



UNIVERSITY  
OF SUSSEX

Human Resources

## Carer Fund Process Guide

University of Sussex

### 1. Purpose:

The University is committed to supporting members of staff who care for others to engage equally with development opportunities to support them in their roles within the University. As part of this commitment, the University has developed a small fund to allow for employees with caring responsibilities to claim for additional costs incurred for caring-related services when attending pre-approved work events, such as conferences, training or career development events as part of the employee's role. The fund will also provide for the cost of learning & development (which cannot be funded from other budgets) for existing members of staff who are returning to the workplace following caring related absence.

The overall aim of the fund is to support the employee's career and professional development needs associated with their role at the University. The approach has been developed in accordance with the University's commitment to students and other stakeholders to ensure value for money in the use of its resources. It is designed to enable proportionate and effective support to existing members of staff who are carers to allow them to meet their professional development needs and to further the aims and outcomes of the University.

This document outlines the eligibility criteria to obtain funding and guidance on how to submit a claim to cover costs. It is important to understand this before committing any funds as claims which do not meet the required criteria will not be accepted.

**Definition of a Carer:** A carer is anyone, including children and adults who looks after a family member, partner or friend who needs help because they are minors, or because of their illness, frailty, disability, a mental health problem or an addiction and cannot cope without their support. The care they give is unpaid.

### 2. Scope

This procedure applies to all University employees. Employees who have voluntarily resigned from their post and are therefore in their notice period are not eligible to apply for this funding.

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### 3. Criteria for claiming from the Carer Fund

The maximum amount that can be claimed by any individual is £1,000 in a 12-month period. Funding to this maximum amount can be claimed to cover:

- a) The cost of learning & development to enable an existing member of staff, who is a carer of a dependent, returning from a period of absence of more than 3 months to return to full capability in their role,
- b) The costs of care incurred to enable an existing member of staff who is a carer to attend a work conference, training or career development event that they would not normally be able to attend owing to their caring responsibilities, in order to help them meet their professional development needs.

#### 3.1 Training for existing members of staff returning to work from a caring related absence of more than three months

- Funding may be approved for the purpose of work-related training where other funds are not available. Work-related training is any training course or other activity which is designed to impart, instil, improve or reinforce any knowledge, skills, or personal qualities to support the individual in their return to their role in the University.
- Funding will be approved for up to one year from the date of returning to work after a period of caring related absence.

#### 3.2 Caring Costs for all members of staff with caring responsibilities

- The reason for applying must relate to a cost that is additional to the employee i.e. would not have occurred otherwise, had the training or development activity not been undertaken.
- Payment will only be made for third-party care of a dependent e.g. payment to a registered childminder, home care provider or care agency. A dependent can be the employee's spouse or partner, child or parent, or someone who does not live in the same household as the employee but is dependent on the support or care provided by the employee.
- It is recognised that in some situations, such as where the care is provided outside of the UK or outside of regular hours, the carer may not be registered. In these circumstances, a justification should be provided along with the receipts in claim reimbursement.
- The fund is not able to cover the cost of pet care.
- Care services must be supplied by a registered provider and claimants must provide evidence of receipt of payment. Reimbursement by the fund will not be made without receipts being submitted to support the claim.

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#### 4. Considerations

It is expected that alternative options should be considered prior to funding applications. For example, a part-time employee may be able to adjust their working hours to accommodate a training/conference event without incurring additional care costs, with the agreement of their manager. Understandably, a feasible, alternative option may not always be applicable or available, and therefore each application will be judged on a case-by-case basis.

#### 5. Procedure

5.1 Claims for re-imburement from the fund will be retrospective using an out-of-pocket expenses claim made through the standard finance system route. Claims must be supported by evidence of prior authorisation and of the caring and/or training expenditure made. Advance payments are not available.

5.2 Employees are required to seek prior approval from either their Head of School, PS Director or Head of Professional Service before the event. This can be in the form of an email or other written document and must clearly state what is being authorised i.e.:

- The costs of caring assistance to care for a dependent whilst attending a conference, training or career development event, and/or
- In the case of returning from a caring related absence, the costs of necessary training not already covered within the school or divisional training budget.

5.3 Once they have incurred the relevant expenditure the employee should create an expenses claim in the finance system.

The claim should include details of the conference, training or career development event and/or the additional care provision required.

5.4 The claim must be supported by the invoice/receipt for the provision and be coded to cost code DL007-02. Relevant receipts and advance approval from the relevant Head of School, PS Director or Head of Professional Service should be attached to the claim in accordance with standard finance process

5.5 The Assistant Director of HR Culture, Equality and Inclusion and the Deputy Director of Human Resources are responsible for verifying that the criteria have been met and the individual has not exceeded the financial limits.

5.6 Should the request for funding be declined, the transaction will be rejected on the finance system including the reasons for this. Where this is because documentation is missing the employee will be asked to correct this. Where the request is declined for any other reasons this will be also explained in an email to the employee. The employee will have the right to appeal this decision by writing to the Pro-Vice Chancellor, Culture, Equality and Inclusion.

5.7 Any additional tax costs, for benefits in kind, will be met by the fund. This will be calculated within finance once the expenditure has been approved.

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