

# Carer Passport Guidance

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*With thanks to the Care and Caring Network for developing this guidance,  
People Services*

# Why do we have a Carer Passport?

- The 2021 Census suggests the number of unpaid carers within the UK is 5.7 million. The University recognises the benefits of supporting carers within the workplace, and the challenges carers can experience when combining work with caring.
- Most people's lives will include at least one episode of caring. It takes people two years on average to recognise that they are a carer. Some become carers overnight some more gradually – so there is a new population of carers in the workforce every day.
- Many large organisations have found a Carer Passport scheme provides a straightforward way to discuss and document the flexibility and support an organisation can give to enable employees to combine caring with work.
- Carer Passports are recommended as good practice by Employers for Carers (EfC). Having a Carer Passport can help to create a supportive working culture where employees feel that they can 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. It is also beneficial for an institution as it can support employees to stay in the workplace.

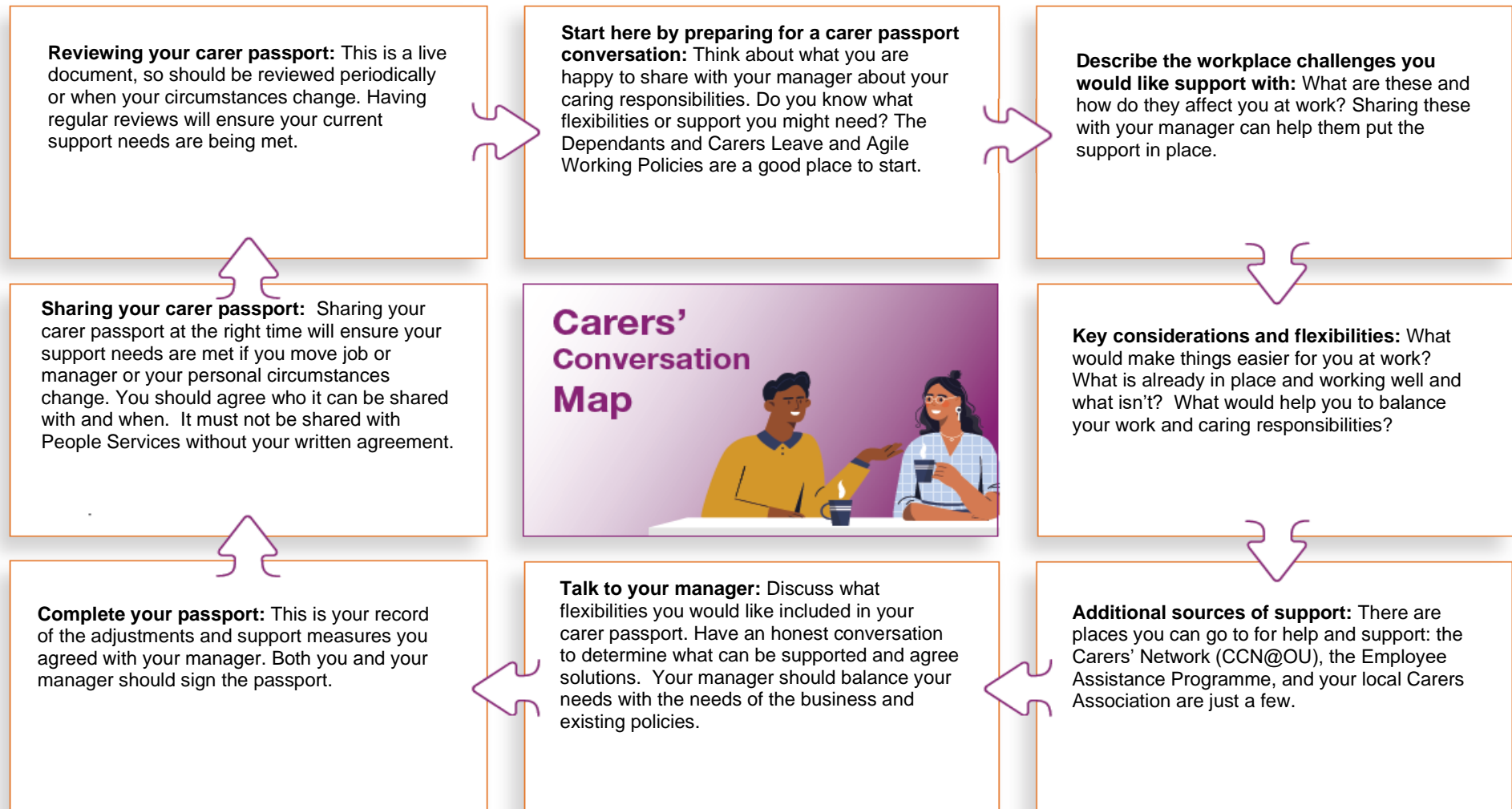
# What is a Carer Passport?

- A Carer Passport is essentially something that can start a conversation about the flexibility needed to combine work and care. This conversation involves balancing the needs of the carer with the needs of the OU, and within existing policies. The passport relies on sensitivity, leaving it ultimately down to the carer themselves to determine how much personal information they wish to share.
- The University recognises that combining work with caring can be challenging and wants to make it okay for carers to talk about the support and flexibility that could enable them to do their best in work and in their caring.
- Using the Carer Passport is completely voluntary. The carer decides if they want to use it, and the passport is owned by the individual. Line managers must keep any copies they receive confidential and not upload passports to the personal file or share copies with anyone (including People Services) without the express written agreement of the carer.
- The passport will be helpful if the carer changes line manager, as the individual can share it with the new manager to help them understand the flexibilities previously agreed and avoid the need to begin the process again. However, the passport is not designed to remove the need for employees to talk with their manager on a regular basis about the impact of their caring responsibilities on their day-to-day working life.
- It can be used as a framework in a 1:1 conversation initiated by the

carer with their line manager, or it could be used as a reflection framework alongside an [Emergency Planning](#) tool like this one. There are prompts and guidance in the Carer Passport. We recommend you download and save your personal copy of the [Carer Passport](#).

- It may not always be possible to accommodate every flexibility, but the OU is serious about trying to find solutions that work for both parties.

# How does the Carer Passport work?



# Frequently asked questions

## 1. I would like to use the Carer Passport. What do I need to do?

If you would like to use the passport document as a framework for a conversation with your line manager, download the document and read it through. Think about what different scenarios you would like to discuss; for example, a short-term crisis or a situation which is stable but deteriorating.

It would be helpful to give your line manager notice that you would like to have that conversation so they can prepare.

The Carer Passport is designed to be used in successive conversations, so it might be best to have an initial conversation and then meet again to agree which ideas will be helpful or desirable.

In the [Useful resources](#) section of this guidance, you will find links to key OU policies but also other sources of support. For example, it may be useful to join one of the regular CCN@OU virtual coffees to talk things through before your discussion with your manager.

## 2. I have children. May I use the passport?

The Carer Passport can be used by employees who are unpaid carers of a family member, partner, or friend, needing help because of their illness, frailty, disability, mental health problem or an addiction, who is unable to cope without their support. So, that may apply to your child(ren).

The OU's [Dependants and Carers Leave Policy](#) sets out what support is available to staff with dependants and caring commitments.

### **3. I am not sure I want to discuss my caring context with my line manager, but I would like to talk through my situation. Who can I contact?**

The CCN@OU is a [staff network](#) set-up to support and champion staff who are unpaid carers. They have an active confidential Viva Engage group, a confidential Teams site, and hold events including a monthly drop-in (virtual) coffee.

You could also use the Employee Assistance Programme. Accessing the service will not be reported to the OU or your line manager. In the [Useful resources](#) section of this guidance you will also find links to help you identify local support groups that offer virtual and face-to-face guidance or simply a listening ear to carers.

### **4. Is caring a protected characteristic?**

Although being a carer is not specified as a protected characteristic under equality legislation, carers are counted as being 'associated' with someone is protected by the law because of their protected characteristic, such as their age or disability. This means you should not be treated less favorably because of your caring responsibilities, e.g., you should not be refused a promotion at work because of them.

The [Employers for Carers](#) site has more guidance on the law relating to carers in the workforce (use the OU's free access code #EFC3721 to set up your account).

## **5. I am a line manager. My direct report has indicated they would like to have a Carer Passport conversation with me. What should I do?**

The conversation can be part of a 1:1 or scheduled separately; ask your direct report which they would prefer. This will give you an indication of the urgency of the situation and the timescale for your preparations.

Before the meeting familiarise yourself with the passport template and seek the advice of People Services if required. We also recommend you look at some of the resources indicated in the [Useful resource](#) section of this guidance, including setting up a login to the Employers For Carers site where you will find resources like the c.60 minute e- learning course *Supporting Carers in the Workplace* and guides like *A Manager's Handbook*.

The Carer Passport is designed to be useful for successive conversations so it be best to have an initial conversation and then meet again to agree which ideas will be helpful or practical.



# Caring and work scenarios

**Jo** is a manager and works full time. His partner has just received a diagnosis of Multiple Sclerosis.

Jo does not consider himself his partner's carer at this point but there have been a couple of occasions when Jo has had to leave work because of incidents at home when his partner had fallen and become distressed. He is aware that his partner is going to need increasing levels of support and care as his condition progresses.

Jo asks for a conversation with his manager and brings along a Carer Passport. He does not find talking about himself easy and does not really know what the future holds but knows he may need help and wants his manager to be prepared for that when the time comes. Jo stresses that work is important to him, not just financially but for giving him a sense of purpose and connection with others.

Jo and his manager agree to keep talking and that his manager will ensure he asks, 'how are things at home?' at least once a month. This will ensure Jo has an opportunity to raise anything that he might find uncomfortable to say without that prompt. They document that on the Carer Passport along with the following from their discussion:

- that Jo has scope to organise his own diary and work from home as needed, but to say if he needs help to navigate appointments or events not in his control.
- that Jo will consider if he would like to talk to someone in confidence about how to adapt to this situation.

**Alex** works full-time on an advisory team. They care for an elderly neighbour who lives alone and have no family of their own. Alex has helped their neighbour for years with things like a bit of shopping, but over time their neighbour has become more reliant on Alex for a range of essential support. Alex also has a young family and is struggling with all the demands on their time. They tell their manager in a 1:1 that they know they need help, but do not know where to start. Their manager suggests they look at the Carer Passport guidance and they set aside some time to talk about what could be done to support them.

Alex knows they do not want to reduce their hours and already manages work comfortably around short morning and evening visits to their neighbour but thinks having some space in the week would give their time to do some of the other caring related tasks.

They and their manager agree and document on the Carer Passport that:

- Alex will trial a compressed working pattern in which they continue to work full-time but over 4.5 days.
- On those longer working days Alex will be supported to work from home so they do not need to spend time commuting. There will be occasions when they will need to attend the office, but their manager will give them as much notice as possible to enable them to make appropriate arrangements.
- The contract change will be processed as a temporary Agile Working request which they will both review in three months with a view to

making the arrangement permanent once both are comfortable it is working effectively.

**Chris** works part-time. His teenage son was born with a life limiting medical condition which can make him very ill at times, and he will always be reliant on the care of others.

Chris manages his work and caring responsibilities well. His manager is aware of his circumstances and knows that he sometimes needs to leave work at short-notice or take periods of leave to be with his son when he becomes sick and needs to spend time in hospital.

Recently, however, Chris's father has had a stroke. He lives alone and whilst he remains independent, he has lost some of his mobility and strength to look after himself fully. The extra support his dad needs is falling to Chris.

Chris is used to talking to his manager about his caring responsibilities. He is aware of the Carer Passport, but he has been a carer for many years and is very familiar with what support is available, and comfortable asking for what he needs. He and his manager are in the habit of confirming anything they agree in an email between them so there is a record to refer back to if needed. Things are particularly challenging for Chris currently and what he really wants is some time to get into a new routine that includes supporting his dad. Chris has a bit of annual leave available but wants to keep that to cover half term when his other children will be home from school.

He therefore requests 6 weeks unpaid leave to help him manage the current situation and be in a better place for when he returns to work. It is a busy

period at work and not the best time to be a team member down, but Chris's manager knows that a short absence now should help Chris to avoid becoming overwhelmed and experiencing his own ill health later.

**Vladimir** is a line manager of a carer, **Vik**, who works full-time. Vik lives with and cares for her mother who has Alzheimer's disease, is unable to leave the home and needs help with her personal care. Vik also has a child who needs additional support.

Vik and her line manager have talked about her caring situation and the impacts on her and the OU, and she has told Vladimir that she would like to have a Carer Passport and asks to meet with him as soon as possible.

To prepare for the meeting Vladimir registers with Employers for Carers and completes the Line Manager training modules.

At the meeting, Vik says her job is very important to her and gives her a sense of self-worth. She is concerned about her career progression and wants to be able to take advantage of CPD and other learning opportunities. She wants to make sure that Vladimir is aware of how her mother's needs change on a daily basis, and that it can be difficult to know when she will be called upon during the working day, sometimes she has been late to meetings. As part of the discussion Vik agrees with Vladimir that, where she is unable to be present at the start of a meeting, he can indicate that she is dealing with a caring matter.

Vladimir is comfortable with this, and he and Vik agree to record that in the Carer Passport. He will divulge as little as possible so that Vik's privacy is maintained but others understand the situation. Vladimir asks Vik to let him

know, where possible, of these unplanned events, e.g., via an IM (instant message). Vladimir encourages Vik to protect some time between meetings. Vladimir and Vik agree that when she has to make up time Vik will work outside her normal hours. They decide that Vladimir will supportively check in with Vik every 2-3 weeks and they will review the arrangements in alternate monthly 1:1s. Vladimir and Vik will also discuss CPD opportunities including online conferences and webinars that Vik might like to attend.

# Useful resources

## OU policies and procedure

[Agile Working – policy and guidance](#)

[Dependants and Carers Leave Policy](#)

[Dependants and Carers Leave Procedure](#)

[Open University Anti-Discrimination Statement](#)

## Sources of information and support

[Employee Assistance Programme](#)

[OU Care and Caring Network](#) – a confidential staff network

Shout 85258 – a free confidential 24/7 text messaging support service

**Carers UK** – provide support to carers across the four nations of the UK

- [information and advice on caring](#)
- [Carer Passport Scheme](#)
- [Key facts and figures](#)

**EFC Digital** – Employers for Carers Digital is an online support portal for working carers.

- The OU is a member of EfC and employees can register for the portal using the OU's **free access code: #EFC321**.
- The portal contains a range of resources including manager guides, and e-learning modules.

**Carers Trust** – find support services across the UK

[Carers: help and support – Citizens Advice](#)

[Mobilise \(mobiliseonline.co.uk\)](#) – free online support for unpaid carers

## Training resources

Employer for Carers e-learning (log in with free access code: #EFC321 to access the following e-modules under the heading Resources for Managers)

- Introduction to caring
- Supporting carers in the workplace
- Carer aware
- [Shared Management Practices Home Page \(learningpool.com\)](#)
- [My Learning Centre: Difficult conversations \(learningpool.com\)](#)
- [Challenging Conversation into great conversations \(learningpool.com\)](#)
- [Course: Coaching Skills for Managers \(learningpool.com\)](#)
- [Leading a Team: The outcome cycle \(learningpool.com\)](#)
- [Bite-size Virtual Workshops - People Managers: Work-Life Balance \(learningpool.com\)](#)
- [Bite-size Virtual Workshops - People Managers: Psychological Safety \(learningpool.com\)](#)
- [Bite-size Virtual Workshops - People Managers: Power Up your Communication \(learningpool.com\)](#)
- [Course: Open Circles Series \(learningpool.com\)](#)