



Superfast Cornwall
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Costing & Justifying Checklist

Making the case

The first thing to do is identify why you want to introduce flexible working and then try to work out the cost to see if you can afford it and you want to go ahead.

At this stage you will need to get the buy-in of the decision makers in the company to the whole concept of flexible working – if they aren't behind the project it won't matter what the cost benefit report shows.

Also at this stage it's worth checking if the company has a vision for its development that helps support the case for flexible working.

Now list the potential benefits of flexible working and try to put a value to each.

Carry out a similar exercise to find what flexible working is likely to cost, although if technical solutions have not yet been devised then it should be recognised that these costs will be approximate.

Armed with the information from the above, the next step is to prepare a cost/benefit report for senior management to help them make an informed decision.

Check List

Complete	Task
	1) Get buy-in from the company's decision makers to explore flexible working
	2) Check the management's vision for the development of the company
	3) Try to identify the benefits
	a) Are there any indicators that the company may benefit from flexible working?
	b) Are there immediate reasons for moving to flexible working?
	c) Are there benefits to the employee that help toward the case?
	d) Other general reasons?





	e) Environmental reasons?
	4) With each of the above where possible put a value to the benefit expected.
	5) Identify what it will cost to put flexible working into practice
	a) Office infrastructure set-up and ongoing costs
	b) Flex workers management set-up and ongoing costs
	c) Flexible worker set-up and ongoing costs
	6) Prepare the cost benefit report

Example cost/benefit analysis

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Capital costs depreciated

The following is a simple example of a cost benefit analysis for a firm that is looking to work more flexibly with three staff moving to home working 3 days a week.

Due to changing their working pattern to work from home three days a week it has been agreed to provide two hot desks for the three staff, rather than keeping three desks free all the time. The reduction in the office space required will enable an extra member of staff to be appointed without relocating the firm. However to keep the cost / benefit analysis simple the savings shown in the benefits section are calculated from a cost per desk / per annum figure.

Capital investment in equipment and furniture has been depreciated over a number of years to arrive at a per annum figure.

Costs	Capital costs	Yrs depreciated over	Other setup costs	per annum costs	
				Revenue	Capital
Office infrastructure setup					
Server costs	£3,500	4			£875
Server maintenance				£500	
Flex worker support & management					
Training			£120		
ICT remote support*			£200	£400	
Flex worker setup					
Laptop x 3	£1,680	3			£560
Home office furniture x 3	£1,500	5			£300
Training			£400		
Admin payments (3 x £104 - the HMR&C limit with no supporting info)				£312	
Home Broadband payments to staff x 3				£900	
Total setup costs	£6,680		£720		
Alternative per annum costs				£2,112	£1,735
Total per annum costs					£3,847

Benefits		Per annum
Increased staff retention by 10% on expected staff annual turnover**		
Advertising costs saved on	£650	£65
Training costs saved on	£340	£34
Productivity increased	£1,000	£100
Extended office hours 15%		
Additional business won		£3,000
Increased staff productivity 5% ***		£2,000



Office space released - per annum saving	£2,500
Total benefit per annum	£7,699

- * In practice it is expected that the ICT support costs will decrease over the first few years
- ** A simple calculation has been done taking 10% of the expected 'normal' costs per annum
- *** Studies have shown flexible working methods have led to productivity increases of between 5%-25%. This figure has been calculated taking 5% of the combined salary costs (£40,000) of the 3 staff

The above shows that a very strong case can be made for flexible working on an ongoing basis and that payback on the total expenditure would take just over 12 months.



Year by Year figures over 4 years

	Year 1	Year 2	Year 3	Year 4
Costs				
Office infrastructure setup				
Server costs	£3,500			
Server maintenance	£500	£500	£500	£500
Flex worker support & management				
Training	£120			
ICT remote support - ongoing costs expected to reduce by 25% each year after first year	£600	£300	£225	£169
Flex worker setup				
Laptop x 3	£1,680			
Home office furniture x 3	£1,500			
Training	£400			
Admin payments (3 x £104 - the HMR&C limit with no supporting info)	£312	£312	£312	£312
Home broadband payments to staff x 3	£900	£900	£900	£900
	£9,512	£2,012	£1,937	£1,881
Totals per yr	£9,512	£2,012	£1,937	£1,881
Cumulative Totals	£9,512	£11,524	£13,461	£15,342
Benefits				
Increased staff retention by 10% on expected staff annual turnover**				
advertising costs saved	£65	£65	£65	£65
training costs saved	£34	£34	£34	£34
Productivity not lost	£100	£100	£100	£100
Extended office hours 15%				
Additional business won	£3,000	£3,000	£3,000	£3,000
Increased staff productivity 5% ***	£2,000	£2,000	£2,000	£2,000
Office space released - p/a saving	£2,500	£2,500	£2,500	£2,500
	£7,699	£7,699	£7,699	£7,699
Totals per yr	£7,699	£7,699	£7,699	£7,699
Cumulative Totals	£7,699	£15,398	£23,097	£30,796
Balance	-£1,813	£3,874	£9,636	£15,454





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Planning Checklist

Having decided that you want to go ahead, the next step is to plan your introduction of flexible working. This needs to take account of the various issues involved, including those related to HR, technology and business processes.

You will also need to assign roles to those members of the company who will be involved with the project.

Check List

Date Complete	Task
	1) Project Planning – decide on the project control mechanisms
	a) Appoint a champion to oversee the introduction of flexi working
	b) Completed cost benefit report
	c) Establish procedures to manage / record costs
	d) Establish a timescale for the project
	e) Establish a change control process for the project
	2) General
	a) Decide/select what flexible working areas you plan to introduce
	b) Establish the success/completion criteria for the project
	3) HR
	a) Establish selection criteria to identify staff to work flexibly
	b) Identify general training requirements for staff managing flexi workers
	c) Identify general ICT training and support requirements for flexible workers
	d) Identify H & S training requirements for flexible workers
	e) Flexible working policy in place



	f) Resolve where Insurance responsibilities lies - for equipment in the home and people and equipment in transit.
	g) Establish exit procedure when flexi working is not proving effective for an individual
	4) Technical
	a) Identify the central ICT infrastructure required
	b) Identify the Flexi workers ICT requirements
	c) Identify Security / backup issues
	d) Identify remote support issues and procedures
	5) Business Processes
	a) Complete the review of the flexible workers role
	b) Inter 'office' communication process finalised
	c) Reassignment of any tasks no longer covered by flexible worker
	d) Arrange regular team meetings

In planning what you will do you may find that your initial estimate of costs may need to be revised, or that what you believe is possible may change. If this is significant it may require you to revisit the 'Costing & Justifying' stage.

Remember any time spent planning will reduce the number of surprises later and is likely to make implementation go more smoothly.



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Example Flexible Working Agreement

The law requires all employers to provide a statement of terms and conditions which complies with section 1 Employment Rights Act 1996 to all employees within 8 weeks of starting employment.

The document set out below, is not such a statement, it has been prepared merely to supplement an existing statement of terms and conditions. If you have any concerns about your legal responsibilities we recommend you instruct a solicitor

Name	
Address	
Telephone	
Mobile	
Job title	
Hours of work (core hours, flexible hours, office based and home based hours)	
Method of communicating remote working times to the business	
Communications agreement (method of communication when working remotely, agreed response times, core contactable times)	
Technical requirements	
Arrangement for ongoing assessment (e.g. review meeting date)	
Arrangement for termination or suspension of flexible working (or whether this is a pilot for a fixed period of time)	



- I have read and understood the company policy on flexible working and agree to it and the arrangement set out above
- I agree to carry out the Health & Safety self assessment on my proposed remote workplace and will operate in accordance with company safety policy
- I agree that flexible working is not a substitute for childcare during the agreed core hours
- I understand that the flexible working arrangement does not affect my status as an employee
- I understand the arrangement for termination or suspension of flexible working

Signed (employee)

Signed (on behalf of the company)

Date

Adapted from The Teleworking Handbook, 4th Edition, Alan Denbigh

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Example Flexible Working Policy

The following is an example only, and highlights some of the things you may like to consider in creating your own policy.

General

Welcome to the world of flexible working!

We will consider requests to work flexibly from any employee, regardless of role.

To be considered for flexible working, employees should complete an application form (which is available from) and discuss the proposal with their line manager.

Applications will be considered on an individual basis. Although there is no automatic right for any employee to work flexibly, the company will fully evaluate all applications and do everything possible to facilitate flexible working where it is in the interests of the business and the employee.

The following criteria should be considered both by management and by the employee when considering the employee's suitability for flexible working:

- Self discipline
- Self motivation and ability to work unsupervised
- Organisational capabilities
- Ability to cope with potential conflicting demands of work and family.

To ensure that flexible working will be positive for the company's productivity and customer relations, the following will be considered when assessing an application for flexible working.

- The cost of arrangement
- The effect on colleagues
- The level of supervision the employee requires
- The structure of the company and staff resources
- An analysis of the tasks specific to the role and how they can be carried out flexibly
- Key outputs and targets

Communications and office supplies

- Broadband – the employer will cover 50% of broadband costs.
- Phone calls – the employer will reimburse business phone calls made on the home phone. The employee will be expected to supply itemised phone bills.
- Paper and other stationery – these will be supplied direct to the employee by the company
- Print cartridges – these will be supplied direct to the employee by the company





Travel

Travel expenses should be claimed for the shortest distance from office / home to destination in the normal way.

Home Office

Technical support will be via the company / IT supplier / maintenance contractor.

Company supplied equipment should be used for work purposes only.

The employee is responsible for informing their home building & contents insurance company that they will be working from home at times.

All company data should be kept securely (password protected or locked room / filing cabinet) when not in use.

Home office equipment – the employer will contribute up to a max of £40 towards an ergonomic chair (seat and back height adjustable and with a tiltable back).

Home office expenses – the company will contribute up to a maximum of £104 p.a. to cover all additional expenses such as heating and lighting Note. There can be significant taxation implications beyond this limit.

All equipment supplied by the company remains the property of the company and must be returned upon request.

Work and Family

One of the great benefits of flexible working is being able to schedule work around family and personal commitments. However, it is important that employees do not try to care for children or elderly relatives at the same time as the employee is working from home. Alternative care arrangements should be made in just the same way as if the employee were not at home.

Health and Safety

Flexible workers proposing to work remotely are required to complete and return to their manager the homeworking self assessment checklist. This is an essential part of the risk assessment for working from the remote location and must be complete before starting remote working.

Terms and Conditions

Any other changes to standard company arrangements.

If the company deems that the flexible working arrangement is not successful and delivering the expected benefits, the arrangement can be terminated with four weeks' notice.

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Flexible Working Application Form

If you are interested in improving your work-life balance by working more flexibly, please complete and return this form.

The purpose of this exercise is two fold:

1. To enable you to state your case for consideration
2. To fully appreciate the issues that must be considered before making changes to your current style of working.

Please consider the questions carefully identifying both the positive and negative impacts where indicated.

1. Personal Details (name, job title, contact details (if necessary)).

2. Describe your current working pattern, including location(s) of work.

3. Describe how you think your job could lend itself to allowing you to work more flexibly (i.e. spending some time working away from your main employment base).

4. Describe the key tasks that make up your job and suggest how your manager will be able to know that you are still as productive as usual.

5. Describe the ways in which you would like to work flexibly, in particular when and where you would work remotely.



6. What do you need to be able to do this? What equipment, technology and other support would you need?

7. What impact will this have on the business? Please include the pros and cons, including possible impacts on your productivity.

8. What impact will this have on your colleagues? You should think about, amongst other things, communications and team working. Please include the pros and cons.

9. What impact will this have on you personally and your work-life balance? Please include the pros and cons.

10. What environmental impacts do you think this would have? E.g. reduction in car miles as a result of reduced travelling or increased teleconferencing.

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Communications Checklist

The aim of this checklist is to assist you in documenting the communication avenues to be used by the remote worker. It may be that the flexible worker will work at more than one remote location, in which case one form should be completed for each location.

Name of Flexible worker	
Remote Location	

1) What communication methods are available at this location?

Communication Method	Available Yes / No	Number / Address if applicable
Phone line		
Separate phone line for business use		
Answer phone		
Mobile phone		
Voicemail		
Internet access		
Email		
Web access		
Instant Messenger		
VoIP to VoIP		
VoIP to Public telephone network		
Video Conferencing		
Fax		
Postal letter delivery		
Postal letter outward		
Parcel delivery		
Parcel outward		
Other (Specify)		



2) If possible specify days & times when expected to be working at this location

Days of week	Core times available at this location	Working times acceptable for normal communications

First look at the operational day-to-day communication requirements.

3) Define between the manager and remote worker what would be considered an 'Urgent' issue.

	Definition
A) Urgent issue requiring remote worker to be contacted	
B) Urgent issue requiring remote worker to contact manager	
C) Urgent issue requiring remote worker to contact colleagues	

4) How will 'Urgent' communications be handled?

Type A,B,C from above list Communications method	Available to use Y/N	Restrictions in time / who can use
Type A		
Phone line		
Mobile Phone		
email		
Fax		
Other		





Type B		
Phone line		
Mobile Phone		
email		
Fax		
Other		
Type C		
Phone line		
Mobile Phone		
email		
Fax		
Other		

5) When working remotely how often / when will the following be checked?

Answerphone	
Voicemail	
Email	
Faxes	

6) What are the preferred methods of communication?

7) How will phone calls be forwarded from the office?

8) How will other urgent correspondence be forwarded / returned to the office?



9) Where will meetings with customers be held?

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10) How will sickness / out of 'remote office' be notified?

Who is to be informed when the remote worker is sick and how?	
Who is to be informed when remote worker is 'out-of-remote-office'?	
How are sickness / out-of-office times notified to manager/colleagues?	

11) How will social networking with Colleagues be achieved?

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Finally, for workers spending extended periods working remotely consider how other less routine communication is achieved

12) Check that the following communication requirements can be met and specify how.

Regular progress meetings	
Appraisal meetings	
Remote working Reviews	

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Review & Improvement Checklist

So now you are working flexibly, what now? It's a good idea to review what is working well and what may not be working quite so well. Then you may decide you need to make some changes to improve things. Of course, you should keep reviewing how it is going - and stay flexible!

Check List

Date Complete	Task
	1) Flex worker perspective
	a) What went well?
	b) What did not go so well?
	c) Any additional training required
	d) Any additional ICT equipment required
	e) Any additional non-ICT equipment required
	f) Follow up on H&S interview – check no problems
	2) Flex worker management perspective
	a) What went well?
	b) What did not go so well?
	c) Any additional training required
	3) Non-flex worker perspective
	a) What issues resulted from flexible working of colleagues
	4) Customer perspective
	a) Any deterioration in customer service
	b) Any improvement in customer service
	5) Technical
	a) Any unplanned technical infrastructure required
	b) Did technical solutions perform as expected?
	c) Any support issues



	6) Business Processes
	a) Are project costs to budget
	b) Has flexible working led to improvements in meeting business needs, or opened up other business opportunities
	c) Any deterioration in any business functions
	d) Any remedial action still needed due to introduction of flexible working
	7) Cost benefit review
	a) Identify full cost of project
	b) Has flexible working given the expected benefits to the business
	c) Has flexible working given any additional benefits to the business
	d) Has flexible working caused any additional problems for the business that can not be addressed economically
	e) Can flexible working continue fully or in part?
	f) Is there opportunity for further flexible working?
	8) Action Plan
	a) Any remedial steps required to address deterioration in any business functions
	b) Additional training required
	c) Additional equipment provision
	d) Additional flexible working options

The above should not be considered a one off exercise as you should review your flexible working implementation at regular intervals to ensure that all is well.

However, you will probably not need to be so detailed with subsequent reviews.



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Homeworking Self Assessment Checklist

The aim of this checklist is to assist you in assessing the health and safety of your home working environment by listing the main areas of assessment and the issues within each to be on the lookout for.

It is not intended to cover the areas to be assessed where home working is anything other than office work. If you answer no to any items, it is likely that a risk assessment for that issue will need to be done.

Name	
Job title	

	Answer yes or no. Please give further details for any 'no' answers
<p>Fire Do you have a clear escape route in the event of a fire? Are all combustible materials (including paper) stored safely and away from any possible sources of ignition? Are all possible ignition sources secure? Is there a working smoke alarm nearby?</p>	
<p>Electrical Equipment Can you confirm that there is no visible damage (including any signs of overheating) to sockets, plugs and leads? Are all cables secure in plugs with no inner cores of the cable visible? Where more power outlets are required, training extension boards (preferably incorporating surge protection) are used <u>not</u> multi-way blocks? Are there sufficient power outlets? Are there power outlets in the right place, to avoid trailing leads for example? If your company has a policy of PAT (Portable Appliance Testing), has your electrical equipment been tested?</p>	
<p>General Equipment Is the equipment supplied suitable for the job being done? Have you have received all the training you require on the equipment provided? Is there a safety guard on all equipment that requires it? Is Personal Protective Equipment available and used where required?</p>	



<p>Working Environment Is your working area suitable in terms of heating, lighting and ventilation? Do you have sufficient space to work? Do you have sufficient separation from other individuals in the home, particularly children? Please confirm that there are no trip or slip hazards, such as trailing wires.</p>	
<p>Security Can all entrances, exits and windows be secured? Can any equipment and sensitive data be secured when not in use? Can you confirm that any 'office' equipment is not causing an additional burglary risk?</p>	
<p>Manual Handling Have you had training in manual handling techniques, if moving heavy or bulky loads? Please confirm that there are no tasks that require you to stretch across work surfaces or shelves or lift heavy or bulky items above shoulder height that do not have a current risk assessment? Please confirm that there is no need for additional lifting and handling aids for any tasks to be undertaken?</p>	
<p>Display screen workstation Have you had your eyes tested if you are having any form of eye strain? Do you have a footrest if you need one? Have you read the HSE booklet "Working with VDUs"? Is the screen free from glare and flicker? (Having light sources, such as windows, at right angles to the screen is usually best.) Is the screen clear and readable, including the fine detail? Can you adjust the brightness and contrast to prevent eyestrain? Can you adjust the screen height, tilt and swivel? Is the keyboard tiltable and separate from the screen? Can the chair be adjusted to the right seat height and back height and tilt? Is the desk at the correct height for you to work? Is there sufficient space under the desk to allow free movement?</p> <p>Please note that you should take time to review your health after one month to ensure there are no problems.</p>	
<p>Remote working alone Please confirm that you do not undertake any tasks that would, for safety, require more than one person present. Please confirm that there are no health reasons against you working alone. If the work is not at your home</p> <ul style="list-style-type: none"> • Has a lone working risk assessment has been done for the location? • Have you read the HSE booklet "Working Alone in Safety"? <p>Is there safe entrance to and egress from the workplace?</p>	



<p>Hazardous Substances Have you identified any hazardous substances used? (These will have orange, yellow or red warning labels.) Is there a risk assessment for any hazardous substances used? (Normally such risk assessments will tell you to follow the manufacturers guidance when handling.)</p>	
<p>Accidents / First Aid Do you have a defined way of reporting work related accidents, injuries, diseases and dangerous occurrences? Do you have a first aid kit available?</p>	

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Implementation Checklist

Ideally, after all the planning, there should be no surprises at this stage and no policy issues.

However in the real world, unforeseen issues are perfectly likely to arise that will need sorting out!

Check List

Date Complete	Task
	1) General
	a) Ensure planning process is complete
	2) HR
	a) Select staff for flexible working
	b) Ensure staff involved are aware of their role
	c) Ensure the proposed flexi worker's management is supportive and trained
	d) Inform <u>all</u> staff of what is happening re flexible working
	e) Flexible working agreement(s) signed and if required Staff contracts adjusted
	f) Flex worker ICT training complete
	g) Flex worker H & S training complete
	h) Home working H & S self assessment checklist(s) completed
	i) Insurance in place - Employee public liability Equipment in the home and people Equipment in transit
	3) Technical
	a) Central ICT infrastructure in place
	b) Flex workers ICT requirements in place
	c) Resolve security / backup issues





	d) Resolve remote support issues and procedures
	4) Business Processes
	a) Agree contact hours/methods with staff when they are 'remote'
	b) Processes in place for inter office communication