

### Background information

Roots Human Resources CIC (<http://www.rootshr.org.uk/>) is the UK's leading specialist provider of human resources (HR) services to social sector employers. We are founded on the belief that social sector organisations of all sizes should have access to high quality, tailored, practical, legally sound and affordable human resources advice and services and recognise the challenges for such organisations in sourcing this.

We develop our services to meet the needs of the social sector, in terms of culture, risk and scale. We offer a full range of generalist HR services from resourcing through to learning and development, employee relations, pay and benefits, risk assessment and management, plus employee outplacement. Our consultants are highly skilled, technically knowledgeable, friendly and professional, and bring with them substantial experience of having worked in social sector organisations.

We are committed to improving people management and leadership in the sector with the overall aim of increasing resources available for frontline service provision.

### The offer under Enhance

We have agreed that Roots HR will provide HR support through 2 core packages as set out below:

- A. HR support for simple or complex HR matters (up to a maximum of 6 days support)
- B. Employment documentation

#### **Core Package A. HR support**

This package would provide general support to a charity on a specific HR case or project. A Roots HR Consultant will undertake a ½ day diagnostic. The outcome of this diagnostic will determine the level of input required by both Roots HR and the charity and define an agreed a plan of work. The maximum level of support available will be 6 days (including the ½ day diagnostic), although simple cases will likely require less time. The Roots HR Consultant will indicate the number of days support required when submitting their diagnostic report.

#### **HR needs of charities may include:**

- Restructures and redundancies
- TUPE transfers
- Salary benchmarking exercises
- Support for recruitment for key roles
- Pay and benefits reviews

- Performance management systems in smaller organisations
- Disciplinarys, grievances, investigations, disputes, absence management, performance management and capability cases where there is a suitably skilled manager in-house with capacity to follow our advice
- Planning and delivery of bespoke training courses.
- Mediation cases

**The type of support provided (as appropriate) may include:**

- An assessment and implementation plan developed by a diagnostic (up to ½ a day). Typically undertaken remotely via Zoom, Teams or telephone
- Meetings (by phone / video conference) with Directors, staff, Trustees and volunteers as appropriate
- Delivery of agreed actions (or advice, documents and tools) from a named consultant as a point of contact
- Final review / report or delivery of project handover
- Advice on next steps and/or continuity.

**Outcomes:**

- Case completed or project implemented successfully
- More knowledgeable and empowered clients
- Clients able to make informed decisions, aware of opportunities and risks
- Clients able to use learning for future similar cases or projects.

**Core Package B. Employment / workforce documentation**

**Examples of use may include:**

- Contracts of employment (permanent, fixed term, Directors etc)
- Casual agreements and zero hours contracts
- Contracts for services (for freelance workers / self-employed consultants etc)
- Employment policies and procedures
- Staff handbooks
- Volunteer agreements
- Volunteer policies and / or handbooks.

**Typical support provided (as appropriate):**

This package offers a 2-stage process as follows:

***i) Phase 1 – up to 2 days of support (Diagnostic)***

Review existing employment documentation and to provide a review report stating whether each document is fit for purpose, fit for purpose subject to minor alterations or unfit for purpose to the extent replacement is recommended. Any additional documents required will be identified and equally, where documents can be merged to reduce the number, we will state this. The Grantee will receive and approve the review report before any further work is undertaken.

**ii) Phase 2 - up to 4 days of support (Delivery)**

Update or create the employment documentation as per the approved review report plus high level advice on implementation (this would include how the documents will be embedded and communicated across the organisation, how this may lead to additional training needs for the charity and best practice around reviewing the documents). Amendments to existing documentation are made using Tracked Changes in Word. The service provides for one round of drafting, one round of feedback/questions from nominated person in client organisation and provision of final version.

Both the review and the updating / creation of new documents are undertaken by Roots HR consultants.

**Outcomes:**

- Employment / workforce documentation legally compliant and tailored to the specific sector and organisation
- Clients able to rely on documents for guidance in managing employment / workforce matters.

**When might the Partner be the most appropriate solution for the charity?**

The support is suitable for charities needing advice on managing one individual, a team or the whole workforce. This includes employees, casual or zero hours workers and volunteers, at Board, executive or senior level, managers or staff. They can provide advice across the whole employment 'journey' from role design, to recruitment, on all people-related matters during employment or volunteering, to termination. Strategically this includes management of change in general, restructures, harmonisation and changes to terms and conditions, charity mergers, diversification (for example developing a trading arm) and wind up.

They do not provide:

- Legal or governance advice
- General business advice
- Support for Employment Tribunals
- HR advice to specific employees on their own individual circumstance.

**Input needed from the charity:**

Charities need to fully engage in the support when approved and Grant Managers will check before making the referral that the charity has the capacity to take up the support.