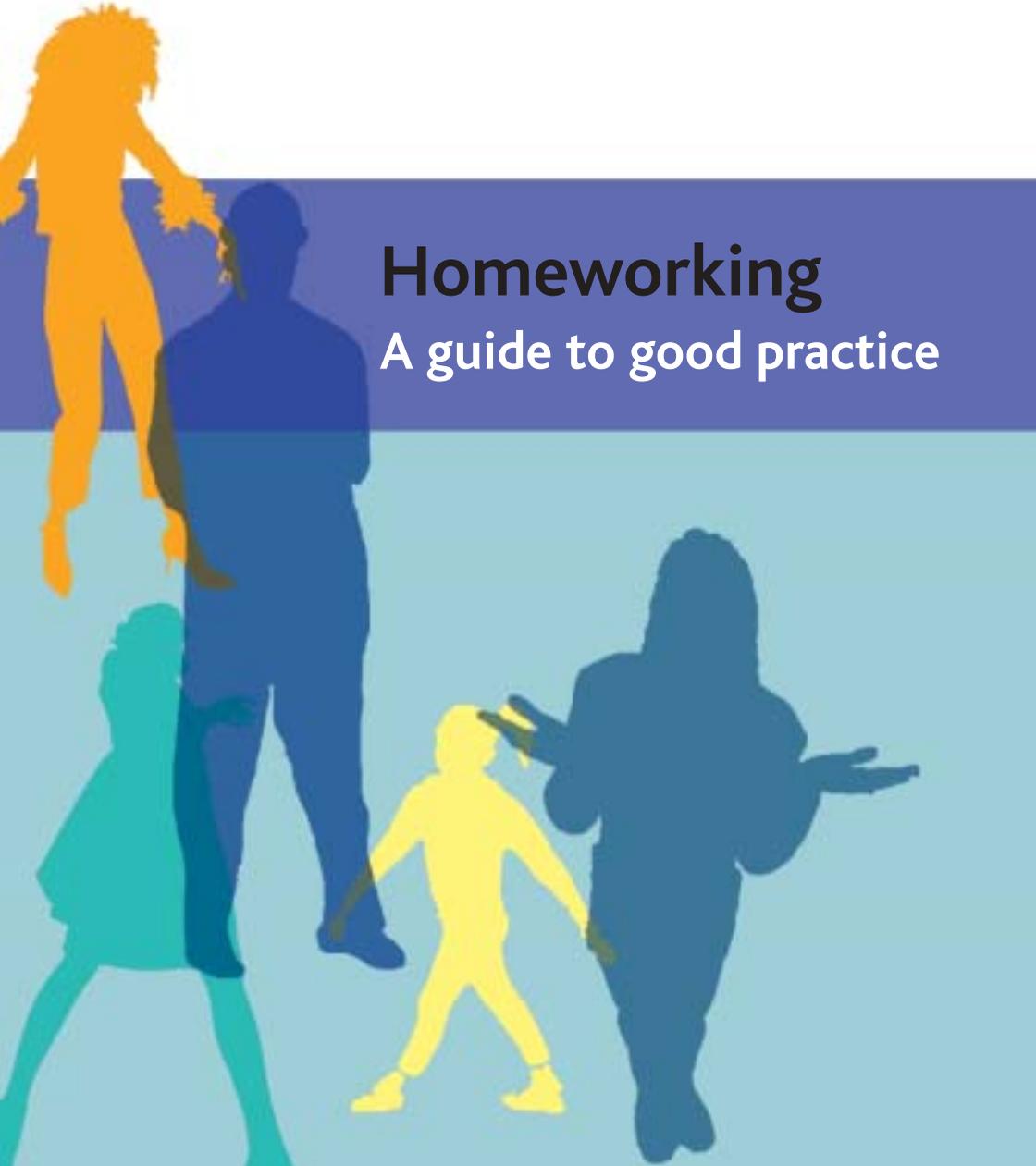




DEVELOPING GOOD
MANAGEMENT PRACTICE

A HEFCE Initiative

The background of the cover features silhouettes of five diverse individuals in various colors: orange, dark blue, teal, yellow, and a darker blue. They are positioned against a background that is white at the top, a dark blue horizontal band in the middle, and a light blue gradient at the bottom. The silhouettes represent a woman with curly hair, a man, a woman, a child, and another woman, all in dynamic, active poses.

Homeworking

A guide to good practice

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The Flexible Employment Options (FEO) project has investigated the impact of introducing flexible working arrangements within the Higher Education sector. This was achieved through piloting different ways of working flexibly at 4 Higher Education Institutions - the University of Birmingham, Canterbury Christ Church University College, De Montfort University and Staffordshire University. Staff across a variety of departments were offered a range of flexible working options during 2002/3 and the effects were monitored and evaluated. The results from these pilot schemes were disseminated at a series of national events and a Summary Project Report was distributed to all HEIs in England in December 2003. Feedback from these events indicated that personnel from the HE sector would like more information on how specific flexible options can be implemented effectively. This guide has been written to provide support and information for managers within the Higher Education sector who are considering introducing a homeworking scheme into their organisation, or formalising an informal homeworking policy. The background research for this guide can be found in 'Homeworking in Higher Education – an FEO Project Report'.

Other guides available are:

Flexitime

Job Share

For more information visit www.staffs.ac.uk/feo

Background

This guide has been written to provide support and information for managers within the Higher Education sector who are considering introducing homeworking in some form or another into their institution or department.

Homeworking is one of the options that many employees say they would like, but it is also one of the most difficult for employers to offer, due to the complexities of this option, and the many considerations that need to be addressed if it is to be successfully used.

According to the UK Labour Force Survey 2002, there were approximately 2.2 million teleworkers in the UK - about 7.4% of the workforce (people who work at home at least one day per week), so teleworkers are a significant, and growing, proportion of the working population. It is worth noting that the Labour Force Survey definition of teleworking is restricted to those who work at home for a significant amount of time. There are other kinds of telework or "e-work" besides the home-oriented varieties: telecentre-based, mobile (but not using home as a base), location-flexible telework (using for example, client sites to work from) - and so forth, but these are not the focus of this report. The number of teleworkers has been steadily increasing at an average of 13% per year since 1997 (the average annual growth rate for all employees is 1.6%).

This means that if one also takes into account the significant numbers of people who work from home occasionally on an informal basis, that the practice is quite widespread, and organisations would be wise to consider introducing a formal policy to cover homeworking, in order to ensure that both employers and employees are aware of all the implications of this working option. This guide will therefore focus upon the factors that need to be addressed for organisations considering offering homeworking as part of a formal policy.

Higher Education Sector

Research from the FEO project showed that from a sample of 63 institutions, only eight (13%) had a formal homeworking policy in place. However, informal homeworking arrangements were much more widespread, with 44 institutions (70%) indicating that informal homeworking was done on a regular basis. In fact, only four respondents (6%) indicated that they did not have any employees who used homeworking, even on an ad-hoc basis.

Where a formal policy existed, homeworking was generally available to most groups of staff, although in one institution, such arrangements were only available to research staff.

Definition of Teleworking - and how it differs from Homeworking

There is no formal definition of teleworking, because telework is not a job definition but a method of working. Teleworking is a generic term for work that can be done at a distance, usually via the use of information technology.

Homeworking is a form of teleworking. Work (on a part or full time basis) is completed from home with the use of basic telecommunication links such as a personal computer, phone, fax and email.

Most jobs involve a variety of tasks, and in the majority of cases, some of these could be performed at home. Some examples of the type of work that could be done by means of homeworking are as follows:

- strategic development and planning (thinking!)
- preparing for meetings and follow up work
- report writing
- communicating with clients (e-mail, phone, fax, etc – in fact, most forms of contact that do not require a face-to-face meeting)
- communicating with other staff
- research
- promotion, marketing and selling
- product design (e.g. software development)
- filing and record keeping
- data entry
- word processing.

Progressive and modern organisations have been questioning whether all of these activities need to be undertaken within an office environment – or if it is possible for certain types of work to be undertaken taking advantage of computer technology and/or the telephone to do this work more efficiently from different locations.

There are various groups who can be defined as homeworkers, who can be broadly divided into the following groups:

- Workers who work from home full time or part time
- Workers who divide their time between home and the office
- Workers who are mobile or peripatetic and primarily use their home as a base

The challenges faced by these workers vary according to the amount of time they spend away from the office. This means that there are different issues involved for workers based at home full-time than there are for those who work at home on an occasional basis, both for the workers and for their managers. However, for the purposes of this report, the general term of homeworking is used to denote staff within higher education who work from home at least some of the time, and no distinction has been made according to which of these categories the member of staff may fit.

The Business Case for Homeworking

There are many reasons why organisations decide to introduce more flexible working arrangements, but homeworking or remote working is frequently regarded as one of the most radical. However, the benefits can be wide-ranging and long-lasting, as well as providing short term solutions. Many prominent organisations have been actively promoting this approach for some time and have measured the benefits across a range of criteria over a significant time period.

Improved recruitment and retention of staff

- Employers and employees alike identify flexible working as the most popular benefit for employee retention.
- By offering the opportunity for employees to work from home, employers are more likely to appeal to staff (potential and existing) living further away from central office locations. As rising house prices and different lifestyle choices mean that many workers prefer to live in diverse locations, even if this leads to more commuting to get to work, offering homeworking as an option can significantly increase the recruitment and retention power of your organisation.
- Homeworking may also be particularly attractive to employees that are looking to balance family and work commitments. Introducing a homeworking scheme is one way to make work-life balance easier, particularly for those with caring responsibilities.

Reduced traffic congestion costs

Greater mobility amongst the working population has led to substantial traffic growth and congestion in almost all areas of the UK. The costs of congestion to organisations and businesses include:

- employees arriving late
- the additional stress on staff (and the effect on productivity)
- the value of staff time spent en route to meetings
- the cost of missed or late meetings
- higher fuel and maintenance costs for company cars.

There are a range of measures that employers can take to reduce these congestion costs, including supporting car sharing, providing incentives for staff to cycle/walk to work or promoting public transport. However, homeworking is possibly the most effective way to reduce costs, as it is the only one of these options that reduces the need to make journeys.

Homeworking is also a way in which business travel can be reduced. In some organizations, mileage costs are substantial, but the use of initiatives such as videoconferencing could substantially reduce these costs. Organisations can calculate the potential benefits of this approach by calculating the cost of reducing business mileage by only 1,000 miles per employee per year. This will not only save a considerable amount of money in direct costs, and is also likely to have more subtle benefits, such as a reduction in the amount of time wasted on unnecessary meetings and less stressed, more productive employees.

Improved image

Homeworking can be good for your image. Many clients and customers identify with the positive messages (flexibility, innovation, desire to maximise workforce efficiency, etc) that introducing homeworking can send out. Additionally, homeworking may also be a means by which staff, particularly those working on a part time basis, may be able to contribute more effectively to the organisation, as they do not have to spend so much time commuting and attending meetings. Other organisations, particularly those from national and local government and other public sector bodies, are likely to value your commitment to more environmentally friendly travel arrangements, and this may also be a positive factor amongst your own staff. Evidence from our own Flexible Employment Options project indicates that even when people do not themselves wish to take advantage of flexible working, they have a more favourable opinion of those employers who put such arrangements in place.

Office Space

With office space increasingly at a premium, and with costs escalating, it makes very good commercial sense for employers to maximize the use of their office accommodation. Allowing staff to work from home, supported by practices such as hot desking or office sharing, should enable employers to fit more staff in the same space, or reduce costs by accommodating the same number of staff into less space. Once again, savings can be substantial, as the move towards homeworking at BT has shown (BT has 7,000 homeworkers, and saves £6,000 each per annum).

Car Parking Provision

Employers and employees alike recognize the difficulties surrounding the issue of car parking and report that it is one of the problems most likely to raise extremely contentious and contradictory views. Homeworking can help to keep costs within manageable proportions by easing pressure on existing parking facilities and controlling demand for new car parks.

Improved Productivity

Evidence from a number of research studies, including the FEO project, indicates that more flexible working arrangements lead to less time off from work and higher productivity. Those studies which particularly focus upon homeworking tend to show the highest productivity gains, for example:

- Amongst local authorities, 70% of Cambridgeshire homeworking employees reported that they get more work done at home than in the office and Merton Borough Council reported a 30% increase in productivity due to homeworking
- One UK private sector employer reported annual homework productivity savings of 20-30% (£4.2million per annum), while another UK organisation reported that the average number of visits made daily by its mobile professionals to clients rose by 33% through homeworking (Flexibility website, 'Implementing a flexible working project')
- The Motor Vehicle Administration Network in the USA reported a 27% increase in productivity from data processors as a result of homeworking (Maryland Department of Transportation, Commuter

Connections, issue 4, volume 4, Autumn 2000), whilst American Express homeworkers produced 43% more business than office based workers.

- When BT introduced homeworking, it experienced increases in productivity of about 20% compared with 1996 (an increase of £5.5 million)

Other Benefits

- Homeworking can provide a solution to one of the biggest problems identified by many employers – having uninterrupted thinking time, which also improves both quality of work and productivity.
- Homeworking also tends to produce more satisfied workforces. In one survey undertaken in 1999, 55% of homeworkers said they were more satisfied with their jobs after starting to work at home, compared with only 12% who said they were less happy (33% were as satisfied as before).
- Homeworking can also lead to staff taking less time off sick and less absenteeism. BT identified savings of £4 million per annum as a result of less sickness absence after the introduction of homeworking. For many staff, one of the biggest deciding factors about whether to take time off work at short notice is the difficulty of the journey to work. A particular example is where staff take time off for events such as family emergencies. Research undertaken in the USA has indicated that, in most cases, whereas office workers tend to take a whole day off work even if the event has been resolved early in the day, home workers tend to go back to work.

Potential advantages and disadvantages for employers/managers

Advantages –

- Can help with recruitment and retention because of its popularity with staff, and thus giving a competitive advantage.
- Can help employees achieve better work-life balance, and therefore increase morale
- Can help employees to remain full-time rather than request part-time.
- Helps employees to feel valued
- Can help managers move from traditional performance management methods to output based ones
- May help to eliminate unnecessary meetings
- Enables clear performance targets to be established
- Very good potential for increased productivity
- Possible to reduce costs in terms of office accommodation
- Enables organisations to be more “green” by reducing commuting and travel by employees.
- Can reduce the number of car parking spaces required by staff

- Lowers employees' stress levels by reducing the amount of travelling required
- Absenteeism is reduced as employees can fit in appointments with homeworking and take less sick leave
- Can enable organisations to provide more appropriate working conditions for certain types of work
- Creates or enhances your image as a caring and progressive employer

Disadvantages –

- Homeworking is likely to have some up-front costs in terms of setting up the home office
- Employers may be expected to provide furniture and equipment at two locations rather than one.
- Staff may experience problems with IT support and connectivity
- Arranging meetings may be more complicated, and some long-standing regular meetings may have to be altered
- There may be some issues around office cover, particularly if not all members of the team are homeworkers
- There needs to be a clear focus upon the business case for homeworking - it should not be seen as a "perk" but a sensible way of improving productivity
- Contact arrangements for homeworkers will need to be carefully managed to avoid any detriment for both colleagues and customers

- Customers phoning or visiting the office may not be able to deal with a particular member of staff
- Managers will need to ensure that homeworkers operate the same standards with regard to health and safety and data protection that they would in the office
- Health and safety assessments need to be undertaken for homeworkers, in order to ensure compliance with the employer's statutory duty of care and DSE regulations
- Careful consideration needs to be given to communication issues, to avoid homeworkers from becoming isolated
- The culture of the organisation may not be conducive to homeworking (at least for certain groups or workers or certain types of jobs), and this may need to be addressed over the long term
- Safeguards must be put in place to ensure that homeworkers can maintain an adequate separation between home and work, and do not work too many hours
- The production and monitoring of a homeworking policy may, particularly in the early stages, be time consuming and complex for employers and line managers

Preparation – what do I need to do first?

As an institution, be clear why you want to introduce homeworking on a formal basis, and to what extent this is part of your overall strategic planning. Support from senior management is important, but so is support from middle managers, particularly those with line management responsibility who will be managing homeworkers and dealing with the consequent issues on a daily basis. If the idea of flexible working is very new and there is little use even informally, then there will almost certainly be cultural change issues to address. Employees and managers will need to be supported and trained to confidently deal with the changes flexible working will bring.

The Trade Unions should be involved at the earliest possible stage in order to gain their support and commitment. They can assist in the promotion and communication process. All the major trade unions and the TUC are supportive of flexible working at the national level.

Design - what do I need to consider when designing a scheme?

Where are you starting from? To what extent does homeworking fit well with your corporate strategy and business plan as an organisation?

Does the organisation, employees, and managers have experience of other types of flexible options (either formally or informally)? If so in which areas and for which group(s) of staff?

Does your organisation already use homeworking? Is it operated on a relatively formal or informal/ad hoc basis?

Do some departments already operate an informal system? If so, how will these arrangements be incorporated into your new policy?

How is homeworking to be incorporated into the institution's flexible working policy (if any) - or is there to be a separate policy specifically relating to homeworking?

Will this form of working be entirely new to some or all employees and managers? If so, what training will be required?

Who will prepare the new policy?

Is the policy to operate across the institution, or only in some designated areas?

Who will be able to work from home? Will it be open to all employees whose job role and personal attributes mean that this is a suitable option for them, or will there be some limit on the numbers of staff able to participate in this scheme? Will patterns of work be relatively fixed (ie one regular day a week) or variable?



Who is going to be responsible for undertaking the risk assessments to ensure that staff comply with health and safety and data protection requirements? If a visit is to be undertaken, how regularly will these be repeated (if at all)? If staff will be responsible for checking their own compliance, will any additional procedures be put in place to check that their working environment at home is at an acceptable level.

Who will be responsible for the purchase of equipment and furniture, and for additional costs such as telephone calls and access to e-mail and the internet?

Who will be responsible for providing advice and information on tax, insurance and other matters related to homeworking?

Will you introduce a pilot scheme in the first instance, to ensure you have covered all the relevant issues and to iron out any unforeseen difficulties that may arise?

How will the homeworking scheme be monitored and evaluated? As there are likely to be some up-front costs associated with this option, a cost-benefit analysis of the success of homeworking is likely to be crucial to its success or failure.

Finally, have you put effective safeguards in place to ensure that arrangements which are not working can be amended or revoked easily and quickly?

Which staff tasks are most suitable for homeworking?

Homeworking will work better for some staff tasks than others. The following list should help you to assess to what extent particular tasks and job roles are likely to be feasible for homework:

- The degree to which work can be sent to and from the employee's home with ease, speed and confidentiality
- How much face-to-face contact is required with managers, colleagues, clients, etc
- how important it is to access equipment, materials, files etc. that are situated only at the workplace,

and

- whether and how much the task requires internet and remote access capability.

Apart from the tasks employees carry out, other points to consider when determining staff suitability for homeworking are characteristics such as self discipline, self sufficiency, trustworthiness, maturity, time management, communication and IT skills. Some staff will value day-to-day interpersonal interaction more than others, and this also needs to be taken into account. It may be preferable to choose staff who fit the 'desirable characteristics' for homeworking already, thus reducing associated training needs. However, if staff are keen on flexible working practices, it may be worth considering providing training for those who need it, in order to ensure that employees with suitable job roles are able to take advantage of homeworking if this also meets the organisation's needs. Staff who work from home also need a suitable location with enough space and privacy to work undisturbed and in a healthy, safe environment, and advice on various issues such as health and safety, data protection, tax and insurance.

As well as the right type of job role and tasks, and staff with appropriate attributes, it also helps to have the “right” type of managers. Those who are best at managing staff working from home are usually skilled at supervision and communication and tend to trust the professionalism and integrity of their employees. They are good at setting objectives, agreeing appropriate performance standards and ensuring work is done to agreed deadlines. Crucially, they also tend to manage performance by results rather than by the clock.

Implementation - how do I Put it into Practice

The following are the major issues you will need to take into account when implementing a homeworking scheme –

Pattern of work - for each homeworker, you will need to agree what their pattern of work will be. For example, will the individual work from home regularly one or two days a week? Will s/he always work from home on the same day or vary this according to the particular demands of their work for that week or month.

Person and Job Suitability – consideration must be given to ensuring as far as possible that homeworkers will be self-motivated and disciplined, and able to ask for help and support when required. Arrangements to minimise isolation and enable good communication must be put in place and regularly reviewed, taking into account the views of colleagues and customers as well as the homeworker and their manager.

Physical Home Office Environment – including proper consideration of health and safety, data protection, confidentiality of data (both electronic and hard copies), and privacy

Ongoing Health and Safety Issues – including risk assessments, accidents, first aid, and measures to avoid the occurrence of repetitive strain injury or any other work related problems

Provision of Furniture and Equipment – agreement must be reached on who will be responsible for the purchase and maintenance of furniture and equipment, including IT equipment, for homeworkers.

IT/Telephone Equipment – including responsibility for purchase, maintenance and support for IT equipment, access to any shared data sources, connectivity, and consideration of the need for dedicated work lines/installation of broadband services

Communication – agreement must be reached with all relevant people about how and when communication will take place (e-mail/phone/meetings) and how enquiries will be handled whilst members of the team are working at home

Terms and Conditions – including contractual matters, travel expenses payments/base location, hours of work (and any agreed flexible arrangements), allowances and expenses directly related to homeworking, appraisal and performance, training and development

Legal Issues – employers' and employee's liability, home insurance, mortgage and tenancy agreements, taxation including local taxation

Key Points

Health and Safety

Firms take widely varying approaches to health and safety when employees start working from home. Some insist upon undertaking a home visit, doing a formal risk assessment, and may even provide ergonomic furniture. Some do not give any consideration at all to health and safety issues. Even when a home office has been properly set up, safe working practices may deteriorate over time. Managers should also bear in mind that the home presents more safety hazards than any corporate office, and that individuals have a tendency to accept far lower safety standards at home than they would tolerate in a more traditional working environment.

Before setting up an employee to work from home, a health and safety officer or trained manager should visit and do a risk assessment. If large numbers are involved, this can be done by the homeworker his/herself using an appropriate checklist, but it is preferable that an impartial person undertakes the initial assessment. The worker should be trained, be involved in the assessment,

understand the signs of repetitive strain injury (RSI) and receive regular updates on health and safety as a reminder. Any pain or discomfort should be addressed immediately to minimise any long term damage. Adaptive technology is readily available and should be provided as soon as a problem starts to become apparent.

Furniture and Equipment

The key thing is to get the basics right, and the first things to think about are the office desk and chair. An adequate office chair is essential for the worker's long-term physical well-being, particularly if they will be sitting at a desk for long periods and using a keyboard. Both the height and the back rest should be adjustable, and the chair should be stable and provide adequate back support. Workers should be encouraged to use a foot rest if necessary, and not under any circumstances to use an ordinary upright dining chair.

It is also important that the desk is appropriate for the job. For PC use, the height of the surface of the desk should be about 690 cms, so that the home row on the keyboard is about 720 cms off the floor. Just as important is to ensure that the desk is deep enough for the computer monitor to be placed straight ahead of the person using it. Squashing in a PC on to a small table or desk or placing the monitor at an angle can cause neck and arm aches. The big risk of frequent use of a keyboard is repetitive strain injury, a potentially very painful condition which can best be avoided by ensuring that equipment is positioned correctly for the person using it (see health and safety above). This, and many other relevant potential health issues for the home-based worker are covered in an informative free booklet *Homeworking*, produced by the Government's Health and Safety Executive.

Most home-based workers choose to install a second, work-only, telephone line and use the existing phone simply for personal calls. This means that work calls don't get answered when you are trying to relax. BT and other telecoms companies offer a number of additional services, which may be worth considering. These include call redirect (for example, to a mobile number) and call minder (voicemail) options. For major internet usage or data communication, ISDN and broadband offer much faster transmission times than dial up services, and are now available from a variety of operators. They also have the advantage of leaving your phone line free when you are connected to the internet, and may therefore obviate the need for a second line. It should be noted that problems may arise in more remote areas, which frequently have poor or non-existent mobile phone network coverage and less access to broadband services.

It is also important to consider at an early stage what facilities will be required for use by homeworkers when they are in the office. Workers need to feel welcome and part of the team, so their space should be as inviting and attractive as those areas used by other staff, and should allow enough storage space for coats, bags, etc. Consideration should also be given to how staff will access to facilities such as photocopiers.

IT Equipment/Technological Aspects

Successful homeworking will involve using existing equipment effectively, but also may involve the purchase of new equipment. Although homeworking does not always require information technology (for example, working from home making comments on a colleague's draft report), most homeworkers will need access to IT equipment at some point in their working lives, and many will use this on a regular basis. This is therefore a crucial element to consider at the planning stage.

It would be sensible to consider the linkages between various pieces of equipment, particularly in a large and complex organisation. The equipment is likely to include remote access infrastructure, office technology, homeworking equipment, and mobile working equipment. It may also include servers (to allow information to be centrally held and distributed) and cabling (for either voice or data). Other types of equipment include more sophisticated technology, such as teleconferencing phones, videoconferencing equipment and/or specialist computer hardware and software, and ideally all of these should operate in a mutually supportive and coherent fashion. In this respect, your IT strategy may be crucial to the success of homeworking in your organisation. However, it is important to appreciate that getting these technical aspects correct can sometimes be an involved and lengthy process and the time allowed for this should not be underestimated.

Legal Issues

- **Planning permission** - The government says that planning permission for part-business use "is not normally required where the use of part of the dwellinghouse for business purposes does not change the overall character of the property's use as a single dwelling" (Planning Policy Guideline 4). You could begin to encounter problems if your business results in much more traffic to your house, if you disturb neighbours unreasonably or if your work generally involves activities which are unusual in a residential area. However, this is unlikely to be an issue with the types of activities with which this report is concerned.
- **Business rates** - You could be liable for business rates if an area of your house is dedicated exclusively to work - some people have claimed that if you dedicate a particular room in your house purely to work, that this

could be considered in this light. However, business rates should not be a problem where the work use of any area of your home is also used for domestic purposes and so for most people this is a purely theoretical issue.

- **Legal restrictions on working from home** - You may need to check with your mortgage lender (if you have a mortgage) or landlord (if you are renting) that they have no objection to your plans.
- **Electricity and gas** - The Telework Association has encountered a small number of occasions when utility companies attempt to charge business tariffs for electricity or gas supplies, but this is usually not an issue.
- **Insurance** - In many instances, standard household contents insurance policies do not cover equipment used for business purposes. Indeed, you may even risk invalidating your whole policy if you fail to disclose to your insurer that you are working from home. A number of brokers have specialist insurance packages for home-based workers. However, the cheapest route is usually to try to insure your work equipment through an ordinary household policy. If your own insurer is reluctant to help, shop around.
- **Capital gains tax** - Generally, no liability arises when you come to sell the home where you live. Accountants have traditionally liked to point out that if part of the building has been used exclusively for work, then you could lose the CGT exemption on that part of the house. In practice, however, this problem is more theoretical than real for most people, partly because of the generous CGT annual exemption provisions which take many people out of the scope of liability altogether. Full relief is in any case normally available if the work area of your home has also been used for domestic use.

Employees

Many employees will regard homeworking as a potentially beneficial prospect because of their caring responsibilities. In 1996, one adult in eight in Britain was looking after, or providing some regular service, for a sick or elderly person, not to mention the large numbers of the working population with responsibility for children. Caring responsibilities are not just falling upon women, although they do of course carry the majority of the caring burden - almost 3 million men in the United Kingdom are carers. However, although homeworking can be a great benefit for those juggling with both work and caring responsibilities, it is important for both employers and employees to understand that to combine homeworking with caring for young children at the same time is NOT possible. You may wish to ask employees to provide written confirmation that they have adequate care arrangements in place, and for details of what these entail, when you are drawing up the precise details of the proposed homeworking "contract", whether this be formal or informal in nature.

Many experts on flexible working believe that it is helpful for people working from home to re-create their office environment. Employees working from home benefit from some degree of flexibility in the hours they work, but both they and their employers need to be completely clear on what outcomes are expected from them and the timescales to which they are operating. Some people feel very fortunate and are regarded by their colleagues as such, which may lead to them feeling guilty and working too long hours.

Conversely, once the novelty of homeworking has worn off even the most mature and steady employees can suffer occasional lapses or a major crisis of

self-discipline. They may be discouraged by the fact that no colleagues are available to greet them first thing in the morning, and they may miss the gossip and banter that provide stimulation and interest to the day. To counteract this, workers should be encouraged to keep in regular contact and drop into the office, as well as attending formal on-site meetings, especially if they are based from home for a substantial part of the week or full time. Managers should talk openly and honestly about self-discipline at the start of the homeworking arrangement and at appraisals, and make experienced homeworkers or homeworking champions available as mentors.

It is particularly important for homeworkers to discuss their plans with their spouse or partner. Just as retirement can be a challenging time for relationships if it means that both partners find themselves at home all day, so too a decision to work from home can bring similar tensions. Indeed, in some respects, these problems are harder to adjust to than those of traditional retirement. Most people who work successfully from home will say that, to be effective, they have to shut out normal domestic distractions and focus on the job in hand. But, if this is to be possible, their partners and other family members also need to understand this. The washing up or the gardening may be waiting to be done — but tasks like these will have to wait their turn until 'work' has ended and 'home life' can be recommenced.

Keeping a good work/life balance is the secret of working from home, and it isn't always easy. Some people find that their work floods over into every part of their personal life: business emails are read and replied to on Sunday evenings, for example, or work documentation crowds every available surface. TV business guru Sir John Harvey-Jones described how he was unable to resist

the urge to rush to the home fax machine every time he heard a new message arriving. On the other hand, some people find it impossible to concentrate on work because of all the everyday domestic things all around, which seem to be crying out to be done. It takes a strong and determined person to create a sensible balance between what sometimes seem to be competing demands but this must be done.

Creating barriers between work and home life is a good survival mechanism, therefore, and these barriers can be both those of space and of time. Not many people go as far as the man who put on his business suit each day, let himself out the front door, walked round the side of the house and came in again by the back door because it helped, he said, to separate his home life from his work life. On the other hand, it is obviously common sense to ensure that you do have enough space to keep your work separate from home life. If possible, try to have a self-contained study or spare room that can be vacated, and if necessary locked, when work is finished for the day. Working on the dining room table is a bad idea for health and safety reasons, as indicated above, but also because of the tidying-up necessary every time people want to eat or you want to invite friends round for dinner! It is also highly undesirable in terms of security and data protection.

Key Success Factors - making it Work

A useful model is the following six point plan for managers and employers:

1. Set clear goals for the group, including any members working from home either full or part time.
2. Ensure the team can identify shared priorities and act upon these appropriately
3. Make a plan to ensure that all goals are achieved
4. Have a clear evaluation framework
5. Provide ongoing support relevant to each member of the team
6. Bring the team together for regular reviews, brainstorming and mutual reassessment of the common goals and objectives.

Employees need to be realistic about themselves and their preferred working style. Above all, it is important to acknowledge that not everyone is suited to working alone. The social aspect of work is important for many people, and managers implementing homeworking projects have found that enabling staff to feel a “part of the organisation” is paramount. This means that homeworkers are usually more successfully taken from existing staff than recruited as homeworkers. It is important that homeworkers should be able to change their mind about working in this way without being made to feel that they have failed - homeworking requires self-motivation and discipline which will not be there if someone is reluctant about this working style.

The following list offers some good tips for homeworkers

Top Tips for Homeworkers

1. If possible, have a separate room for work. At the end of the day, close the door and don't open it until you start work the following day! Even better, get a lock.
2. Work regular hours. Don't allow work to spill over into your leisure time.
3. Ensure you have a good office desk and chair. Your health depends on a good posture at work
4. Take regular exercise. It is easy to become unfit and lethargic if you spend all day sitting down.
5. Have a second telephone line installed purely for work calls, with an answering service, or use broadband.
6. Don't be afraid to explain to neighbours and friends who call that you are at work. Rather than inviting them in, arrange a time at the weekend or in the evening when you can meet up.
7. Consider meeting up regularly with other local home-based workers, particularly if you work more than one or two days a week from home. Get information on any Informal networking groups that may operate in your area.
8. Don't become isolated. Keep in touch with the office regularly and if you can, take advantage of opportunities to work away from home (work visits, conferences, etc). Ensure that you remain part of the organisation - out of sight does not have to be out of mind!

Piloting

It can often be worthwhile to pilot your homeworking scheme. This minimizes disruption and allows you to evaluate the impact of the scheme and to adjust your future plans accordingly.

A pilot can provide some practical answers to important questions:

- Is more (and better) work being done?
- Which managers are most suited to managing homeworking methods?
- Could changes to any other organisational policies usefully be considered?

The practical realities of staff and management attitudes to the scheme will become more apparent during the pilot, and will enable you to identify the likely success of an organisation-wide project.

Monitoring and Evaluation

Whether you introduce a pilot scheme or not, the benefits of homeworking should be weighed against the costs of putting the scheme in place. Even where effects can't easily be quantified, they should be recorded in order to help evaluate the scheme.

Some useful measurable indicators of scheme performance are listed below. You may not wish to include all of these measures, but you should identify those of particular importance to your institution for inclusion, and use a range of indicators to give a reasonable picture of how the scheme is operating:

- travel expenses claimed
- staff salaries paid while travelling
- change in the amount of time spent travelling (to and from work, and to meetings)
- time that staff are not available for work (sickness, absenteeism)
- parking space available for other uses or less pressure on existing provision
- changes in overhead costs (the need for office space (£/square metre) and/or equipment)
- phone bills
- cost of new specialist equipment (e.g. teleconferencing facilities)
- staff commuting costs

Other effects are also relatively simple to measure:

- impact on staff motivation and morale (from staff surveys, simple questionnaires or focus groups or existing appraisal processes)
- impact on the work of staff
- impact on staff recruitment and retention (where staff join, ask them if the homeworking policy was a positive or negative factor for them)
- impact on staff retention (where staff leave, undertake exit interviews including questions on the homeworking scheme)

- quality of work produced (for example, the standard of reports that an individual produces in the office and when working from home)
- effects on external relationships (is there evidence that homeworking makes you more attractive to your customers?)

Most employers start their evaluation by determining a benchmark against which to assess progress. It is also a good idea to set some measurable targets for your homeworking project at the outset. Your evaluation framework will tell you how you are progressing both against your benchmark and against targets. As you get a better feel for how things are going you may wish to adjust the way you implement your project, or your performance targets. Ultimately, it may be sensible to revisit your objectives when you get good information on where things are heading. In this way, your evaluation is a closed loop that helps you to deliver constantly improving performance. However, it is important to remember that many factors that affect project performance are outside the control of the project.

Summary

- Homeworking schemes can work very effectively, but they need careful planning and preparation before they are introduced. This flexible option, above all others, has the greatest potential for both savings and expenditure for the organisation, so it is crucial that schemes are realistically costed and adequate support networks are in place to support homeworkers. Even with the required outlay for equipment, furniture, etc, homeworking schemes can produce cost savings, particularly where institutions are considering downsizing and reducing the amount of land and buildings they own or lease.
- To ensure that a homeworking arrangement succeeds there are critical factors that apply. These include ensuring that the manager and the employee have clear objectives and a shared understanding of what outputs are to be produced.
- If the correct approach is adopted, homeworking can be utilised for a wide variety of roles. This method of working should not be regarded as a perk, available only to particular staff groups or individuals, but as a legitimate style of working which can improve productivity for a whole range of jobs across the spectrum within the institution.
- The support of senior managers is crucial if homeworking schemes are to succeed. However, this is true of most types of flexible working.

- When introducing a homeworking policy, there are certain steps that should be followed:
 - Define rationale for introducing policy
 - Identify potential benefits for employer and employee
 - Consider possible issues for employer and employee
 - Design a transparent and flexible policy
 - Consult and communicate
 - Implement
 - Promote
 - Monitor, review and adapt as required

Typical Homeworking Patterns

- Occasional homeworking – a member of staff works from home on an occasional, ad-hoc basis, usually in order to complete specified items of work. This pattern is quite common but tends to be undertaken on an informal basis
- Split week – working from home regularly on one, two or three days a week is a common pattern. Its popularity lies in its ability to deliver the benefits of homeworking without sacrificing the social aspect of work, and is suitable for a large number of roles, many of which require the delivery of various different types of work. This enables homeworking to be used as appropriate for work such as report writing, drafting documents, working with figures and other work that can most effectively be produced in a quiet environment.
- Based at home full time - this is popular with a minority of people, but is not the preferred choice of most, due to the problems of isolation and social exclusion identified in the report
- No fixed schedule – this option is rare as it requires very good organisational skills and is frequently not easy to manage within teams or with customers. It can however potentially be very flexible for an organisation that requires very innovative working practices and has highly skilled and confident virtual managers.

Appendix 2

Useful contacts / Example policies

Useful contacts

Equal Opportunities Commission	www.eoc.org.uk
Flexibility	www.flexibility.co.uk
Homeworking	www.homeworking.com
International Telework Association	www.telecommute.org
National Statistics	www.statistics.gov.uk
Telework	www.telework.org.uk
Work Foundation (Industrial Society)	www.theworkfoundation.com
Working Families	www.workingfamilies.org.uk
Working from Home	www.workingfromhome.co.uk

Homeworking policies available on-line

Birkbeck College	www.bbk.ac.uk
University of Bristol	www.bris.ac.uk
Liverpool John Moores University	www.livjm.ac.uk
University of Salford	www.salford.ac.uk
University of Westminster	www.wmin.ac.uk
University of York	www.york.ac.uk
NHS Wales Local Health Boards	www.wales.nhs.uk/lhg/ documents/homeworking.pdf
Worcester City Council	www.cityofworcester.gov.uk/

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May 2005

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