Remote and Mixed Model Working

Practical Resource for Organisations - Part 1

'The Future Of Work – Flexible, Remote and Mixed'?

Researched and written by Parents and Carers In Performing Arts (PiPA)

Commissioned by Society of London Theatre (SOLT) and UK Theatre

Published July 2021

TABLE OF CONTENTS

FOREWORD

Sarah Jackson, Chair of PiPA, authority on flexible working, women at work, gender pay-gap.

PiPA research over the past five years first revealed and has then consistently underlined the additional barriers that result in too many parents and carers giving up the industry and taking their talents, skills and diversity of lived experience elsewhere.

The pandemic has hit this industry arguably harder than almost any other. So many individuals have had to leave, longstanding companies and venues have closed or fear closure. And yet, as we re-open, there is hope that a stronger, more inclusive industry may result. The experience that so many people have had of working from home, often in roles and with responsibilities that had appeared to be suitable for onsite working only; and of managing teams remotely who would normally be together in the same place – there is so much learning that can be taken forward so that we do not go back to how things were before, but create something different. Something better. Something more inclusive that better reflects and speaks for the great diversity of life across the UK.

Building on the remote working experiments of the past 16 months rather than simply pressing "re-play" may feel challenging, but by applying the practical common sense and creativity that are the hallmarks of the performing arts, and with an acceptance that for every organisation the answer will be uniquely their own, this truly is a golden opportunity for real, long-lasting and positive change.

INTRODUCTION

The last eighteen months have been incredibly challenging for the theatre workforce. Since the start of the COVID-19 pandemic many people have lost their jobs, many have been prevented from working, and many have been working from home. As the theatre industry reopens, organisations are looking at developing constructive approaches to returning to the workplace for those workers who are able to do so. This is an important juncture for organisations to consider the benefits of remote working – and the practical steps needed to take to integrate new approaches - before simply returning to pre-pandemic working patterns.

As a sector we have an opportunity to embed the specific learning from working remotely throughout the pandemic, combined with the accumulated knowledge, case studies and research-led strategies from PiPA's work in this area over the last five years, and establish an updated model for working that will allow the sector to remain a competitive and flexible employer.

In May 2021 PiPA conducted research with theatre sector workers that identified a huge appetite for flexibility in the way we work in theatre, including remote working. This survey was conducted while many in the sector had been working from home for at least twelve months, and the findings reflect both the positive benefits, and practical challenges, both for managers and for the general workforce.

The survey findings reflect the thinking around flexible working that business leaders, chief medical officers, and directors of health and wellbeing have been advocating for a decade:

> *"The way to attract the best people, and keep them, is to offer them a working environment in which they can thrive and be their best. And flexible working has the proven potential to do just that, paving the way to greater inclusion, diversity, and helping to reduce, at last, the gender pay gap."*
> - **Paul Hamer, CEO, Sir Robert McAlpine**

Wider workforce research, such as the McKinsey 'What executives are saying about hybrid working'[1] report, have predicted that a mixed model of working (also referred to as hybrid or blended working) will become far more common in the workplace than pre-pandemic:

> *"The majority of executives expect that (for all roles that aren't essential to perform on-site) employees will be on-site between 21 and 80 percent of the time, or one to four days per week."*

Because of its work in this area over the last five years, PIPA has a wealth of knowledge and experience to draw on, alongside some case studies of arts organisations who have first-hand experience of developing remote working policies and putting them into practice. PIPA have worked with organisations including Royal Shakespeare Company, LW Theatres and Royal Opera House, all of whom have found that by working with their staff in developing and implementing new approaches to working, both staff and the business have benefited in many ways:

> *"We found the PIPA Charter Programme incredibly useful - it's clear how much consideration, thought and care has gone into it. Simply the act of working through the programme helped us remind ourselves what we already do that's great, and challenge ourselves on what more we can do in future – as well as sparking new ideas and creative approaches we hadn't considered before. The reports were tailored to our organisation, and full of practical suggestions, information and links to other resources. Finally, the support and guidance from the team at PIPA, and Matt in particular, has been invaluable both in helping us think about our own internal approach, and connecting us with other organisations and best practice."*
> - **Kate Sirdifield, HR Manager- Royal Shakespeare Company**

The business case for a mixed model of working is stronger than ever, and business leaders are acknowledging the benefits of more flexible approaches in motivating their workforce and creating more productivity, as outlined in the KPMG Intelligent Working Statement:

> "It's all about focusing on outcomes and trusting our people to do the right thing for themselves and our firm. We're happy to consider any working arrangement that allows you the work-life balance you want, providing you can fulfil your commitments".

The focus of this report is what new approaches to working could that mean for a sector that faces unique challenges in terms of working patterns and hours, a sector which is 75% freelance, and struggling to rebound from the crippling impact of COVID-19.

PiPA Remote Working Research Analysis & Tools

As in many other sectors, overall, the research conducted by PiPA in May 2021 during COVID-19 identified significant appetite and opportunity among managers and within the workforce for embedding a more robust and flexible infrastructure into daily working practice.

318 people responded to the survey, providing attitudes from a broad representation of roles across the sector. 50% of respondents included traditionally office-based roles including administration and PR, and of these 24% were from senior management. 66% of respondents currently manage staff or freelancers, and of these 40% have managed someone during lockdown, while 24% have managed someone before lockdown (of these, 20% have also managed someone during lockdown).

44% of respondents included, but were not limited to, backstage workers, performers, creatives (lighting designers, directors, producers, casting directors). 96% of respondents have experienced fully or partly working remotely or from home.

The survey reveals the benefits of flexible and remote working as expressed by the respondents:

- 64% reported a better work-life balance
- 60% reported an ability to better manage caring responsibilities/family life
- 52% achieved more than when working on-site
- Positive effects were reported on stress (33%), mental (39%) and physical well-being (46%)

There is also understandable trepidation, due to the challenging experiences of remote working during the pandemic, and the desire to get back to the security of what we know. Although 89% of managers surveyed felt that their teams have been as productive, if not more productive, whilst working from home, nearly half (45%) found it harder to manage their teams remotely as when managing on-site teams. This document addresses these commonly arising concerns below.

As well as the benefits reported from various forms of remote working, the research also identified some key challenges experienced including feeling disconnected from colleagues; lack of boundaries between work and domestic life and working over contracted hours. With research-led strategies and training to overcome these

challenges, there is an opportunity as a sector, to make a mixed model of working sustainable for as many people and employers as possible.

High-level vision and planning for mixed working has the potential to redress the imbalances and pressures experienced during the pandemic. This has the potential to result in long term productivity and wellbeing gains for the performing arts industry. Additionally, those facing other barriers to work including parents, carers and disabled people will benefit from a more flexible structure.

As we look to reopening there are many factors to consider and no one-size-fits all approach in a post-Covid landscape. There is conflict between wanting things to 'get back to normal' and 'doing things differently.' To assist leaders and managers as they explore new approaches to working, based on tried and tested strategies as part of the PiPA Charter Programme, PiPA have designed a suite of practical tools to support managers to assess the potential opportunities and challenges for organisations identified through the research.

This document includes this guidance:

- **Making the business case for remote working** – a summary of the benefits and challenges of developing new policies
- **Types of remote working** – definitions and explanations
- **Common concerns** – addressing frequently arising questions

Additional practical tools complement this document and include:

- ***Remote Working Sample Policy***
- ***Making Off-Site Working Work*** *includes the tools-*
    - ○ **PiPA Role Analysis tool**
    - ○ **Remote Working Checklist**

These resources are intended to facilitate impartial and practical support in identifying the potential for mixed models of working within organisations.

MAKING THE BUSINESS CASE FOR REMOTE WORKING

This section outlines definitions and key benefits and challenges of remote working. Useful in making a case to Senior Management Teams or Boards.

What is Remote Working (definition)

Remote Working, often known as *Working from Home*, may cover working from any other premises, enabling employees as well as freelancers to carry out the activities within their role, away from the organisation's building or traditional office environment (i.e. off-site, rather than on-site).

The remote worker should have access to the necessary equipment, tools and resources to execute their work away from the employer's office or building.

Freelancers often provide their own equipment and space but, on some occasions have access to on-site facilities. If activities using facilities you would usually provide are to take place off-site this will require consideration in line with remote working provision.

What are the main benefits?

Evidenced by the PiPA/SOLT/UK Theatre May 2021 research, the benefits of remote and mixed working for individuals and employers in the performing arts sector include:

- **Better work-life balance:**
  Two thirds of respondents say they benefitted from a better work-life balance whilst working from home which is likely to lead to increased job satisfaction and positively impact workforce retention and performance.

  "Flexibility creates happier and more productive people and teams"

- **Engagement**:
  Nine out of 10 managers reported the same, if not increased productivity for their teams working remotely during the pandemic.

  Almost nine out of 10 workers said they were as productive if not more productive working from home.

  "I have found that my work from home days are more productive for admin duties and for running team meetings, attending meeting etc. Because I try to plan all of these into my work from home days, what I am finding is the days that I am on-site, I am more free to be less 'desk bound' and to actually participate in my work, our shows, with my on-site team more, I am more mobile, more present for them."

- **Retention:**

9 out of 10 workers feel that offering some form of remote working would make a job more attractive which impacts the rate of staff turnover.

"There are definitely benefits in terms of being able to recruit roles from a wider pool of candidates if location is not an issue."

- **Financial incentive:**
  Nine out of 10 of respondents stated a key benefit of remote working was reduced costs (such as travel, and other expenses connected with working on site) which is also likely to reduce staff turnover in lower paid roles.

- **Profitability:**
  Remote Working can reduce overheads for both the individual and organisation; utility costs for the organisation's building can decrease, as can commuting costs and other associated ongoings (such as childcare) for remote workers.

  "Pre-Pandemic I wouldn't have thought my role would work well from home, but I've been pleasantly surprised how much can be done. It's a mix of on-site and home working, but it's definitely advantageous to do whatever aspects can be done from home."

What are the main challenges?

The main challenges that arise when implementing remote working fall within four categories:

- **Management** – Six out of ten survey respondents reported they are managing people in their current role, over half (55%) report finding it easier or the same to manage remote workers as managing on-site teams. Nonetheless that means 45% of managers are finding it harder to manage their teams remotely. One fifth of managers said they would benefit from more support and training in order to be able to effectively manage people working remotely.

  "Managing people remotely, particularly people I've never met or spent time with in person, does have its challenges and I think these will become more apparent in the long-term. I would appreciate some training on how to best manage people remotely."

- **Communication** – This is key to the successful implementation of remote working; from workers being informed that this can be requested, to the communication of the organisation's Remote Working policies and guidelines. An additional challenge is to formalise ad hoc or informal methods of communication within teams or between managers and staff, that have been developed on-site, or relied on face-to-face interaction. It is crucial to ensure systems and processes remain effective when one or more of the team are no longer full-time on-site so that standards and delivery are unaffected. This will also address some of the challenges reported in our survey such as experiencing a lack of boundaries between work and domestic life (62%) and frequently working over contracted hours when remote working (44%).

- **Team Dynamics** – A high proportion of respondents said that they experienced feeling disconnected from colleagues or the team (69%) and feeling isolated (40%) when remote working.

  Whilst the feeling of isolation might have been enhanced due to lockdown, the challenge is to ensure and enable team connectedness when some may be offsite. Equally important is to think through how to maintain organisational culture, including induction and support of new staff.

- **Resources** - Remote working equipment, such as devices, software and broadband need to be fit for purpose; many respondents commented on inadequate resourcing during the pandemic. Adequate equipment and resources will support the uptake of remote working and its effective implementation. If it is an organisation's decision or a requirement of the role, it will be the organisation's responsibility to ensure this equipment is made available. The *PiPA Resource Checklist* in part 2 of this resource 'Making Off-Site Working Work' is a useful tool to identify equipment required to make working off-site a success.

TYPES OF REMOTE WORKING

Below is an outline of the different types of remote working along with their specific opportunities and challenges. This will be useful for managers and employees to build a shared understanding and insight of Remote Working in order to have productive conversations about it.

Type	Description	Opportunities	Challenges
Full-time Remote Working (Favoured by one out of 10 survey respondents)	Working away from an organisation's building or from the traditional office environment for all aspects of the job. This can include working from home, in co-working spaces, or at different sites. This type of working may be suitable for most desk-based jobs.	• Enabling uninterrupted focus time for Remote Worker, especially for tasks that require concentration and less team contribution. • Reduces issues around limited space or shared spaces within organisations. • Opportunity to engage with workers based at different locations. • Opportunity to expand the diversity of talent within the workforce as recruitment is not impacted by location/commuting distance or access to a building etc.	• Certain roles and duties within the performing arts will need to be undertaken on site or in conjunction with other people. Analysing the role and its activity to understand the impact on the individual, their team and the organisation will determine if remote working or a mixed working model is suitable. (See *PiPA Role Flexibility Assessment Tool* in *Making Off-Site Working Work*) • Ensuring equal communication and engagement between remote and on-site workers.
Mixed Working (Sometimes referred to as *Hybrid Working* or *Blended Working*) (Favoured by seven out of 10 survey respondents)	This is a mixed model of working partly on-site (in the organisation's building or office) and partly remote. To implement effectively, it requires compartmentalising the different tasks and responsibilities within a role to understand what aspects can be conducted remotely and what aspects are best for the individual and the organisation to take place on-site.	• Establishing a mixed approach means an organisation's working practices are prepared and agile to respond to sudden changes experienced by their workforce (self-isolation requirements, childcare, travel restrictions etc). • A mixed working model can present opportunities for remote and flexible working for aspects of roles which have previously been considered as inflexible (e.g.	• Establishing effective communication across the team, departments, and throughout the organisation. • Ensuring there is no disparity of experience between those working on-site and those working remotely. • Ensuring that the scheduling of working remotely and on-site is beneficial for the individual, the team and the wider organisation. • Working from home may become temporarily challenging due to unforeseeable circumstances

	A mixed approach is suitable for a variety of roles, where agreed upon aspects can be carried out off-site (e.g. project planning, budgeting, emailing, making and sewing, etc). This form of remote working will suit most roles and organisations within the performing arts.	backstage/ technical, creative). • A mixed approach will contribute to embedding the flexibility that will support transitional periods for the workforce (e.g. returning from maternity leave, or long-term sickness etc.).	(such as failure of broadband services), and therefore, providing space or hot desks may still need to be on offer. • Remote Working may not be a viable option for some due to personal circumstance (insufficient space, caring responsibilities). This is important to consider if the request is coming from the organisation.
Ad hoc Remote Access	The tools used to effectively implement Remote Working can also be applied to improve access. It can include offering remote interviews, accepting self-tapes and using online platforms as standard for meetings, workshops or events.	• This offer can increase access to work and other engagement opportunities, improve recruitment processes, attendance management, and support access needs and wellbeing. • Meetings, workshops, training and events can be accessed at different times due to the ability to record remote activity.	• Proactive and clear communication should come from the organisation to raise awareness that remote access is an option. • Support may need to be given for people to be able to use certain digital platforms and software. • Ensuring remote experiences are sufficient and comparable to live attendance.

COMMON CONCERNS

This section outlines previously identified barriers or misconceptions which can prevent remote working. This will be beneficial for managers to familiarise themselves with in advance of implementing a mixed, or fully remote, model of working.

> *"Flexible working I could control, one request at a time. Blended working will just be a free for all."*
>
> - A mixed model of working establishes a principle that staff members have increased control and choice about where they work – on your premises, from home, or from some other location away from your site.
> - This kind of choice and autonomy has been shown to increase employee engagement and thus performance.
> - It's a positive change to introduce. But you also need to have control as a manager.
> - It will be important for you to invest thought into establishing the boundaries, within which your staff are able to choose where to work remotely, and when, so that they know what is possible and acceptable.
> - You may find it most practical to involve your team in this, so that everyone shares in the design, understands, and takes responsibility for the team's mixed working practice.

> *"Everyone will want to work remotely. Nobody will come in to work."*
>
> People like coming to work, because work fills a social need as well as being how to earn a living. Many people found full-time working from home during the pandemic an isolating experience. Many people will be glad to get back to your premises, which are designed for them to carry out the job you pay them to do.

> *"Everyone will choose to work from home on a Friday."*
>
> Well, they may do! This is why it will be important for you to have defined the parameters for remote working. For example, that a certain number of people are required on your premises on a particular day, for a particular reason. With those requirements clearly set out, it will be up to the team members to agree how they will ensure that the right number of staff are on site at any time. (One organisation dealt with the Friday 'problem' by splitting the staff into two teams, the Friday Crew and the Monday Crew. Everyone works on site Tuesdays to Thursdays; all team meetings and other activities requiring collaboration are scheduled for those days. This model may not suit your business, but it is an example of innovative problem solving that meets everyone's needs.

"There are some roles in my team that have to be done on the premises."

This may well be true, and it is your right as the manager to say so. But take the time to think about whether elements of a job could be done remotely (for example, in Wardrobe, the Bible can be worked on at home, even though other elements of the role may need to be done on site). And don't be afraid to consult the role-holder concerned. They are likely to be practical and realistic about where they need to be and when. The more you can delegate around the design of your team's mixed model of working, the more it is likely to fit the exact demands of your business as well as the needs and preferences of your team members.

"I shan't be able to change someone's arrangement in future if I need them to work on the premises."

Make use of trial periods for individual arrangements; consider designating the first three or even six months as a pilot, and build in team reviews and evaluations about how it's going. Keep communication open and encourage constructive discussion. Make it everybody's responsibility to make mixed working a success for the team. But also establish from the start what your expectations or requirements are: for example, that the whole team will always be on the premises for the monthly team meeting; or that the organisation commits to giving sufficient notice when requiring someone to be physically present on a day they have been accustomed to working remotely.

"I have a big team. I simply don't have time to be considering and authorising lots of remote working requests."

A mixed model of working is an overarching principle, supported by your team protocols, that effectively normalise informal flexible working. It is different from a team member making a formal request under the legislation for a contractual change to when or where they work. By introducing a mixed model of working, you are passing responsibility to your team members to make their own decisions about where they can do their best work. After the initial time investment to take stock and to set out agreed parameters, the demands on your time should be less. Step back and let your team manage their own work locations.

"Theatre work/ The Performing Arts is not suitable for any kind of remote working"

The COVID-19 pandemic has shown that there is now capacity within a multitude of roles for remote working. It is important that this learning is embedded into the long-term strategy of an organisation. Even before COVID-19 there were many examples of remote working from within the performing arts; Stage Managers sending rehearsal reports from home, Production Managers answering emails whilst in transit, costume alternations being carried out away from the venue etc. Carrying out an analysis on which roles and tasks can still be completed remotely will support the embedding of a mixed approach.

PiPA Remote and Mixed Model Working Resource Part 2

Making Off-Site Working Work: A 'How To' Guide

TABLE OF CONTENTS

INTRODUCTION

Since March 2020 remote working has been implemented in a multitude of ways, and with it, new ways of working have been introduced and lessons learnt. Successful, long term, sustainable remote working requires rigorous planning and support. It is important to evaluate the organisation's experience, understanding both the benefits and the challenges, to harness the full potential of remote and/ or a mixed model of working for your organisation and workforce.

This resource can be used by both the employee, line-manager or HR function within an organisation and used to facilitate positive and productive conversations around making remote and a mixed model of working work.

This resource is presented in 2 sections: **Planning** and **Assessing**.

- **Planning** - This section outlines the foundation steps managers can take to ensure a successful rollout of remote and a mixed model of working.
- **Assessing -** This section provides templates which outline key aspects of consideration that can support in identifying how a role can incorporate remote working. They can be completed by the person responsible for engaging or managing the role, or someone who has already done or is doing the work as they will be well placed to know details of the role and its responsibilities. It could also be done collaboratively with the person you are looking to engage.

Some of the remote working considerations outlined will be relevant to freelancers (self-employed individuals), e.g. how you will communicate with the individual, whether any of the work needs to be done on-site, but some of the considerations will not be applicable. This document is for guidance and to be used in alignment with your organisations policies and procedures.

This guide and the accompanying resources are intended to provide general information only and should not be treated as a definitive guide or relied on as legal advice.

PART 1: PLANNING

PLANNING FOR REMOTE WORKING

From consulting the workforce, to reviewing and updating policies, to begin trialling remote working, to establishing effective working practices, to revieing and embedding innovative ways of working, the below plan will take you through it step by step:

Area	Considerations
Evaluation	The experience of remote working, or working from home during the pandemic, was for most organisations an emergency response to an unfolding situation. The sector deftly embraced and innovated around the extreme but temporary challenges that would not usually be a factor in remote working (e.g. closing of all childcare provisions, complete areas of the industry closing etc). • Where has remote working been successfully implemented in the past 12 months? • Where has remote working been more challenging over the past 12 months? • Which of these challenges may have been due to Covid? • Which of the non-Covid challenges could now be addressed and if so, how?
Consult Your Workforce	Understanding what the workforce would like and why will support your organisation to implement remote working most effectively. • What is your workforce's preferences on moving forward with remote working? • How many of your workforce/ team would like to trial *Full-Time* or a *Mixed Model of remote working*? • What are the personal circumstances experienced by your workforce, which remote working could support? Requests should be treated consistently and fairly, taking into account individual personal circumstances, where appropriate, e.g. it may be a reasonable adjustment for a disabled employee to be able to work from home. • How can Remote Working support a successful re-opening of your business?
Remote Working Policy	This policy is the start of the communication of your remote working offer, informing your workforce of what it is, how it can be accessed, expectations of your team and how it will be managed. • What does 'Remote Working' mean for your organisation? • How can it be requested or accessed by the workforce/ your team? • What is the process for Remote Working requests? • How is this trialled and reviewed? What is the timescale? • What are the expectations for Remote Working? *(Check here for any exclusionary terminology such as 'neutral backgrounds are essential' or 'cannot have any interruptions or background noise').*

	• How will Remote Working be managed? • Do you offer Remote Working at recruitment? • What is the technical support, device provision, or reimbursement for expenses? • There should be clear understanding of what has been agreed, preferably in writing and signed to show agreement. If a permanent change is made, the contract should be amended (with consent) where necessary.
Communication	When remote working, a concern may be that the communication between individuals and departments will reduce. Remote workers may feel more isolated or disconnected from their team. It is therefore important to explore mechanisms to sustain effective communication. This can include: • Scheduling regular virtual team meetings and 1:1s. • Using software and digital platforms that support a variety of different communications (emails, calls, video calls, chats/direct messages, assigning and scheduling and tasks). Such platforms include Microsoft Teams, Zoom and Google Workspace. • Scheduling remote social engagement opportunities to enable social interaction ('watercooler moments') between team members to support team building, internal support and collaboration. • Collaboration and delegation of communication methods between team members gives the autonomy to decide the most effective way to carry out day-to-day operations and interactions, without putting all the responsibility on the manager.
Digital Inventory	Making sure anyone who is working remotely has appropriate devices, software and broadband that is fit for purpose as well as a suitable remote workspace, is key to their success. The minimum requirements to enable remote working are: • A Laptop or Computer. • A reliable internet connection. • Online meeting facility such as Microsoft Teams, Google Hangout, Skype or Zoom. • Access to company emails and shared documents/files. The list above is not exhaustive and mainly considers office/desk based duties. Different conversations will need to take place in order to facilitate remote working for other roles (e.g. Will a person working remotely in wardrobe need courier or travel support for costumes, do they have the sufficient storage and sewing equipment?). The same responsibilities within an organisation's *Workspace Assessment* should apply to Remote Working. On page 8 of this resource is a **Resource Checklist** to support you with the logistics of this.
Supporting Working Practices	The working practices listed below will maximise the potential for a successful rollout of remote or a mixed model of working for individuals as well as managers and the organisation.

	• **Scheduling** – Team working or meetings need to be scheduled in advance to allow remote workers the opportunity to organise activity at the remote working location accordingly (e.g. childcare, other meetings in shared working settings etc). This could also include agreeing set days/times for meetings or ringfencing time where meetings don't happen to allow focused, uninterrupted working. Establishing the days and times when people operating a mixed model of working are required to be on-site, will be helpful for the whole team. The same applies for those working 100% remotely who may be required for monthly meetings. It is likely that you will need to incorporate some flexibility into your arrangements. • **Monitoring overtime and TOIL** – this supports an ethos which respects people's start and finish times at work, avoiding staff feeling they should be checking emails or accessing work out of hours. This is a tool for the employee to manage their workload rather than an employer to keep tabs on hours worked. It is important for the employer to set clear expectations about boundaries. Modelling behaviours will be crucial within this. • **Integrating virtual 'social time'**- this can include regular coffee or lunch catch-ups, or short weekly team meetings to encourage social exchange, and mitigate feelings of disconnect or isolation.
Trial and Review	Any new form of remote or flexible working may benefit from a set trial period as it needs to work for both the individual and the organisation. Trials and regular reviews will support everyone to adjust to the new working practice. The success of embedding any degree of Remote Working will depend on both the individual and organisation taking equal responsibility in its implementation. • Agree parameters and expectations. • Agree on timescales for the trial. • Conduct a review. • Agree on new parameters for a trial or for its implementation longer term.

If employees are working remotely abroad you will need to consider your ability to contact them and potential issues for working outside of the UK, e.g. tax, social security.

PART 2: ASSESSING

ROLE ANALYSIS

When analysing a role for its suitability for remote or mixed model working, first consider the type of role and activity:

Collaborative Roles:

Are the duties within this role highly dependent on being able to work together as part of a team?
Does this team work to short-term deliverables (such as productions)?

If so, there may be flexibility within certain elements of the role to be carried out remotely, but these will need to take into account the effects on other team members, shared deadlines and the need to be on-site for showtime.

Deconstructing the duties within certain roles can support in identifying elements which can be fulfilled remotely (e.g. a DSM could create and circulate rehearsal reports remotely).

Independent Operational Roles:

Are the duties within this role less reliant on other people and involve regular, repeated activity with longer deadlines?

This could be administrative or finance based roles where there is clear capacity for autonomous working, and therefore can be carried out remotely, in part or in full.
See challenges outlined in The Future of Remote Work – Flexible, Remote and Mixed?

Management Roles:

Does this role come with responsibilities to manage staff or freelancers?

Managing people can be done remotely as the pandemic has taught us, and will benefit from careful consideration around scheduling, communication and regular check-in moments.

Are there opportunities for other team members to deputise or job share when the manager is off-site?

Public or Audience Facing Roles:

Are the duties within this role connected to service delivery to the public or audiences at designated times or locations?

Elements of the rehearsal process can be planned to accommodate remote working for performers and the creative team, such as the readthrough taking place via a digital platform.

Front of House or Catering staff may struggle to work remotely, but there will be administrative tasks which can be completed remotely, such as rota creation.

Producers, programme managers and creative engagement roles which involve public facing duties, may benefit from working remotely (i.e. a producer working whilst traveling via train between venues).

ROLE FLEXIBILITY ASSESSMENT TOOL

This is a step-by-step conversational tool for managers attempting to identify where the flexibility is within a role and workload for Remote or Mixed Model working.

CONSIDERATIONS		ANSWERS
Role	What is the role?	
	What are the key aspects of the role?	
	Which of these can be managed remotely?	
	What are the essential requirements (deadlines, times, locations) of the role?	*This should focus on the practical requirements of the role.*
	Which of these can be delivered remotely?	
	Other	*Think about the key aspects of the role in relation to the rest of the team.*
Collaboration	Is the role part of a team?	
	How many are in the team?	
	Who does the person work with?	
	Who do they report to?	
	Who do they manage?	*How much face time is required?* *What adjustments might be needed in relation to remote working?*
	How would this be affected by Remote Working?	*If this would incur negative impacts, how could they be addressed?*
	Other	*When, how and to whom does the role need to be accessible and available to, both internally and externally?*
Time	How many hours is the contract currently?	
	Is this role part-time, full-time or more than full-time?	

	Are there necessary core hours and any flexible hours?	
	Could some tasks be shared by, or split between two people to facilitate remote working?	
	Other	
Location	Where do the activities need to be carried out?	
	Which parts of the job could be carried out remotely?	
	Other	*Does doing the job differently require more space or different use of space?*

RESOURCE CHECKLIST

When working off-site it is important that the individual has access to the equipment, software and resources they will need to successfully carry out their role, as well as ensuring their physical and mental wellbeing is supported too. What different roles require will vary, but below is a short checklist to support the conversations and preparatory steps when someone is moving to remote working.

It is also important to carry out a similar workplace assessment as you would if the person was working in your building. These guidelines may already exist in your induction packs/processes, health and safety guidelines, or you may already have Display Screen Equipment (DSE checklist). Areas covered include: positioning of equipment and furniture, viewing experiences of screens, and a review of the working environment. This is to check that they have sufficient space, work station setup and a configuration that will limit negative impacts on their physical health.

Equipment	
Laptop/Desktop/Tablet	☐
Keyboard	☐
Mouse	☐
Camera	☐
Microphone	☐
Mobile Phone	☐
Software	
Email	☐
Calendar	☐
Access to storage/server	☐
Digital Communication Platform	☐
Resources	
Sufficient and Reliable Broadband	☐
Support with additional costs (e.g. higher broadband costs, printing)	☐
Workspace	
Desk/Workspace	☐
Chair	☐
Lighting	☐

PiPA remote working policy

NB this is a sample policy for the remote element of a mixed model of working

Headings	Guidance	Suggested wording
1 Our remote working policy		
Purpose	This policy applies when an organisation wishes to establish an overarching policy that employees may decide (within reason – usually after prior consultation with their manager or their team) where they work, without the need for a permanent change to their contract (for which your flexible working policy will apply).	The purpose of this document is to state [the Company's] policy on remote working, which we intend should enable our employees (in consultation with their manager and their team) to have greater control over where they work; and to be able to choose the most appropriate place to work in order to deliver their best work. These arrangements will be monitored and evaluated taking into account the practical issues, costs involved and the effect on productivity and quality of service.
Definition	Set out what remote working means to your organisation (include other sites/locations). Does this policy refer to permanent home working as well as ad-hoc/occasional home working? Set out types of homeworking that the policy will cover and whether home or the employer's business premises will be the main place of work. For example, the types might include: • Home as the main place of work. • Flexible homeworking with time split between home and the office. • Mobile working with a base at home to travel to the employer's different premises and customers.	Remote working is a way of working 'at a distance', using information technology (IT) to allow you to undertake work away from [the organisation's] premises. As a remote worker, [you may be based permanently at home, or] you may work occasionally or more regularly from home, or you may be mobile and connected to our premises from other locations. Unless your contract of employment states that your home is your main place of work, our premises remain your main place of work.

	• The office as the main place of work with working from home or from another location occasionally.	
Scope	Explain that this policy covers ad hoc and regular remote working, that does not require a change to the employee's contract of employment. Explain that anyone who wishes to make such a permanent change should refer to your organisation's flexible working policy.	This policy covers both ad hoc and regular remote working that does not require a change to your contract of employment. Working remotely may be on an occasional, a temporary or a permanent basis and all contractual obligations, including your core working hours, continue to apply. If you wish to make a contractual change to your employment, so that you work permanently from home, please refer to our flexible working policy for details of how to make a formal request and of our process for considering such a request.
Organisational commitment to flexible working	This is where you should set out your commitment to flexibility. Include a reminder here that although remote working is a type of flexible working, it refers only to WHERE work is carried out. Your people should not assume that other aspects of flexible working (WHEN, and HOW LONG) are automatically also variable under this policy (unless of course, they are in your organisation).	The provision of remote working is part of our commitment to flexibility, and plays an important part in making it possible for [our organisation] to attract and retain the best people regardless of personal circumstances; and supports our commitment to making our organisation inclusive of all our people. We are also committed to accommodating an employee's wish or need to work remotely on a temporary or permanent basis; or as an adjustment for an employee with a disability, should this be reasonable and required. This policy explains how to agree remote working with your manager, and the things they and you should take into account when considering your arrangement. It also covers the safeguards that need to be put in place and the practical arrangements that make remote working a success.

		Remote working is one type of flexible working (enabling you to vary **where** you work), but you should not assume that other aspects of flexible working (such as changes when you work or for how long) are automatically part of a remote working arrangement. You should discuss your wish for such changes with your manager. This policy does not form part of your contract of employment and may be amended at any time.
2 Setting up remote working		
Who is eligible	You should set out who will be eligible. Is it open to anyone who has a role where at least some activities lend themselves to being carried out from home? If you wish to restrict eligibility in any way, you should make it clear that anyone may nevertheless request it as a reasonable adjustment. Thereafter, you need to decide, for example, whether it will be a day one right for all new starters, or whether you will require people to have worked for you for a certain length of time. You might also want to restrict it to those with a satisfactory performance record.	All our employees are eligible to use remote working, as long as you have a role in which at least some activities are suitable for being carried out away from our premises. OR You are eligible to use remote working if: • You have a role in which at least some activities are suitable for being carried out away from our premises, AND • You are requesting it as a reasonable adjustment AND/OR • You have completed [a certain length of service] AND/OR • You have satisfactorily completed your training/ probationary period AND/OR • You have achieved [a satisfactory grading] in your most recent performance review If you are eligible to make a formal flexible working request, you will still be able to apply using our flexible working policy.

		Every employee is eligible to request flexible working (a contractual variation to, for example, where they are required to work) under the relevant legislation, once they have completed 26 weeks of continuous employment This remote working policy is in addition to your legal rights, providing a flexible and more informal way to manage where our staff work. If your situation is such that you wish to propose a permanent, contractual change to your terms of employment with us, you should make your request under our flexible working policy.

Criteria for remote working	Your employee and their manager will need to answer these questions satisfactorily
	
	• Is the role suitable for remote working?
	• Is the home or other remote site suitable?
	• Is the role-holder suitable?
	• Will remote working meet your organisation's needs as well as your employee's?
	    ○ Remember that your employee does not need to show a positive benefit to you. But you do want to be confident that there will not be negative impact on their performance or on their wider team.
		To be able to work remotely, you will need to identify which elements of your role suit working away from our premises, and be able to show us that where you intend to work is suitable. You will need to be sure that you have the personal qualities that suit remote working. And you and your manager should be confident that remote working will not be negative for [our organisation] or for you personally.
		
		1. Is your role suitable for remote working?
		    a. Please identify which activities suit working remotely and which are better suited to our workplace.
		    b. Think about how you will plan your time and activities, if you propose to work remotely some of the time, and on our premises some of the time.
		    c. [Set out the factors that the organisation will use for assessing whether the role can be done just as well away from your premises by someone working remotely].
		2. Is your home (or other remote site) suitable for remote working?
		    a. Homeworkers need a safe and reasonable space, security and privacy in which to work, and for office-

| | | type tasks a reliable internet connection that is able to support our work systems.
b. IT systems will be monitored on an ongoing basis and if the system proves unreliable, [the organisation] will be entitled to suspend and/or terminate the arrangement
c. If you intend to work remotely from home, your work space has to be adequate both for practical working and in terms of health and safety legislation. Ideally, you should have a separate room or area set aside for remote working.
3. Will remote working suit your personal qualities?   We expect you to show:
a. Self-motivation and discipline.
b. The ability to work without direct supervision.
c. The ability to complete work to deadline
4. Will remote working meet our business needs as well as your personal needs or preferences?
a. We do not expect you to be able to show that working remotely will enable to you to do more or work better than your current arrangements, but we do want to be confident that there will not be negative impact on you, your team or your colleagues/customers/clients more widely. |
| **Approval process** | Note that we talk about a "proposal" for remote working, to distinguish this from the formal "request" that an employee may make for contractual flexible working, the process for which should be set out in your flexible working policy.

We recommend that managing proposals for remote | [The organisation] will properly consider all proposals for remote working.

There is no automatic right for you to work remotely, and not all roles or jobs will be suitable for remote working. |

| | working should be as light touch as possible. Your aim is to enable your employees to think for themselves and take responsibility for how they deliver their best work. You also want to avoid burdening your managers with additional micro-level decision-making.

You might put in place an expectation that each manager or team leader takes the opportunity of this new remote working policy to meet with their team to discuss what it means in their particular situation. PiPA's guidance on establishing a flexible working protocol is a useful resource, enabling teams and their managers to agree the parameters within which they will operate remote working; and to agree protocols around availability and contactability etc.

Thereafter/instead/or in addition, you should think about:

• Who the employee should discuss their proposal with. Line manager, line manager plus HR etc? Encourage the employee and line manager have an open conversation about the arrangement at an early stage
• How long the process will take. Aim to ensure that managers deal with requests promptly. A formal request for flexible working has to be dealt with within 12 weeks. You should aim for a much quicker turnaround for remote working proposals. You might want to encourage your managers to set "yes" as their default position, with an agreed trial period as their safety net. | The process we will follow is: set out your process here, drawing on the guidance notes |

	• The grounds on which the employee can appeal if their proposal is refused (refer back to your criteria for assessing a proposal: suitability of role, home or remote premises, role-holder and impact on the organisation).	
Trial periods and review	It makes good sense to agree a trial period for any new arrangement, not least to give your managers confidence that if things are not working out, they will have the ability to take corrective action. It is also wise to build in regular reviews, to ensure the arrangement is still working or consider whether it needs to be changed.	Your manager will agree a trial period for any new remote working arrangement, so that you can both be sure that it meets the needs of your team and our organisation, as well as you. If the arrangement negatively affects your performance or that of your team, your manager may extend the trial period, or require you to return to working from our premises. Your manager will build in regular reviews with you [and/or your team], to ensure that the arrangement continues to work well or to consider whether it needs to be changed in any way.
3 Working remotely		
Keeping in touch	You should provide guidance on what is expected in terms of contactability, reporting, communications, attendance at key meetings in the workplace. You could put this into a set of homeworking protocols for teams to tailor to their specific situation. *See PiPA's Remote Working Resource: Making Remote Working Work*	Successful remote working depends on everyone being as available and contactable to their colleagues as they would be on our premises. Your manager will set out what our expectations are in terms of your contactability, reporting, communications and attendance at key meetings. Optional additional wording, which you may not need if your managers implement team protocols around keeping in touch: When you are working away from our premises, you must be available by telephone or video conferencing should there be the need to check or clarify issues relating to your work, and be available should external stakeholders or partners wish to make contact with you directly. Exceptions to this will be:

		• during authorised periods of annual leave, maternity/adoption/paternity/parental leave and compassionate leave, or at other times agreed in writing by your manager; • sickness which has been notified to the Company in accordance with established procedures. Your manager will be responsible for ensuring that adequate arrangements are put in place for the co-ordination of work, eg, deliverables, collection and organisation. Additionally, there must be regular communication with work colleagues and periodic attendance to the office location (unless this latter aspect is impracticable due to the nature of a disability/illness).
Attendance at the main office/base	You should ensure that your employee understands and accepts that your premises remain their main place of work, and that you will require their presence there – how frequently will depend on their role and their team's responsibilities. For an employee whose use of remote working is ad hoc, it will be sufficient that they understand that they may be asked to change their plans and how much notice their manager will give them of this. For someone whose arrangement is based on a regular pattern of remote days, you should consider setting out in more detail your minimum expectations around attendance at your premises	When you are remote working, our premises remain your main place of work. On request, you may be required to attend the workplace for purposes such as [management/team meetings/briefings, training, performance assessment, disciplinary, grievance hearings and/or operational reasons etc]. You must be flexible in attending our premises when requested. The dates and times of such attendance will normally be agreed in advance, and where possible with no less than xx days notice. If your remote working arrangement is based on a pattern of regular or semi-regular days away from our premises, your manager will set out for you our minimum requirements around when and how often you will be expected to work on our premises.

	Team protocols will help here too, to agree notice periods and to create a sense of team ownership of time for collaboration, whole team meetings and so on.	
Boundaries and wellbeing/hours of work	It is clear from the experiences of many during lockdown that remote workers may find it difficult to establish boundaries between their home and working lives. This can bring risks to wellbeing and to their performance. The employer should ensure that employees who work from home are clear about their hours and the core hours when they should be at work. You can address this via the suggested wording in this section. Alternatively (or in addition) you could cover this in the team's flexible working protocols.	Your hours of work on days when you are working remotely will be the same as though you were in the office. We take your wellbeing very seriously, and will provide you will support and guidance to help you set clear boundaries around your remote working day and avoid being "always on". If you find that your working hours are exceeding your normal pattern, you should discuss this immediately with your manager. In particular, remember that Regulation 4(1) of the Working Time Regulations 1998 provides that a worker's average working time, including overtime, shall not exceed 48 hours for each seven-day period (to be averaged over a period of 17 weeks). If your working hours are likely to exceed this amount when working remotely/from home, you must discuss this immediately with your manager.
Sickness absence reporting	Employees working from home often try to "work through" sickness that might otherwise have made them think twice about coming into your premises. This can be to your advantage – during the pandemic, employers reported that recorded levels of staff sickness reduced among those working from home. However, you should encourage your employees to report in sick when they are sick, wherever they are expecting to work that day. It is better for their longer term performance and engagement to take a proper break when they are unwell, in order to recover more quickly, and to avoid blurring the home/work boundary.	If you are unwell on a day when you are working remotely, you should not try to work. Please report and record your sickness absence as usual.

Caring responsibilities	Working from home is not a substitute for childcare or eldercare, unless in exceptional circumstances (for example, as during lockdown). In such exceptional circumstances, the employee should discuss their situation with their manager and agree a short-term and, if necessary, long-term plan of action. If long-term support is needed, please refer to PiPA's *Best Practice Charter Programme* for more resources and bespoke support on using flexible working and parental leave.	When you are remote working, you must separate domestic and work activities and commitments as far as is practicably possible. Unless in exceptional circumstances, working remotely from home is not a substitute for childcare or eldercare. If you have caring responsibilities, you will be required to demonstrate that the care arrangements for your child or adult dependant do not conflict with work activities. Your manager must be informed as soon as practicably possible of any changes to caring arrangements that have implications for the work being undertaken remotely. Where it is possible, arrangements will be made with you, short and/or long term, to accommodate any care responsibilities that you have whilst ensuring that you are still able to carry out your work for us.
Employee performance	Your people will need to be confident that employees who work from home will be managed consistently with office staff, and given the same opportunities for training, development and promotion.	Employees who work from home are subject to the same rules, procedures and expected standard of conduct and performance as all other employees. Contractual obligations, duties and responsibilities remain in place, as do our workplace policies. Equally, we are committed to ensuring that any employees who work remotely will be managed consistently with office staff, and given the same opportunities for training, development and promotion. We want you to remain as involved as possible in our organisation and our activities while you are working remotely. This includes having access to company news, events and benefits, as well as opportunities for professional development, training and promotion. We will keep in regular contact with you when you are remote working. This may be via phone, email, video conferencing or face-to-face meetings.

			If you at any point feel isolated, left out, or lacking guidance or support you should discuss this with your manager.
Practical stuff			
Health and safety	As an employer, you have a duty of care to your employees and should carry out a risk assessment before homeworking can be approved. You should draw up a homeworking health and safety policy, which should set out what will happen if the risk assessment identifies concerns, including who will make and pay for changes to bring the employee's home up to standard, and what timescale will be allowed. It should also set out what will happen if concerns are not addressed and reserve the right to refuse a homeworking application. Of course, there is a fine line between taking reasonable precautions and invading personal privacy. But you do need to assess the risks of issues such as available space and lighting. As a minimum, there should be enough room for work to be carried out, including space for the workstation, other equipment (e.g. printers) and storage of materials. General health and safety hazards need to be considered by both the employer and the employee, because you as the employer have little direct control over the home workplace. There should be suitable access to the work room and the employee needs to		We have a duty of care to our employees and so we may require you to agree to a Health and Safety Risk Assessment being carried out at your home to identify any adjustments or equipment that may be necessary for you to carry out the work in a safe environment. We may ask you to take responsibility for carrying out this Risk Assessment, in which case we will provide advice and guidance to assist you. If required to, you must attend the usual office health and safety courses, read all relevant material and undertake to use equipment safely. We reserve the right to check home working areas for health and safety purposes. If the Risk Assessment identifies concerns, we reserve the right to require you to return to working on our premises. Alternatively, we will agree with you a schedule of changes that must be carried out, and a timetable for doing so. Before costs are incurred, we will agree with you who will be responsible for paying for necessary improvements. If we require you to meet any of these costs, you will have the option instead to return to working at our premises. When you are remote working, you must make sure that you use equipment correctly and that you take reasonable care of your own health and safety. You must also be aware of the risks your work poses to other people, such as family members (including children).

	ensure good standards of housekeeping, including adequate lighting, removing trailing leads and not using the floor or high shelves for storage. If you specifically recruit someone for a remote working job, it's relatively easy to set minimum requirements for their workspace. But post-pandemic, it is likely that more of your employees ask to work from home. If someone is working from home only part of the time, the your assessment of whether the home provides a suitable workplace should take this into account.	
Security	You will need to set out clear requirements around data protection and confidentiality. How should staff working remotely store and transmit documents and information?	*It is our policy that computer users are not permitted to load non-standard applications and other software on to our PCs or laptops. You should not download any application or software without specific advance permission.* *In all instances, repairs and servicing to Company-owned equipment will only take place by persons authorised by us to do so.* *You must ensure the security and safekeeping of any confidential information provided by us for use in the remote working environment. Such information should not be accessible to your family or visitors. You must ensure that all reasonable precautions are being taken to maintain confidentiality of material in accordance with our requirements.* *If you discover or suspect that there has been an incident involving the security of information relating to the Company, clients, customers or anyone working with or for us, you must report it immediately to your manager.*
Equipment and IT	You should set out:	*Suggested wording relating to IT equipment*

	- What you will provide. - For example, furniture, phone, phone line, Broadband, printer, fire extinguisher, paper. - What the employee is expected to provide. - For example, heating and lighting. - Who will pay for any installation and other necessary costs, and, if required and agreed, how costs can be claimed back. - Who the equipment belongs to, who is responsible for maintaining/moving it and how this will be done, and whether it can, or cannot, be used for personal matters by the homeworker or their family. - Running costs and expenses - You should state whether you will contribute towards costs of working from home – for example, heating and lighting - and expenses. If so, you should state how much, what can be claimed and how, and what is taxable. It is important to have a clear policy worked out in advance of your people beginning to work remotely, for the avoidance of future misunderstandings, disputes and costs.	*For remote working, you may only use IT equipment provided by us or that we have approved. You agree to comply with our instructions relating to software security and to implement all updates to equipment as soon as you are requested to do so.* *You will ensure that there is sufficient and appropriate equipment in place to facilitate remote working.* *If you intend using any personal equipment such as a computer for remote working you must check with us first. We will need to make sure that it's suitable. Any personal equipment that we agree to you using remains your responsibility, so you would need to cover the cost of things like repairs. [The organisation] shall not be responsible for the provision, maintenance, replacement or repair of any personal equipment used by you when working remotely for us.* *Any equipment supplied by us should be used for our work only and you should ensure you take reasonable care of it. This is particularly important with respect to computer equipment due to the risk of introducing computer viruses. Company PCs set up in remote workers' homes are fully interactive with our office systems.* *It is your responsibility to take reasonable care to ensure the safety and security of any equipment and to maintain the remote working environment to the agreed health and safety standards.* *While you are working remotely/from home you will be covered by the terms of our policies and procedures as set out in our employee handbook, including the Disciplinary Procedure and IT Policy.* *Add additional wording here re*	

		• *What (else) you will provide* • *What the employee is expected to provide* • *Who will pay for kit and/or installation; if the employee, how they should claim it back* • *Who equipment that the company has paid for belongs to, who is responsible for maintaining it* • *Whether you will contribute towards your employee's running costs and expenses*
Insurance tax and mortgage implications	Be clear about the remote worker's responsibilities for these.	*Equipment supplied by us to those working from home is covered under our insurance scheme against theft, fire and damage. All equipment must be kept in a secure place when not in use. At all times, your home must be locked when left unoccupied. Failure to do so may render the insurance invalid. If your actions render any insurance invalid, we may seek to recover any losses associated with your breach from you personally.* *You will be required to inform your Home and Contents Insurer that additional IT equipment has been provided (if it has) and that you are working from home.* *We will not be responsible, in any circumstances, for any additional premiums requested by your Insurer as a result of any equipment provided to you to enable your remote working.* *There will be no change to Council Tax or Domestic Rates. The Domestic Rate is only affected if you are carrying out a business from your home.* *You are responsible for ensuring home/remote working does not breach any of the terms of your mortgage, rental agreement or any other agreement governing your residence.*

		There may be tax implications to homeworking. You should get specific advice on this.
The employer's access to the employee's home	You should say how frequently and in what circumstances you will require access to your employee's home. For example, you may need to for: • Initial set-up. • Maintenance of equipment. • Health and safety assessment • Electrical equipment testing • One-to-one meetings with managers/ colleagues/ clients	*We reserve the right to visit, or instruct a relevant third party to visit, you at home, or wherever you are working remotely, at agreed times for work-related purposes, including health and safety matters. It is a condition of this policy that you agree to accept any such visit from Management or any designated third party. Such visits will be for the purposes of:* • *providing a channel for reporting* • *performance monitoring and feedback* • *general discussions about work-related matters* • *ensuring health, safety and security* • *delivering and collecting work* • *any other work-related purposes that the Company considers appropriate.* • *to reclaim equipment upon termination of the homeworking arrangements.*

Requirement to work from home

You should provide guidance for employees and managers for situations where **you** require your employees to work from home. Line managers should have open and honest conversations with their team members and be prepared to find alternative arrangements, on a case by case basis, for employees who do not have a suitable home environment to work in, or those who in working from home would suffer detriment to their physical and mental health, safety, or wellbeing. Alternatives could be another workplace, an out of town 'hub' location or priority for a workstation in the workplace.