

# The ultimate guide to MAT people strategy: Health, wellbeing and culture edition



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# Why is it important to foster inclusive, supportive environments, where school and trust leaders can thrive?



Kathryn Birch  
Founder and  
CEO at SAMpeople  
and FusionHR

Educators across the UK are tasked with inspiring and leading the next generation, a mission that requires dedication and resilience. However, the Working Lives of Teachers and Leaders Wave 2 report suggested that 84% of teachers’ and leaders’ stress and poor wellbeing was an important factor in their consideration to leave the profession.<sup>[1]</sup> It is more important than ever to develop a people strategy that truly supports our teachers and leaders to thrive.

When teams are healthy, motivated and deeply focused on their goals, their performance, and that of the organisation, can greatly improve. Research consistently highlights that when employees feel valued and supported and their work is meaningful, their wellbeing is improved. This in turn builds a stronger commitment to the organisation’s goals and importantly, improves performance.

As schools and MATs continue to expand and adapt, how can they holistically support and develop their teams, fostering resilience in the workplace?



This book shares insights and advice from our highly qualified HR Consultants at FusionHR, who have worked with schools and MATs for over 20 years. The team are passionate about solution-focussed approaches, so read on to access practical actions and takeaways that work with you and your challenges, goals and culture, to get you to where you want to be.

I hope this book leaves you with ideas and strategies for your own schools and trusts and I look forward to hearing your thoughts.

All the best,

Kathryn Birch

[1] Working lives of teachers and leaders: wave 2 summary report, conducted by the Department for Education, 2023



# The People Strategy Series

for schools and MATs

**The People Strategy Series for schools and MATs is an online event series all about people management in schools and trusts.**

Every month, The People Strategy Series explores topics to help empower you in your role, answer common questions, and support you to design a leading people strategy. Our in-house HR experts look at everything from HR compliance, legal pitfalls, EDI, flexible working and more. Access actionable strategies to take back to your trust or school.

If you enjoy their articles, why not book on to The People Strategy Series for even more free content?

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# Strategies for championing positive wellbeing and mental health in your schools

Learn about the foundations of a successful wellbeing strategy



# Strategies for championing positive wellbeing and mental health in your schools



Chloe Auty  
HR Consultant at FusionHR

**Length of service:** 3 years

**Schools and trusts you have worked with?** I have supported different types of schools across the nation during my time at FusionHR. Whether on an ad hoc basis to support with a specific project or as a dedicated HR Consultant as an extension to the school.

**HR specialities:** I have over 3 years experience in the education sector and I am passionate about mental health and wellbeing being a priority focus in our schools and trusts.

I love the opportunity to support schools in achieving and maintaining a healthy approach to employee wellbeing, whether supporting a school leader in managing an individual or on a strategic whole school approach.

According to the Indeed Work Wellbeing Report 2023, only 23% of UK workers are thriving, reporting high wellbeing at work.<sup>1</sup> The education sector, in particular, faces mounting challenges, with leadership facing tight budgets and teachers under significant pressure. This raises an urgent question:

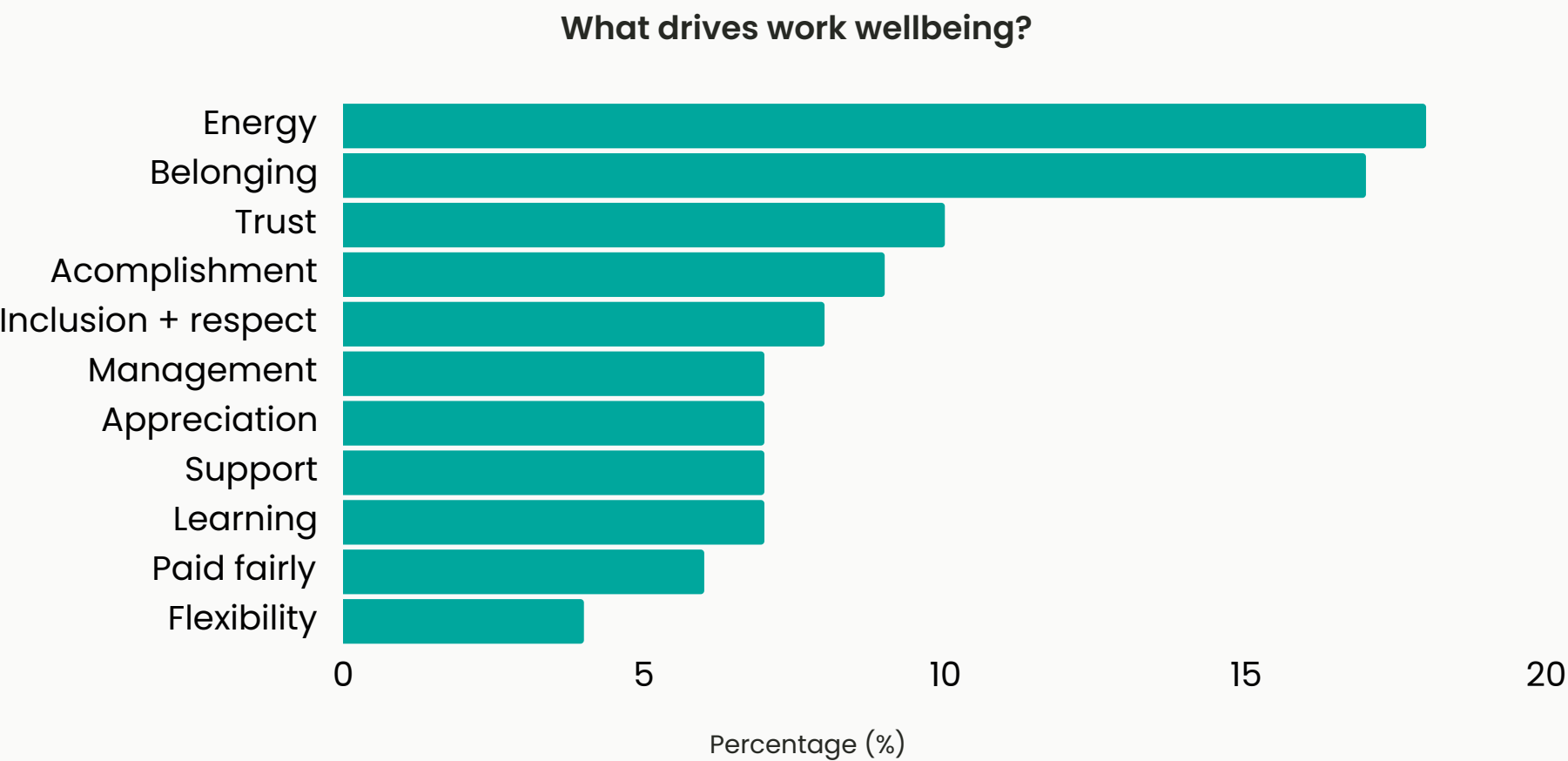
**How can we support our teachers, leaders and staff to promote wellbeing and tackle the causes of work-related mental health problems?**

HSE statistics show work-related stress, depression or anxiety accounted for 17.1 million lost working days in 2022/23, with the education sector among the most affected.<sup>2</sup> Prolonged stress can lead to burnout, poor engagement, and high turnover, impacting your organisation's culture. Prioritising wellbeing retains staff, reduces recruitment costs and fosters a positive working environment.

The Indeed Work Wellbeing Report 2023 suggests the **top 3 factors driving work wellbeing are energy, belonging and trust**.<sup>1</sup> Collaborating with employees to develop a strategic wellbeing strategy, can make sure staff feel valued and heard, fostering energy, belonging and trust. Wellbeing was also highlighted as important to jobseekers, so making your wellbeing strategy available externally could help drive recruitment and strengthen your stance as an employer of choice.

**What are the benefits of a wellbeing strategy?**

- Evidences a commitment
- Increases engagement
- Improves workplace wellbeing
- Reduces absences
- Improves performance
- Embeds you as an employer of choice
- Better outcomes for children



<sup>[1]</sup> UK Work Wellbeing 2023 Report: How thriving people create thriving companies, Indeed, conducted by Forrester Consulting, 2023.  
<sup>[2]</sup> Working days lost in Great Britain, Health and Safety Executive, 2023.

# Foundations of a successful wellbeing strategy

## Involve employees

Consulting employees leads to a well-received approach that genuinely supports staff and improves engagement.

Consider an anonymous survey to encourage honesty and higher engagement. Running this annually tracks changes and provides fresh insights.

## Develop a positive culture and promote organisational values

To align staff, it's essential to actively promote these values, reminding employees of the purpose behind their work. Open communication and transparency are key; fostering an open-door policy can help staff feel comfortable sharing concerns. The physical environment also plays a role – displaying diversity, inclusivity, and mental health resources visibly reinforces a supportive culture.

Finding time for team-building activities can be valuable. Simple activities, such as the Macmillan Coffee Morning, provides meaningful opportunities for staff to connect and strengthen relationships.

## Conduct Stress Risk Assessments

You can use the HSE Management Standards to help conduct stress risk assessments. Once in place, employers must routinely check relevance and reissue as required.

## Build your mental health policy

Policies give a consistent approach across organisations. Involving staff in policy development fosters a sense of inclusion and trust. Regular reviews make sure that support remains relevant and removes unused resources, swapping in more effective tools and support.

## Provide mental health training

All employees can benefit from mental health training, supporting them to identify stressors, use strategies and techniques and set boundaries. Making sure that managers understand their role in supporting mental health – and when to refer to professional support – helps reduce the load on leadership teams.

## Appoint Mental Health Champions and First Aiders

These people play a key role in fostering engagement, encouraging access to support and initiating conversations. Regular training provides them with clear goals, strategies and personal coping mechanisms for the role demands.

### Top tip:

When appointing a Mental Health Champion or First Aider, consider the time demands or share the role to lighten the load and provide multiple support contacts for employees.

## Clear promotion of available support

Effective ways of promotion include using an intranet, employee portals within HR systems, newsletters, or physical signage in staff areas. With clear communication, employees are more likely to engage, making sure that any investment in support provides real value.

## Use an Employee Assistance Programme

An Employee Assistance Programme (EAP) assists employees with work related or personal problems. An EAP generally offers support such as:

- Cognitive Behavioural Therapy (CBT)
- Face-to-face or virtual counselling and GP appointments
- Access to blogs and podcasts,
- Wellbeing strategies
- Signposts to specific support for family and domestic matters
- financial debt management, legal rights bullying and harassment

## Be savvy with Occupational Health

Occupational health referrals can assist with work-related stress and mental health issues. They can suggest appropriate and effective support for employees, ensuring they can return to work supported.

[Read more on occupational health in our next article.](#)

The wellbeing of our teachers, leaders and staff is not just a moral obligation, but a strategic necessity for the education sector's sustainability. By fostering open communication, promoting clear policies and ensuring leadership is aligned with wellbeing goals, schools and MATs can build a thriving environment with teachers and leaders equipped to effectively handle challenges.

# Occupational health:

## How to get the best from making a referral

Check out advice on maximising occupational health services



# Occupational health: How to get the best from making a referral



Hayley Wilson  
HR Consultant at FusionHR

**Length of service:** 1 year and 5 months

**Schools and trusts you have worked with?** I am the consultant for 13 schools, and I know that no matter what level of support my schools require, I am able to provide a service that makes a positive difference.

**HR specialities:** Initially, I worked as HR Support Officer, which gave me valuable insights into occupational health, counselling, mediation and investigations.

The team I work with is knowledgeable, supportive, and passionate. Our aim is to reach an outcome that has a positive impact of children's education.



Ruby Pert  
HR Support Officer at FusionHR

**Length of service:** 1 year and 4 months

**Schools and trusts you have worked with?** In my role, I engage with a diverse range of educational establishments, including both trusts and individual schools. As a primary point of contact for incoming telephone inquiries, I have the privilege of speaking directly with many of our customers. These engagements allow me to build strong connections and foster relationships across our customer base.

**HR specialities:** Occupational Health, Contracts Administration, and Investigation Administration.

Effective HR processes are essential in schools because they help manage staff efficiently, which directly influences both the quality of education and the overall school environment.

In the 2022/23 academic year, **over 66% of teachers took sickness absence**<sup>[1]</sup>. With staff absences placing added strain on tight school budgets and disrupting learning, it is crucial schools and MATs support their staff back to work quickly and reduce further absences.

**How can schools and MATs make the most of Occupational Health referrals for maximum impact and support?**

Occupational Health (OH) referrals can provide independent, impartial insights and recommendations for both employers and employees. They can support tailored return to work plans, consider medical circumstances and suggest adjustments such as modified working hours, reduced workload and delegating responsibilities to foster a supportive working environment.

Timely referrals can prevent extended absences, mitigate workplace risks and strengthen employer-employee relationships.

**When should you make an Occupational Health referral?**

If an employee's absence levels are becoming a concern, you may consider a formal absence management process. An OH referral can form part of the evidence to move forward.

To progress, you may need to understand:

- Are there limitations or risks needing further clarification?
- Is an existing rehabilitation or informal plan not progressing?
- Does medical history impact their work?
- Are there stress related issues needing clarity (personal, work related, clinical)?
- Is the employee fit to attend absence management meetings?
- If off sick, is there an estimated return to work date?
- Is the employee a candidate for ill health retirement?

[1] School workforce in England, Department for Education, 2023



# Producing an effective Occupational Health referral

## Understand the purpose

It is important that both parties understand the purpose of the referral. There is a common misconception that employees are only referred when there's doubts surrounding the legitimacy of their absences or if further actions are going to be taken, such as disciplinary or capability. It is important that the employee understands that the referral is for their benefit, as well as for their employer's benefit to support them back to work.

## Be compliant and transparent

To be compliant with data protection regulations, the referring manager must have consent from the employee to share information with an OH Practitioner. When sending the referral form this must be encrypted, or password protected so details stay confidential.

## Consider accessibility and suitability

Consider what kind of appointment would be most beneficial and suitable for the employee. Would a video call or telephone appointment be best? Does your employee have access to a computer? If during working hours, can the employee access a quiet confidential space? Discuss this with the employee prior to submission so they are informed and in agreement about the next steps.

## Provide key details

- Attaching the employee's job description can help in advising the next steps or adjustments.
- Include any risk or stress assessments already in place for the employee.
- Check you have the employee's most up-to-date contact details to reduce delays.
- Include absence history and current medical issues to show how those are impacting the employee's role.
- If an employee is already on long term sick, state whether you would consider a phased return to work programme and how long for.

## Explore additional questions

You may consider asking further critical questions to inform the referral. Here are just a few you may ask:

- What is the employee's suitability to continue working in the existing role?
- What are the likely timescales of a return?
- Should the employee return to work, is there anything that may make them go off sick again soon?

## What happens after an Occupational Health referral?

After the appointment, the OH Practitioner will prepare a report, which will require the employee's consent before it can be released. The report will contain advice and recommendations for next steps. The report will only discuss health concerns relevant to the employee's fitness for work.

You may wish to formulate a plan to consider implementing the adjustments outlined in the report and monitor these on a regular basis. Consult with the employee to keep an open line of communication and show that the school or MAT is open to supporting the employee. With this bespoke support in place, you should see absence levels decreasing and employee productivity increasing.

The occupational health service can be expensive, however when used effectively it can be a worthwhile investment. Effective use of occupational health services not only supports employees in returning to work sooner but also ensures they receive the ongoing support needed to thrive. By understanding when to initiate referrals and making the most of the insights provided in OH reports, schools and MATs can enhance their absence management process, ultimately benefiting staff wellbeing and organisational resilience.

### Top tip:

For data protection purposes, make sure you are storing OH data securely and destroying this information in line with data protection policies.

# How to identify, address and reduce unconscious bias in your trust

Reflect on your unconscious bias and learn how to manage it in the workplace

# How to identify, address and reduce unconscious bias in your trust



Liz McLoughlin  
Senior HR Consultant at FusionHR

**Length of service:** 2 and a half years

**Schools and trusts you have worked with?** I have worked with multiple trusts and schools providing HR support to senior leaders both onsite and virtually.

**HR specialities:** I have over 18 years HR experience including 6 years within the education providing advice and support to trusts, schools and universities.

I am passionate about my role at FusionHR and strive to support my customers to deliver the best outcomes for children.

*You are preparing for your dream job, and you have taken extra time to make sure you look perfect and so decide to take a cab to the interview location. While in the cab, you talk to the driver about what you are up to, and you share stories about your families.*

*You are greeted by a friendly receptionist who tells you not to worry about being late, no harm done, and points you in the direction of the lift, telling you to head to the eighth floor.*

*You rise to the eighth floor, and when the doors open, you come face to face with a stern personal assistant. They ask you if you know what time it is, before pointing to a seated area and disappearing through a door into an office.*

*A few minutes later, you are called into a room where you are met by the CEO of the company, who shakes your hand, and you begin your interview.*

Take a moment to reflect on your journey and the images of the people you encountered along the way. Notice that you weren't given any specific details about these individuals, yet you may have filled in the blanks with your own assumptions. Did any stereotypes come to mind?

Unconscious bias refers to a prejudice or a stereotype that an individual may hold about a particular group of people that they aren't fully aware of. This can be directed towards people of a certain race, gender identity, sexual orientation, physical abilities. This means that people may make decisions influenced by assumptions or false beliefs rather than objective facts. Unconscious biases can subtly shape our perceptions, often leading us to conclusions that aren't fully accurate or fair.

Bias can affect all corners of your school or trust. From recruitment to management to retirement. Addressing it can reduce employee disengagement, foster a positive culture, boosting workplace wellbeing and satisfaction. The Equality Act protects employees from discrimination that may arise from unconscious bias, making it essential to keep as a priority on the agenda.

Encouraging personal reflection throughout your teams can help to reduce the influence of unconscious bias on decision making across your school or trust. This practice not only supports fairer outcomes and reduces discrimination claims, but can foster self-development, reflection and growth among staff.



# Types of Unconscious Bias

## Attribution bias

Attribution bias affects how we judge other people by their achievements. It can be particularly impactful during recruitment. We tend to credit our own success to our abilities and our failings on external factors, while seeing other's success as luck and their failures as personal flaws.

In interviews, if you find yourself making assumptions about a candidate, ask clarifying questions to better understand them before drawing conclusions.

## Confirmation bias

A tendency to seek, interpret, and remember information that aligns with our preconceived opinions. In recruitment, this can lead us to focus on evidence that confirms our initial opinions about a candidate, risking inaccurate judgments and potentially losing great talent.

To counteract this, provide standardised questions for the panel for fair opportunities and to avoid straying into areas that might trigger unconscious bias.

## Affinity bias

Affinity bias leads us to favour candidates we feel that we have a connection with or a similarity to. For example, somebody attended the same university or reminds us of ourselves.

To avoid this bias, actively notice similarities with the candidate to then differentiate between attributes that could cloud judgment. Make sure you are taking a step back and looking for different skills, experiences, and unique qualities that would contribute positively towards your team culture.

## Halo effect

This occurs when we perceive one great thing about a person and let that colour everything else. For example, somebody attended a highly regarded university, they got a particular grade, or prestigious award, and we let that influence how we see everything else they are presenting to us.

Keep an open mind by considering how a person's skills and experiences compare to those who may not have had similar privileges or opportunities.

## The Horns Effect

The horns effect, the opposite of the halo effect, can occur when one negative trait unduly shapes our perception of someone. For example, if someone's appearance seems particularly untidy, we might assume they are lazy or unprofessional.

To avoid this bias, take a moment to identify the source of your gut feeling – often, it is something minor or superficial that shouldn't influence decision making. Recruitment panels can help counteract this by providing diverse perspectives, but also consulting with other team leaders for a balanced view.

# Next steps?

## Supporting employee success and progression

Make informed decisions, free from unconscious bias, by having deeper and more robust conversations with employees about their career aspirations and next steps. Avoid assumptions based on their current role and background to truly support employees to thrive, grow and develop.

## Personal reflection

Think about situations where you are most likely to be influenced by unconscious bias; in meetings, before a tough decision, or before speaking to certain groups. The more you are aware of your own biases, the better you can avoid it influencing these decisions.

## Review policies, procedures and training

Conduct consistent reviews using employee consultations and working groups. Provide regular CPD and training for all staff, to improve confidence in recognising bias in themselves and others. Encourage rotation in leading meetings to promote openness and broaden interactions among employees.

## Evaluate your recruitment process

Are assessments fair and policies consistently applied across roles? Does your school or trust reflect the diversity of the surrounding community? Are job adverts reaching diverse audiences, and are they accessible to a broad demographic? Consider anonymised applications to help reduce unconscious bias.

## Conduct data audits

Look at ethnicity data from applications and successful candidates for roles within your school or trust. How does this compare for different job tiers within your organisation? Is there diversity throughout the tiers? Does the diversity of staff reflect the school community?

Audit ethnicity data for upper pay scale teachers and TLR postholders. Are those successfully appointed reflective of the number of applications? How does this compare to the ethnicity data for your school community?

## Show commitment via your website

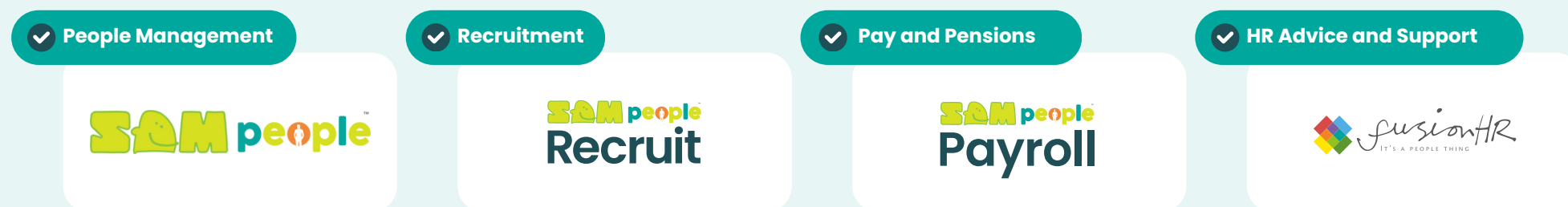
A thoughtfully designed Equality, Diversity and Inclusion (EDI) page on your school or trust website can help highlight the culture and commitment to EDI practices in your organisation. This can appeal to new candidates so showcase your diverse employees, highlighting success stories and career journeys.

By practicing self-reflection, we can be more aware of when our thoughts and feelings may be subconsciously influenced. This heightened awareness, empowers us to pause, consider and make thoughtful choices and decisions to overcome our unconscious biases. Within the workplace, this thoroughly supports a positive and inclusive environment, fostering a culture where all employees feel valued and motivated to thrive.



# Simplify and connect the whole employee journey

SAMpeople is the UK's fastest-growing education HR system, working alongside FusionHR, providing hands-on education HR support. We provide a suite of integrated HR software, including a full HR system, a recruitment platform, payroll bureau and HR consultancy services. We support over 1,800 schools and trusts to manage and support their staff with confidence, clarity and consistency every day.



## We help over 1,800 schools and trusts to:

### Finally understand the complete picture of their staff

Our products join up all your staff data, so you can track every interaction. Turn scattered touchpoints into clear insights about absences, recruitment, retention and wellbeing, and know exactly where to focus your attention.

### Scale HR without increasing headcount

With a strong HR infrastructure, it's easy to roll out consistent processes and policies and treat everyone the same way. And with our people services team at FusionHR, HR advice, consultancy and strategy is only a phone call away.

### Dramatically reduce HR admin for everyone

With self-service tools for employees, and helpful reports, automations, alerts and templates for managers, HR quickly becomes less of a mountain.

"The impact has been amazing, we are seeing change and we are seeing each school engaging with the systems. It's helping build an inclusive culture."

Sally Boaden, Chief Finance & Operating Officer,  
Raleigh Education Trust

## FusionHR can support your school or MAT with:

- ✓ Investigations
- ✓ Occupational health
- ✓ HR policies
- ✓ HR case work
- ✓ Change management
- ✓ HR administration
- ✓ People strategy
- ✓ HR audits and compliance
- ✓ Restructures
- ✓ Wellbeing reviews
- ✓ HR training and development

## We're education people, people

We created SAMpeople because we've been there.

Founded by former school staff and our education HR specialists at FusionHR, we're bringing together decades of HR expertise with the latest in people management technology.

Read our story at [sampeople.co.uk/about](https://sampeople.co.uk/about)

Notes

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