



# SOCIAL IMPACT REPORT 2023/24





# *Roots HR's vision, mission and social purpose*

Established in 2009, Roots HR CIC's vision is to improve social sector outcomes through better people management.

We seek to achieve this through our mission of providing high-quality, practical and affordable human resources services on a greater-than-profit basis tailored to social sector organisations.

As a social enterprise, our social purpose is to improve the management of people within social sector workforces through the provision of our HR services and via development opportunities for their leaders and managers.

# 4,835 hours of HR consultancy

During the financial year 1st April '23 to 31st March '24 we delivered **4,835 hours** of HR consultancy to **229 clients** within the social sector; allowing us to transfer knowledge, promote learning and improve people management within the sector, maximising client resources for frontline service delivery.

This consultancy was delivered through our range of **employer-led HR** services:

## COMPLY

our HR advice service

## PERFORM

our HR consultancy and project management service

## GROW

our HR learning and development service



*Click the titles to access the service page.*

1

*Free HR Support*



£643,274  
worth of free  
HR support

Using profits generated in financial year '22-'23 and in-year, we are proud we were able to fund the development and delivery of **FREE HR support** valued at **£643,274.00**. This was delivered as:

- ✓ Free HR Consultancy;
- ✓ HR Toolkits;
- ✓ Documentation;
- ✓ Learning and development.

2



*Free HR  
Consultancy*





£13,563 worth of  
free HR consultancy

Including...

We delivered **73 hours** of free HR consultancy to over 100 social sector employers via our 1-hour free voucher, to the value of **£7,227.00**.

As part of Social Enterprise Day 2023 we provided **5 social enterprises** each with a block of 4 hours of consultancy, available to them for a 12-month period from November 2023 for support with their day-to-day people management, to the value of **£1,980.00**.

We were delighted to sponsor the Social Enterprise Mark CIC annual survey through the provision of 4 free hours of support worth **£396.00**.



For Small Charity Week 2023 we established a Small Charities Social Impact Fund for 2023, which funded up to **40 hours** of employer led HR consultancy support delivered by our consultants. Through this fund we were able to support 4 small charities with delivery of various HR projects, with support valued at **£3,960.00**.



“Jimmy was very helpful and patient with a total amateur and helped us handle a difficult employment issue.”

*Feedback from recipient of support via Small Charity Social Impact Fund 2023*

“Able to fully put in place processes for staff appraisal and there was some review of existing staff handbook. We now have a robust staff appraisal process in place.”

*Dean Brockway, Chairman, Education for Everyone*

“Super helpful, kind, supportive and efficient.”

*Amelia Clapham, CEO, Ace Music Therapy CIC*

# 19 blogs and Employment Law Bulletins

Our HR consultants provided the sector with **19 blogs** and **Employment Law Bulletins** on topics such as:

- ✓ 2024 employment legislation changes
- ✓ Menopause in the workplace
- ✓ Flexible Working
- ✓ The Effect of Money Worries on Mental Wellbeing At Work
- ✓ Uniting Against Racism: Building an Inclusive Workplace
- ✓ The Rise of Artificial Intelligence: How can social sector employers prepare
- ✓ Guidance on topics such as:
  - holiday pay and entitlement
  - The introduction of Carer's Leave
  - Right-to-work checks
  - Statutory Sick Pay
  - employment contracts and much more!

3



*Toolkits*



Issued 1,681  
**HR Toolkits** with  
a retail value of  
£502,619

We were delighted to continue to giveaway our free HR toolkits on the following topics:

- ✓ Recruitment
- ✓ Selection
- ✓ Pre-Employment Checks
- ✓ Induction
- ✓ Probation
- ✓ Agile Appraisal
- ✓ Wellbeing at Work
- ✓ Pay and Benefits
- ✓ Personnel Files
- ✓ Managing Leavers
- ✓ Managing Sickness Absence
- ✓ Managing Underperformance

Each toolkit is jam-packed full of useful guidance, templates, tools and training webinars to support social sector organisations.

4



# *Documentation*



# Updated the portfolio of 27 free HR Factsheets

We developed a new factsheet on Mediation and updated our portfolio of 27 free HR Factsheets on a range of topics including:

- ✓ Terms and conditions of employment
- ✓ Starting to employ a workforce
- ✓ TUPE
- ✓ Minimum redundancy process
- ✓ Employee engagement
- ✓ Employee wellbeing
- ✓ Flexible working
- ✓ Sickness absence

As part of Volunteers Week, we issued **153 Managing Volunteers Toolkits**, including guidance, a template Volunteer Agreement and up to 1 hour of free HR support to help with implementation, worth **£28,764.00**.

5

*Learning &  
Development*





Delivered  
an 8-week  
**HR training**  
programme to 30  
line managers in  
the social sector

In '23 - '24 we were delighted to run our 8-week, modular **HR for social sector line managers** virtual training programme twice.

30 delegates attended the programme covering topics such as:

- ✓ Recruitment and selection
- ✓ Onboarding & induction
- ✓ Performance management
- ✓ Wellbeing and inclusion
- ✓ Managing change
- ✓ Managing absence
- ✓ Developing your team
- ✓ Managing hybrid /virtual teams

This offering has a retail value of £1,495 + VAT per delegate, providing people management training worth **£44,850.00** to managers within the sector.

Keep an eye out for the application for the full programme in 2024-2025



[Subscribe to our newsletter!](#)



“As someone new to line management, the programme gave me a grounding in all the necessary areas without being overwhelming.”

“It was extremely informative, and the tutors were very knowledgeable. I particularly enjoyed the onboarding module.”

“It covered all of the areas that I required to assist me in my role as Line Manager.”

“It was really helpful how it followed the employment journey through advertising, recruitment, onboarding, induction, probation, performance, disciplinary and capability management and then about managing teams and how to motivate and get the best out of them. It was a really thorough and worthwhile course.”

“The course covered relevant and important topics and the peer learning was very beneficial. It also provided reassurances in relation to the law, correct and considerate approaches, effective management of potential situations that may arise.”



[Click to see more reviews.](#)

Delivered 3  
**HR governance**  
sessions for  
Trustees with  
a retail value  
of £25,075

We delivered 3 HR governance sessions for **Trustees** in the year to **85 delegates** at a value of **£25,075.00**.

The session included guidance on an HR framework for charities, advice on managing and monitoring performance and handling difficult situations.



“Everything was covered very thoroughly. It was really useful and gave great insights to what we need to be doing.”

*Maureen Brunt, Trustee, Mallard Community Charitable Hub Ltd*

“It was detailed and gave a good insight into what is expected of trustees.”

*Debra Hawley, Trustee, Secretary & Co-founder, Families Out Loud*

“It was well set out easy to follow highlighting the important feature and practices that needed to be in place.”

*Gwyneth Jones, Trustee, Mayfair Community Centre*



 [Click to see more reviews.](#)

Delivered  
**webinars** to 780  
delegates

During the year Roots HR delivered quarterly **webinars** to **333 attendees** on:

- ✓ Managing volunteers
- ✓ Diversity, Equity, and Inclusion
- ✓ Managing absence
- ✓ Legal updates for 2024

In addition, we delivered **11 webinars**, including some via partner organisations such as Social Enterprise UK and Visionary to **447 delegates** on topics such as:

- ✓ HR Essentials
- ✓ Equality, Diversity and Inclusion
- ✓ Small Organisations Forum – Q&A HR session



“Succinct but not rushed; very clear (PowerPoint) slides - and I appreciated receiving them afterwards. Good opp’s for Q&A and well-managed.”

*Will Sutcliffe, Chair, Bradford City of Sanctuary*

“Explained the changes with key facts. Kept it informative but simple and loved the example for holiday pay.”

*Sarah Helme, Finance & Compliance Officer, Church Schools of Cambridge*

“Really clear information - good amount of detail without being overwhelming. Enjoyed the Q&A”

*Elizabeth Smith, Manager, Hand to Mouth*

“I found the information to be presented in a clear, non-jargon way, both verbally explained well and in the slides. Loved the calculator because holiday is often complex to deal with. Really grateful and please send my thanks to all involved.”

*Rachel Colbourne, HR & Operations Coordinator, ESTEEM*

“I wanted to check we were doing everything right and I think we are. It was also great to allow so much time for questions. I asked two questions myself but also learnt things from other peoples' questions.”

*Anne Pridham, Operations Manager, London Plus*



 [Click to see more reviews.](#)



Contact us for expert HR services for charities and non-profits.

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