**Schedule of Services – ‘As Required’ COMPLY**

This Schedule is effective from the commencement date. It gives details of your advised service requirements. Services provided under this Schedule may be time-based or fixed fee, as indicated below. If service requirements change, this Schedule will be replaced with a new version agreed with you.

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| **Client organisation name:** |       |
| **Client organisation address:** |       |
| **Number of employees:** |       |
| **Number of casual workers:** |       |
| **Number of volunteers/student placements/work experience:** |       |
|  |  |
| **Description of time based services to be provided:** |       |
| **Commencement date:** |       |
| **Subscription period:** |       |
| **Number of hours:**  |       |
| **Fees:** | **£ XX per hour + VAT**  |
| **Inclusive or exclusive of expenses:** |  |
|  |  |
| **Description of fixed fee services to be provided:** |       |
| **Commencement date:** |       |
| **Service delivery period:** |       |
| **Fees:** | **£ XXX + VAT** |
| **Inclusive or exclusive of expenses:** |  |
|  |  |
| **Name and role of lead person/sponsor in Client organisation:** |       |
| **Lead person/sponsor email:**  |       |
| **Lead person/sponsor telephone number:**  |       |

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| **Names/positions for any other client personnel authorised to instruct Roots HR and to make changes to the work, including contact email and telephone details:** |       |
| **NCVO or Social Enterprise UK membership number or Social Enterprise Mark holder number (if applicable):** |       |

Before any work can be undertaken on your behalf, you are requested to confirm acceptance of this Contract by signing and returning this Schedule. You should retain a copy for your own records.

**The following terms apply to all activities delivered as part of our ‘As Required’ COMPLY people management advice Service, and should be read in conjunction with our standard Terms and Conditions.**

1. You commit to purchase a specified amount of consultancy time, based on a minimum of four hours. Additional hours can be purchased as required at the then current applicable hourly rate in effect at the time of the request.
2. Additional As Required hours will be used, if required, only with your agreement and will be billed at the end of the month in which they were used, payment due within seven days.
3. The COMPLY As Required Service is delivered by phone and email. Where you contact us by phone and in the unlikely event that we are unable to handle your call at the time of contact, we guarantee to return your call within 4 working hours. If we do not do this, that call will be handled free of charge. Where you contact us by email, we anticipate the urgency is less (unless you highlight this) and will respond over the same or next working day.
4. On occasions, it may be agreed between us to deliver the Service on-site or face-to-face. In these cases, the Service is provided on a minimum half day (four hours) basis or where time is used over four hours, a full day (eight hours) basis. Where a full day is used, we will absorb the cost of the travel time unless otherwise agreed. Where time used is a half a day, travel time will either be agreed with you at 50% of your current hourly rate or a full day charged, whichever is the lower cost. We will in every case advise you of these charges in advance of incurring them.
5. On occasions when work is delivered on site or face to face, travel and other expenses will also be incurred. Again those anticipated will be advised to you in advance. Expenses, where agreed and incurred, will be billed at the end of the month in which they were used, payment due within seven days.
6. For time-based work, usage of time is recorded on a timesheet in multiples of 15 minutes and provided to As Required subscribers on a quarterly basis, at the end of your project or upon request.
7. Unused time-based purchased consultancy time remains on the timesheet for up to one year from the date of purchase, unless an extension to this is agreed by Roots HR in writing.
8. At the end of the stated period for unused time-based purchased consultancy time, you will be notified of the unused time and it will remain available on a timesheet for your use for a further three months, unless an extension to this is agreed by Roots HR in writing. After this period, any remaining unused purchased time is moved to our Social Impact account where it will be used for our pro bono work, the nature of such work being determined annually by stakeholder feedback. We maintain a record of all such time moved to the Social Impact account and the use of time from that account.
9. You may ask us to undertake fixed fee work such as the creation or updating of documents or an HR or H&S Healthcheck, taking the time from your purchased As Required hours and we may agree to do this. Where this is the case, the number of hours equating to the fixed fee will be deducted from your subscription. Where a fixed fee covers the delivery of a Service, any reasonable time incurred by Roots HR in the performance of the fixed fee component of the Contract shall be borne by Roots HR.
10. Roots HR reserves the right to offer discounted rates for COMPLY Services to NCVO members and Social Enterprise Mark holders and to the members of other partner organisations and these may be varied by Roots HR from time to time. In order to benefit from discounted rates, you must notify Roots HR before any and all Services commence that you are eligible for a discount and provide evidence of current membership which may be subject to checking with the partner organisation.
11. A mini HR Healthcheck is conducted by phone and email. A standard HR or Health and Safety Healthcheck is conducted on site.
12. The following applies to standard paid-for Human Resources healthchecks: these are provided to organisations in the West Midlands/West Mercia region on site with inclusive travel. They are provided to organisations outside of the West Midlands/West Mercia region by phone and email, with an option for an on-site visit to be requested which will incur travel fees at the cost of public transport or mileage at HMRC approved rate for business mileage, currently 45p per mile.
13. The following applies to Health and Safety Healthchecks: these are provided to organisations in the West Midlands/West Mercia region on site with inclusive travel. They are provided to organisations outside of the West Midlands/West Mercia region plus travel fees at the cost of public transport or mileage at HMRC approved rate for business mileage, currently 45p per mile.
14. The following terms apply to the creation, review or updating of documents:
15. You may ask us to undertake a review of your existing documentation for legal and practical fitness for purpose and provide a written report of our findings and recommendations. We will do so at a rate of four documents per hour, where each document is of up to 8 pages of A4 typed print in 12 font or larger. Where a document exceeds this definition, it will be classed as two or more documents at the rate of 8 pages of A4 typed print in 12 font or larger per document.
16. Documents are created using a standard template which is tailored to your organisation, or developed through a review and update of your existing policy in our standard template style (either moving to our standard template or comparing the existing document to our standard template, whichever is more efficient) PLUS one iteration of stakeholder review, questions and amendments.
17. Without prejudice to our Liability as set out in our standard Terms and Conditions, we guarantee the technical accuracy of the advice we give you and the quality of our Service. The scope of this guarantee is such that if you wish to exit from your subscription at any point up to three months from the start date of the Service, simply inform us in writing and we will arrange for it to end. You will pay only for the time used and the cost of any HR Healthcheck undertaken in that period. This guarantee is separate to our Complaints Procedure which can be used at any time during or after this period.

***In signing this Schedule, you understand that you are entering into a legally binding Contract. You confirm that you are authorised to do so by your organisation and that you have read, understood and agree to our standard Terms and Conditions and the additional ones in this document.***

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| **Signed on behalf of Roots HR:**  |  |
| **Dated:** |  |
| **Signed on behalf of Client organisation:**  |  |
| **Print Name:**  |  |
| **Job Title:** |  |
| **Dated:** |  |