

Teams List and Roles

The information below applies to Unicorn's devolved structure in 2010, with around 40 members, although a smaller business may still find the team and roles lists useful for distributing roles and named responsibilities, and writing job descriptions.

Team meetings

A small start-up, like Unicorn in the early days, may be able to conduct all shop business at the fortnightly members meeting. However, for anyone considering a devolved structure, see below for approximate number of attendants, frequency and duration of Unicorn team meetings in 2010.

- Ambient Buying (fortnightly, 1 hour, 6 people)
 - Deli (fortnightly, 1 hour, 6 people)
 - Fresh, i.e. Chilled/Bread (fortnightly, 1 hour, 6 people)
 - Veg (fortnightly, ½ hour, 8 people)
 - Alcohol (fortnightly, ½ hour, 2 people)
- Shop (weekly, ½ hour, 3 people)
 - Store (fortnightly, ½ hour, 3 people)
 - Security (as needed, ½ hour, 2 people)
- Secretariat (fortnightly, ½ hour, 3 people)
 - IT/Communication (as needed, ½ hour, 2-3 people)
- Production (fortnightly, ½ hour, 6 people)
- Personnel (weekly, 1 hour, 4 people)
 - Training (fortnightly, 1 hour, 2 people)
 - Employment Opportunities (as needed, ½ hour, 2 people)
- Operational Planning (weekly, ½ hour, 5 people)
 - Maintenance (fortnightly, 1 hour, 2-3 people)
 - Cleaning (as needed, ½ hour, 2 people)
- Education and Marketing (fortnightly, 1 hour, 2 people)
- Finance (fortnightly, 1 hour, 4 people)
 - Cashing Up (as needed, ½ hour, 5 people)

Team Aims and Objectives

The lists below give an idea of the aims, objectives and roles for each team, as found in the team charters (see below for a Team Charter Template).

Ambient Buying

- Aim: To provide a wide ranging and diverse selection of ambient goods in keeping with Unicorn's principles of purpose, whilst making a profit.
- Objectives:
 - Source new suppliers
 - Source new products
 - Pricing and margin control across the whole shop
 - Provide a wide selection within the confines of shelf and storage space.
 - Increase profitability
 - Buy directly where possible
 - Be competitive with supermarket prices
 - Ensure suppliers and products are ethically based, where possible

- Team roles:
 - Negotiation and ensuring favourable terms
 - Place orders on time
 - Order to ensure stock levels are not higher than need be
 - Try to get order level high enough not to run out before next delivery
 - Maintain good relations with suppliers
 - Be aware of prices internally and externally
 - Check new catalogues for price changes
 - Get as many unique selling propositions as possible
 - Product development – sampling, taking products to buyers meetings and training
 - Plan promotions

Deli

- Aim: To provide a fresh, wide ranging and diverse selection of chilled foods
- Objectives:
 - To maintain good hygiene practices
 - All members to undertake Basic Food Hygiene training
 - To monitor wastage fortnightly
 - To check and record all refrigerator temperatures daily
 - Deal with deliveries
 - Keep strictly to stock rotation and ensure no products are out of date
 - To increase the organic food we sell
 - To increase the local food we sell
 - to increase profitability
 - Be price savvy
 - Increase our range of cold and hot food made fresh onsite

Fresh (Chilled/Bread)

- Aim: To provide a diverse selection of chilled foods
- Objectives:
 - To monitor wastage
 - To check and record all refrigerator temperatures daily
 - Deal with deliveries and monitor cold store
 - Plan developments: increase range (new chiller, freezer, cold store...)
 - Keep strictly to stock rotation and ensure no products are out of date
 - To increase profitability
- Team roles:
 - Source and sell chilled foods
 - Maintain and develop lines

Veg

- Aim: To provide fresh, good quality, good value seasonal Organic fruit and vegetables, locally where possible, at a profit.
- Objectives:
 - Ensure produce is of organic standard of soil association or recognised equivalent.
 - Receive deliveries and transfer produce that requires chilling to the fridge as soon as possible.
 - Check quality and quantity of deliveries for possible claims

- Pay suppliers within terms agreed
- Source new suppliers, more locally when possible
- Keep prices up to date
- Ensure presentation is good and standards of produce are kept high
- Communicate to till operatives about unusual veg or price changes
- Keep other members of team informed of issues when changing shifts
- Be aware of methods of cooking, storage, ripeness and seasonality of produce to be able to answer customers' queries
- Know how to store produce on our shelves or in fridge at end of day to avoid spoiling
- Provide a wide selection within the confines of shelf and storage space
- Increase profitability

Alcohol

- Aim: To provide good quality, good value organic vegan alcohol and sell it at a profit
- Objectives:
 - To promote organic brewing and winemaking and the environmental consequences
 - To promote micro breweries and artisan products in an industry that's swamped with cheap low grade products
 - Regularly review prices of competitors
 - To use minimum number of hours while maintaining good offer
- Team roles:
 - To sell alcohol in a responsible manner e.g. no underage customers, no cheap strong chemical laden products (any incidents of underage buying need to be written in 'incident book', everyone's responsibility)
 - Deal with all licensing issues
 - Ordering and stock take
 - Organising tastings
 - Researching new products
 - Wine, beer and cider guide, update in customer newsletter
 - Deal with customer inquiries and train other members to feel confident at recommending products.

Shop

- Aim: Efficient running of the shop floor.
- Objectives:
 - Monitoring of customer care & procedures
 - Managing shop floor layout with buying, store & site teams
 - Highlighting training needs for shop floor e.g. more floorwalkers or pickers needed
 - Aiding communication between shop floor and store, for planning and day to day running of shop
 - Ensuring shelves are filled sufficiently
 - On the day cover, lunches, rota issues
- Team roles:
 - Training for core roles – till, picking, putting out, customer care
 - Bringing all shop floor issues and needs together by communication with other teams e.g. shelf space, till takings, out of stocks

- Point of reference for customers, to answer queries and handle complaints
- Point of reference for members and casuals
- Crisis management with Ops Planning when needed e.g. power cut, robbery, fire alarm
- Feed back to membership on probationary member's progress
- Peer reviews for all team members
- Maintaining card machines

Store

- Aim: The efficient, safe & harmonious day-to-day management of all retail goods-in systems
- Objectives:
 - Storage of goods-in, in accordance with picking/ records systems
 - Compliance with produce tracking systems – i.e. Soil Association/ picking location system
 - Safe handling and health & safety compliance & Training
 - To enable good access to goods
 - To provide a flexible storage space though stock rotation and minimal wastage
- Team roles:
 - Splitting and storing goods-in
 - Use of internal and external forklift
 - Waste/recycling management
 - Liaison with linked teams (Shop, Buying & Production)
 - Storeroom safety/safe handling
 - Store hygiene
 - Stock rotation

Security

- Aim: To ensure a safe shop for staff and customers.
- Objectives:
 - To maintain CCTV, building alarm and personal alarm systems
 - To propose and implement new security measures where necessary
 - To train staff in safe methods for dealing with security threats
 - To liase with police and other local business regarding possible threats

Secretariat

- Aim: To ensure a coop which makes well-informed consensus decisions driven by an agreed 3 year plan, meets legal reqs & inspires a sense of ownership in all members
- Objectives:
 - Facilitate internal communication
 - Support team, forum and general meetings
 - Continually review structure of organisation & 3 year plan
 - Ensure good external contacts via subscriptions & 1+4% fund
 - Meet legal requirements
- Team roles:
 - Coordinating internal comm (newsletter, noticeboards, internal post)
 - Coordinating forum & general meetings (packs, agenda, minutes)

- Supporting and reviewing structure (charters, teams, meetings, etc.)
- Coordinating, writing, monitoring & updating an agreed 3-year plan
- Maintaining external communications (checking email & post, renewing subscriptions)
- Meeting other legal requirements (up to date register & policy document list, keeping minute book safe, fill in annual return sheet, AGM business)
- Overseeing 1% and 4% fund

IT/Communication

- Aim: To ensure accurate tills & labelling, good sales information, and smooth functioning of all communication technology
- Objectives:
 - To keep tills working and accurate
 - To keep up labelling to date on shop floor and in production
 - To keep computers & printers working and meeting the needs of co-op
 - To keep phones & fax machines working and meeting needs of co-op
 - To provide training and information to meet the needs of the co-op
- Team roles:
 - Update & maintain tills (Ecr & Stock database, keyboard, clerks)
 - Update & maintain Filemaker (shop floor labels & production labels)
 - Service/replace/expand all communication technology as needed (tills, PCs, printers, fax & copy machines, phones, phone system, structured cabling, patch panel, network, internet connection)
 - Update & maintain email system, back ups, fax numbers, anti virus protection, software
 - Produce regular sales reports from EPOS
 - Training members on using and maintaining communication technology

Production

- Aim: Maintain full shelves of packed goods to manage and exceed Unicorn's demand
- Objectives:
 - Supervise daily packing needs, ensure smooth flow and efficiency, with a sensitivity towards individual needs and our cooperative principles
 - Write daily list for products and hours needed
 - Communicate with Store and Buying on O/S's and deliveries
 - Ensure collective health and safety and hygiene standards
 - Monitor and buy bags/labels/ink when necessary
 - Calculate and understand packing rate, report regularly
 - Look to improve and develop our practice, in line with increasing demand and experience
 - Quality control / assurance / licence (soil association / trading standards)
- Team roles:
 - Supervising packing room
 - Training casuals, new starters, current staff
 - Pricing, new products
 - Cleaning packing area, maintaining equipment
 - Health and Safety

- Liasing with Soil Association
- Monitoring hours worked and productivity statistics

Personnel (See policy in Structure Policies Appendix)

- Aim: To contribute to the success and future objectives of the business by dealing professionally with any issues relating to Unicorn's employees.
- Objectives:
 - To be aware of and respond to staffing levels at Unicorn and recruit the right people at the right time
 - Encourage employees to develop skills and increase knowledge to benefit themselves and Unicorn.
 - To establish and review systems to address people issues
 - To provide up to date legal and procedural advice to Membership
- Team roles:
 - External recruitment
 - Internal recruitment and changes to job descriptions/roles
 - Pastoral care
 - Discipline and Grievance Procedure
 - Absence Monitoring
 - Personnel related Policy Documents
 - Terms and Conditions and employment contracts
 - Personnel-related correspondence (internal or external)
 - Pension scheme administration
 - Personal data management
 - Employee Reviews
 - Termination of employment and administration (e.g. exit interview)
 - Manage budgets for recruitment and legal advice

Training

- Aim: To develop and equip individuals, teams and the collective with the skills, resources and know-how to prosper
- Objectives:
 - Responding to individual & team requests for support through training
 - Set up self appraisal annual review form and support individual progress at review
 - Training in compliance to existing and forthcoming legislation
 - Overview and co-ordination of core training for new recruits
 - Promoting awareness of like minded ventures/businesses
 - Encouraging self-development not immediately associated with day-to-day tasks
- Team Roles:
 - Where a skill or qualification is a requirement of a contracted role, ensure the requisite training has occurred
 - Oversee regular fortnightly Training sessions
 - Monitor induction training and probationer projects, maintain up to date induction pack, provide point of contact for new staff
 - Promote/co-ordinate visits to other enterprises, trade shows and social enterprise events/conferences
 - Organise Farm/Market Garden visits during probation
 - Operate the Member Individual Training Budget

Employment Opportunities

- Objectives:
 - To uphold our second principle of purpose, recruit those with learning difficulties
 - To recruit, train and retain people with learning difficulties to work as part of our team
 - To support and develop productive, independent and valued works
- Team roles:
 - Oversee induction and ongoing training and development
 - Reviewers (and point of contact re: problems and procedures)
 - Deal with feedback from the membership
 - Liase with relevant employment agencies
 - Manage training budget from relevant employment agency

Operational Planning

- Aim: To co-ordinate infrastructure of the day-to-day
- Objectives:
 - To liase with Personnel and other teams in order to accurately forecast and meet the needs of the business in the short, medium and long term
 - To design and update member rotas
 - To organise cover and casual workers week-by-week
 - To monitor other aspects of infrastructure, including those relating to sub-teams

Maintenance

- Aim: To maintain and improve where possible the internal workings of the premises, as well as helping other teams achieve their goals if they involve more specialist skills.
- Objectives:
 - Identifying areas/items in a state of disrepair and rectifying as appropriate
 - Responding to requests for works/notices of damaged areas of the building and requests for other works
 - Identifying and responding any other areas of improvement.

Cleaning

- Aim: To establish and maintain a high standard of cleanliness throughout the premises. This includes the following areas:
- Objectives:
 - Establish appropriate monitoring system to ensure all areas are cleaned regularly.
 - Provide training through written information and training sessions.
 - Monitor all cleaning processes currently in place at Unicorn
 - Observe H & S instructions and guidelines
 - Provide the necessary cleaning materials and equipment for effective and efficient cleaning
 - Ensure all workers are involved in general cleaning activities required to meet our aims.
 - Provide a central service point for all departments.

- Team roles:
 - Fortnightly cleaning task allocation on Red Thurs cleaning session
 - Cleaning task allocation for morning cleaning slots.
 - Cleaning schedules for all areas without individual governance
 - To monitor environmental health and pest control as needed

Education and Marketing

- Aim: Educate about and market Unicorn and its principles with depth and honesty
- Objectives
 - To communicate honestly - we are very lucky in having their trust/loyalty (integrity) and as we get bigger this is in jeopardy
 - To increase quality of shopping experience
 - To improve relationship with customers (loyalty)
 - To inform & educate customers (propaganda)
 - To keep customers we have
 - To get new customers (focus on local ones)
 - Focus on internal education through information, improve quality of info

Finance

- Aims: Enable & provide good financial management to Members' and external bodies (as required). Meet legal financial requirements.
- Objectives:
 - Improve financial awareness among members and enable members to make informed business decisions through providing training and support as needed, and clear and regular reports.
 - Identify & assess financial opportunities, & promote the long-term viability of Unicorn through loanstock issue, investment in business etc.
 - Monitor/improve profitability/efficiency, e.g. sales/hour....
 - Advise/propose appropriate wage levels & rewards.
 - Good clear archiving of all related documentation.
- Team roles:
 - Invoicing
 - Payments out
 - Chasing credit notes
 - Reconciling delivery notes
 - Setting up and maintaining credit accounts
 - Monitoring discount levels & terms
 - Ensure receipt of new supplier details
 - Euro payments & replenishment of euro account (including monitoring euro charges linked to the account)
 - Awareness of cashflow & banking
 - Maintain good communication with finance team
 - Monitoring/filing BACs instructions
 - Purchase ledger data entry
 - Good communication with suppliers
 - Finance overview:
 - Interpreting financial reports
 - Forecasting and budgeting
 - Cashflow and bank account management

- Ensuring adequate training & passing on knowledge with support for the finance team & members
- Book-keeping (Quickbooks) & Accounts
 - Maintain Quickbooks: data entry (inc. purchase & sales ledgers), journals & reconciling
 - Keep clear records of queries/communications etc.
 - Archiving
 - Audit & end of year preparation
 - Budgeting
 - Forecasting
 - Maintain fixed asset register
 - Training notes and support for new members
 - Report takings etc & forecast takings etc via newsletter/forum
 - Report to members via training, MMs etc.
 - Standardising practices with transparent systems
 - Liason with professional outside consultancy where appropriate
 - Vat returns
 - Cashflow, bank account & loans etc. management, maintenance, filing and general awareness
 - Stocktake
 - Liaise with other teams re: hours, recruitment, budgets, etc.
 - Maintenance of relevant financial spreadsheets/graphs, asset register, cashing up template, takings graph,
 - Awareness & management of cashing up/takings issues/errors.
 - Margin control (with Buying Team)
 - Ensure Quickbooks & Financial data is backed up.
 - Ensure adequate business insurance is in place
 - Recommend targets for member bonuses & manage payments
 - Write report for MM
 - Keep Quickbooks software & support up to date
 - Annual membership Pay Review
 - Monitor member benefits.
- Other:
 - Intrastat
 - National Statistics
 - Card Machines

Cashing Up

- Aim: To account for, manage, bank and clearly record daily takings
- Team roles:
 - Cash Handling
 - Ensure cash is counted for tills & float
 - Count & bank takings
 - Record details of takings on cashing up spreadsheet
 - Assimilate, organise & file: cashing up sheet, till x & z printouts, card printouts, paying out, till errors sheet, receipts, card slips
 - Investigate, understand & minimise errors, communicate these
 - Order & collect change as appropriate
 - Recognise & report errors/concerns as appropriate
 - Perform reconciliation of takings, monitor and minimise discrepancies

Team Charters

When Unicorn devolved its structure, each team devised a Team Charter. Teams review and update their charters yearly (around the AGM) to reflect changes in the evolving structure and refocus team activity. The charter's purpose is to:

- Provide a job description for the team
- Give an understanding specific roles within the team
- Show clear lines of responsibility & accountability
- Offer clear information to anyone inquiring outside team/organisation
- Aid training by establishing what an area of work entails and what special training requirements an individual needs to participate in the team
- Provide criteria for peer reviews of individuals within the team, and of the team within the community of teams/sub-teams.
- Act as a benchmark which can be reviewed tested and revised as required.
- Note any procedures in choosing and rotating forum rep, team overview, chair and minute taker, and name those who currently hold these positions

Team Charter Template

Date revised: ../../.. (to be revised annually at the AGM)

Team: <i>(Name)</i>	Frequency of Meeting: <i>(Date/time/length)</i>
Current participants/team size: <i>(who's actually in the team/who comes to meeting if different)</i>	
Representation: <i>(is the team represented directly at the forum or through another team, if directly then by whom and how is this role decided. If through another team - which)</i> Currently: <i>(named individual, if applicable)</i>	
Overview/Chair/Minute-taker: <i>(note how is this role decided, rotation)</i> Currently: <i>(named individual, if applicable)</i>	
Record of meetings: minutes & forum report OR only forum report Agenda available in <i>(name specific place)</i> on <i>(day)</i> . To be posted in advance of meeting and prepared for meeting by <i>(chair/overview/minute-taker)</i> .	
Aim and objectives Aim: <i>(what team aims to do overall, should link to MMs and the business plan)</i> Objectives: <i>(key things that need to be done in order to achieve the aim)</i> •	
Responsibility to: <i>(the membership via forum, MMs, the policies of the co-op, customers, etc.)</i>	
Budget responsibilities: <i>(if applicable)</i>	
Team roles: <i>(functions provided by the team – important to understand when devising training and looking at individuals' peer review. A detailed description also helps decide priorities and what could be delegated to others/other teams)</i> •	
Are there specific responsibilities held by individuals in the team? <i>(What and by whom – helps in planning and training. Consider someone to look out for ethical & environmental implications of team decisions)</i> •	
Procedures for peer review: Using standard peer review form found in Unicorn/Reviews/'New Peer Review Summary' OR Using own peer review form found in <i>(insert filepath here)</i> Reviews to be conducted by <i>(named team member or Personnel if desired)</i> .	