

Who Cares Wins:

The Social and Business Benefits
of Supporting Working Carers



A report for Carers UK

by

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led by **CARERS** UK

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Preface

Six million people in the UK provide unpaid care for partners, relatives or friends in need of help because they are ill, frail or disabled, with three million of them juggling this care with paid work. Many suffer social isolation and ill health as a result. This might seem like a poor return for commitment to a loved one, but the picture is worse still if we look at long-term poverty and disadvantage. Currently one in five people gives up work to care, often with associated loss of income, loss of pension and loss of long-term financial security. The loss to their employers is no less significant in terms of both human resource and its replacement.

Carers UK is delighted to have been able to commission this report as part of the work of the Action for Carers and Employment (ACE National) partnership which it leads. The report demonstrates just how great the benefits are to both employer and employee of developing a carer-aware and carer-friendly workplace culture.

These are examples of good practice which should lead where all employers can follow, to develop and deliver the workplace of the future. That future is one in which demographic trends – an ageing population and changes in family structures – will see three out of five people caring at exactly the same time as the economy will need more of us to work longer.

Employers have a key role to play in squaring this circle, and this report shows the way...

Imelda Redmond
Chief Executive, Carers UK

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The study could not have been completed without the organisations which gave us research access, and we are therefore very grateful to those members of the *Employers for Carers* group who made arrangements for their organisations to take part in the study. Our sincere thanks, too, to all the managers and employees who responded to our surveys and questions, and provided us with documentation. To protect their confidentiality and privacy, all our research respondents remain anonymous, and carers' names in this report have been changed.

The research was directed by Professor Sue Yeandle at Sheffield Hallam University. The staff involved in the study included, between 2003 and 2005:

- Dr Cinnamon Bennett, who led on the analysis of organisational policies
- Dr Lisa Buckner, who provided the statistical analyses
- Dr Pamela Fisher, who worked on the project in its early stages
- Lucy Shipton, who contributed to fieldwork and data analysis
- Anu Suokas, who led on the organisational case study fieldwork
- Ian Chesters and Samm Wharam who provided administrative support



Chapter 1

Carers and employment: policy, practice and research

In *Who Cares Wins* we present the findings of research conducted for Carers UK by the *Centre for Social Inclusion* at Sheffield Hallam University. The work formed part of the Action for Carers and Employment (*ACE National*) Development Partnership (*ACE 1*), funded through the ESF EQUAL Community Initiative Programme.¹ Designed to explore the social and business benefits of supporting working carers,² the study has enabled us to:

- clarify the circumstances of carers who are in employment, and establish the policy and business context in which the situation of carers and employment should be understood
- identify some of the challenges which organisations and individuals face in combining employment and caring
- explore innovative approaches in selected organisations, which have changed the way they operate, and created workplace cultures which enable carers to continue in paid work
- examine why these employers think it is in their business and organisational interests to create a supportive working environment for working carers

The report is organised as follows:

- In Chapter 1 we explain our research design and objectives, set out the contemporary policy context, and highlight the main findings of our new analysis of the statistical data on carers and employment available from the 2001 Census
- In Chapter 2 we set out the perspectives of the organisations we studied, using data from official organisational documentation and from our interviews with managers
- In Chapter 3 we explore the perspectives of employees who were also unpaid carers and who were working in these organisations
- Chapter 4 draws lessons from the research and makes recommendations for other employers, government and service providers

Research evidence about carers and employment and the study design

The research reported here was commissioned by *Carers UK* in 2003. This was a particularly opportune moment, as in April 2001, just before the *ACE 1* project began, the decennial Census of Population and Housing in the UK had asked – for the first time – a compulsory question about the unpaid caring responsibilities of every UK resident. This new information, which can be linked to other Census data about individuals and their households – their age, sex, ethnicity, employment circumstances, household composition, qualifications, health, housing, travel to work, access to a car and other details – represents a major breakthrough for those interested in understanding how unpaid caring for a friend, relative or neighbour fits in with other dimensions of everyday life. Using both the standard Census output (which became available in 2003), and specially commissioned Census data, the research team has been able to draw on the very latest available statistical information about carers and employment. This material is presented in detail in the Annex to this report.

The research has also involved case study work, using a multi-method research design, to explore in depth how three very different organisations – a private sector utility company, a large government department, and a small manufacturing company – are trying to support their employees who are carers. This case study research was conducted alongside our other work for *Carers UK*, which included a longitudinal survey of carers in touch with carers' organisations and follow-up in-depth interviews with 30 carers. The main report of that work is published elsewhere (Stiell et al 2006).

Previous research, both about carers and their lives, and about the development of family-friendly and flexible employment practices and policies, informed our research questions and the methods we used. Throughout the study, we worked closely with *Carers*



UK, reporting on and evaluating their activities in the ACE 1 partnership (Formby and Yeandle 2005), attending and participating in local, UK and international events about carers and employment organised by *Carers UK*, and observing *Carers UK*'s activities and influence as a national membership and lobbying organisation acting on behalf of carers.

Our key research objective has been to gather evidence about, and to try to understand, why some organisations have begun to claim that their approach yields important business benefits for them as employers, as well as producing real 'social' benefits for their employees. In these organisations, senior managers have made an explicit commitment to develop and introduce flexible, carer-friendly employment policies – and now take it for granted that their employees need to achieve a balance between paid work and other aspects of their lives. The employers who came together in the *Employers for Carers* group, and who were already working closely with *Carers UK* when our research commenced, claimed that their approach was by no means purely philanthropic. Rather, they were saying – to carers' organisations, to their own staff, and to government and policy-makers – that there was also a robust business logic behind the policies they were developing, and that by supporting carers at work they believed they were more effective, more efficient and more successful in achieving their own business and organisational goals.

The central focus of this study has therefore been on a small number of organisations, each very different, which have been trying to create a supportive environment at work for carers. These organisations allowed us research access, enabling us to review their policy documents and some of their operational data, to survey their employees and arrange focus groups and face-to-face interviews with staff who are carers, and to speak with managers, at both the senior, strategic level and in line managerial positions, about the implementation of the new policies and approaches they have adopted. The case study work has thus been multi-method, using documentary analysis, surveys, qualitative research interviews and some observational work to assemble a body of evidence. In developing this research design we have tried to gain a holistic view: trying to assess what it is like to be employees, supervisors and managers in the organisations studied, and to gain some insight into

the organisational cultures of the workplaces concerned.

We also wanted to explore the situation of working carers from other angles. Our statistical work on the Census enabled us to show how ubiquitous caring is, underlining that caring is, for most people, at some time in their life, a normal and everyday thing to do. Caring is done by men and women, by people of all ethnicities, and by people of all ages. Across the lifecourse, caring for others who need help or support of some kind is likely to happen, at some point, to most of us – thus even in the 'snapshot' picture of life revealed by the Census, we find that over 2.6 million men and women in England and Wales were working carers on Census day (29th April) in 2001.

Yet caring and employment do not fit easily together for everyone. We knew from earlier research that carers often found their situation isolating, exhausting and frustrating, and that many carers found they could not carry on as before in the workplace when their time to care – for an elderly parent, for a sick or dying partner, for a disabled child – came along (Phillips et al 2002). Indeed, some carers reported that their employers were unsympathetic to or uninterested in their changed circumstances, or that employers were reluctant to take them on in the first place if they disclosed caring responsibilities when they applied for a job. Our 2004 survey of carers, and the face-to-face interviews we conducted with carers in four parts of the country in 2005, quite separate from our case study organisations, were designed to capture some of the issues these other carers encountered. As Stiell et al (2006) show in their separate report, many carers trying to combine paid work and caring continue to encounter frustrations both at work, and in their efforts to secure the alternative services they need to make possible the combination of paid work and caring they would prefer.

In recent years, evidence about the benefits of flexible working arrangements, and of adopting family-friendly employment practices, has begun to accumulate. A review of the results of the *Joseph Rowntree Foundation's* large programme of research on *Work and Family Life* (Dex 2003), which included studies of carers and employment (Phillips et al 2002; Yeandle et al 2002; Crompton et al 2003; Bond et al 2002; Yeandle et al 2003) noted that employers adopting a flexible approach to supporting employees



with family responsibilities gained both increased productivity and enhanced employee commitment, and that these benefits arose especially in businesses which had '*made flexibility integral to their business and culture*' (Dex 2003: 22-23).

These earlier studies also revealed employees' limited awareness of the policy options available to support them, and line managers' inconsistent knowledge and practices. These factors were significant barriers limiting fair and widespread uptake of carer-friendly policies, even in progressive and well-managed organisations (Yeandle et al 2002). Dex concluded that new organisational strategies needed to be devised to ensure managers were appropriately trained and briefed to operationalise the policies, and that they also needed '*to be given freedom (and training) to decide what to do in individual cases, based on assembling and then evaluating the business case for an employee's request*' (Dex 2003: 25). As we will see in this report, these are issues which even explicitly 'carer-friendly' organisations are still finding they need to be vigilant about and to address.

A number of authors have recently reviewed the literature on employment policies and public policy support relating to working carers (Pickard 2004; Howard 2005; Arksey et al 2005). Others have conducted new investigations which have shed light on working carers' experiences or on carers' attempts to access paid employment (Phillips (ed.) 1995; Phillips et al 2002; Yeandle et al 2002; Evandrou and Glaser 2003). Their reports indicate that, in the main, carers want to work, and that access to paid employment can protect carers from social exclusion (Arksey 2002). Nevertheless, many people continue to experience difficulty in combining caring and employment. This is because they:

- often do not have adequate access to flexible working arrangements
- may find it difficult at work to disclose the nature or extent of their caring responsibilities
- are not always met with understanding and support on the part of their employers
- frequently feel guilty about both their caring and their working situation
- find that support services are not geared to their needs or timetables as working carers
- sometimes have very demanding caring roles, or

encounter caring situations, which make undertaking paid employment extremely difficult

One of these earlier reports (Yeandle et al 2003), drew attention to the way the relationship between work and family life had risen up the policy agenda for government, trade unions and employers in recent decades. It pointed out that government had begun to acknowledge the importance of its role – in establishing a range of employment rights and entitlements, in developing an infrastructure of support for parents and carers, and in consolidating its policy and legislative approach to equality and discrimination. The key developments and changes in public policy in this area are outlined later in this chapter.

Over the past decade, employers have responded too, variously participating in the government's *Work-Life Balance Challenge Fund* (Nelson et al 2004), joining the employer networks *Employers for Work-Life Balance*³ (which ran between 2000 and 2003) and *Employers for Carers* (a group formed as part of the ACE 1 partnership led by Carers UK, and running between 2003 and 2005), and also taking action independently, in pursuit of their own interests. As the experience of BT, who chaired *Employers for Carers*, has shown (see Chapter 2), employers who have adopted this approach have been responding to social, economic and technological change, as well as to demographic pressures and sometimes to union bargaining strategies. The adoption of more flexible employment practices, and employers' recognition of the importance of family and personal life to their employees, has led to some major changes. This means employing staff on a wider range of more flexible contracts, deploying their workforces in more varied ways, and introducing new organisational policies, sometimes going well beyond the minimum standards set in employment law. The policies they have chosen are often designed as part of a strategy to uphold employee commitment, to retain trained and experienced workers, and to keep down recruitment costs.

As noted elsewhere (Yeandle et al 2003), there is a multi-faceted rationale underpinning these developments. This holds that:

- these 'work-life' or 'family-friendly' policies address inequality and discrimination which operates against the best interests of the business, and which is also at odds with contemporary values relating to social justice



- a positive impact on employee commitment can be achieved by using diversity management to meet individuals' differing 'needs' (Dex and Scheibl 2000)
- new technological developments are making it easier to implement some types of work-life balance policy (Evans 2000)
- there is a 'business case' for the policies – i.e. the costs of developing and operating the policies are considerably outweighed by productivity gains and reduced operating costs

Who Cares Wins is concerned with all of the above, but has tried to pay particular attention to the last point, which in the earlier research had been only partially evidenced. The employers we have studied view the policies they have developed as primarily about 'flexible working', in some cases seeing them as measures which are much broader than support for their employees who have family or caring responsibilities. There are also indications that others are becoming convinced that flexible working is beneficial, for employers and employees alike. Thus in a recent survey of human resources professionals, 63% of respondents could identify at least one benefit which flexible working had brought to their organisation, with 'improved staff morale and motivation' and 'better staff retention' prominent among the advantages identified (IFF Research Ltd 2005).

Despite this, other analysts have recently expressed mixed views about how widespread and accessible flexible employment arrangements actually are, and the evidence from employees, managers and employers is not always in harmony. Thus the TUC has noted that although 'the recent rise of flexibility in working patterns has been fuelled by a demand from both workers and employers', nevertheless 'British workplaces are still far from flexible ... The majority of employees have no individual working time flexibility.' Based on its own analysis of the UK Labour Force Survey (LFS⁴), the TUC concluded:

There is a massive mismatch between the hours and patterns of work that employees want, and what they can get. (TUC 2005: 2)

The TUC's assessment is based on data which showed a recent increase in the proportion of employees using flexible working arrangements. It also revealed, however, that only 20% of public sector employees

and a mere 6% of private sector employees were actually employed on a flexible basis. Term-time working, which is popular with parents, including those caring for disabled children, was reported as their current working arrangement by just 14% of public sector workers, and by only 1% of those in the private sector (TUC 2005: 6).

Views derived from surveys of managers and employers have been somewhat more positive. The CIPD's 2005 *Guide to implementing flexible working* stresses:

Recent CIPD research ... demonstrates that flexible working policies are now becoming the norm in organisations. Four in five employees surveyed reported that their employer offers some form of flexible working. The research also highlights the potential benefits of flexible working from an employer's perspective in such areas as improved retention, recruitment and a positive psychological contract. (Clake 2005: 4)

The CBI meanwhile, representing British employers in the private sector, found that its own *Employment Trends Survey* in 2005 showed:

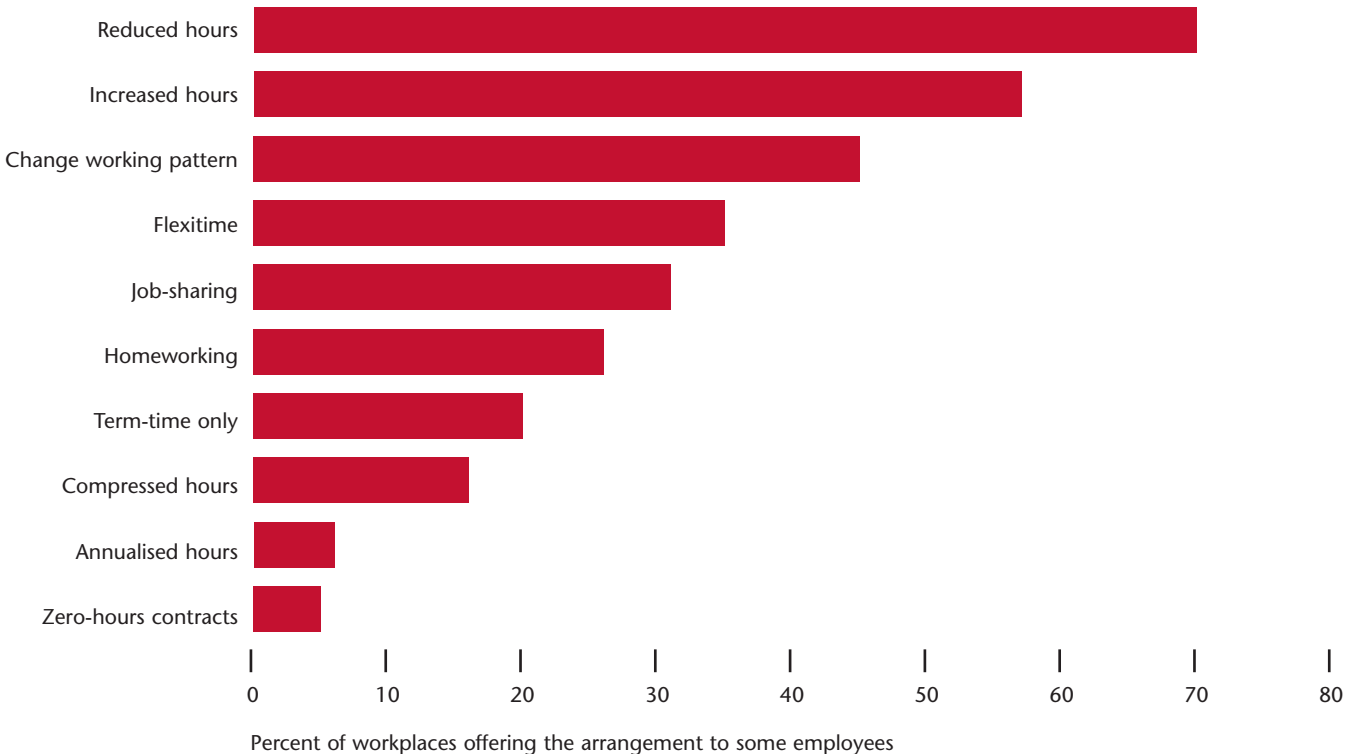
The vast majority of employers already offer flexible working arrangements. Ninety per cent have at least one flexible working arrangement in their company, with a third (35%) offering at least three. Eighty-five per cent have part-time employees while over a third (34%) have introduced flexitime. Thirty-four per cent have jobshare schemes while 19% have created career breaks and sabbaticals. The survey also shows that the right to request flexible working is working well, with 90% of requests accepted or a compromise agreed. (CBI 2005)

Separate, government-sponsored research also found, in the *Second Work-Life Balance Study*, conducted in 2003, that employees (just over 2,000 respondents in a telephone survey) reported greater availability and uptake of certain 'work-life balance' practices compared with the previous version of the same study (Stevens et al 2004).

The 2004 *Workplace Employment Relations Survey* (WERS) confirms that many employers are 'offering' some form of flexible employment (Figure 1.1) (Kersley et al 2005). However it is clear that what is formally 'on offer' in the workplace, and what is actually experienced, by employees and by line



Figure 1.1 Availability of flexible working arrangements: workplace data Source: WERS 2004



managers, is not always the same thing. This is also recognised by the CIPD, which in 2005 published its comprehensive guide to implementing flexible working, stressing the need to move 'from rhetoric to reality'.

In *Who Cares Wins*, we look at all these issues of work-life balance and flexible working arrangements from the point of view of carers. In designing our research, we chose to use a case study approach in organisations already fully committed, 'at the top', to working flexibly and to supporting carers. This was because we wanted to explore both employer and employee experiences and attitudes, and to examine the evidence, where it existed, of the 'business case'. Necessarily, our approach to this has been multi-method. We hope we have captured both the employer and the employee viewpoint in our analysis.

Carers and employment: the national picture

Unpaid caring for relatives, neighbours or friends occurs throughout our society, is an especially common experience for those in their 40s and older, and is part of everyday life alongside paid work for

over 2.6 million people in England and Wales. It occurs in all cultures, and amongst women and men. People who are combining paid work and unpaid care can be found in all industries, all occupations and in small, medium and larger firms. Carers who have paid employment are somewhat concentrated in lower level occupations, and are more likely than other workers to work close to home and to have health problems of their own. Statistical evidence also shows that, on average, working carers have fewer qualifications than other employed people.

The new evidence obtained from the 2001 Census gives a much more comprehensive picture of the situation of working carers than was previously possible, and is more reliable than data derived from other surveys which use sampling techniques.⁵ Although it cannot answer all our questions about caring and employment, it shows us that in England and Wales:

- 10% of the population – some 5.2 million people – are carers, looking after a relative, friend or neighbour on a regular but unpaid basis. 3.9 million of these carers are men and women of working age



- Caring is most common among women and men aged 45-64 years – almost a quarter of all women in their 50s, and almost 1 in 5 men of this age, are carers
- Caring is a major part of life for many younger people too – 1 in 5 female carers aged 25-44, and 1 in 6 male carers of this age, provide unpaid care for at least 50 hours each week

Focusing specifically on carers of working age, and on caring and employment,⁶ we can note that:

- Over 1.5 million carers are in full-time employment (58% are men)
- Almost 675,000 carers are in part-time employment (89% are women)
- Approximately 10% of male employees and 14% of female employees are carers; the figures are broadly the same in small, medium and large workplaces
- The vast majority of working carers are aged 30-59; those with the heaviest caring commitments are especially strongly concentrated in this age group
- Employed people of both sexes in the Pakistani, Bangladeshi and Indian communities have particularly high rates of caring. Younger Pakistani and Bangladeshi men are three times more likely than White British men to be carers, and among women, 14% of younger Bangladeshi employees, compared with just 5% of all female employees of the same age, are carers
- Working carers – men and women, in full- and part-time work – pay a considerable penalty in terms of their own health. Those with heavy caring responsibilities are 2-3 times more likely than non-carers to have poor general health
- Working carers are more likely to be unqualified, and less likely to hold university degrees, than other people in employment. This suggests carers' access to skills and qualifications may have been neglected
- Working carers are clustered in lower level jobs. Among men and women under 45, rates of caring are highest among those in personal service occupations, and lowest among professional workers
- More men with heavy caring roles are found in the manufacturing, construction, wholesale / retail and

transport sectors, and far fewer work in the finance and real estate sectors

- Working carers, especially women, are more likely than other workers to work from or near home
- Over 300,000 working carers live in a household which contains a person with a limiting long-term illness
- Over 85,000 working carers live with a sick or disabled person aged 16 – 44
- Almost 124,000 working carers have a sick or disabled person aged 45-59 in their household
- Over 42,000 working carers live with a sick or disabled person aged 75+
- Caring is related to early retirement. 24% of retired men aged 45-59, and 28% of retired women of this age, are carers. Some of them will have given up their jobs prematurely to accommodate their caring role
- Over 131,000 carers are unemployed and actively looking for work, and of these about 44% are women

A changing public policy environment

The contemporary policy context affecting carers and employment is changing, with some recent progress in the legal rights of carers, developments in which *Carers UK* and its partners have played an important role. Despite this, a situation in which carers are able to participate in all aspects of modern life 'just like everyone else', with the freedom to choose what is the best way, for them, to combine their caring roles with their jobs, careers, training and education remains some way off.

Carers in paid employment today find themselves in a changing public policy environment, in a labour market undergoing considerable structural change, and in organisations where managerial practices and employers' expectations of their employees can be highly variable. Here we set out some of these changes, briefly outline how the social security system is currently organised in relation to carers and employment, and draw attention to important shifts and developments in public policy which have affected carers and employment in recent years. In the following section, we also summarise some of the key factors shaping changes and developments in the UK labour market, and how organisations manage their workforces.



Shortly after coming to power in 1997, the New Labour government published *Caring about Carers: a national strategy for carers* (Department of Health 1999), which stressed: the importance of improving the information available to carers about services and the help available to them; the need to improve services for carers; that carers' own well-being and health was an issue which policymakers and statutory service providers should address; and that enabling carers to combine caring and employment if they wished was an important concern of government.

At this time carers were already recognised in UK legislation, which included the *Carers (Recognition and Services) Act 1995*, passed under the previous Conservative administration. This had first introduced the concept of a carer's assessment. The year after *Caring about Carers* was produced, the *Carers and Disabled Children Act 2000* was passed, extending carers' rights. Subsequently further legislation, the *Carers (Equal Opportunities) Act 2004*, placed a statutory duty on Social Services Departments (SSDs) to inform carers of their rights. This Act also required SSDs, in conducting carer's assessments, to consider carers' wishes in relation to education, training and employment. Although not as strong or effective as many carers and their advocates wanted, these changes to the law represented significant steps forward in recognising carers' need for legal protection from disadvantage and discrimination, and in setting minimum standards of behaviour in relation to employment and related activities.

Under the *Employment Relations Act 1999*, all employees gained the right to 'reasonable time off' to deal with unexpected situations related to their caring or parental roles, which can be either paid or unpaid, at the discretion of their employer. Carers of disabled children under 18 years old, along with parents of all children under 6 years old, also gained the right to request flexible working in their employment under the *Employment Act 2002*.

The New Labour government has also encouraged a number of voluntary initiatives and has led campaigns in relation to promoting work-life balance, in 2001 setting up a *Work-Life Balance Challenge Fund*, specifically aimed at employers wishing to enhance and develop their employment policies in this area. This approach has recently culminated in the publication of the White Paper *Work and Families: Choice and Flexibility* and in the *Work and Families Bill*

2005, expected to become law during the current parliamentary session. This aims to create a modern framework of employment rights and responsibilities for employers and employees, and will extend to all carers the right to request flexible working, from April 2007.

Social security arrangements for carers who wish to combine paid work and care remain quite restrictive. The main benefit for carers, *Carer's Allowance*, is available to those caring for 35 or more hours per week and can be paid to carers who are in paid jobs, so long as their earnings from employment do not exceed £82 per week (2005/6 rates). This means that carers who receive this benefit have to weigh up the pros and cons of taking employment for more than a relatively short part-time working week, as longer working hours would mean earning above this threshold level and thus losing their *Carer's Allowance*. In November 2005 this benefit was payable at the basic personal rate of £45.70 per week, with additional rates available to some claimants of other specified benefits. *Carer's Allowance* is not available to those in full-time education, and is a taxable benefit. In late 2005 the Department of Work and Pensions also launched a new campaign to inform carers of their pension entitlements, encouraging them to apply for Home Responsibilities Protection where appropriate.⁷

There have also been a number of important developments affecting carers in social care policy. *Carers Grant* was introduced in 1999, initially on a ring-fenced basis, as a grant to local authorities. It has been used to provide a range of supports for carers, including respite breaks, and can, in theory, be used to support the needs of carers combining paid employment with their caring role. Guidance issued to local authorities in 2002 in *Fair Access to Care* set out how local authorities should develop their eligibility criteria for access to social services, and can be interpreted as encouraging social services departments to assess risks, including the risk of losing employment, when considering the service needs of carers.

Other government papers have also been important in establishing the context in which social services departments approach their work with carers. *Modernising Social Services 1998* made specific mention of enabling carers to remain in employment, and more recently, the 2005 government Green Paper



Independence, Well-Being and Choice: our vision for the future of social care in England, stressed the importance of ensuring that ill and disabled adults and their carers are appropriately supported in the future. The January 2006 White Paper *Our health, Our care, Our say: a new direction for community services* has subsequently laid out a government vision which involves 'a radical and sustained shift in the way services are delivered, ensuring that they are more personalised and that they fit into people's busy lives'.

Promising 'a new deal for carers', the 2006 White Paper notes 'considerable public support' for carers, recognises that 'caring for someone can have life-altering consequences', and points out that 400,000 people combine full time work with caring more than 20 hours per week. The planned new support for carers includes an extension of the 1999 Strategy for Carers, and more emphasis on carers' services in local authorities and PCTs, reflecting 'developments in carers' rights, direct payment regulations, carers' assessment and carers' grants'. The government promises to

work with stakeholders to consult, develop and issue a revised cross-government strategy that promotes the health and well-being of carers, including the particular needs of younger carers, and includes the use of universal services.

This will involve setting up an information service for carers to help them make decisions, and ensuring that in each council area, there is 'short-term, home-based respite support' available to support carers in crisis or emergency situations.

This brief summary of the social care and social security context for caring and employment makes it clear that carers' potential needs as employees are now on the public policy agenda, and that carers already have some legal rights to be supported and protected if they wish to combine employment with care.

Changes in the labour market

Just as important as this developing public policy framework are the changes and developments expected to affect the labour market and employers in the 21st century. The changing demographic context, both in the UK and across Europe, means that the labour force is quite rapidly changing. Ageing populations and smaller numbers of young

people entering the labour market mean that economies will need people to remain in paid work for longer, probably well into their 60s, and that it will be important that all who can participate in paid employment are encouraged to do so. There are already strong commitments to increase the employment rate across all EU member states, and policies to reduce the numbers of people who take early retirement or withdraw from the labour force for long periods of 'economic inactivity' have also been agreed as part of the EU Employment Strategy. This should mean that carers, along with other groups such as disabled people and lone parents, will be encouraged to take paid work if they can, and offers a structural labour market context which should be favourable to the development of policies which can support carers to enter or remain in employment.

Another favourable factor is that in recent decades the number of jobs in the economy has continued to grow, linked in part to the strong performance of the service sector and to moves towards a 24 hour service economy. Between 1991 and 2002 the number of jobs in England grew by 19% (44% more part-time jobs and 11% more full-time jobs⁸). Big increases in the numbers of jobs are also projected for the period 2003 and 2012, including some 1.6 million additional positions in managerial, professional and service sector employment (LSC 2005). Many of these jobs are, or can be delivered on a flexible basis.

Also important are new technological developments, especially those affecting communications, and the opportunities and pressures arising from international business operations and instant global communication. Many employers operating at the global scale have introduced a variety of different forms of flexible working, and, as we show in Chapter 2, companies like BT now see home-based working and other technology-assisted forms of flexible working as important ways of saving costs and of managing their business effectively in a globalised and competitive operating environment. Encouragingly, there is also growing evidence that those who work part-time, or whose employment offers flexibility over which they have some control, are both happier and more productive at work (Swan 2005; Moynagh and Worsley 2005).



The main body of this report examines our case study material about carers and employment, and discusses organisational, managerial and employee experiences.

Chapter 2 explores developments in three very different organisations which are actively trying to operate in ways which enable carers to work and care, using flexible working arrangements and re-shaping their workplace cultures to provide supportive environments at work. As we will show, these arrangements can be tailored to individual carers' needs, while at the same time addressing the needs of the business or organisation. Drawing on managerial perspectives, Chapter 2 shows the strong business benefits which emerge from this approach.

In Chapter 3 we draw on working carers' views and experiences of employment in the case study organisations. Our data comes from our survey of employees in the selected workplaces, and from face-to-face interviews and discussion groups with working carers. These carers gave us detailed information about their own experiences of combining work and care, and of being employed in an organisation committed to supporting working carers.

- 1 The case study material in Chapter 2 was collected through the support and co-operation of three of the organisations who formed the ACE 1 *Employers for Carers* group.
- 2 We use the phrase 'working carers' throughout this report to refer to people who are in paid employment or self-employed who also provide care, unpaid, for a relative or friend who is frail, ill or disabled.
- 3 *The Work Foundation*, working in partnership with *Parents at Work* has now taken on aspects of the work of this group. It points out that while work-life balance debates have been developing over several decades, many of the relevant 'key milestones' in public policy have only been introduced in the past decade. <http://www.employersforwork-lifebalance.org.uk>
- 4 The Labour Force Survey is a quarterly sample survey of households living at private addresses in Great Britain. Its purpose is to provide information on the UK labour market that can be used to develop, manage, evaluate and report on labour market policies. It is conducted by the Office of National Statistics.
- 5 The statistics in this section are drawn from the 2001 Census Standard Tables (Crown Copyright 2003). A more detailed presentation of our analysis of the Census is given in the appendix to this report.
- 6 Those 'in employment' include self-employed. References to those who are 'employees' do not include the self-employed.
- 7 *State Pensions for carers and parents – Your guide* was made available in doctor's surgeries, Jobcentre Plus offices and local Pension Centres, following an announcement in autumn 2005 by Stephen Timms, Minister of State for Pensions Reform.
- 8 Buckner, Yeandle and Tang (2004).



Chapter 2

Employers' perspectives on supporting carers at work

In this chapter we report evidence about the managerial and organisational practices of three organisations where we had research access. In these case studies, we collected data about employers' perspectives using both company documentation and face-to-face and telephone interviews – with HR and other senior managers with a strategic perspective, and with line managers responsible for implementing company policy. Our evidence from discussion groups and interviews with working carers employed in these organisations is presented in Chapter 3.¹

Figure 2.1

Three carer-friendly organisations

Utility company

Large employer, private sector, multi-site operation. Staff include some frontline call centre staff, engineers working in a variety of locations, and staff in head office

Government department

Large employer, public sector, multi-site operation. Staff include some providing front-line service to the public in locations across the country, and office staff in central office locations

Manufacturing company

Small employer, private sector, single site. Staff include office based and factory workers

All three organisations in this study had introduced policies and practices to support working carers, acting from a variety of different starting points and for different reasons, discussed below. Despite their many differences, a range of common steps can be identified in their approaches. Taking these steps has involved reviewing their organisational culture and embarking on a journey of cultural change. The practices of a fourth company (also in the utility sector), which has gone further than most organisations in quantifying the business benefits of

providing carer and family friendly policies, are also profiled in this chapter, using evidence provided by a senior manager.

Support for carers: debates about equality

Equal opportunities and special entitlements for carers

The two large employers in this study made it clear that they had started addressing the needs of carers in their workforce from an equal opportunities perspective. Their equal opportunities policies aimed to ensure that all employees have equal access to progression opportunities, and that in the recruitment process, all prospective employees are fairly assessed and treated equally.

These policies were first introduced in the 1980s, in response partly to the legislative requirements of the *Sex Discrimination Act 1975*, and partly to growing popular awareness about women's disadvantage in the workplace. Initially, they focused on maternity rights and on women's childcare responsibilities, but they had subsequently been extended to include other family roles, including caring for other dependants.

The policies have been around for a very long time. The company first looked at women-friendly policies, and then moved on to family-friendly policies.

Corporate Director, HR, utility company

In the 1990s the two large organisations had identified carers as a group of employees who needed special treatment to enable them to enter and sustain their employment. One continues to define carers as a distinct category, separate from parents, making a distinction between the nature of caring for a disabled child or dependent adult and the type of services available, compared with the routine care of healthy children without special needs.



When you are caring for children you can put them in nursery or school, but this is not the same for an adult being cared for – there are no alternatives.

Diversity Manager, HR, utility company

Definitions of carers used in the large organisations

If you are a carer, you have responsibilities which have an impact on your working life. You will be responsible for the care and support of a disabled, elderly or sick partner, relative or close friend who is unable to care for themselves, as they are ill, frail or have a disability (utility company)

Carers may or may not live with the person they are caring for, and may share the care with others in the family, or with professionals. The care may be short or long term, planned or unplanned (government department)

Both organisations currently offer various forms of part time work and working patterns (split shifts, early/late starts, long/short days, term-time working, etc) to allow carers to accommodate their responsibilities outside work (for more details see Figure 2.2). They also offer a range of special leave options to address the particular circumstances of carers related to the nature of their caring responsibilities and the unpredictability of some caring roles. These leave options are available over and above the statutory requirements provided for in employment law.²

The leave options available in the two large organisations are summarised in Figure 2.2. The exact terms and conditions of each entitlement vary slightly, depending on the historical development of policy in each organisation. In both cases, the available options are presented as written policies.

These options provide a definition of 'a carer', outline entitlements and an explanation of the decision making process, and direct carers to other policies and employee support which may be useful, such as flexible working arrangements and internal counselling services. The organisations felt that having formal policies helped them to ensure consistency and fairness in implementing leave options, which rest on

managers' discretion, across teams and sections, and were a valuable means of alerting carers to the support they can access. The evidence from the two large organisations in this study is that:

- Leave entitlements are not abused, but are highly valued by carers. This has a business benefit, because it increases their commitment to their job and to their employer

Carers don't actually want to take time off.

Manager, HR, and member of carers' network, utility company

Many carers take (their own) time off for caring, and don't claim back the time they are entitled to.

Carers only use the policy when they really need it, and then only take a few days off a year. And when they are at work they are motivated, loyal and never late to work.

Manager and member of carers' network, utility company

- The costs of these leave entitlements are off-set by the financial savings achieved through improved retention rates

(In a caring emergency) you are not dealing with an absence, you are potentially dealing with a vacancy, if you don't respond appropriately. The cost of recruiting is incomparable to the cost of 2-3 days' emergency leave.

Policy Development Manager, HR, utility company

(Retaining carers through support or special leave arrangements) represents a saving to the company of about £1million / year

Manager and member of carers' network, utility company



Figure 2.2 Types of special leave option and the situations they aim to address:
large organisations

Policy or arrangement	Care Situations	Terms and Conditions
<p>Carers' Emergency Leave</p> <p>Unforeseeable emergency incidents involving dependant, leave needed for a short period If more time needed, then absence becomes planned leave</p>	<p>Help if a dependant gives birth, is sick, injured or assaulted (carer may not be providing direct care, but may wish to be present)</p> <p>To make longer term arrangements for a dependant's care</p> <p>To cover when existing arrangements break down</p> <p>To deal with an unexpected incident involving a dependant child at school</p>	<p>Must have a period of continuous service</p> <p>Paid – for 5 days per year (more allowed at line manager's discretion depending on circumstances)</p> <p>Agreed with line manager but request arrangements should not delay departure in an emergency situation, they can be sorted out after the event</p>
<p>Carers' Planned Leave</p> <p>Leave needed for a foreseeable event lasting for a defined period If more time needed, absence becomes a career break, or a review of working pattern/hours can be undertaken</p>	<p>Providing nursing care following hospital discharge</p> <p>Assisting dependant to move accommodation</p> <p>Attending benefit/ legal hearings with dependant</p> <p>Attending hospital appointments with dependant</p>	<p>Paid – either for 5 days per year, or up to a month if matched with annual leave</p> <p>Line manager's decision, request will not normally be refused</p>
<p>Career Break or Sabbatical</p> <p>Not exclusively for carers Minimum period 3 months – 2 years</p>		<p>Must have a period of continuous service</p> <p>Job held open</p> <p>Line manager's decision</p>
<p>Unpaid Leave</p> <p>Not exclusively for carers When all paid leave options exhausted</p>		<p>For a defined period of time</p> <p>Line manager's decision</p>
<p>Cost of Dependant Care</p>	<p>To enable a carer to attend training, or perform work duties requested by the organisation – at a time when they would normally have caring responsibilities</p>	<p>Line manager's decision</p> <p>Paid in arrears on production of proof of payment</p>



The social and business benefits of a commitment to diversity

In contrast to the large organisations, the manufacturing company included in this study had not developed a specific carers' policy. It too has a long standing commitment to equality, and has adopted a range of alternative ways of supporting the carers in its workforce, but it does not see a business benefit in offering paid leave for which only carers are eligible. Evidence from this organisation shows that the company has, whether intentionally or not, taken a different approach to managing people; that of recognising and trying to address individual and diverse needs rather than identifying carers as in need of special treatment.

We don't want to single out one group of people and give them extra benefits which others can't have. Hence there is no paid leave for carers of children or others. There is lots of flexibility, but not pouring lots of cash into people's pockets.

Managing Director, manufacturing company

As we show in Box 2.1, this small company makes extensive use of flexible working, negotiates hours of work with each individual, and expects its employees to work in effective, supportive teams. The commitment to an organisational culture which values each employee and respects the importance they attach to their lives outside work is a strong company value, developed by its managing director and senior managers, and cascaded throughout the firm.

In the past 5 years, the two large employers in this study have also been developing a more sophisticated understanding of carers' needs, and positioning their approach within the pursuit of a diverse (rather than an equal) workforce.

People are not put into boxes – 'carer' – 'disabled'. Every carer is different and will need an individual solution. So it's about 'fair' treatment, rather than equal treatment, as that implies everyone is the same.

Diversity Manager, HR, utility company

Everyone in (this government department) has a duty to act fairly and

Box 2.1

How flexible working supports carers and works for the business in a small manufacturing company

The company...

- Is a production company making promotional products
- Was set up in 1987 with support from the Enterprise Allowance Scheme
- Is a family business run by its owner/managers
- Operates on a single site
- Has 'flat' management: 200 staff; 13 heads of department; 20 team leaders
- Recruits its staff locally – 60% are women
- Has a flexible work culture reflecting its values and the practicalities of labour supply
- Is a member of Employers for Carers
- Has Investors in People Work-Life Balance status

Flexible Employment at the company...

- Is informed by the owner/managers' own life experience
- Employees' hours are individually negotiated
- 2 in 3 employees work flexibly, many on part-time or variable contracts
- Employees can 'bank' hours / 'make good' hours deficits
- Work is delivered by teams: co-operation and loyalty is expected to be the norm
- When business peaks, employees often work extra hours
- Flexible working started in the office, has been extended to factory operations
- Production takes place between 7.30 am and 10.00 pm



What the managers say

The pay is nothing special at all, but we get very good people, and if there is a rush order on, or some crisis in production – which often happens, people rally round and support and do the work.

We want a work culture in which people do not feel pressurised into lying.

If little Johnny was sick, we wanted people to feel they could say little Johnny was sick – ‘I can’t come in today’. We have 2 little Johnnies, and they get sick from time to time.

Our carers never take (unfair) advantage of flexibility. They’re just too busy arranging their lives.

If you don’t treat people with respect, they will come to work and do what you tell them to do, and they will take the money and go home at the end of the week. But they won’t bring their enthusiasm and their energy and their creativity to the job – or they will do it with a degree of resentment.

Let’s manage to keep the culture – guard it, nurture it, protect it. We have long discussions about how we’re going to approach each problem, and it will be approached from a moral perspective – but that morality is based on good business sense.

Culture not regulation is the key

- Informal communication methods with minimal rules/regulations are used
- The system works through trust and respect, with management low-key
- Multi-skilling is crucial – most employees acquire their skills on the job, many starting as unskilled or unqualified
- Employees say the company recognises that every caring situation is unique and must be handled individually

Operational issues and how the company benefits

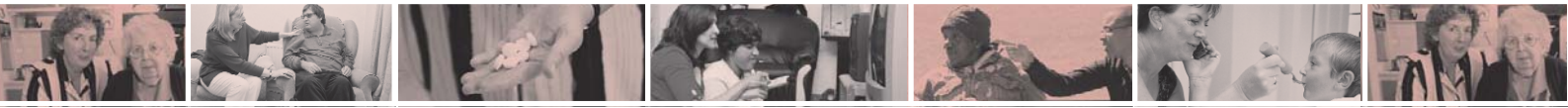
- Flexible hours, variety in work and multi-skilling are connected – they attract staff in a tight labour market – even though wages are relatively low
- The flexible working and multi-skilling enable rapid delivery of orders – keeping the company ahead of its global competitors
- Managerial responsibility is delegated – team leaders do not have to check with senior managers about using flexi-time or discretion – saving senior staff time, and giving team leaders autonomy and self-esteem

How employees benefit

- Enhanced self-esteem, loyalty, responsibility and autonomy
- A better atmosphere at work
- More effective communication
- Reciprocity – ‘we all work better when we are here’
- Peace of mind, happier at home and at work

How the business benefits

- Productivity increases
- Savings in recruitment and retention costs, accommodation and systems
- Clients needs can be flexibly met
- Reduced sick leave
- Lower staff turnover
- A happier workforce and a high level of trust in relationships at work



with respect towards all with whom we come into contact within our work. That means being alert to the different needs and preferences of all our colleagues, so that they can develop their potential within (the organisation) and contribute fully.

Supporting Carers: a guide for managers in the Department, produced in conjunction with the Network for Caring, June 2004

Managers in the case study organisations see this approach as effective because it:

- widens the pool of potential recruits, by offering visible ways of supporting diverse need (particularly important in tight labour markets)

Initially we weren't paying much and the work was casual, hence the people wanting this work were women with children. We had to find ways of working which attracted them.

Operations Director, manufacturing company

- supports the creation of a workforce that reflects its customer base and is therefore better able to understand customer needs and to deliver an appropriate service

The group looked at issues such as engineers going into peoples' homes where the customer had caring needs. We need engineers to be sensitive to the needs of vulnerable customers.

Diversity Manager, HR, utility company

- retains skilled staff by recognising and accommodating the changing social demands on employees throughout their working lives

HR tries to get out the message that flexibility is for everyone, whatever the reason, and caring isn't just childcare, and staff give back 100% if their needs are met.

HR Manager, London, government department

Each of these factors is explicitly linked to the organisation's business and organisational effectiveness.

The social and business benefits of flexible working

Extending flexibility in working patterns, and giving greater choice to all employees, including carers, is the primary means by which these organisations are now enacting their commitment to the 'human dimension' of their business practice, and offering a 'social' benefit to their employees.

Our own experience of having young children (as company directors) and the (difficulty of affording) childcare meant we wanted to give others the flexibility we ourselves needed in order to work.

Operations Director, manufacturing company

By supporting carers in our workforce (the organisation) can contribute more fully to society as a whole.

Supporting Carers: a guide for managers in the Department, produced in conjunction with the Network for Caring, June 2004

However, managers in these organisations were very clear that flexible working arrangements bring quite specific business benefits. All three organisations pointed out that greater flexibility was becoming more important in delivering services more efficiently and competitively. Their approach was distinctive in that they had linked the 'managing diversity' and 'flexible working' agendas together. The way these organisations have conceptualised carers and their needs, and the practices they have introduced to support them over time, are summarised in Figure 2.3.

Their approach has led each of the organisations to operate with a very wide range of flexible working practices. They feel that more 'traditional' forms of flexibility, developed in the 1980s, are no longer sufficient to meet employees' needs, and that as employers they too can benefit from more fluid working arrangements. Hence current arrangements:

- are offered to every employee, rather than to selected groups, and go well beyond current legislation which grants parents of very young and disabled children the right to request flexible working
- are administered by line managers, who are trained to negotiate individual arrangements with each employee who requests flexible working. Decisions



Figure 2.3 Ways of thinking about carers' needs and how an organisation can best respond

Period	Conceptualising carers	Organisational means of support
1980s	Carers as a group with special needs	Equal opportunities policies, special entitlements and limited flexible working options Focused on women and those with family commitments
2000s	Carers as a diverse group, which can include anyone at any time in their working life	Flexible working policies, based on trust and autonomy Offered to everyone

Figure 2.4 Flexible working options offered by the organisations

Traditional flexible working patterns	Progressive flexible options
Formal flexi-time with core hours and time sheets	Any pattern of reduced hours/ number of days
Annualised hours	Working from home/ remotely
Term-time working	'Cafeteria' benefits (e.g. ability to pick and choose, e.g. increasing / decreasing annual or unpaid leave for a particular working pattern)
Part time	Self rostering (team voluntarily agree shift patterns for manager to approve)
Job share	Job share register within a company
Shifts of varying lengths over a 24hour day	Split shifts, e.g. arranged with a period of time off in the middle of the day or afternoon.
Career break	Compressed working (9 day fortnight)

are made in relation to business needs and to the requirements of the individual's post

- rely on trust and on employees taking responsibility for managing their workloads individually and in teams

The experience of these organisations gives rise to our conceptualisation of flexible working arrangements into 'traditional' and 'progressive' categories, shown in Figure 2.4.

The reasons they gave for embracing flexibility are discussed below, while how arrangements are managed and promoted is discussed in the following section. Managers in these organisations were convinced that flexible arrangements had five types of

benefit. These were that flexible arrangements:

- (i) attract and retain staff in a tight labour market

We are not the only company operating 24 - 7. All call centres are grouped together (in the same geographical area) and all go fishing from the same pool. They are competing to offer the best hourly rate. We are not cash rich - we can't offer the sort of perks which banks can offer, but we can offer good work-life balance.

Policy Development Manager, HR, utility company



Box 2.2 Work Wise Scheme, utility company

Workwise came about because of complementary business needs: the need to improve staff retention and to make savings in the company's property portfolio by releasing a building in central London. Initially the project was called 'Project Martini – any time, any place, anywhere'. It offered 3,000 employees the opportunity to work from home and hot desks in the remaining offices. Employees agree the days they will be in the office, and have equipment to enable them to be in contact with colleagues at all other times.

Workwise has led to a £3 million saving on property in 18 months, predicted to be £5-8 million over the next 2-3 years. Surveys of employees have thrown up comments like 'it's much better now, it gives me the opportunity to deal with the children's school run 2 days a week and then concentrate just on work for the other 3 days' and 'it ended 4 hours of commuting each day, travelling through peak traffic, as a consequence my work output has increased.'

Policy Development Manager, HR, utility company

(ii) motivate staff, making them more productive

We have anecdotal evidence that if you offer a better work-life-balance, employees are more motivated. We can also turn the assumption that part-time workers are not committed to their work on its head. Productivity of output can be measured in call centres, and there is evidence there.

Policy Development Manager, HR, utility company

Flexible working improves productivity – you have a fixed time to get work done in, and so you get your head down. It is a way of motivating staff and reducing stress, they know they can ask me (to change their hours) and they will get a considered reply.

Line Manager, government department

(iii) allow services to be delivered around the clock, to meet customer deadlines

Our flexibility of working practices means we can offer clients very flexible strategies, for example varying the lead-

in times to meet the requirements of individual orders.

Operations Director, manufacturing company

(iv) contribute towards the human resources management of a diverse workforce

Employees nowadays are not so concerned with salaries and bonuses, they take into account flexible working benefits.

HR Manager and member of the Carers' Network, Utility company

(v) reduce organisational infrastructure costs, by improving use of plant (as in the manufacturing company), and in cutting down on systems and estates costs.

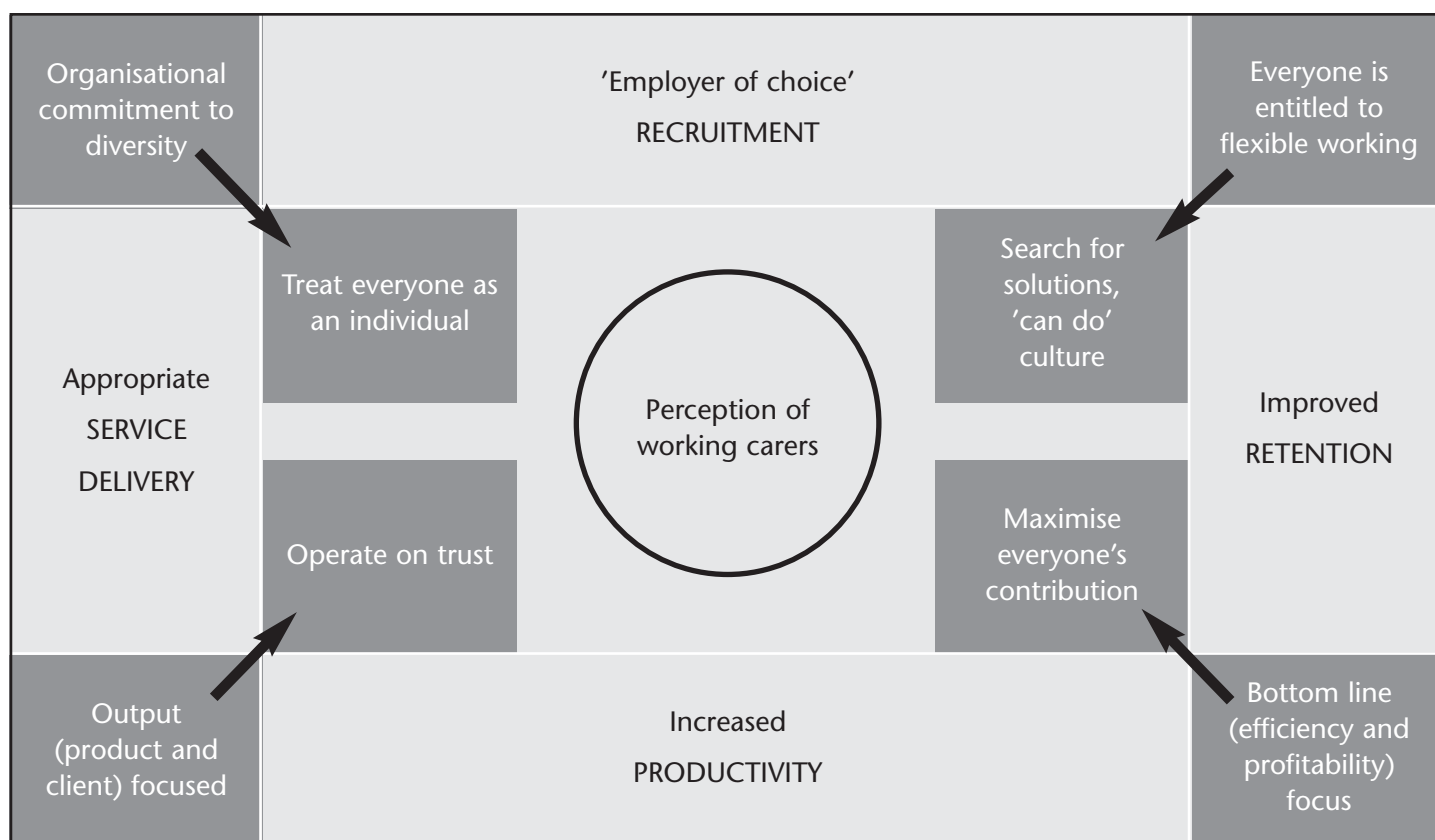
The private utility company had introduced a home-working scheme (see Box 2.2) enabling it to achieve significant cost savings as well as other benefits for employees, while the chair of *Employers for Carers*, BT⁵, cites reduced infrastructure costs in its calculation of the value of flexible working, including its support for carers, using hard business measures (see Box 2.3).

Organisational Culture

The successful and equitable implementation of flexible working practices and carers' policies depends on the culture of the organisation, and on its



Figure 2.5 Cultural messages supporting the implementation of support for working carers



managers' ability to uphold organisational commitments, as BT's experience indicates. Evidence from the three case study organisations suggests that certain cultural messages create a more supportive work environment for working carers, positively influencing the way they are perceived and treated by both managers and colleagues. Figure 2.5 summarises the four key messages as:

- Treat everyone as an individual
- Search for solutions
- Operate on trust
- Maximise everyone's contribution

These messages arise from approaches to employment and business (shown in each corner of the figure), which are adopted to achieve benefits in the areas of:

- Recruitment
- Retention
- Productivity
- Service delivery

Universal flexible working entitlement and the 'can do' culture

How does offering flexible working options to every employee, and empowering managers to implement flexibility, wherever possible, bring benefits to managers and to carers? Managers in the case study organisations argued that it frees them from having to make 'value' judgements about whether requests for flexibility or special entitlements are 'deserving'. Instead, their decisions are made on the basis of whether and how the business will be affected. This reduces resentment between colleagues, which, as other research has shown, can arise if carers are perceived to be getting preferential treatment. Also, and very importantly, it reduces the anxiety carers can feel when making their requests.

There is no resentment about carers taking carers' leave, as anyone can ask for flexible working arrangements and does not have to give a reason.

Diversity Manager, HR, utility company



There is not a list of reasons to justify flexible working. We just address whatever needs employees have: this varies from a 3 month holiday in America; the need to be available on the end of the phone; to having to dash off with no warning.

Operations Director, manufacturing company

Lower grade staff (e.g. in the call centre) used to be more worried about caring and retaining their jobs. This perception has now changed.

Manager and member of the Carers' Network, utility company

We want to be able to accommodate people, so we won't say no without it being fully thought through...the higher up you go (when making that decision) you get somebody who can see the solution, for example like providing cover from another section, rather than looking for cover within the team.

Deputy Manager, government department

We look upon flexibility as a two-way street. It is not us expecting all the staff to be totally flexible when we want them, but neither is it a case of the staff can just walk out whenever they need, they have to consider the needs of their team. There will be occasions when we say, look we want you to consider the needs of the whole company, we have to get this order out.

Operations Director, manufacturing company

Output-focused approach and a culture of trust

A trust-based culture measures employees not on the number of hours they put in or on whether they are present in the office, but on the quality of their work and their contribution to their team. In these organisations, managers are not asked to 'police' employees but instead to focus on overall output. This benefits carers by removing any managerial suspicion that they are not committed to their work when

taking time off, and makes a nonsense of any requirement on them to provide 'evidence' of their caring role.

We did have rules of flexitime, but threw them away. We have focused on building a focus on looking after your team and your customers – and as long as that happens, anything goes (any form of working arrangement).

Managing Director, manufacturing company

It's actually easier to manage when people are managing themselves. It encourages employees to take responsibility, if they know they are not going to be interrogated when they need to request a change in working arrangements.

Deputy Manager, government department

Some managers have raised concerns that they don't know if someone is a carer or not. But we reinforce the importance of trust in making this work. Trust is one of our 5 company values. This is a process of change, we are still going on a journey.

Diversity Manager, HR, utility company

Commitment to diversity and people's difference, maximising everyone's contribution

This type of organisational culture needs to be supported by good intelligence and communication about the different needs and circumstances of the workforce. These organisations' approach is that anyone can become a carer at any point in their working lives, and that given the demographic profile of the population this will increasingly become the norm rather than an exceptional experience.

(Special provision for carers) does not come under the heading of 'equal opportunities'. A carer could be someone of any age, ethnicity or gender – it cuts across everyone.

Diversity Manager, HR, utility company



HR did lots of promotion with managers, using statistics to demonstrate the different life stages of the workforce and ask questions of managers about how they will deliver the business in the future, given the changing profile of their employees.

Policy Development Manager, HR, utility company

Focus on bottom line / culture of maximising everyone's input

The culture in these organisations supports carers by challenging the stereotype of carers as 'problem' employees. Rather, the problem managers are expected to address is how to reduce the cost to the business of high rates of absenteeism, low employee retention and/or poor or ineffective recruitment. This puts the onus on managers to hold on to each employee, and to secure the investment that the organisation has made in their skills and knowledge. In learning more about their employees' needs, managers explained that they had come to view carers differently; as very committed employees who were making significant contributions to their service.

It's really busy here, and sometimes people just find the pace difficult to cope with and leave the service. Not, in fact, people who have got caring responsibilities though, they tend to find it easier, as they are more used to juggling life a bit more.

Line manager, government department

It's often small things that are needed to make the difference to carers, such as having mobile phones switched on at work so that they can be contacted... this makes the person able to stop worrying and concentrate on their work.

Managing Director, manufacturing company

This type of organisational culture underpins the 'can do' approach to flexible working. It leads managers to find solutions to each individual's work-life conflicts that are imaginative, flexible and cost effective.

Challenges in bringing about cultural change

As we have seen, managers' attitudes and actions are central to the successful implementation of policies addressing diversity and flexible working in all three organisations. Post holders with an overview of the organisation's objectives highlighted these as relating to inconsistency, 'old-style' management, and the balance between organisational and individual needs.

While all three organisations yielded substantial evidence of progress in becoming truly 'carer-friendly' employers, all nevertheless recognised that embedding their approach took time and commitment, and each had encountered some obstacles to progress.

Inconsistent application of policies and discretionary decisions

In the large organisations it was difficult to ensure that every manager dealt with carers' requests in the same way or in the same spirit. Informal mentoring by colleagues, and open discussion in management meetings, had improved consistency. Both the large organisations had decentralised HR structures to support their managers. Departmental HR advisors also attended business meetings to ensure they were aware of the business limitations affecting individual requests. Both these employers were also in the process of implementing a monitoring system for recording and analysing the nature and number of requests made, and the decisions taken in response. One benefit of this was the opportunity to identify any 'rogue' sections with anomalous arrangements.

Even in a small company it could be a struggle to maintain consistency. In the case of our small manufacturing company, finding the time for communication was crucial.

As the company has grown it is more difficult to keep the 'company feel', as small teams evolve their own identity and membership. We are very aware that each new employee needs to learn about the job and the culture. We have to take time to communicate.

Managing Director, manufacturing company



Box 2.3 Flexibility Pays: a Senior Manager's View

For any organisation, major change only occurs as a result of a clear vision based on a business need. When BT began its journey towards becoming an organisation characterised by a high degree of flexibility in the late 1970s, it identified **globalisation**, fast **accelerating technological developments** and an expected huge **increase in consumer demand** as three key factors with profound implications for it as an organisation. It was clear that BT would experience high demand 365 days a year and 24/7, and that to respond to this it would need to engage its employees 24/7. Yet the fiercely competitive business environment it faced meant it would have to do this without increasing costs.

BT grasped early on that **flexibility is about choice**, and that the detail of how flexibility can be achieved cannot be prescribed. More important was to ask, 'what do you want flexibility to be?' This posed a real challenge for managers, who crucially needed to grasp both the **business needs** facing the organisation, and the **aspirations of its people**. And what fast became clear was that most people in BT wanted to continue to work an average week, but to do so 'in a different way'.

Analysis of the business showed that, in an extremely competitive market, the organisation had to reduce its operating costs. Infrastructure costs were very high, but as it began to encourage home-based working, BT realised that the organisation could save £6,000 with each home worker it created – more if staff were based in London. With **11,000 staff home-based** in 2005, this represents an enormous **saving of over £60 million**.

A glance at the demographic trends, listening to what children and young people say about how the adults in their lives work, and intelligence about the attitudes of graduates and the other young people BT needs to attract as future employees and customers quickly shows how unsustainable extended commuting times and long inflexible working hours are in relation to family and personal life.

Of BT's current 102,000 strong workforce today, 75,000 work flexibly. BT has calculated the **average increase in productivity** for these workers at **21%** – worth at least **£5-6 million** on the company bottom line. BT's annual **staff turnover is below 4%** – when the sector average is 17% – and **sickness absence** among home workers averages **below 3 days** per person per annum.

Just as important, BT's 20 million customers rate **quality of service 5% higher** than before – and these **customers are 7% happier** too. These important business gains show that introducing flexible working arrangements has already made business sense for BT in hard economic terms.

Getting managers at all levels within BT to accept flexible working as the norm has not been without its challenges. It's been important when talking to managers and introducing flexible working to show them the evidence that proves **managers using flexible working have better bottom line results** than those who do not:

Flexible workers are 14% happier than other colleagues.

Stress related absence has been reduced by 26% through flexible working alone.

Carers can continue to harmonise their caring and working lives – a crucial issue with the rise in caring responsibilities throughout society.

Disabled staff can manage their jobs because the work can come to them.



How BT developed flexible working arrangements for its field force is particularly instructive. Field force employees are now paid per job rather than per hour. This has taken time and several iterations to work out, but the results have been dramatic: **in the first full year** of operating the new **flexible arrangements**, field force staff took home on average **more pay**, and **worked 2 hours less per week**, while servicing an **additional 1 million customers**.

BT sees flexible working arrangements as a 'major societal inclusion tool'.

There are **environmental benefits** too. Last year, BT **saved 12 million litres of fuel** through using flexible working arrangements and establishing Net Meetings. This cut its own costs, but also **reduced traffic nuisance** and achieved significant environmental gains reducing CO2 emissions by 54,000 tonnes. So flexible working is also a sensible and productive way of organising your business.

A less tangible gain, but one BT rates very highly, relates to its people relationships. *It's really an illusion to think you are controlling people just because they are 'in the office'*. BT's message here is that 'It's OK' – to use the technology you have through your work to organise your personal life – to book your holiday or to check your bank balance. At BT we have **replaced managerial control** with trust. This does put some demands on management – managers need to be able to be very clear with their people about what output is expected, when it is required and what quality is needed.

As flexible working arrangements have been introduced, BT has ensured they are **led from the top**, established **throughout the organisation**, and apply to **everyone**. The company does not need to know **WHY** its people want to work flexibly – all that matters is *'is it operationally possible?'*

Innovation can happen anywhere in your organisation – not just at the top, so it's important to 'free it up'. **Every job has a component that can be done in a different way**. Today most of BT's senior managers work flexibly, and many of the senior appointees coming to BT say a key reason why they **want to join the company** is because they will be able to work flexibly.

To sum up: if you put flexible working practices in place, and allow your people to engage with them and develop them, you will get:

- clear **productivity gains**
- huge **cost savings** (for BT nearly £1 billion in accommodation/systems costs alone)
- **increased customer** satisfaction
- more **creativity and energy** (flexible working produces twice as many new ideas)
- **reduced sick leave**
- **lower staff turnover**
- and a **trust-based relationship** with your staff which is 'worth its weight in gold'.

Based on a speech given in London in October 2005 by Caroline Waters, BT Director of People Networks, to the Working Families Conference 'Is Less More?'



Persistent 'old' style management practices

Underlying any inconsistency in the application of policies was often an 'old and traditional' management style. Managers with this approach find it difficult to trust employees when they are not present in the office. They are fearful that flexibility will mean work will not get done. These managers tend to allow their value judgements about the reasons given for carers' requests to affect their decision making. In the large organisations, the HR professionals were tackling these managers' attitudes by presenting them with hard evidence of the business case for granting carers' requests, and discussing carers' situations.

HR assists managers to implement policies. They go through the rationale, the need to change, best practice and reassure them that not every response will be yes.

Policy Development Manager, HR, utility company

Managers' reactions depend on the individual – some requests are refused and appeals are referred to HR. In this case HR tries to share the business case with managers.

HR advisor, government department

The large organisations see their HR personnel as important 'change agents' whose consistent message and encouragement is critical in influencing managers' behaviour.

We needed specific training with HR (personnel) about change management and how to persuade managers to comply with change.

Corporate Director, HR, utility company

Balancing business needs and individuals' needs

HR personnel stressed that the needs of the business had to be at the heart of all decisions relating to carers' requests, and that because business needs varied between sections, so should the response to staff.

Every office has different flexibility issues. The way it works is by not prescribing the outcome. The business

needs and the workforce of a call centre are very different to the needs and workforce of a power station. Each must address its own barriers.

Diversity Manager, utility company

Managers in front line service areas, or in areas with small specialised teams, had greater difficulty making all forms of flexible working available to their staff. They also sometimes struggled to cover unpredictable absences relating to emergency caring situations.

There is much less flexibility in some areas, as we need a counter open for fixed hours. In this case there might be staggered hours and self rostering, but the counter has to be open at 9 regardless of employees' caring responsibilities. Managers delivering front line services are much more restricted in what they can agree to than managers in HQ, where you can provide just as effective a service from the end of a modem at home.

HR Manager, government department

Managers try to get round this difficulty by up-skilling their front line staff, so that they can cover a range of job roles.

We constantly move people around between sections to cover. I don't like people to get too focused on 'this is my job'. I want them to think 'this is the work I am doing today'.

Deputy Manager, government department

HR personnel also felt it was important that managers should be able to say 'no' to requests which would be detrimental to the team and its work: that a balance had to be found.

Sometimes it is hard for the person that wants the time off to understand that we've still got to keep the show on the road. They can see we've got these family friendly policies. Generally we have to find a compromise.

Deputy Manager, government department



Developing policies and practices: key steps

Each of the case study organisations was able to describe the range of different actions it had taken in developing support for working carers. These included collecting information about carers in their organisation, taking positive action to develop support arrangements, actively promoting flexible working, and benchmarking their organisation's approach against other organisations.

Awareness raising

Awareness raising had taken a number of forms (see Box 2.4). Piloting small scale flexible working schemes had enabled the large organisations to test the waters; to identify the range of caring responsibilities employees and potential recruits were likely to have; to consider carers' preferences about working hours; and to assess their contribution to the job and to their work teams.

The large organisations had also set up focus groups of carers and had included questions about caring responsibilities in their staff satisfaction surveys. This information gathering had been facilitated by personnel in the human resources department.

We gained insight into the realities of carers' lives – carers' came forward and said, 'I could work if I could have a shift covering these hours.' We realised that this issue was not specific to a geographical area.

Diversity Manager, HR, utility company

This approach was not thought necessary in the small company, which used personal knowledge of staff, and its emphasis on effective and regular communication, to ensure the needs of working carers were well understood.

Positive action to build expertise and establish support structures for carers

The two large employers had both invested resources in developing structures to support carers, in the form of carers' networks, connecting this new provision to their policy making and performance monitoring processes. The stimuli facilitating this positive action investment had included:

- the White Paper on Modernising Government (1999) introducing the arguments around diversity (in the government department)
- a Chief Executive with personal experience of caring
- an organisational expectation of being at the forefront of employment practices
- a staff survey highlighting lack of awareness about carers' entitlements and inconsistent implementation
- a staff survey highlighting a concern among part-time employees that they were missing out on training opportunities
- pressures to widen the recruitment pool which brought carers' needs to the fore

While the structure and aims of the two organisations' carers' networks were similar, the amount of resource committed was different. In the utility company the network has been largely employee-led, with some assistance from the HR department. Having identified a small group of employees who were passionate about setting up a self-help group for carers within the organisation, HR endorsed the idea of an online network and formalised the structure, with a national chair, regional chairs and deputy chairs. The Human Resources department also provides administrative support for the carers' network website. Those employees who hold the elected positions in the network are volunteers, and fit running the network around their normal duties. They are able to access a small travel and subsistence budget, which allows them to meet face to face on a quarterly basis, and the network's publicity materials are produced on their behalf by HR.

The network does not cost much – there's the intranet support, which we had already, some travel expenses for the quarterly meetings. The network is self sustaining. If I leave tomorrow I expect it will continue. It is important that the carers' network is not seen as a TU initiative or a managers' initiative but an employees' initiative. It gives it credibility and demonstrates that it will be useful – as it is run by those with first hand experience of caring.

Diversity Manager, HR, utility company



Box 2.4 Examples of awareness-raising

Piloting carer recruitment

Working with Job Centre Plus and Carers UK, the utility company had set up a small scale programme to recruit people who were carers. After receiving training from the Job Centre to build confidence, each person on the scheme was interviewed and, if successful, was offered a job. The hours and working arrangements were discussed with each person individually, so that the position fitted exactly their caring responsibilities. This scheme made a significant contribution to the organisation's understanding of carers' concerns and situations. Many of the people recruited through this scheme had subsequently been with the company for over 10 years, and were making significant contributions to the further development of initiatives for carers.

Carers' focus groups

In response to a requirement to review HR and equal opportunities practices, HR personnel set up focus groups, including one for working carers. They looked at different areas: past and present experiences of working; returning to work after a period of absence; policy and its application; and channels of communication. A report was completed which highlighted the need for better communication and implementation of existing policies. This in turn led to the recommendation that a Carers' Network for employees should be set up.

Box 2.5 Carers' Network: structure and aims, government department

Structure:

- Run by paid employees, with a central team and regional representatives in the different business units
- Membership open to carers and 'Friends of the network' (non carers who want to know about the issues)
- Primarily an on-line interactive community, where questions, comments and information can be posted
- Some face-to-face events and conferences
- Publicity via posters, stalls, newsletters and surveys of the workforce
- Links to organisational policy-making processes – a Carers' Champion at director level; individual senior managers and board members involved as members; formal links to relevant corporate committees

Aims which benefit carers:

- Raising awareness of the issues affecting carers, including challenging perceptions of what it means to be a carer
- Providing a safe environment to raise issues, obtain advice and exchange views and experiences with other carers
- Providing information to carers about their internal entitlements as employees and external resources and services for their dependent

Aims which benefit the organisation:

- Providing a consultation panel to assist in the development of policies and procedures and internal management training programmes
- Benchmarking the organisation against its peers, e.g. through entering for awards
- Improving staff satisfaction survey ratings
- Offering support to managers dealing with carers
- Building up the membership of the network to identify and support all carers
- Meeting organisational goals for example around communication



In the government department, the *Network for Caring* was created alongside three other networks, each focusing on different 'special needs' groups, covering both parents and carers. The networks were resourced to meet requirements outlined in a new Equality and Diversity Action Plan produced in response to the white paper on modernising government. The network had a small number of dedicated staff whose job it was to run the on-line community. These employees responded to an internal job advertisement and had been drawn from sections across the department. This team was advised by volunteer regional representatives, produced a monthly newsletter for all business units and organised training and awareness raising events. Box 2.5 summarises the way the government department set up its network.

Making flexibility work for working carers

All the organisations recognised that high-level managerial commitment was crucial for effective implementation of flexible working, and had found that a systematic approach, drawing on available resources, was needed. It was essential to keep employees informed, to use the organisation's technology and infrastructure effectively, and to adopt a planned approach to policy implementation, training and publicity.

In a small organisation it was possible for the directors to take a personal part in raising employees' awareness.

The managing director takes new people around on a tour, which is another opportunity for discussion. If we are concerned that new staff are not familiar with flexible ways of working we try to place them with teams who are the most developed... and know the way we want to run this organisation.

Operations Director, manufacturing company

The two large organisations had each found it necessary to produce employee guidance in the form of handbooks (see Box 2.6) and question and answer summary sheets to explain to carers the different options available, and to assist them in thinking about their choices and the impact permanent changes in their working arrangements would have on their colleagues, their team and themselves.

New guidance was produced that used a friendlier approach, moving away from the formal language used before. It helps employees to think through all the different impacts of their requests, and to prepare for their interview with their manager.

HR Advisor, government department

In those parts of the business where flexible options are limited because of the nature of the work, for example because the team has to deliver a face-to-face front line service with fixed hours, induction packs for new employees have been written to manage their expectations.

We spell out the sort of arrangements which we like to run ... so that it is not shambolic, but very safely planned.

Line manager, government department

Box 2.6 Carers' Handbook, government department

Contents:

- Introduction and definition of a carer
- Special Leave (circumstances, further sources of information)
- Parental Leave (circumstances, further sources of information)
- Eldercare, issues explored
- Dependants with a disability, issues explored
- Carers' Centres, full resource list
- Benefits which carers are entitled to claim and template forms
- Career development and training – access for working carers, and additional dependent costs
- Network for caring, details and membership form
- Advice on scheduling meetings and events (so that carers can attend)
- Useful phone numbers and addresses, internal and external



Technology had been important in helping the private sector utility organisation offer staff in back office positions considerable flexibility. These positions do not involve face-to-face contact with the customer, and can be performed in any location. The technology used includes company mobile phones, laptops, remote computer access and facilities at home such as PC equipment and broadband installation. The company was exploring whether call centre staff could be offered a form of tele-working from home during the research period, and it was hoped that carers in these jobs, in the future, would also have the option of home based working.

In all three organisations the decision to grant an employee's request for leave or flexible working arrangements was taken at the lowest level; by their line manager or supervisor. Managers were encouraged to discuss the options available with the employee making the request, including asking about the alternative support they could obtain outside the workplace to allow them to continue working. The decision was only deferred upwards if the manager was unable to reach a compromise which met both business and employee needs. In this event, a senior manager would review the options and the decision. If a request was turned down, an employee was entitled to appeal via the human resources department.

In these organisations, many changes to working arrangements were not recorded and remained as informal agreements between individuals and their line managers. This was a key element in building a trust-based culture. A record was only made when the change affected pay or terms and conditions of employment (for example a reduction in hours).

One barrier which managers acknowledged had caused many carers anxiety was the 'burden of proof' placed upon them; the need to prove the existence of a caring commitment, for example by showing a doctor's appointment card, or hospital correspondence. This requirement had proved unnecessary and unhelpful, and was no longer made of employees in any of the organisations studied.

Training line managers of carers: For managers to exercise their discretion, in line with the intended approach, they needed access to relevant HR expertise, support and information. This was recognised in all the organisations, which aimed to equip their managers in both formal and informal

ways. The small manufacturing company found it could rely much more on informal ('do as I do') guidance to induct managers into their role, and placed considerable emphasis on 'guarding, keeping and nurturing' its distinctive organisational culture in all its interactions with staff. By contrast, the large organisations needed to use a variety of more formal and specific methods to communicate an unequivocal message about organisational expectations of managers.

Formal approaches: Both large organisations ran in-house manager training courses. Their 'leadership programmes' included a focus on managing a diverse workforce. These programmes had been supplemented by voluntary one-off sessions, to inform managers of changes to the organisations' carers' policy and legislative requirements.

Informal arrangements: In all organisations, junior managers could be informally mentored by senior managers in the area of managerial discretion. Weekly management meetings also provided an opportunity for more junior staff to raise issues with more experienced colleagues and to ask for advice.

In the two large organisations, information specifically on carers reached managers in a variety of ways:

- Managers' guides and managers' training packs had been produced by both large organisations. In the utility company the carers' network took the lead in writing the training pack.

The Network produced a pack for managers; this was then sent to HR to tweak, and then back to the chair. He has sent it out to senior managers and they will cascade this down to the other managers

Manager, member of the Carers' Network, utility company

- The HR departments also issued briefings relating to legislative changes, emailed to all managers, and available on the staff intranet
- Local HR advisers were available to answer managers' specific questions and to advise them in individual cases
- Managers could refer to the carers' network, which (as already mentioned) was essentially an on-line community run by employees who were carers. They were able to post questions about caring



issues on the intranet notice board, and could access the resources posted there. Managers were also able to telephone the network coordinators directly for advice, and some did so

The training and guidance materials which the large organisations had developed aimed to 'win hearts and minds'; they were designed both to raise awareness, and to convince and empower managers to take appropriate decisions with confidence. They did this by presenting the following information:

- Real examples of the business savings achieved through flexible working
- Statistics to demonstrate the different life stages of employees within the workforce, emphasising the growing incidence of caring among employees
- Case studies of real carers working for the organisation, to raise managers' awareness of the variety of circumstances a carer may face; the type of solutions that can be found; and to demonstrate the contribution carers are able to make once a solution is in place

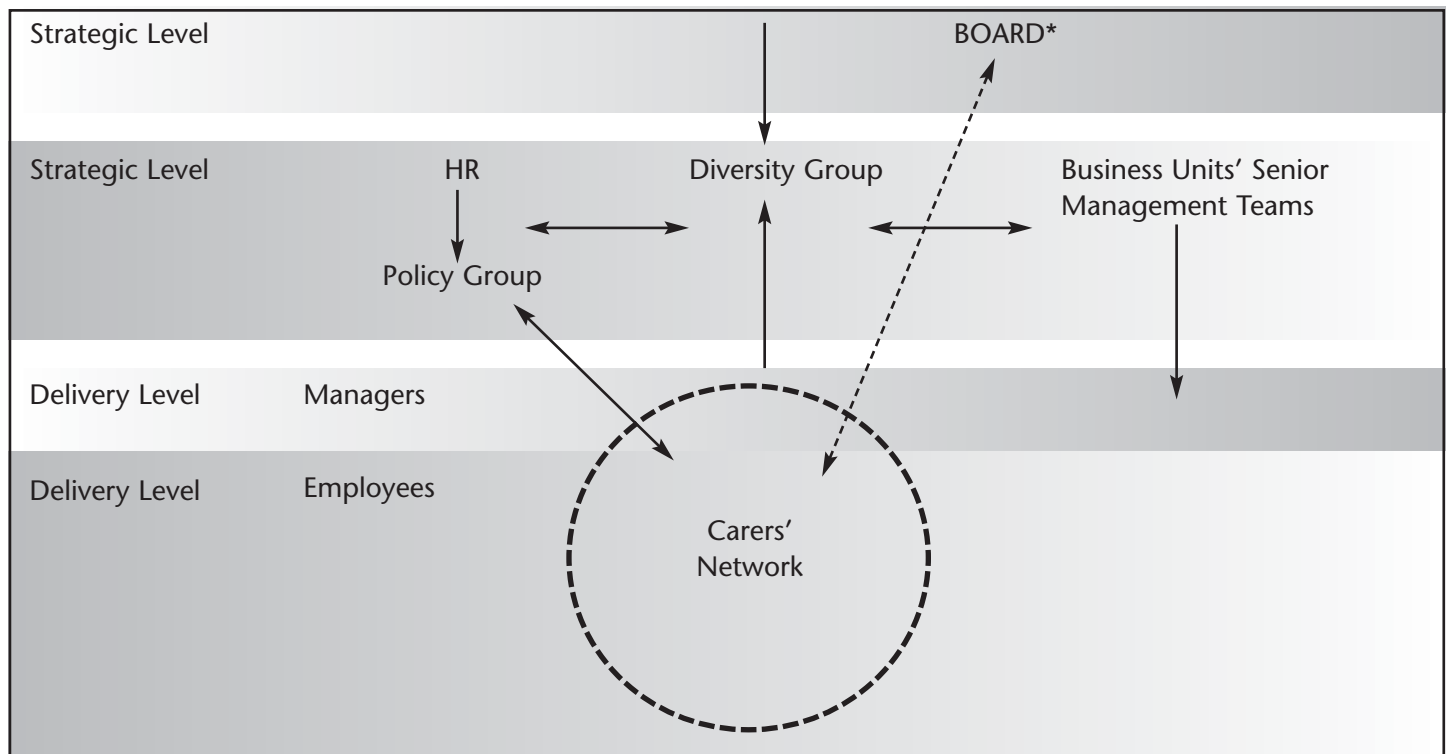
There are case studies on the intranet to promote the right to ask for flexible ways of working. HR email round for volunteers who readily come forward. Case studies are also published in the quarterly magazine for employees who have no on-line access.

Policy Development Manager, HR, utility company

In this way questions about the scope of a manager's discretion could be answered, and the stereotype of carers as 'problem' employees could be challenged.

Figure 2.6 summarises the roles of the carers' networks at strategic and delivery levels within the large organisations. Both organisations had a top level group consisting of senior managers and executives which focused on operationalising organisational commitments to diversity and equalities. The carers' network had unique input into this group, via its close links with HR.

Figure 2.6 Structures for policy and practice review



* Carers' Champion – Board member with a remit to promote carers' interests, also a member and figurehead of the Carers' Network



This transfer of knowledge upwards was further enhanced by the involvement of Board members, executives and senior managers as members of the network, and by the designation of a Carers' Champion at senior level to act as a messenger to senior peers, to be a spokesperson at internal and external events, and to symbolise the organisation's support.

Carers' and flexible working policies were reviewed regularly in these large organisations. As one HR manager commented, 'they are a movable feast'. Feedback received from business units and the carers' network, and changes and policy developments, were presented and endorsed by the senior representatives from all business areas. These members then disseminated information to staff in their part of the organisation.

The networks thus played an important role in advising managers on a day to day basis, and in supporting individual carers in the workforce.

Benchmarking against other companies and through Carers UK

Those responsible for HR in these organisations were aware of the benefits of looking at other companies' practices to inform their own policy and practice development. In some cases, benchmarking was informal; HR officers and managers reflected on their own past working experiences and aimed to incorporate good ideas or avoid practices which were unsuccessful:

(This organisation) benchmarks its performance against similar companies and also companies where members of HR have previously worked. Coming from the finance sector, I was aware of a lot of initiatives around diversity which I drew on in my current role.

Policy Development Manager, HR, utility company

In other cases, HR officers and managers were members of external carers' organisations and networks, such as Carers UK, where exchanging good practice is a central activity:

We are involved in Carers UK. Our representative is a senior executive, who pushes forward the real issues that need to be addressed.

Corporate Director, HR, utility company

All three organisations had also put their organisational practice to the test by presenting it for peer and expert review in award schemes such as the Working Families Employer of the Year, which now incorporates a specific award for support to working carers. The utility company and the government department also actively tried to influence the practice of organisations to which they sub-contract business.

This chapter has focused on three very different organisations, each of which is actively trying to operate in ways which enable carers to work and care, using flexible working arrangements and developing a workplace culture which provides a supportive environment at work. As we have shown, these arrangements can be tailored to individual carers' needs, while at the same time addressing the needs of the business or organisation. Drawing on both managerial perspectives and employee accounts, we have shown that there can be strong business benefits in taking this approach. Across our case study organisations, many staff, at different levels, believed these policies were enhancing productivity and employee commitment, that they were enabling the organisation to make significant savings in recruitment, retention, estates and other costs, and that other business gains, linked to greater happiness at work and enhanced employee morale, included improved customer satisfaction and better client perceptions of the organisation. These factors were widely felt to be bringing these organisations significant benefits in hard business terms.

As discussion of this topic elsewhere suggests,⁶ other organisations may find it valuable to their business, as well as beneficial for their employees, to develop a working environment which is supportive of carers. The case study organisations' experience indicates that three essential elements in the approach needed are:

- link carers' needs to a wider diversity agenda. This means making an organisational commitment to accommodate and welcome a diversity of employees' circumstances, while recognising the specific pressures carers face
- train and support your managers. They are the key to equitable and effective implementation of your policies and practices in support of carers



- develop networks within your organisation, using modern technology. This special provision builds organisational expertise in relation to carers and can also offer self-help and co-worker support by creating an on-line community

In the next chapter we turn to the perspectives of the carers working in the case study organisations, and assess how far the organisational and managerial views and experiences discussed in Chapter 2 are shared by those employees who are combining work and care.

- 1 Details of the methods used in this part of the research are given in Appendix 1.
- 2 Emergency Family Leave allows an employee reasonable time off from work to deal with an emergency affecting a family member or someone living with them as a member of the family. There is no legal obligation on the employer to offer paid leave in this situation. <http://www.dti.gov.uk/er/timeoff.htm>
- 3 Flexible working – the right to request and the duty to consider for employers and employees', enacted 6th April 2003 <http://www.dti.gov.uk/er/individual/flexible-pl516.htm>
- 4 This point is also made in another recent study exploring evidence of the relationship between flexibility and productivity (Cooper 2005) 'Is less more? Productivity, flexible working and management', Working Families, October 2005.
- 5 BT chaired *Employers for Carers* between 2002 and 2005. Although not included as one of the case study organisations in this report, its People Networks Director, Caroline Waters, has given the authors permission to use material from a speech she gave in October 2005 in this report.
- 6 As for example at the *Flexible Working: the shape of future employment* conference for employers, hosted in Glasgow by *Carers Scotland* in February 2006.



Chapter 3

Carer-friendly workplaces: employees' experiences

This section explores the views and experiences of carers who were working in the three case study organisations, and who therefore had first-hand knowledge of what it was actually like to be a working carer in a workplace which had adopted a carer-friendly approach. Listening to carers' experiences and perceptions was used as a way of testing the effectiveness of the policies and of exploring the extent to which employee experience was consistent with the accounts given by senior managers and HR professionals. We focused on the following questions:

- Are the policies working for carers?
- Do carers themselves have anything to say about the business benefits of the policies?
- Have carers noticed any changes in the workplace culture and in management practice since the introduction of the policies?
- What, from working carers' point of view, still needs to be done, or is still 'not quite right'?

As some of the carers who participated in this study had been employed in their organisation for some time, they had both observed and participated in the development of their organisation's practices. In what follows, we have included their comments about how past practice in relation to working carers has been changed or improved. The chapter also summarises the comments carers made about support services external to their workplaces. These reveal some important concerns about the flexibility and adequacy of service provision. These issues are touched on here because they were so important to carers, although they were not the main focus of this research. New work on this topic is currently under way, as part of the Action for Carers and Employment (ACE National) partnership (ACE 2) operating between 2005 and 2007.

The carers' views expressed here were collected in focus groups led by members of the research team, and in face-to-face interviews conducted in each workplace. In total, 34 carers took part in this aspect of the research.

Are the policies working for carers?

In general, carers were very positive about their own working arrangements and about the way specific situations they had encountered had been dealt with. This provided supporting evidence that these organisations' self-image, as promoted by senior managers (and presented in the previous section of this chapter), was often shared by working carers themselves. The following comments refer to a range of the policies and approaches discussed earlier:

[My manager]...doesn't worry about when you work, as long as you get your work done. If you've got a team meeting to go to, you make a point of being there, but the rest of the time, I think we can manage our own time.

Adam, utility company, caring for son with Down's syndrome

You can bank your flex hours, which then come in very useful when you suddenly need them.

Jane, manufacturing company

I'm still part-time so that I can swap my working days, without taking a holiday, so that I can take my mother to the hospital. My manager was very good.

Tanya, utility company, manager, caring for mother-in-law with Parkinson's disease

The policy made life so much easier. I've been allowed to reduce my hours temporarily under the carers' policy...It means that if circumstances change at home, I would be able to go back full-time without there being any problem.

Nancy, utility company, caring for mother with dementia

Everybody is equal, so everybody has the opportunity to have time off for whatever



they want. Where people haven't got children they've got grandchildren to care for...even the younger ones, there's always the morning after the night before when they ring in and say, 'I can't get in till lunchtime', and it's okay, we support each other.

Margaret, manufacturing company

Some carers commented in very positive terms on the atmosphere at work, rather than on specific organisational practices:

When I have had to go very quickly because [my son] has been taken ill at school...people around me have said, 'give it to me, and you get off.'

Adam, utility company, male, caring for son with Down's syndrome

Others disclosed the particular elements of the job which made it work well for them:

This is the great thing about this job, and I think it's the thing that has enabled me to do what I do with my parents. I've worked in offices before where your workload was never ending, and [here] at the end of the day, you carry nothing over and so that makes it quite useful for me.

Sheila, government department, usher, caring for mother & mother-in-law

Some employees saw benefits in their organisation's approach, but felt it was limited to carers working in certain areas of the organisation:

It's certainly easier at headquarters to take work home with you than it is in the [front-line]...so I think that's where more home working happens.

Dennis, government department, caring for elderly parents

We also encountered an acceptance that there were some limits to flexibility, even within a positive context:

It's difficult to manage a small team of people like that [flexibly], so to reduce my hoursthey would consider it,

however, it may mean changing my job role.

Donna, utility company, female, caring for elderly parents

In addition to these views, a number of carers also gave positive accounts of using carers' leave, compassionate leave and other absences from work (including permission to take additional unpaid leave), which they felt had helped them in dealing with specific caring situations which had temporarily disrupted their more usual working arrangements.

Do carers identify business benefits?

In our discussions with working carers, we were able to collect their views about the 'business case' for flexible and carer-friendly working arrangements. Their comments related to: their transferable skills; the advantages of multi-tasking; their motivation, loyalty and happiness at work; and to a variety of other benefits which they were convinced flexible working brings to an organisation.

Skills learnt as a carer are applicable at work and make you a more effective employee

This related to their view that caring responsibilities give carers additional skills that are often transferable into the workplace. For example, carers in the utility company felt that they had become better time keepers and were more organised:

If you're organised at home, you tend to bring that into work.

Donna, utility company, caring for partner

We know how to balance, you know, three, four, five things at once, and you get it done, because it has to be done.

Carol, utility company, caring for elderly parents

Several carers in the government department also pointed out that facing and overcoming stressful challenges outside of work can help when dealing with stress and conflict at work, and that being a carer also helps with human skills such as interacting with people and being more sensitive.

Multi-skilling the workforce

In the government department and in the manufacturing company, carers were very aware that the policy of multi-skilling employees meant if



someone was unable to come into work, their responsibilities would still be covered:

Everyone multi-tasks, so it's not a problem if someone is not there. Multi-tasking and flexibility go hand in hand.

Clare, manufacturing company

In the government department, steps had been taken to ensure that employees in the more specialist departments were trained to cover other duties in an emergency or if someone had to take time off. In departments not involving contact with the public, staff had more flexibility, as their working hours were not dependent on service hours. However because the range of tasks in this department was quite complex, team work and multi-skilling were also an important part of working arrangements. It was made clear that this was done not just to cover for absences, but to reallocate work and handle a busy workload.

Supported working carers are highly motivated and loyal

The interviews provided a range of evidence that working carers see themselves as highly motivated at work, and link this to their caring responsibilities:

As carers we sell ourselves to [our company]. You've never met carers that aren't motivated. You can't be late, that's the kind of attitude we've got – as a group we're very organised.

Gerry, utility company, manager, caring for disabled son

Working for an organisation that supports carers meant that these carers wanted to 'give something back' by putting in extra effort at work:

I personally go that extra mile for them, because I appreciate what they're doing for me.

Donna, utility company, caring for elderly parents

My experience from opposite ends of the spectrum shows that flexibility to grant whatever is needed, whenever it's needed – and the trust in us as individuals to know what is best – is absolutely fundamental. As a result, those of us

who have been treated in that way do feel loyalty and a will to give back.

Victoria, government department, caring for elderly mother

Carers also reported that having supportive managers created a sense of loyalty and made them reluctant to leave the organisation. One carer pointed out that if a company treats its employees well, it is likely they will sell the brand to people outside of work, potentially creating additional customers for the company.

In the manufacturing company, employees noted that organisational support creates less stress among people who have caring responsibilities:

I think [management] realise that...they are getting better production from us with this attitude. I don't think that they feel they lose anything by letting us have these days off that we need. In terms of production, we all work better when we are here.

Christine, manufacturing company

Working carers work harder

Carers also confirmed that they shared managers' views about the 'give-and-take' attitude, founded in a sense of reciprocity and trust, which develops when they feel well supported at work. For example, carers at the manufacturing company said they were willing to work longer hours over Christmas out of appreciation for their managers. This also arose in our interviews at the utility company, where employees discussed times when they had worked outside of their hours, with no extra pay, in order to help their team hit deadlines:

There have been occasions when there's been a deadline for a report and I'll come in at 6am in the morning so that I know I'll get that report completed.

Donna, utility company, caring for elderly parents

Working carers sometimes connected this point with feelings which some may feel are less positive, speaking about the guilt they felt when having to take time off for their caring duties. This was particularly the case at the government department. One carer here felt that she tended to put in more effort with both her work and her colleagues to make up for the occasions when she would have to take time off:



You've got a lot of the time worrying that you're taking too much time off, the time you're actually there you try and put in 200% ...if anyone asks me a favour I can't say, 'No I can't do it', because I feel I've got to do it because other people cover for me when I'm not there. You want to look willing.

Eva, government department, caring for daughter and elderly mother

Happiness at work

Feelings of 'guilt', which sometimes gave rise to an enhanced sense of obligation towards the team, a particular manager, or the organisation as a whole, need also to be seen in the context of carers' reported happiness at work. Our interviewees stressed that flexible carers' policies enable carers to come to work with peace of mind, a feeling that they have an understanding employer, and the knowledge that they can talk to their manager about their personal circumstances:

It all makes for a happier workforce and, obviously, yes, people can come to work with an easy mind.

Sheila, government department, caring for mother and mother-in-law

In the manufacturing company, where individual requests were worked out with line managers, carers confirmed that a very trusting environment and a happy workforce had developed:

When people aren't stressed with their job we're going to be more productive. There's no point being at work if you're going to be worrying about something. When we are here we're relatively cheerful people, which reflects on your colleagues as well.

Rebecca, manufacturing company

Flexible working

Granting requests for flexible working can also be affected by the nature of the change required by the carer, and managers' ability to find workable solutions:

She (line manager) had obviously made her mind up that she didn't want me to

change my work pattern [from 20 to 12 hours], and then she found out that if I could change my work pattern, they would get a full time member of staff in addition to me, so it worked to their advantage. So she has actually been very supportive.

Melanie, government department, caring for son with Down's syndrome

Carers cited a number of ways in which the flexible working arrangements their employers had put in place to support carers were beneficial for the organisation as a whole, particularly in service areas which ran outside of the normal 9-5 hours:

I worked in a section... [where out] of the 12 of us only one person actually worked a conventional 5 day week...it was really good from the point of view of the customer base...we had an advice line and it was manned from 6am to 10pm almost every day and they [the customers] were amazed that they would actually get a real person on the line.

Beth, government department, caring for child with severe learning difficulties

Changing organisational cultures

In these organisations carers were aware that they were working in workplaces where senior managers were committed to actively developing a carer-friendly approach. They recognised that some past managerial practices had altered, and also showed an awareness of the likelihood of, and potential for, further change:

When my situation first started, every single time I had to use my annual leave and unpaid leave, so I'd used all my leave to care for someone. But when I got in touch with the Carers Network, they said, 'Hang on a minute, you're a full time carer', and told me about my options such as special leave.

Shakoor, government department, caring for wife with mobility problems

Some carers were now surprised when they encountered an inflexible or more traditional approach:



I know that there are jobs that I probably wouldn't apply for – you know that you're not going to get them [as a job-share] because you know what the culture is... it is changing, it is coming down from the top end, and you can't expect things to change overnight.

Beth, government department, caring for child with severe learning difficulties

Others were happy in their own situation, but still aware of continuing limitations and scope for further change, especially at line manager level:

I was told I couldn't have unpaid leave – due to being a manager 'You need to be here to manage your staff'. So I had to make other arrangements. But afterwards I regretted it, and wished I'd gone back to my manager.

Shakoor, government department, caring for wife with mobility problems

The focus groups showed that employees were aware there had been organisational changes over time in relation to carers' policies and practices. They were also expecting technological developments to bring further changes, such as home working:

We're about to go through the Flexible Working Programme, and then hopefully things will get a little bit simpler. I guess the restriction I found was that I didn't have broadband at home...my perception is that we are moving in absolutely the right direction. This flexible working would make people's lives much easier.

Claire, utility company, caring for parents-in-law

What still needs to be done?

'Proving' caring responsibilities

The question of 'proof of caring' was raised by a number of carers at the utility company, and was causing carers concern at the time of our research contact. This issue has subsequently been addressed at the organisational level, following input and advice from members of the Carers' Network, and working carers no longer have to provide proof, such as a

doctor's note. However, as these are issues likely to arise in other organisations, it is worth noting our respondents' views here:

It's an issue, when you get a manager asking you to prove that you are caring...If your cared for person was ill for one afternoon, how would you bring in proof for that?

Donna, utility company, caring for elderly parents

It's such an emotive issue, you're in a bad way anyway, you're upset, caring for someone, you might have to go into hospital...it's not a good thing to do [asking for proof], so it's about knowing your own staff.

Gerry, utility company, manager, caring for son with dysphasia

Awareness

Another issue in both the government department and the utility company was an ongoing lack of awareness among some line managers of arrangements for supporting carers within the organisation. Working carers themselves were very positive about the policies which had been developed, but were nevertheless concerned that this information was not always known by the person authorised to agree leave for flexible working:

I don't think all the managers here are aware of the information. You could go round and do a survey here; you'd probably get 50:50 aware of the support.

Tanya, utility company manager, caring for mother-in-law with Parkinson's disease

There was scope for raising more general employee awareness too:

I don't think people are very clear about what they're entitled to.

Esther, government department, caring for uncle with Alzheimer's disease

All the policies are on the intranet ... they're all listed, and 'carers' is one of the sections that is on there. So whilst they're probably not promoted, they are freely available, it's not cloak and dagger stuff.

Adam, utility company, caring for son with Down's syndrome



When you don't know [about carer's policies], you don't know what you can ask for. When you know that you are entitled to these things then it gives you the ammunition to go in and ask for it.

Danielle, government department, caring for 2 disabled children

Career development

Some carers felt their caring responsibilities made career progression difficult, and that it could be hard to cope with a challenging job on top of caring. Victoria considered she had been held back in her career during the last 7 years by her caring responsibilities:

I didn't feel that I could justify pushing for a more senior post and then having to pull out... Is it me that hasn't pushed myself, or is it them that have assumed that I wouldn't want to? That I don't know, it's an open question.

Victoria, government department, caring for elderly mother

Sheila decided to work part-time and to prioritise caring, and recognised that in doing so she was making a choice which affected her career:

This department have always been good with me, if I wanted to have gone down a certain road, I'm sure they would have let me, but it's been my choice. It's never too late to change things, but I don't want to, because I am coping.

Sheila, government department, caring for mother and mother-in-law

Annie also prioritised her caring responsibilities over opportunities to progress in her career:

You've got to put the time and effort into studying, and I think that I've got more than enough to cope with, without taking something else on. But it would be nice to have promotion and more money. It's not really feasible at this point in time for me, because of the other responsibilities that occur.

Annie, government department, caring for elderly parents

Others were conscious that in some caring and working situations there was a risk the carer would compromise their health in trying to do both:

I think one of the difficulties is that if you are ambitious and want to get on yourself, there's a cost to your caring responsibilities, and that cost is, you do your caring responsibilities, and you do your job – and you don't look after yourself.

Peter, government department, caring for diabetic blind wife

Another concern was the relationship between employment and carers' benefits. Melanie expressed this in relation to her career development:

If I got promoted and my salary went up, I would lose the carer's allowance, so I would end up having to work more hours to recover the money that I would lose.

Melanie, government department, caring for son with Down's syndrome

Guilt and relationships

Guilt and worry were recurrent themes in our discussions among carers working in the government department (but interestingly did not come up in the other organisations). Sophie, who had also taken a lot of time off due to her own illness, felt guilty even though she was not getting paid, as she considered she was letting her colleagues down:

It's not only your managers that you feel guilty about, sometimes other staff, your colleagues; I think I always feel that they talk about you behind your back.

Sophie, government department, caring for mother who had stroke

Working is important to carers

Many of the carers we spoke with emphasised how very important paid work was in their lives despite the tension with caring it sometimes produced. These carers saw their workplace as a place of respite from caring, as well as somewhere they could have a more individual identity:



I think it keeps you grounded when things are going very badly elsewhere... and to actually come and just be a normal person.

Beth, government department, caring for child with severe learning difficulties

I think there's a limit to which worrying about a situation can actually help it, and therefore if you can get away from it, having arranged things as best you can...it probably makes you healthier.

Victoria, government department, caring for elderly mother

Others expressed the view that, 'work keeps you sane', helps you to switch off from what is happening at home, and takes your mind off your caring responsibilities:

I go to work to escape the problems at home...if I didn't have that time to myself...it would lead to signs of madness in my case. I think it's very, very important to have switch off time.

Esther, government department, caring for uncle with Alzheimer's disease

It's the normal thing in your life, it's something that you go and do every day.

Eva, government department, caring for daughter and elderly mother

Coming into work is a relief in a way...if you have somebody there 24/7, really coming into work is my sanity.

Nancy, utility company, caring for mother with dementia

Some carers even felt that working enabled them to be a better carer:

Having a job where you can be flexible gives you an opportunity to get away from the situation you are in, and it gives you time to be yourself at work without those outside pressures. It keeps you fresher than if you're there 100% of the time caring, as that can get on top of you.

Clare, manufacturing company

Alternative care services

Carers who took part in the focus groups and interviews recognised that support from social services could be very

important when an individual is trying to balance paid employment and caring responsibilities. For example, help in the home could enable an employee to remain in the workplace during working hours, and to carry out their caring responsibilities outside of these times:

[Social services] takes the pressure off, I mean they help her with her breakfast, they help her with her lunch, and then they help in the evening...otherwise we'd be running backwards and forwards.

Alison, manufacturing company

Working carers across all three organisations nevertheless spoke about many problems which they had experienced in their dealings with social services, and complained that they often had to 'kick up a fuss' before they received the services they needed:

I've had help from social services...because I was having a really bad time getting her in and out of the bath....and I did eventually get, after moaning and moaning, eventually we got a chair.

Tanya, utility company, manager, caring for mother-in-law with Parkinson's disease

Others noted that, in their experience, social services were not good at offering you anything. 'Unless you cry your eyes out, they just allow you to get on with it'. Some felt that a care recipient living with the unpaid carer was far less likely to receive formal support services. Carers emphasised that much more rapid assessment of those they care for was needed, and that social workers should do more, by acting as the carer's advocate, and keeping carers informed about their entitlements, rather than having to be 'pushed' to provide support.

Some carers spoke of their difficulties in having a stranger in the house to help with caring duties:

I suppose it's organisations like social services, who might be able to pay someone we know rather than a stranger, if we could have a say about who is coming in our house...that would help. I would consider that more.

Shakoor, government department, caring for wife with mobility problems

Working carers also talked about the need to reduce the paperwork from social services, and for options and arrangements to be easier to understand:



...it's all right for me, but if it's someone who's older shall we say, some of the terminology that they use is not very user friendly. I mean I know that they're probably trying to cut down on having 94 different forms, but what they've got now is a 94 page booklet...which is a bit crazy.

Donna, utility company, caring for parents

Victoria faced problems in combining her employment at the government department with the telephone discussions she needed to have with social services, who were only contactable during core working hours. Although she had the opportunity to make personal phone calls from work, she pointed out that she is often not in the right frame of mind when at work, or did not have the relevant paperwork to hand in the office. Other carers confirmed that people in this situation would find it a lot easier to be able to conduct conversations of this type outside of core working hours.

A lack of information about available services, entitlements and benefits seemed to be one of the biggest barriers to gaining appropriate provision and guidance. Some carers said that they would not know where to go if they needed help, and others felt it was difficult to access relevant information on what is available from social services, the NHS or the voluntary sector:

My dad has got MS... as far as I know he never gets any literature from anywhere – I mean, I know he's not on any medication for his MS, which may be a reason why he's not had anything from Macmillan nurses or anything, nobody. I wouldn't know where to go to get anything.

Margaret, government department, caring for parents

I didn't know about the Carer's Centre near me until 6/7 years ago. They were very helpful with the information they gave me. When you're caring for someone and you don't know about these organisations, you think you're the only one that's doing it, and you're going on a downward spiral.

Tanya, utility company, caring for mother-in-law with Parkinson's disease

Working carers who had been given relevant information about their situation found it very helpful:

I was given all the possible information from the hospital when my mother had a stroke, who to contact, and who not to contact and about caring. They were very good, it worked quite well.

Sophie, government department, caring for mother who had had a stroke

I would use a Welfare Officer from the [government department]. She was fantastic in terms of thinking about who to call, and then things started to happen. It's helpful to have someone in the workplace who can help.

Pauline, government department, caring for disabled mother-in-law

However, many felt that better information about entitlements and benefits, support groups and knowing where to find out about advice and guidance was needed.

Our evidence from working carers in the three case study organisations shows that employees, like most of their managers and their human resources personnel, were fully aware of their organisation's approach to supporting working carers, and valued the arrangements which had been put in place. It was clear that those who had been with their employer for some time had noticed improvements in the way they were treated and in the support available to resolve any conflict between their work and caring roles. While some of these carers identified issues for further improvement, and in some cases cited individual instances where their situation had not been handled as well as they had hoped, most were conscious of working in an explicitly carer-friendly atmosphere, and welcomed this. Many could point to advantages for the organisation, as well as to themselves, of these arrangements, and believed that there was a 'business' case for providing carer-friendly policies and practices.

¹ For example, several carers mentioned that they were struggling to understand how the Direct Payments Scheme worked and could help them.



Chapter 4

Policy priorities: lessons from the research

In Chapter 1, we noted that unpaid caring for relatives, neighbours or friends occurs throughout our society, is an especially common experience for those in the prime years of their working lives, and is part of everyday life alongside paid work for over 2.6 million people in England and Wales. It occurs in all cultures and amongst women and men – and those who are combining paid work and unpaid care can be found in all industries, all occupations and in small, medium and larger firms. Carers nevertheless tend to be clustered in lower level occupations, often work close to home, and frequently have health problems of their own.

Today these working carers find themselves in a changing public policy environment, in a labour market undergoing considerable structural change, and in organisations where managerial practices and employers' expectations of their employees can be highly variable. The organisations discussed in this report are at the forefront of progressive practice in the way they conceptualise, support and respond to their employees with caring responsibilities. Acting with a number of like-minded employers, and supported by Carers UK, they had formed the *Employers for Carers* group as a way of highlighting their practice and of showing what can be done in the employment situation. In so doing they created an opportunity to influence thinking about how best to support carers at the employer, policy-maker and government level.

Chapter 2 focused on these three very different organisations, and examined what they have done as they have actively tried to operate in ways which enable carers to work and care. Drawing primarily on managerial perspectives and documentary evidence, we highlighted their commitment to flexible working arrangements and to developing workplace cultures which offer supportive environments for carers at work. As we demonstrated, they have found ways of tailoring working arrangements to the needs of individual carers, while also addressing the needs of their organisation and meeting their business targets.

In Chapter 3 we turned to the employee perspective,

collecting our information directly from carers in the case study workforces, and reporting what these employees had to say about working in a carer-friendly organisation. Chapters 2 and 3 both showed that there can be strong business benefits in taking this approach. In all three organisations, many staff, at different levels, believed the policies were enhancing productivity and employee commitment, that they were enabling the organisation to make significant savings in recruitment, retention, estates and other costs, and that the other business gains, linked to greater happiness at work and enhanced employee morale, included improved customer satisfaction and better client perceptions of the organisation. These factors were widely felt to be bringing these organisations significant benefits in hard business terms.

In our separate report on carers of disabled children, which refers to a different sample of carers, we confirm that some carers still have to give up work, or find it very hard to re-enter employment, because of their difficulties in finding an appropriate way of combining work and care. That evidence shows there are still many sources of tension for working carers. A situation in which the more positive approach seen in the case study organisations described here is the most common or universal experience of carers remains some way off. A key challenge for the future will be to find ways of creating a wider range of supportive working environments, so that they become carers' everyday experience of work, rather than simply organisational aspiration or rhetoric.

With carers' potential needs as employees firmly established on the contemporary public policy agenda, we therefore conclude our report by outlining some key messages from our data, and making recommendations which we think government, employers, trade unions, carers' organisations and others will want to consider. We present these in the context of the growing number of carers, their developing legal rights at work, and their need, when they wish, to be supported and protected in combining employment and care.



Statistical evidence about carers and employment

Our key findings from the newly available statistical evidence are that:

- Carers are a large and growing group, found across all sectors of society and in all sections of the workforce
- Caring is most likely to occur in people's 40s and 50s, but increasingly can arise at any age
- There is some clustering of working carers in lower level jobs
- Carers in employment are less well qualified than other employees, suggesting that there is scope in education and skills policies for paying more attention to carers' needs
- Some carers appear to be paying a 'poor health' penalty for combining work and care; as well as affecting carers themselves, over time this situation may compromise both their caring and their employment roles, and needs to be addressed as a matter of urgency
- High levels of caring among some ethnic minority groups, especially at younger ages, suggest these carers may face additional barriers in accessing paid employment and career opportunities

Already, almost all employers have within their workforce a group of employees who have been, are now, or will soon be, trying to combine unpaid caring and paid work. Because of their typical age, the employees most affected are the most experienced workers in the organisation and in the economy. If they are lost to paid employment, or deployed in jobs below their potential, their employers, and the economy as a whole, will lose out in hard economic terms. This is quite aside from the personal costs – including lost income, missed educational and career opportunities, and damage to their health – borne by individual carers and their families.

Recommendations

We recommend that government, employers and trade unions assess the costs of not providing adequate support for the millions of people combining work and care, and ask themselves how they can justify these costs, and how much better off individual firms and the economy and indeed society as a whole would be, if they were adequately supported.

Our main findings from our organisational case study evidence about carers and employment are that:

- All organisations, large and small, public and private, can provide a supportive environment for carers
- Many carers want and prefer to combine paid work and care
- Managers need training and support in responding to carers' requests. Awareness of the tensions carers may experience needs to be raised across all grades and across teams of workers
- Paid leave (for both emergency and scheduled caring) can reduce staff turnover and absence, cutting employment costs. These leave entitlements are rarely abused and increase individuals' loyalty and commitment
- Flexible working benefits carers because it addresses the diversity of individuals' circumstances, rather than stereotyping them as problem employees. It is responsive to individual circumstances, and reduces resentment about 'preferential treatment'
- Implementation of flexible working and carers' policies depends on the culture of the organisation; managers need to play a key role in upholding organisational commitments to diversity and inclusion
- In large and established organisations, building a supportive environment for carers involves a programme of cultural change. This must be endorsed by top-level management, and have input from the organisation's human resources department, as well as some specialist support structures
- In a small firm or work team, multi-skilling, team working, and good communication between managers at different levels provide effective cover if carers have unexpected emergencies



- Gathering information about employees' caring responsibilities is an effective way of demonstrating the business benefits of a flexible approach; individual case studies can be important in winning managers' hearts and minds
- Carers' networks and other forms of positive action need not be resource intensive and are valuable for carers and managers alike

As we have demonstrated, carers' issues seem finally to have arrived on the UK's public policy agenda. The new government White Paper on health and social care outside hospital (*Our health, Our care, Our say*, Department of Health 2006) makes an explicit central government commitment to revisit the National Carers' Strategy and to offer a 'new deal' for carers. The current pensions debate, now clearly delineated in the Turner report (Pensions Commission 2005) has identified the significant disadvantages faced by carers, whose reward for caring is all too often poverty in their own old age, emphasising the need to tackle this issue in pensions reform. In 2007, new legislation on Work and Families will extend the right to request flexible working to carers, and the 2006 White Paper *A new deal for welfare: empowering people*

to work (Department of Work and Pensions 2006) is also relevant to carers, through the government's focus on supporting sick and disabled people and those who care for them to access paid employment as a crucial focus for its welfare reforms.

As society struggles to reconcile the needs of individuals and families for care alongside the needs of the economy, and of individual firms, to recruit and retain a skilled, experienced and productive workforce, it must surely be in the interests of all employers and organisations to address this agenda with new vigour as well, approaching the situation of carers in the same spirit.

This report has highlighted what three forward-thinking organisations have done to address their own agendas about work and care, and has presented their view, using evidence from both their managers and their employees, about why supporting carers makes business as well as social sense. It is now for other organisations, for employer and professional bodies, and for trade unions and government to follow their example in creating workplaces fit for carers in the 21st century.



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Appendix 1

Research Methods

Organisational Case Studies

In adopting a case study method we were using a multi-method approach to explore the perspectives of both working carers and their managers (who were sometimes carers themselves). This element of the research was central to the analysis of the business benefits of organisations employing and supporting employees with caring responsibilities.

Carer-friendly organisations who were members of the *Employers for Carers* group, part of the ACE National partnership, were invited to participate in the research: three were able to give full research access. The organisations were: a utilities company in the private sector; a central government department; and a private sector manufacturing company.

In each of the participating organisations, initial senior level meetings took place to discuss the research aims and agree access. A short screening questionnaire was devised and sent to selected members of staff (all staff in selected departments and worksites in the two large organisations; all company employees in the manufacturing firm). This enabled the researchers to identify employees with caring responsibilities who were willing to take part in the research.

Face-to-face interviews and focus groups were set up with all carers who responded to the screening questionnaire indicating that they were willing to take part. In the large organisations these were structured to include carers of disabled children, carers of spouses, carers of older people and carers with multiple caring roles in separate groups. These working carers taking part thus had a wide range of caring responsibilities and were employed at a variety of job levels, including management roles. All the focus groups and face-to-face interviews were tape recorded, with the permission of the research participants; these were subsequently transcribed and analysed by the research team.

We also arranged individual face-to-face semi-structured interviews with managers in each of the organisations. Three separate interview schedules were

developed, for line managers, human resources managers, and trade union representatives. These interviews focused on the organisation's policies relating to employees with caring roles, explored the history of the organisation's flexible working policies, and discussed the practical processes involved in managing staff. They were also used to collect evidence about the way the organisations monitored take-up of flexible working and of policy options supporting working carers. In total 22 interviews were conducted with managers. All interviews were tape recorded; this data was subsequently transcribed and analysed.

The human resources managers in the three organisations gave us confidential access to a range of relevant policy documents, HR briefings, benchmarking assessments and guidance for employees and managers. This provided important contextual and historical information about the three organisations for our analysis.

All participants in the research were assured of confidentiality, to protect their own interests and to encourage frank disclosure. For this reason the organisations where the research was conducted are not named in this report.

Analysis of 2001 Census data

The Census in 2001 was the first to include a compulsory question on the provision of unpaid care and the weekly hours of care provided. The Census also included questions covering age, sex, ethnicity, health, economic activity, occupation, industry, travel to work, household structure, tenure, etc.

The Standard Output from the 2001 Census was released in 2003/2004 as a set of pre-defined tables. Within these, data on unpaid care was limited to information covering:

- Age, sex, general health and provision of unpaid care (for all people in households)
- Sex, economic activity by general health and provision of unpaid care (for people aged 16-74)



- Households with a person with a limiting long-term illness and their age by number of carers in the household and economic activity

Additional tables were commissioned from National Statistics to cover unpaid care by economic activity and ethnicity, for men and women aged 16 to state pension age.¹

In 2005, an additional dataset from the 2001 Census was made available. This dataset, known as the 2001 Census Individual Sample of Anonymised Records (SARs)², differs from previous 2001 Census output in that it is a 3% sample of individual people's responses from which identifying information such as name, date of birth, postcode, etc. have been removed. This means that it is possible to look at different combinations of variables that are not available from the Standard Census Output, such as provision of care by occupation and sex, for example.

These data were analysed by extracting the data on men and women of working age (16-64 for men and 16-59 for women) and then cross-tabulating this against a number of different variables and by sex and age as required.

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1 16-64 for men, and 16-59 for women.

2 2001 Census SARs, Crown Copyright 2004. This work is based on the SARs provided through the Centre for Census and Survey Research of the University of Manchester, with the support of ESRC and JISC.

Finding out more

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CARERS UK
the voice of carers

the 1990s, the number of people in the UK who are aged 65 and over has increased from 10.5 million to 13.5 million, and is projected to reach 17.5 million by 2025 (Office for National Statistics 2004).

There is a growing awareness of the need to address the needs of older people, and the need to ensure that they are able to live independently in their own homes for as long as possible. This has led to a number of initiatives, including the development of new housing schemes, the provision of services to support older people in their homes, and the development of new models of care.

One of the key challenges in providing care for older people is the need to ensure that care is tailored to the individual needs of each person. This is particularly true for people with dementia, who often have complex needs and require a high level of care.

There are a number of factors that can influence the needs of older people, including their physical health, their mental health, their social support, and their financial resources. It is important to consider all of these factors when developing care plans for older people.

One of the key areas of research in this field is the development of new models of care that can better meet the needs of older people. This includes the development of new housing schemes, the provision of services to support older people in their homes, and the development of new models of care.

There are a number of challenges in developing new models of care, including the need to ensure that care is tailored to the individual needs of each person, the need to ensure that care is cost-effective, and the need to ensure that care is sustainable.

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