

Background information

[Roots Human Resources CIC](#) 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.

Offer Under Enhance

We have agreed that Roots HR will provide HR support through 3 core packages as set out below. **Please note that all work with provider is carried out remotely (via email, phone, Skype or similar) and will not involve face to face meetings.**

3 core packages of support:

1. Simple case requiring two days of support
2. More complex cases requiring six days of support
3. Employment / workforce documentation

Core Package 1. Simple Cases requiring two days of support

This package would usually provide general support to a charity on a specific HR case or small project, where the charity uses our advice and undertakes implementation itself.

Examples of use may include:

- Smaller restructures and redundancies
- Smaller TUPE transfers
- Salary benchmarking exercises
- Support for recruitment for key roles

- 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
- Simple mediation cases
- Planning and delivery of bespoke training courses.

Typical support provided (as appropriate):

- An assessment and implementation plan, possibly via a site visit
- Methodology, documents and tools plus advice and phone / email support from a named consultant as a point of contact
- Final review
- 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 2. Complex Cases requiring six days of support

This package would usually provide in-depth support to a charity on a complex or contentious HR case or larger project. Some of the implementation may be undertaken by a Roots HR consultant and some by the charity itself.

Examples of use may include:

- Larger restructures and redundancies
- Larger TUPE transfers
- Pay and benefits reviews
- Performance management systems in larger organisations
- Disciplinarys, grievances, investigations, disputes, absence management, performance management and capability cases where there is no suitably skilled manager in-house and/or limited capacity to follow our advice
- Complex mediation cases
- Planning and delivery of bespoke training programmes.

Typical support provided (as appropriate):

- Initial fact find, assessment, options appraisal, risk assessment and implementation plan, via conference calls, emails and a site visit
- Meetings (by phone / video conference) with Directors, staff, Trustees and volunteers as appropriate
- Agreed methodology plus use of Roots HR's documents and tools where required; feedback on fitness for purpose of charity's own documents and tools where these exist
- Delivery of agreed actions from a named HR consultant
- Advice and support from the named HR consultant for actions agreed to be undertaken by the charity
- Final review leading to case report and recommendations or project handover document or email with advice on next steps and

conference call with senior manager(s) and/or Trustees as appropriate for learning / 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 aware of fitness for purpose of own documents and tools
- Clients able to use learning for future similar cases or projects.

Core Package 3. 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

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 – upto 4 days of support

Update or create the employment documentation as per the approved review report plus high level advice on implementation (this would include how the policy 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 policy). 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
- Advice to employees.

Input Needed from the charity

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