

POLICIES, PLANS, PROCEDURES MATRIX WITH COSTINGS

Lexcel v6 PMS		Cost
1	Structure and strategy	
1.1	n/a	
1.2	Strategic Business Plan	£250 plus VAT
1.3	Business Continuity Plan including section re testing and log for recording	£250 plus VAT
1.4	Corporate Social Responsibility Policy	£100 plus VAT
Additional Supporting Documents	n/a	
2	Financial Management	
2.1	n/a	<i>FINANCIAL EYE</i>
2.2	Financial Management Procedure Document which includes: <ul style="list-style-type: none"> • Annual budget including income and expenditure; • Annual income and expenditure accounts; • Annual balance sheet; • Annual income and expenditure forecast to be reviewed quarterly; • Variance analysis conducted at least quarterly of income and expenditure against budgets; • Variance analysis conducted at least quarterly of cash flow and cash flow forecast. 	
2.3	Time Recording Policy	
2.4	Billing Clients Procedure	
2.5	Financial Transactions & Authorisations Procedure	
Additional Supporting Documents	<u>Misc:</u> Info for back of invoices.	
3	Information Management	
3.1	Information Management & Security Policy	£175 plus VAT
3.2	Email Policy	£125 plus VAT
3.3	Website Management Policy	£125 plus VAT
3.4	Internet Access Policy	£125 plus VAT
3.5	Social Media Policy	£125 plus VAT

3.6	Register which details each plan, policy and procedure ensuring named person responsible for each plan, policy and procedure and a procedure for the review of each plan, policy and procedure.	£125 plus VAT
Additional Supporting Documents	<u>Policies</u> Cyber-Crime Policy; £125 plus VAT Card Payment Policy; £125 plus VAT Data Protection Policy. £325 plus VAT	
4	People Management	
4.1	Health & Safety Policy (personnel and visitors)	£175 plus VAT
4.2	Equality & Diversity Policy	£175 plus VAT
4.3	Learning & Development Policy	£175 plus VAT
4.3	Learning & Development Plan	£150 plus VAT
4.4	Job Descriptions / Role Profiles	£25 plus VAT / profile
4.5	Recruitment, Selection & Career Progression Procedure / Policy	£125 plus VAT
4.6	Induction Checklist	£75 plus VAT
4.7	Staff Leaving Policy	£125 plus VAT
4.7	Exit Interview Proforma & Checklist	£75 plus VAT
4.8	Performance Management Policy	£125 plus VAT
4.9	Whistleblowing Policy	£175 plus VAT
4.10	Flexible Working Policy	£175 plus VAT
Additional Supporting Documents	<u>Policies</u> Fire Precautions, Procedures and Instructions + Standing Fire Instructions; £175 plus VAT Remote or Agile Working Policy; £175 plus VAT Maternity Policy; £175 plus VAT Paternity Policy; £175 plus VAT Adoption Leave Policy; £175 plus VAT Collection, Sponsorship & Collection of Goods Policy; £125 plus VAT Jury Service Policy; £125 plus VAT <u>Forms:</u> Deed of Confidentiality & Post Termination Covenants for all Staff; £125 plus VAT Self-Certification Form; £25 plus VAT Holiday and Proposed Absence Form; £25 plus VAT Training Feedback Form; £25 plus VAT Training Request Form; £25 plus VAT	

	<u>Plans:</u> ICT & Software Plan. £250 plus VAT	
	<u>Other:</u> Collection, collating and Reporting of Diversity Data; £1.50 plus VAT per member of staff.	
5	Risk Management	
5.1	Risk Management Policy	£175 plus VAT
5.1	Compliance Plan	£250 plus VAT
5.1	Risk Register	£250 plus VAT
5.2	Outsourcing Policy	£175 plus VAT
5.3	n/a	n/a
5.4	Management of High Risk Matters Procedure	£175 plus VAT
5.5	List of work that practice will / will not undertake	n/a
5.6	Generic risks and causes of claims associated with areas of work (contained within LE RM Policy)	n/a
5.7	Key Dates Policy and Procedure	£125 plus VAT
5.8	Conflict of Interest Policy & Procedure	£175 plus VAT
5.9	Supervision Policy & Procedure	£125 plus VAT
5.10	File Inactivity Policy & Procedure	£125 plus VAT
5.11	File Review Policy & Procedure	£125 plus VAT
5.12	Risk Assessment – opening, mid transactional and closing	£225 plus VAT
5.13	AML Policy	£325 plus VAT
5.14	Property and Mortgage Fraud Policy	£175 plus VAT
5.15	Anti-Bribery Policy	£175 plus VAT
5.16	Annual Risk Review	£175 plus VAT
Additional Supporting Documents	<u>Registers:</u> High Risk Register; £125.00 plus VAT Register of Gifts & Entertainment; £125.00 plus VAT Declined Instructions Register; £125.00 plus VAT Register of Staff Interests. £125.00 plus VAT	
	<u>Forms:</u> Breach Reporting Form; £75.00 plus VAT File Review Form; £75.00 plus VAT	

	CQS File Review Form. £75.00 plus VAT	
	<u>Policies:</u> Charitable & Political Donations Policy; £125 plus VAT Outsourcing Policy. £125 plus VAT	
	<u>Others:</u> Outsourcing Questionnaire; £125 plus VAT Conflict of Interest Letters (acting for both parties etc); £125 plus VAT Demands & Needs. £125 plus VAT	
6	Client Care	
6.1	Client Care Policy	£125 plus VAT
6.1	Referring Clients to Third Parties Policy & Procedure	£125 plus VAT
6.2	Client Care Letter (one discipline)	tba
6.2	Terms of Business (generic)	£325 plus VAT
6.3	Register of Standing Terms of Business	£125 plus VAT
6.4	Costs Information Policy & Procedure	£125 plus VAT
6.5	Complaints Handling Procedure	£125 plus VAT
6.6	Client Satisfaction Survey	£75.00 plus VAT
6.7	Accepting and Declining Client Instructions Policy & Procedure	£125 plus VAT
Additional Supporting Documents	<u>Policies:</u> Vulnerable Client Policy; £175 plus VAT Mental Health & Stress Management Policy; £175 plus VAT Quality Policy £175 plus VAT .	
	<u>Registers:</u> Complaints Register; £125 plus VAT Third Party Recommendation Register. £125 plus VAT	
7	File & Case Management	
7.1	Case Strategy	£75 plus VAT
7.2	Undertakings Policy & Procedure	£175 plus VAT
7.3	n/a	
7.4	File Progression and Management Policy	£125 plus VAT
7.5	Expert, Counsel and Barristers Policy & Procedure	£125 plus VAT
7.6	File Closing Procedure	£125 plus VAT

Additional Supporting Documents	<p><u>Policies:</u> Domestic Abuse / Safeguarding Policy (Family Law); £175 plus VAT Family Mediation Policy (Family Law) £175 plus VAT</p> <p><u>Registers:</u> Undertakings Register; £75 plus VAT Expert & Counsel Register. £75 plus VAT</p> <p><u>Forms / Checklists:</u> File Checklist (by work type). £75 plus VAT File Closing Form. £125 plus VAT</p>	
Miscellaneous		
	Office Manual & Staff Handbook complete with policies;	£3,500 plus VAT
	Office Manual ONLY complete with policies	£2,500 plus VAT
	Staff Handbook ONLY complete with policies.	£1,750 plus VAT
	INDIVIDUAL SECTIONS OF OFFICE MANUAL / STAFF HANDBOOK WHICH CORRESPOND WITH LEXCEL V6 AND CAN BE PURCHASED AS A STANDALONE SECTION COMPLETE WITH POLICIES, PLANS, PROCEDURES AND REGISTERS WHICH RELATE TO THE SECTION:	Price on application
	SECTION 1 – STRUCTURE & STRATEGY	
	SECTION 2 – FINANCIAL MANAGEMENT	
	SECTION 3 – INFORMATION MANAGEMENT	
	SECTION 4 – PEOPLE MANAGEMENT	
	SECTION 5 – RISK MANAGEMENT	
	SECTION 6 – CLIENT CARE	
	SECTION 7 – FILE & CASE MANAGEMENT	£625 plus VAT
	Bundle of Template Registers (Risk Register, Undertakings, Complaints, Declined Instructions, High Risk, Gifts & Entertainment, Outsourcing, Expert & Counsel, Third Party Recommendations, Register of Interests)	
	Bundle of Template Plans (Compliance Plan, Strategic Business Plan, Business Continuity Plan, ICT Plan, Learning & Development Plan)	£795 plus VAT
	Referral Agreement Template	£50.00 plus VAT