

Reference Number: UHB 485 Version Number: 1a	Date of Next Review: 23 September 2023
SUPPORTING CARER'S GUIDELINES	
Introduction and Aim	
We are committed to improving the health and wellbeing of our employees by providing flexible arrangements to meet the needs of staff with caring responsibilities, where possible, whilst maintaining the standard of service and consistency of patient care. Cardiff and Vale University Health Board (the UHB) recognise that employees with caring responsibilities may require short term arrangements for either child or dependent care, or for longer term requirements have the 'right to request' flexible working arrangements. We understand and acknowledge that caring responsibilities may potentially impact on a member of staff's ability to do their job. The organisation will work within the principles contained in these guidelines, and other associated policies to ensure that staff are not unfairly disadvantaged by such responsibilities and are able to successfully combine their work and caring responsibilities. The organisation values each individual and strives to retain staff and accommodate where possible their changing circumstances whilst balancing the needs of the service. Supporting staff to achieve a positive work/ life balance with caring responsibilities can be beneficial as staff are likely to feel more valued, thus be more productive and satisfied at work. These guidelines set out a range of short and long term options available to staff through agreement with their line manager. Application of these guidelines will be in accordance with the principles of the Health Board's Equality, Inclusion & Human Rights Policy, Special Leave Policy and Flexible Working Procedure.	
Objectives	
• To ensure there is an agreed process to support staff with caring responsibilities and helping them manage a healthy work-life balance. • To ensure that staff are aware of options available to support them with caring responsibilities. • To ensure that managers are aware of, and understand their responsibilities in responding to staff who have caring responsibilities. • Ensure there is consistency, fairness and transparency with support offered to carers.	
Scope	
These guidelines apply to all employees of the Health Board who have caring responsibilities.	

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Equality and Health Impact Assessment	These Guidelines are covered by the Adaptable Workforce Policy EHIA – this found there to be a positive impact
Documents to read alongside this Procedure	Adaptable Workforce Policy Annual Leave Procedure Equality, Inclusivity & Human Rights Policy Flexible Working Procedure Managing Attendance at Work Policy Occasional Home / Mobile Working Policy Parental Leave Procedure Special Leave Policy
Accountable Executive or Clinical Board Director	Executive Director of People and Culture
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<u>Disclaimer</u> If the review date of this document has passed please ensure that the version you are using is the most up to date either by contacting the document author or the Governance Directorate.	

Summary of reviews/amendments			
Version Number	Date Review Approved	Date Published	Summary of Amendments
1	26 Jan 2021	8 Feb 2021	New Guidelines
1a	23 Sept 2021	9 Nov 2021	Accountable Executive updated to Executive Director of People and Culture Rolled forward for 2 years with no further changes

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1	Definition
	According to The Work and Families Act 2006 the definition of a Carer is an employee who is or expects to be caring for an adult who: -Is married to, or the partner or civil partner of the employee; or -is a near relative of the employee; or -falls into neither category but lives at the same address as the employee. -The "near relative" definition includes parents, parents in law, adult child (a son or daughter who has reached the age of majority), adopted adult a child, siblings (including those who are in-laws), uncles, aunts or grandparents and step relatives. -Childcare covers a range of care choices from children from birth up to the age of 14 years and with a child with disabilities up to the age of 18. This applies to a person caring for a child who has additional needs or require caring responsibilities. -For the purposes of these guidelines a carer will be regarded as an individual that provides help and support to a child, partner, relative or friend (as outlined above) on a regular basis. The dependant individual would not be able to manage without the help that is provided because of physical or mental fragility, illness, vulnerability or disability.
2	Responsibilities
	Line Managers are responsible for: -Recognising that caring responsibilities can be unpredictable and that the need to care can sometimes arise unexpectedly as a result, for example, of sudden illness or incident / accident. Where possible the line manager should respond to these requests at short notice with flexibility and understanding -Producing a carers support plan with the member of staff and review the plan with them regularly. -Knowing their staff and being aware of the staff with caring responsibilities in their department that have been discussed or disclosed to them and knowing the needs of the member of staff to assist them with their caring responsibilities (enable them to be a carer.) Some staff undertaking a carer's role may not recognise this as a role, as it may often be a function of a personal, social or family relationship. -Treating staff within their department with caring responsibilities fairly. Carers may sometimes be reluctant to acknowledge their caring responsibilities, for fear of discrimination against them.

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-It is important that caring responsibilities are discussed in confidence and that line managers are sensitive towards each individual case and ensure that staff are not discriminated against on the ground of their caring responsibilities.

-Signposting staff with caring responsibilities in their team to resources offered by the department, Employee Assistance Programmes, Patient Experience Team's Carer Support, Workshops available outside the organisation and our services within Occupational Health Services and Employee Wellbeing

-Managers should ensure information on carers rights, such as the right to a Carers Assessment, are displayed in appropriate staff areas so that staff are signposted to the Health Boards Information and Support Centres.

-Providing and allowing access to a telephone to make appropriate calls in confidence whilst in work, to check on the person they are caring for when required

-Providing staff with caring responsibilities advance notice if they are required to attend training, meetings or work outside their usual shift pattern, so that alternative care arrangements can be made.

-Respond positively to flexible working requests and be responsible for assisting staff to explore options of what may be appropriate for their situation. A flexible approach to accommodating appointments can be made to avoid the member of staff utilising a greater amount of their annual leave because of their caring responsibilities.

-Taking a positive and flexible approach with staff with caring responsibilities during any organisational change process and recognise that carer's may not be able to work particular shifts due to caring responsibilities.

-Requests for flexible working may be required on a short term basis to maintain their attendance in work. Tailored adjustments as part of the Managing Attendance at Work Policy may also be considered to ensure support is provided and retain the member of staff in work.

Staff with caring responsibilities are responsible for:

-Informing their line manager of any caring responsibilities they have for someone. The manager may then be in position to offer support to the member of staff, whilst balancing the needs of the service. A carers support plan will be compiled in partnership with their line manager detailing the adjustments made and the plan should be reviewed regularly.

-Updating their line manager of any change with their caring responsibilities.

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	-Ensuring that they have care arrangements in place to fulfil their contractual duty of attending work. However, there may be occasions when emergency time off is requested to care for dependants. Workforce & OD is responsible for: -Signposting line managers and staff with caring responsibilities to relevant resources and support that are available to help carers via Occupational Health Department and Employee Wellbeing website ie Managing Health & Wellbeing staff checklist, as well as the Patient Experience Team Carer Support. -Supporting the line manager in considering flexible working requests from staff with caring responsibilities. Trade Unions Responsibility -To signpost line managers and staff with caring responsibilities resources and support that are available to help carers within the Health Board or Trade Union membership. -Support staff with exploring appropriate options to accommodate their work commitments and caring responsibilities, in particular if requests are made to their line manager's with short notice for emergency situations. -Support members during meetings to discuss their carers support plan with their manager.
3	Principles
	The Guidelines seek to ensure the following principles: -Two way communication between the line manager and staff if they are caring for a dependant, so that appropriate support can be offered and discussed. This may be difficult to predict in advance. -The manager and member of staff discuss and agree a carer's support plan to document the communication and arrangements agreed. The caring responsibilities may vary at different times. -Carers are covered under the Equality Act 2010 under "disability by association", and "disability discrimination". The equality act protects carers from being treated unfairly due to their association to the person they care for, Staff who are carers should be treated fairly and not discriminated against because of their responsibilities as a carer or because of the individual they care for. -Requests for staff with caring responsibilities for flexible working arrangements, emergency annual leave or unpaid leave are considered promptly, on an

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	individual basis and in confidence. A positive and flexible approach should be taken to consider cases received from carers.
	Types of Support
	Dealing with stress is one of the key issues for staff who are carers. It is difficult to find time to 'switch off'. The overall impact of stress can be detrimental to all parties, From the carers themselves to the person they are caring for, any other dependants they may have, as well as for the organisation and the services it provides. It is therefore crucial that the organisation supports each member of staff to its best ability and one of the key areas is recognising the signs of stress and putting workable solutions in place. 1. Supporting Policies 1) Carers Support Plan The line manager and member should complete a carer's support plan which will document the agreed arrangements that are put in place to support and accommodate the caring responsibilities held by the member of staff that may impact their working arrangement. The carer's support plan will enable both the line manager and member of staff to make a formal agreement of change in hours, duties and reporting arrangements that are reviewed on a regular basis. 2) Workplace Adjustments that can be made for carers: - Access to a telephone whilst in work, for communication required for their caring responsibilities. -Positive and flexible approach to responding to annual leave requests at short notice. -Flexible and positive approach from management to accommodating adjustments requested and agreed on a carers care plan. 3) Options of Leave Available to carers: -Special Leave Staff with caring responsibilities can apply to their line manager for special leave for emergency situations. These are situations where an unexpected or sudden problem has occurred concerning a dependent. -Flexible Work Procedure Staff who have worked for the UHB for a minimum of 26 weeks can apply to work flexibly on a short or long term basis. Only one request for flexible working can be made in a 12 month period: -Part time working, staff can apply to reduce their contracted hours to less than the full time hours (37.5). -Compressed Hours, staff can apply to work their normal hours of work over a shorter period of time.

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-Flexitime, staff can apply to have more discretion over the start and finish times of their working day, based around core hours.
 -Temporary Reduction in Hours, staff can apply to reduce their hours by 5-50% for a period of no less than 3 months and no more than one year.
 -Annualised Hours, staff can apply to work their contracted hours over a year, rather than a number of weeks.
 -Term-time Working, staff can apply to work during the school term and is off during the school holidays. The salary is paid in 12 equal monthly instalments,

-Parental Leave

Staff who have nominated caring responsibility for children under age 18 are eligible to apply for parental leave. An employee is entitled to 18 weeks unpaid parental leave per child up until the child or adopted child's 18th Birthday, 4 weeks is the limit an employee can take for each child per year.

-Annual Leave Procedure

Staff with caring responsibilities can request emergency annual leave at short notice.

- Annual Leave Purchase Scheme

The Annual Leave Purchase Scheme means that staff can apply to 'buy' up to two weeks additional Annual Leave and spread the reductions in their salary over a 3, 6, or 12 month period.

-Managing Attendance at Work Policy

A proactive approach is taken by management to assist staff to remain in work and care for their wellbeing. Tailored adjustments / Reasonable adjustments can be arranged with management to support staff with caring responsibilities to remain in work, whilst managing other commitments over short period of time and return work at earliest opportunities where possible.

4)Other Support available for carers:

-Mental Wellbeing Resources. The Health Board promotes a healthy and supportive working environment. Staff can access internal and local courses, workshops and services, leaflets including self help tips for managing stress, counselling and mindfulness via the Health Board's webpage.

-Physical Wellbeing Resources. Recognising the importance of physical wellbeing, benefits to individuals of being active can include helping with better sleep, managing weight, reduce the physical and mental affects of stress and reduce the risk of medical conditions. Access to resources that are available to staff including leisure centres, gyms can be found on the Health Board webpage.

-Patient Experience Team's Carer Support. Access up to date advice and information is a vital way to ensure carers are aware of their rights and the support available to them locally. The Patient Experience Team is able to provide carers with the relevant information based in the individuals need, helping to reduce the possibility of a carer reaching breaking point.

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	-Support Services within the Health Board, Leaflets and workshops can be accessed directly via the Health Board website. Occupational Health Department, Employee Wellbeing Services are available for staff whose health may have an effect on their ability to work. Discussion with your line manager will be able to assist or for access to the Employee Wellbeing service contact the service directly via Health Board webpage
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Appendix 1

Carers Support Plan

The Carers Support Plan should to be used alongside the Supporting Carers Guidelines to document actions / arrangements agreed and discussed with management to support staff with caring responsibilities.

Name of Member of Staff:	
Department:	
Line Manager:	
Union Representative (if applicable):	
Date of Meeting:	
Details of caring responsibilities (Briefly describe situation and its impact):	
Details of Support offered: (i.e Carers Assessment details/EWS/Patient Experience Number)	
Agreed arrangements between member of staff and line manager to support member of staff (short and long term arrangements to be included):	
Additional Information:	

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Timescale for reviewing Carers Support Plan	Please circle as appropriate Weekly Monthly 3 Month 6 Month Other
Agreed and signed by Member of staff: Line Manager:	

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Appendix 2 - Helpful ideas and Organisations

Below is a list of the main organisations, which can provide help and assistance. However, there will be many local facilities in your area that can also help.

Contact your local Social Services Department which will have a list of local organisations, as well as being able to provide you with an up-to-date list of local care homes and respite facilities.

It is also important that all carers ask for a "Carer's Assessment", including young carers. Your Social Services Department will carry out the assessment.

These organisations can help with form filling and benefits advice, as well as advise you of your rights around employment and training.

Carers Wales River House Ynysbridge Court Cardiff CF15 9SS Tel no: 029 20811370 Fax: 029 20811575 info@carerswales.org www.carerswales.org	Age Concern & Help the Aged in Wales Ty John Pathy 13/14 Neptune Court Vanguard Way Cardiff CF24 5PJ Tel: 029 2043 1555 http://www.accymru.org.uk/	Care & Repair Cymru Norbury House Norbury Road Fairwater Cardiff CF5 3AS Tel: 029 2057 6286 http://www.careandrepair.org.uk/
Hafal Suite C2 William Knox House Britannic Way Llandarcy Neath SA10 6EL Tel: 01792 816 600 http://www.hafal.org/	Christian Lewis Trust 62 Walter Road Swansea SA1 4PT Tel: 01792 480500 Fax: 01792 480700 http://www.christianlewistrust.co.uk/	Crossroads Wales 3 rd Floor 33-35 Cathedral Road Cardiff CF11 9HB Tel no: 029 20090087 Fax no: 02920228859
All Wales Forum of Parents & Carers The Old House Fedw Hir Llwydcoed Aberdare CF44 0DX Tel: 01685 886558	Alzheimer's Society 3 rd Floor Baltic House Mount Stuart Square Cardiff CF10 5FH Tel: 029 2048 0593 http://www.alzheimers.org.uk/	Learning Disability Wales 41 Lambourne Crescent Llanishen Cardiff CF14 5GG Tel: 029 2068 1160 http://www.learningdisabilitywales.org.uk/
Multiple Sclerosis Society Wales Temple Court	Contact a Family Wales 33 –35 Cathedral Road Cardiff	Princess Royal Trust for Carers Victoria House

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Cathedral Road Cardiff CF11 9HA Tel: 029 2078 6676 Fax: 029 2078 6677 http://www.mssociety.org.uk/wales/index.html	CF11 9HB Tel: 029 2039 6624 Fax: 029 2039 6625 wales.office@cafamilly.org.uk http://www.cafamily.org.uk/inyourarea/wales/index.html	250 Cowbridge Road East Canton Cardiff CF5 1GZ Tel: 07725416031 Tel: 02920 221788 http://www.carers.org/
www.direct.gov.uk/carers Government website for the latest information and services.	Counsel and Care Tel no: 0845 3007585 advice@counselandcare.org.uk www.counselandcare.org.uk	Community Legal Services Direct Tel no: 0845 3454345 www.clsdirect.org.uk
Parkinsons Disease Society Maritime Offices Woodland Terrace Maesycloed Pontypridd CF37 1DZ Tel: 0844 225 3715 http://www.parkinsons.org.uk/	The Stroke Association Greenmeadow Springs Business Park Unit 8 Cae Gwyrdd Tongwynlais Cardiff CF15 7AD Tel: 029 2052 4400 Fax: 029 2061 5863 http://www.stroke.org.uk/	SNAP Cymru 10 Coopers Yard Curran Road Cardiff CF10 5NB Tel: 029 2038 8776 http://www.snapcymru.org/
Carers Line Tel no : 0808 808777 (Wed & Thurs 10-12 & 2-4) www.carersuk.org	Visit your local Citizens Advice Bureau www.adviceguide.org.uk	Working Families 0800 0130313 www.workingfamilies.org.uk

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Appendix 3 - Main Legislative/Policy Developments affecting Carers in Wales since 1995

Development	Key change for Carers* column highlights selected provisions and does not aim to summarise all aspects of the development indicated
Carers (Recognition and Services) Act (1995)	Introduced the concept of a Carers Assessment
Carers Strategy in Wales: Implementation Plan 1 (2000) Policy document	Stressed that enabling carers to combine work and care was a priority for Government, in line with the UK National Strategy issued in 1999.
Employment Relations Act (1999)	Gave employees the right to 'reasonable time off' to deal with emergencies
Carers and Disabled Children Act (2000)	Gave carers the right to an assessment (carers of adults and disabled children). Allowed carers to receive services in their own right and introduced direct payments to purchase these. Direct payments offered to parents of disabled children to manage on their children's behalf
Changes to Invalid Care Allowance (now known as Carers Allowance) (2000)	Amendment to the Social Security and Benefits Act 1992, which included extending carers' benefits to people aged 65 and over
Employment Act (2002)	Gave employed parents of disabled children, under the age of 18, the right to request flexible working arrangements
Children Act (2004)	Required local authorities to lead on joined up service delivery through multi agency Children's Trusts. Strong emphasis on supporting families and carers, described as 'the most critical influence on children's lives'
Carers (Equal Opportunities) Act (2004)	Placed a statutory duty on local authorities to inform Carers of their rights and to consider Carers' wishes in relation to education, training and employment when conducting Carers Assessments
Work and Families Act (2006)	Extended the right to request flexible working arrangements to all recognised Carers in employment from April 2007

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Pensions Act (2007)	Recognised carers' situations and reduced the number of qualifying years needed for a full, basic state pension and introduced the new Carers Credit for those caring 20+ hours a week for someone who is severely disabled
One Wales (2007)	Coalition Agreement between Labour and Plaid Cymru includes a pledge to introduce legislation to improve support for Carers
Revised National Carers' Strategy (2008)	The Welsh Assembly carried out a consultation exercise in 2006 to re-focus its Carers Strategy, issuing an Action Plan in 2007. In 2007, it was working closely with the UK Government in its consultation and has pledged to revise the Wales Carers Strategy in light of the new deal for Carers
Sharon Coleman –v- Attridge Law and Steve Law Case	Case Law established around discrimination 'by association'. Sharon Coleman was denied flexible working conditions at her employers, which were available to other staff, to allow her to care for her disabled son
Equality Act 2010	As a result of the Sharon Coleman case, the Equality Act extends protection, not just in relation to employment, but also across the provision of goods and services. The Act also aims to extend the Carers ruling of 'discrimination through association to disability' across other 'protected characteristics' of Sex, Gender Reassignment, Disability and Age For the first time, Carers will be protected from direct discrimination (and harassment) because of their association with people who are protected from discrimination themselves