and extending working life. It may link in to employee assistance programmes and initiatives around emotional resilience and wellbeing, and offer additional support if required through these routes. Thus, it reflects a wider cross-organisational approach to valuing the workforce. As such, if it is promoted at the highest levels within an organisation, this sends a clear message about its importance. As above, the Department for Transport, reports that its Carer Passport has contributed to reduction in staff turnover from 11.1% to 9.3% due to the retention of older workers.

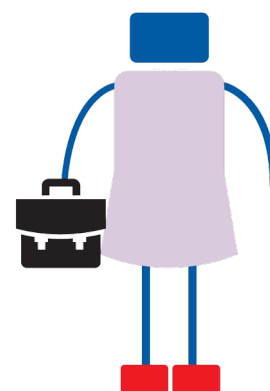
The establishment of good practice around the use of a Passport can also help to ensure that workplaces are not detrimentally affected by the reality of caring within their workforce, but that the employer has the opportunity to agree any working adjustments for an employee, resulting in no impact on essential business operations. Centrica plc has measured the benefits of a wider policy of supporting carers and found that £4.5 million was saved from reduced absenteeism and £2 million through retention costs.”

Seen overall, the scheme provides an opportunity to retain skills and knowledge within the workforce. It can help avoid the recruitment and other costs associated with high staff turnover and staff absence. Many employers now welcome the scheme. They see that it has an important part to play in maintaining team productivity and workplace stability.

Elements of success

The Carer Passport should be user-friendly and simple in content, minimising the number of personal questions asked. There should be an implicit (or even explicit) acknowledgement that some individuals will find it difficult to talk to their manager about personal issues, such as caring responsibilities. The use of a Passport can be a positive way of helping this discussion.

The employee usually controls the information recorded within the Passport, including the amount of personal information given. The Passport is a ‘living document’ which can be reviewed and amended



if the employee's caring responsibilities - and the impact these have upon them - changes. Even without changes to caring responsibilities, the Passport arrangements are usually reviewed on a regular basis (eg. through 1:1 meetings with the line manager).

The Passport also 'stays with' the employee so that, even if they move departments or their role changes, it remains in place. Any new line manager will be made aware of the Passport (if the employee wishes them to), and of the employee's caring responsibilities and any agreements which have been made. They are then immediately aware of the employee's situation, avoiding the need for it to be explained again, and can provide reassurances from the start of the working relationship.

The Passport prompts a conversation which the employee may find challenging and upsetting, but with the expressed intention of providing understanding and support. Its contents are confidential and treated accordingly. The employee and line manager both hold a copy, and a copy is usually kept in the employee's personal file within the HR department (though in some workplaces, it is simply held by employee and line manager). In the case of one major employer, for example, no one else has access to the contents – and, indeed, no one else is aware of who has a Passport.

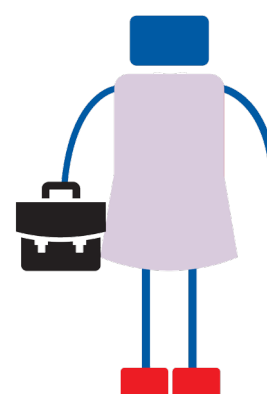
Models are often developed with the support of a Staff Carers Group or similar body. This means that those in caring roles are central to this process and can help design ways of working which are effective for - and sensitive to - the needs of carers. For many employees, revealing information about their caring role may be something they don't want to do. Employers should try to communicate from the start that this can have benefits for them, and can reduce the pressure to feel they have to cope alone.

Any challenges

If the Passport is kept as an informal document between employee and line manager, and not held or acknowledged elsewhere, this can weaken its potential. At times, there may be an organisational reluctance from the start and suspicions about what it represents – and about whether it is a change to the employee's contract or a request for flexible working. These concerns need answering, so as not to undermine the success of the initiative.

Employees do not always want to identify themselves as a carer, and they may fear it becoming a label. Many carers explain, understandably, that they want to be known for what they do in their job – and not known primarily as a carer. They may fear a 'glass ceiling' for those with caring responsibilities. The way in which the Passport is used within the workplace needs to respond to this valid concern by respecting the employee's wishes, and by offering a level of protection to choose the way in which they 'present' (or don't) their role as carer to colleagues.

Where workplaces have established a wider culture which is relatively inflexible, and quite formal in the management of staff (with managers perhaps having limited capacity to agree flexibility), the scheme can sit



less comfortably. However, that said, it can provide a mechanism for increased flexibility. Where there is more flexibility anyway, the scheme easily fits into conversations which are already happening, and perhaps even a wider approach to carers. This dynamic needs to be considered, as the scheme alone cannot provide a 'fix all' if it is done in isolation.

The Carer Passport can be difficult to organise internally, particularly when its status is unclear and it sits outside the HR department. Carers sometimes raise concerns about the informal status of Passports within their workplace, with one carer describing that 'in my organisation, managers seemed free to pay attention to it or not'. An adhoc approach can also result in unclear guidance around the paperwork to support it (eg. for one carer, their Passport was simply a copy of their application form, with no follow-on conversations held or support offered).

To be successful, the Passport needs its internal champions from across the workplace and ideally at the most senior level. This applies in other sectors too, where for example a senior clinician acting as champion on a hospital board can make all the difference. Within the workplace, there is a huge part to be played by senior level sponsorship and case studies to illustrate newly emerging practices. Whether this reflects a championing of carers more widely, or simply a championing of the Passport tool, advances are being made. The issue is given visibility and a mechanism. Managers need to be ready to follow through, responding to staff who respond to the raised profile of the initiative but currently feel unsupported.

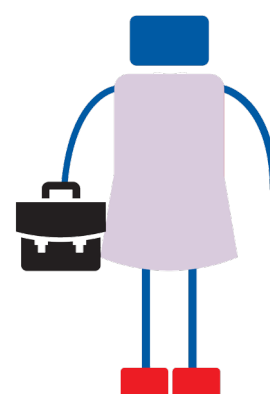
Promoting the Carer Passport in the workplace

The take-up of the Carer Passport by an employee is a voluntary process, which can be suggested by employee or employer. To have visibility and be known as an option across the workplace, it requires strong internal promotion.

The Passport should be championed by senior management and, in larger organisations, by departmental heads, the HR department, and the Staff Carers Group if there is one. Existing communications mechanisms (eg. the internal intranet, departmental noticeboards, staff briefing sessions) should be utilised. Where there are senior staff or Trustees who are carers, and who are willing to identify themselves as such, this can make a huge difference for other employees who fear the stigma of being seen as a carer.

The Passport can be promoted during all stages of the employee's journey within the organisation. While there seems to be little existing evidence of it being directly mentioned as part of an induction programme for new staff, there is clear potential for this. It can help to normalise the initiative. Also, where staff move within an organisation due to promotion, change of role or restructuring, the Passport can sit within a checklist for the transition – and there are examples of this already happening. Again, it leads to normalisation and these working practices becoming embedded across all departments.

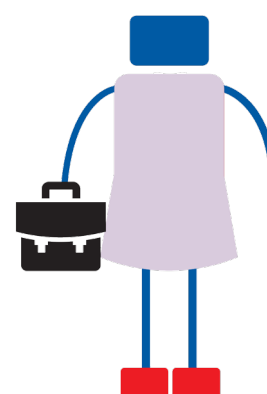
Other employees who are in caring roles can play an enormous part in promoting the scheme. Their knowledge and insights can be a real asset, and their involvement in the development of policy and practice around the Passport is highly recommended. They can play a significant part in helping to build employee confidence in the initiative.



Going ahead

[For Going Ahead section throughout, please assume a double-page, ideally with 'Going ahead' copy on LH side and 'Resources and templates' on RH side. Not a disaster if it's not a spread, but ideally would be.

- Be informed by the expertise and insights of carers when developing this initiative, as the concept is one which clearly resonates with them.
- Clarify the status of the Carer Passport within the workplace, including whether it is a formal or informal arrangement.
- Generate a Carer Friendly environment within the workplace, one in which employees are able to identify themselves as carers and ask for support, and line managers are able to provide it.
- Acknowledge that not all employees will want to identify themselves as carers, and it will take time to build confidence around these policies and practices.
- Provide guidance on how the completion of personal information in the Passport should take place in a reassuring and supportive environment which respects confidentiality, and supports managers to be equipped for this.
- Use the Passport to link in to other forms of support, including Employee Assistance Plans, and trusted sources of information and advice.
- Recognise the experiences of younger carers in the workplace, who often struggle to build an employment history because of the pressures upon them and need more support to acknowledge the skills they have developed as a carer.
- Ensure that the Passport is championed by management and at the most senior levels of the organisation (for example, by having a Carer Lead in place at Director or Trustee level).
- Provide a supportive environment to encourage any senior staff, Board members or Trustees with caring responsibilities to consider identifying themselves, thus increasing visibility and sending the message that caring can affect any of us in the workplace.
- Ensure the Passport's visibility, using all internal communications tools (including the intranet and newsletters) to encourage staff to understand the issues involved and to motivate carers to identify themselves.
- Promote the existence of the Passport at all stages of the employee's journey - from the day they start, when it can be introduced as part of the induction programme and appear on the induction checklist.
- Consider recording the number of carers in the organisation and where they are located, helping to engage more effectively - while acknowledging that not all employees with caring responsibilities will wish to recognise themselves as carers, and that some will come in and out of caring situations. Hold all such information in confidence.



- With agreement from employees, record further information around carers' interest in training and other opportunities, and their willingness to provide guidance to others. Again, hold all such information in confidence.

Resources and templates

- [Template Carer Passport log >>>](#)
- [Leaflet to explain the scheme >>>](#)
- [Poster to promote the scheme >>>](#)
- [Sample letter from Director >>>](#)
- [Going Ahead summary >>>](#)

