

MAT people strategy: Health, wellbeing and culture edition



The UK's fastest-growing education HR software

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



Siobhan Hammond, BA(Hons) CiPD
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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^[1]. 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,

Siobhan Hammond, BA (Hons) CiPD

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.¹ 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?

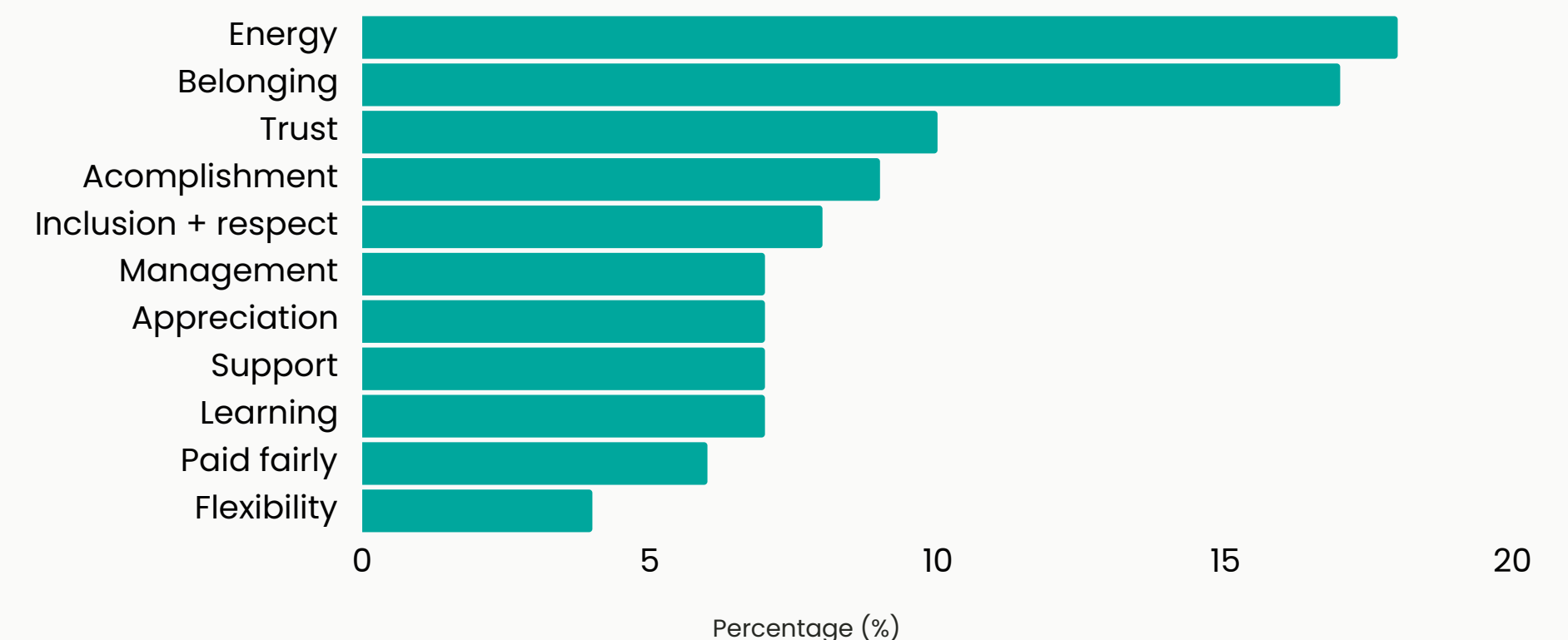
HSE statistics show work-related stress, depression or anxiety accounted for 17.1 million lost working days in 2022/23, with the education sector among the most affected.² Prolonged stress can lead to burnout, poor engagement, and high turnover, impacting your organisation's culture. Prioritising wellbeing 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**. 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

What drives work wellbeing?



[1] UK Work Wellbeing 2023 Report: How thriving people create thriving companies, Indeed, conducted by Forrester Consulting, 2023.

[2] 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 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**.^[1] 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 employees 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.

Download our Equality, Diversity and Inclusion template policy template.

Click [here](#) or scan the QR code to download:



Managing difficult conversations

Access practical advice for line managers on handling difficult conversations with employees

Managing difficult conversations



Becky Aspin

HR Business Partner at FusionHR

Length of service: I worked with FusionHR for 2 years. I've previously worked in HR functions across the public sector for 10 years.

Schools and trusts you have worked with? I have worked with a range of schools and trusts, all the way from small primaries and nurseries to large multi-academy trusts. My largest client has 15 schools.

HR specialities: Equality, diversity and inclusion (EDI) and policy work! I am an EDI champion with a true passion to deliver strategy and solutions to increase EDI presence across the educational sector. I have recently produced a sexual harassment toolkit, and a restructuring and redundancy toolkit is coming soon!

The ability to conduct challenging conversations is an essential part of a line manager's responsibilities. It's often the case that issues don't resolve themselves, and neglecting them can lead to significant difficulties for your organisation.

Why is it important to address difficult issues promptly?

Often, deferring a challenging conversation in anticipation of a "more suitable opportunity" results in the issue remaining unaddressed. It's rare for problems to resolve on their own; they usually require intervention. Even if an issue seems temporary, it may recur if not managed at the beginning. It's best to avoid procrastination in addressing issues, as it can exacerbate them. Unaddressed issues are open to potential consequences such as:

- Poor performance or misconduct may escalate or become more ingrained over time
- More difficult to impose disciplinary sanctions at a later stage
- Impacts on overall organisational productivity
- Deterioration of morale or increased stress levels among colleagues
- Rumours develop, leading to heightened workplace unease
- Reduce or remove respect for the manager and the organisation as a whole
- They interfere with the manager's own work responsibilities

How to prepare for a difficult conversation

Being prepared in advance for handling a difficult conversation helps ease nerves and makes sure you cover everything you need to in the conversation. Poor preparation can make you look unprepared and reflect badly on you and the organisation in responding professionally to employee concerns. Below are ways you can prepare for handling these conversations:

- **A thorough investigation of the issue:** Gather all facts and contextual information before the conversation
- **Define the desired outcome:** Be clear on what you hope to achieve from the conversation. What's your goal?
- **Anticipate employee response:** Take time to consider the employee's personality and their likely reactions. This helps you tailor your communication approach effectively. It's also helpful to anticipate what the employee's desired outcome might be, so you are prepared to respond
- **Assess your state:** Make sure you are in a calm, objective, and prepared mindset before initiating the discussion
- **Prepare relevant materials:** Assemble any necessary evidence, policies, or previous documentation that might be helpful. Having it in front of you will help to keep the conversation on track and factual

On the day of the conversation, you might find it beneficial to rehearse what you intend to say to help you sound more confident and informed in the conversation.

When choosing a location for the conversation, consider an appropriate environment and whether a neutral location might be advantageous for both parties. Where possible, conduct the conversation face-to-face. Sometimes words and body language can be misinterpreted over a phone or video call. It's also important to make sure the location is private, on a one-to-one basis, where no one can overhear. Sitting next to each other rather than opposite each other makes the conversation feel less intimidating and more collaborative.

Most importantly, allocate sufficient time for the conversation. You might receive unexpected reactions or need to chat things in further detail. Leaving plenty of time shows care and a willingness to listen. Consider the timing of the conversation and what the employee is required to do after the conversation if they are upset or angry.

Be prepared to have a follow-up meeting if necessary to finalise remaining actions or check in on an employee's wellbeing.

Avoiding email when managing difficult conversations

- Email is not recommended for delivering sensitive feedback or engaging in difficult conversations
- It is unsuitable for direct instructions
- Emails are prone to misinterpretation, particularly in contexts where trust may be low
- Exercise caution with the use of bold text and capital letters, as they can be perceived negatively
- It is important to note that email correspondence can serve as evidence in formal complaints, so always be mindful of its content

Effective communication strategies

When holding a difficult conversation, it's important to articulate yourself clearly, avoiding miscommunication or misunderstandings. You want to come across professionally while showing genuine empathy. Below are ways to effectively communicate in difficult conversations:

- **Establish a professional tone:** Initiate the conversation in a professional yet non-threatening manner
- **State the issue clearly:** State the issue directly and unambiguously
- **Give context behind the issue:** Explain the importance of the issue and its impact on the team or organisation
- **Give specific examples and evidence:** Substantiate your points with evidence and supporting data
- **Focus on the issue, not the individual:** Stick to factual information, carefully avoiding personal opinions or accusatory language
- **Collaborative approach:** Address the issue with a spirit of collaboration rather than blame, working together towards a solution
- **Serious consideration:** Treat the issue with due seriousness and gravity
- **Positive framing:** Maintain a constructive and optimistic outlook throughout the discussion
- **Awareness of non-verbal communication:** Be aware of your body language and facial expressions. Avoid sitting with your arms crossed – open body language is best

The importance of active listening

Active listening gives individuals a sense that their concerns are being taken seriously. Listening helps gather useful information to support the next steps. While preparing questions is good, allow the employee time to respond organically. See our guidance for active listening:

Do:

- Ask for the employee's perspective to aid in identifying potential solutions
- Use open-ended questions to encourage detailed responses
- Listen attentively and acknowledge the employee's viewpoint
- Appreciate the value of silence in allowing for processing time and deeper thought
- Request clarification if anything is unclear to make sure you have a full understanding
- Summarise the employee's key points to confirm your understanding
- Check that the employee has understood what you have said

Don't:

- Interrupt the employee while they are speaking
- Answer the questions that you have posed to the employee yourself
- Pose multiple questions simultaneously, which can be overwhelming

Explore the employees' issues together in a collaborative approach. Probing questions will help you gather further information. For example, say "Could you expand on that?". Always ask rather than tell, leaning on open questions to keep the conversation going. Be patient and allow the employee sufficient time to respond and listen attentively. Lastly, discuss the advantages and disadvantages of potential solutions together.

Next steps

Establishing agreed actions together

Once you've discussed the issues, collaboratively agree upon an action plan and next steps. By doing this together, you continue to build trust and support, making sure the employee feels supported rather than blamed. **Below are steps for agreeing on an effective action plan:**

- Brainstorm potential solutions together
- Collaborate with the employee to define a mutually agreed-upon path forward, which helps the employee take responsibility for resolving the issue
- Initiate progress with small, manageable steps
- Establish a clear deadline and a date for a follow-up meeting for accountability
- If improvement is required, agree on measurable metrics for development or progress
- Consider any support the employee may require to succeed
- Request the employee to summarise the agreed actions to confirm their understanding
- Conclude the discussion by stating your ongoing support for them

7 tips for providing constructive feedback

1. **Consider why you're giving feedback:** Determine the objective of the feedback before you begin
2. **Appropriate timing:** Deliver feedback promptly and at a suitable moment for the individual to receive it
3. **Thorough preparation:** Make sure all your points and examples are well-organised and ready
4. **Be specific:** Provide examples rather than generalised statements to make your feedback actionable
5. **Follow up and review:** Monitor progress and conduct follow-up reviews to see how things are progressing
6. **Documentation:** Maintain a record of all feedback discussions for future reference
7. **Confidentiality:** Conduct feedback sessions privately and confidentially to guarantee trust

Managing emotional responses

It's natural for employees to be emotional when navigating a difficult conversation. You may face a range of emotions, such as upset, anger or confusion. If this happens, it's important to keep the conversation on track and avoid being sidetracked into unrelated issues. Maintain your composure and continue to listen calmly, responding to any anger with calm gestures, a lowered voice and a slow, deliberate speaking pace. Don't engage in arguments. If an employee is upset, respond with silence, allowing them time for emotional processing without interruption. Refrain from physical attempts to comfort the individual, as this can sometimes be misinterpreted in a professional setting.

Embracing flexible working: Strategies for the education sector

Explore how to navigate flexible working requests in your school

Embracing flexible working: Strategies for the education sector



Hayley Wilson
HR Consultant at FusionHR



Ella Hughes
Headteacher
Chapel Street Primary School

The right to request flexible working applies to all employees from day one. Achieving an appropriate work-life balance, whether that's for wellbeing or childcare, is a popular reason for flexible working requests. However, navigating flexible working requests in a school environment can be tricky. This article aims to support schools and trusts in making the most of flexible working, exploring how it can be applied in education and the benefits it offers to both employers and employees.

Understanding flexible working

Flexible working involves making a change to when, where or how an employee works.^[1] This covers a wide range of arrangements, including:

- Part-time working
- Job sharing
- Flexible time
- Compressed or annualised hours
- Term-time only
- Working from home and mobile working

Current UK legislation and employee rights

The current UK legislation on flexible working was updated for all employees in April 2024, making it a right from day one of employment to make a request. As much as this provides additional benefits to employees, there was no change to the employer's obligation to accept a request. The revised legislation focuses on how it can be requested and the additional rights for the employee.

Key employee statutory rights in relation to flexible working

- **Right from day one:** Employees can make a flexible working request from the first day of employment
- **No business case required:** The employee is no longer required to make a business case for the change. This acknowledges concerns raised by the Equality and Human Rights Commission about disadvantaging less senior or less skilled employees
- **Two requests per year:** Employees can make two requests within a 12-month period. Both requests must be considered
- **2-month response timescale:** It is the statutory requirement for employers to respond to a request within two months. This includes time for consideration, a meeting with the employee, and any further consideration or appeal

It is important to note that any request that is made and accepted will be a permanent change to the employee's contractual terms and conditions unless you agree otherwise. A request can be agreed on a temporary basis with an agreement to review how it is working, or the employee may set out in their initial request that they want it to be temporary only.

Top tip: Clarifications on the "Right from day one"

The "day one right" does not mean a candidate has the right to request flexible working during the interview process or can state that they are able to do a job, but only on a part-time basis. Only after they are successfully employed can they decide to submit a flexible working request on day one of their employment.

Implementing flexible working and developing a policy

More and more schools and trusts are exploring flexible working to combat a lack of flexibility in the sector, draining teachers and staff. Offering flexibility can make it easier to attract talented people and encourage them to return after a career break, such as maternity leave.

Flexible working is about understanding what is fair for both the employer and the employee. It's not about everybody having the same outcome, but everybody having the opportunity to discuss their desired outcomes and having a fair process in place. Each case should be dealt with on an individual basis.

Evaluating the feasibility of flexible working in schools

Implementing flexible working in schools and trusts can be tricky. It's important to evaluate the feasibility of flexible working arrangements within your school. This involves:

- Identifying roles and tasks that are suitable for flexible working arrangements
- Understanding the importance of aligning flexible working with your school's goals

You should consider flexible working in the job design, recruitment, and appointment phases. Having a strategic business plan is useful in case job posts are requested to be flexible or part-time instead of full-time. This includes looking at your resources and how posts could be covered through full-time, part-time, or flexible job shares.

Flexible working policies are important to set a consistent message, making sure all requests and employees are treated fairly. A clear policy helps employees understand what they are entitled to and what flexible working means in your school or trust.

Policy development and consultation

It's important to follow all legal requirements, including the ACAS Code of Practice, when managing flexible working requests. Include details of the legal requirements in your policies so employees have a clear understanding of the process. Consult with education trade unions to clarify processes and make sure you are always consistent and transparent.

Once policies are in place, it's important to review them, taking into account employee views regularly. Support from key individuals, especially senior leaders, is essential to achieve success when implementing flexible working patterns. Your school or trust culture must support and prioritise flexible working, avoiding stigmatising flexible workers and communicating consistent messages.

Essential information to include in your flexible working policy

Introduction	Set the scene: introduce the school/trust's policy rationale and employee rights
How to submit a request	Provide clarity on the process: requests should be made in writing (e.g., on a standard form/proforma), what information must be included and who the request should be submitted to
Required information	Key information about the request (to save time): date of application, changes sought, desired commencement date, statement that it's a statutory request, details of any previous applications and whether it's part of a reasonable adjustment for a disabled person
Meeting	Outline that a meeting will usually be arranged within the two-month period. Employees have the right to be accompanied by a work colleague or trade union representative. A meeting is not necessary if the request can be approved without further discussion. The aim is to find out more and discuss the benefits to both parties
Outcome	The decision must be informed to the employee in writing as soon as reasonably possible. Decisions are made on a case-by-case basis (agreeing to one request does not set a precedent). The request may be granted in full or in part (e.g., a modified version, on a temporary basis or a trial period)
Right to appeal	Employees must be notified of their right to appeal if the decision is not upheld or upheld in part. This should be a separate point
Timescales	Be very clear on specific time limits: all requests (including any appeal) must be dealt with in a two-month period from the date of first receipt. Set internal targets (e.g., hold a meeting within 5 days, notify of decision within 14 days of the meeting)
Appeal process	Detail that the appeal must be lodged in writing within the stated grounds (e.g., within 14 days of notification). State the timescale for the appeal meeting (e.g., 5 days of receipt) and the employee's right to be accompanied

Managing a flexible working request

Once a request is received, you must deal with it in a reasonable manner to prevent potential employment tribunal claims. The ACAS Code of Practice is a key guide.

You must be conscious of the two-month time frame, which includes concluding any appeal. It's advisable not to wait to hold the meeting.

Having an open and honest conversation

It's important to manage your staff's expectations when it comes to discussing and implementing flexible working. Explain that both parties will need to be flexible in the process to get the best outcome for the school and the employee.

- Hold a meeting to identify the employee's needs and discuss any alternative options that could work for both the school and the staff member. Open conversations may lead to another solution that hadn't been initially presented.
- If the employee is not happy with the decision or an alternative suggestion, they should have the right to appeal (this is best practice, though not a statutory right).

Grounds for refusing a request

If a request is rejected, the refusal must be based on one or more of the eight prescribed business reasons and clearly stated in the outcome letter. If you fail to deal with a request properly and fairly, it could lead to an employment tribunal claim for discrimination or a claim for breach of statutory procedure (with a potential award of up to eight weeks' pay).

The statutory grounds for refusal are:

- The burden of additional costs
- An inability to reorganise work among existing staff
- An inability to recruit additional staff
- A detrimental impact on quality
- A detrimental impact on performance
- A detrimental effect on the ability to meet customer demand
- Insufficient work for the periods the employee proposes to work
- Planned structural changes to the business

Embracing a whole school strategy

Flexible working should be a whole-school or trust approach and built into your strategy. Successful implementation requires consideration of your culture, gaining buy-in, and being creative about how you can offer flexibility. The post-pandemic environment highlighted the distinction between flexibility of location and flexibility of hours.

Build a proactive, whole-school or trust approach by exploring the areas below:

Team-based approach

Support line managers to coordinate working patterns and availability between team members to cover required slots.

Multi-skilling and training

Multi-skill your staff and build transferable skills between team members. Provide training to support teams to fill in or substitute for one another. This can also help reduce resentment from workers whose roles prevent them from working from home.

Proactive management

Make it a management responsibility to talk to people about their flexibility needs (e.g., at an annual review or during budget time). Be proactive rather than reactively waiting for individuals to make requests.

Technology

Make the most of technology to support flexible working. Task automation tools and cloud-based software alleviate workload and allow for working from home where appropriate.

Monitoring and evaluating flexible working

It's important to measure and evaluate the impact of flexible working right from the start. You will be able to see what's working and what isn't to inform future strategies. It could highlight new areas to explore and roles that might not have previously been appropriate for flexible working.

Quantitative measures

This involves assessing numerical information, routinely collected throughout the year.

Employee surveys	Measure well-being, work-life balance, engagement, diversity, and inclusion. Compare staff with flexible arrangements to those without.
HR outcomes/metrics	Recruitment, staff turnover, sickness absence data, health and safety metrics, KPIs, mental/physical well-being, and exit interview data.
Time/performance	Travel time and expenses saved. How well the teams meet their timetables, targets or reach their potential.

Qualitative measures

This involves gathering data that may be routine or specific to flexible working evaluation.

Performance reviews	Used for both parties to reflect on whether flexible working is succeeding and whether appraisal objectives are being met.
Check-ins and discussions	Hold follow-up meetings early in the process (e.g., one month after implementation) to discuss the impact on workload and performance and capture learning, especially after a trial period.
Case studies	Gather case studies to highlight successes, learnings, risks, and benefits as an evaluation tool.
Steering group	Arrange a group to meet regularly to monitor progress and ensure fairness. Include employees from specific groups (e.g., parents, carers, disabled employees) for wide feedback.

Using this data allows you to:

- Identify problem areas that need addressing
- Explore diversity in your future recruitment processes
- Evaluate whether flexible working is making a difference to gender, ethnicity, and disability pay gaps
- View the process as continuous, collecting data every 3, 6, or 12 months

How Chapel Street Primary are embracing flexible working



Ella Hughes
Headteacher
Chapel Street Primary School

We're a three-form entry primary, so we are big for a primary school. We have a large team, and we do have lots of different flexible working arrangements in different teams.

What flexible working arrangements are you currently supporting at your school?

We have leaders who work compressed hours, and I once had an Assistant Head who had a 0.95 full-time equivalent contract – that was a new one for me. That wasn't the original request that had been made, but when we really unpicked it, it turned out that 0.95 enabled them to achieve what they needed to do in their home life, but gave us what we needed to from school.

We've got TAs who have different start and finish times. Our general model is that they start at half eight but work later to do after-school clubs. However, that didn't work for one of our TAs who had some caring responsibilities at home. We were able to offer her an earlier start so she could run the breakfast club provision for us, rather than doing the after-school provision. She was working the same hours as the other TAs but with different start and finish times.

We've got teachers who job share or maybe work 0.8, and they have most of the full-time class teaching responsibilities, but we cover that one day a week. We have staff who are able to have elements of working from home, different locations or shorter hours on particular days to facilitate their needs.

What positives have you found with flexible working?

Some of the key positives that we have found from exploring flexible working have been around recruitment and retention of staff, and building up diversity of staff. We've got different people able to do different roles, with different experiences and circumstances, from home.

Flexible working has had a really positive effect on morale and attendance at work and buy-in of staff. We have found that where we are able to put flexible working in place, staff do then go above and beyond in their roles because they feel valued and supported, and committed to the school and what they're trying to do.



Have you faced any challenges?

You're balancing lots of different needs and constantly having to weigh up what's right: for a member of staff, teams, the children, and the costs. Trying to get that consistency and fairness across different roles and different teams can be really tricky.

What might be available as flexible working for a teacher can be really different to what's available for someone in the admin team. For example, it's easier for an admin team member to work from home than it is for a teacher who's got a class in front of them. So getting fairness across roles can be tricky.

There can be unexpected or unintended consequences, and that can be a positive or a negative – you just have to anticipate. For example, if you've got a job share, you've got two brains rather than one, and that can bring loads of positives – you've almost got two different people and two different perspectives and viewpoints.

However, the negative side of that might be that sometimes you need double the training or double the line management or support that's needed. It's two individuals rather than one, so that can be really tricky.

How have you managed requests and staff expectations?

One of the things I've really learned is that what people ask for in a request is what they think they need, but that might not actually be the best solution. Spending some time unpicking what it is they're hoping to achieve has been really helpful for us in terms of getting the best outcomes for both the staff member and the school's needs. It's important to be aware of what assumptions you might have and what assumptions they might have. They might be quite definitive about what they're asking for and insistent that's what they need. However, when you really take the time to talk to them and understand why they're putting that request in, other options can open up that actually work much better for them as well as the school.

For example, someone asks to reduce their hours, but when I dive deeper with them, being able to do some working from home would be even better for them than actually shortening their hours. That's something we can facilitate. One of the biggest things I've learned is that it's important to really understand what the person is hoping to achieve beyond what they've written down in their request – unpick what all of the different options might be.

Has implementing flexible working changed the way you create and advertise roles?

When we're advertising jobs or doing job descriptions for roles, we've found it helpful to do a RAG (red, amber or green) rating of that job description and what aspects might be suitable to be worked flexibly. We decide which elements of the job are essential to be done on site during set hours and which could be done by someone else at a different time or in a different place. Sometimes they don't fit either, and we explore potential approaches to conducting these elements of the role.

We have become much more proactive in anticipating where our flexible working opportunities lie before requests even come in. The RAG rating of job descriptions has really helped us pick out areas and roles that we have previously thought weren't able to be flexible.

What else have you learnt from implementing flexible working in your school?

We've realised that all stakeholders having a really good understanding of flexible working helps to cement your ethos and culture. Making sure all staff understand the policy, what's possible, what's not and the processes to request.

It's really important to remember your governors, because often it's them that an appeal may go to. You want them as key stakeholders, who are part of that process, understanding what you're trying to achieve, and encouraging people to put requests, particularly where you've got pinch points.

For example, I have found that around teacher deadlines, when teachers might be looking for jobs, you suddenly get an influx of flexible working requests. When you get several at once, it can be quite difficult to manage them all at the same time. It's been helpful to encourage people to speak to you as soon as possible.

I think some of the common challenges are knowing what's in your blind spot or what's an assumption. Often, in education, we're doing things the way they've always been done because that's the way it is, and we aren't always aware of what the creative solutions might be. We might have an assumption about a role or flexible working options that actually aren't true.

I've also found that this subject can be very emotive, but I've not always anticipated it. If someone's making a request, there's a real need there, and you're invested in that individual, but you have to balance that with the needs of the school. You can be making really difficult decisions, and you can't always do what you want to – sometimes you do have to say no. That can take an emotional toll and be quite difficult. Being able to manage the emotions that can come with requests for you and other people, alongside following the process fairly and consistently, can be tricky.

How have you found managing assumptions if staff members receive different flexible working agreements?

With anything with HR, you're following confidential processes, so what you are able to share can be very limited, certainly about other people's circumstances and situations. However, your team will have made assumptions or have perceptions about what's happening based on what they can see without having all of the information. These assumptions can be tricky to manage when you can't share the information that gives the full picture, but you're dealing with people who have beliefs about what might be happening or what should be happening.

Certainly, we found it very helpful to make sure that we are taking advice from FusionHR from the very beginning. Our HR support has allowed us to see where we could have handled things differently or explored areas sooner. At the point it starts getting tricky coming to HR for advice and finding out there was something earlier on that might have avoided it or would have been needed. Having that second pair of eyes from FusionHR has been vital to check processes and explore another viewpoint. I would have never thought to offer somebody a 0.95 full-time equivalent contract, but through speaking to FusionHR, that was absolutely the right thing for them and for the school. If nothing else, my main top tip would be to use HR advice because they've got lots of expertise around the process and the options.



Next steps

Ready to take the next step in implementing a successful flexible working culture at your school or trust?

- 1. Review flexible working arrangements currently in place and get an understanding of your workforce demographic. You may already have employees working flexibly (e.g., adjusted start/finish times, virtual meetings) without formal recognition
- 2. RAG rate job descriptions and identify areas where you might be able to offer flexible working opportunities
- 3. Update your flexible working policies and procedures, and regularly review these with senior leaders and key stakeholders
- 4. Make sure that line managers know how to recognise and respond to a request in a fair and consistent manner
- 5. Monitor and evaluate flexible working arrangements to see how you can expand and develop offerings across your organisation

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Supporting bereavement and grief in the workplace

Learn how to guide and assist colleagues experiencing loss

Supporting bereavement and grief in the workplace



Becky Aspin
HR Business Partner at FusionHR

Grief is an inherent part of the human experience. Its impact can ripple through our educational communities, affecting not only our personal lives but also our professional environments. As school and trust leaders, a supportive and empathetic culture means understanding how to compassionately guide and assist colleagues who are experiencing loss.

This article explores key skills to equip you with the vital knowledge and practical tools needed to confidently support your staff, strengthening your school or trust's community and resilience.

When we hear grief, we often think about the death of a loved one. However, grief is a natural human response to any significant loss and change in our lives, because grief is about letting go of what was or what we expected to be.

Below are some key losses in school communities that could trigger a grief response:

- Loss of a pupil (through ill health, accident, etc.)
- Death of a colleague
- Not getting a promotion/career setback
- Witnessing a traumatic event (school accident, violence)
- Working with a child in a serious incident (safeguarding/welfare)
- Other significant changes: Redundancy, school closure, major restructuring, retirement (loss of routine, colleagues)

Recognising grief in the workplace

Grief can show up in the workplace in four particular areas: cognitive, physical, emotional, and behavioural symptoms.

Cognitive

Difficulty concentrating, memory issues, poor decision-making, feeling overwhelmed, e.g teachers planning lessons, managing behaviour.

Physical

Exhaustion, sleep disturbances, appetite changes, headaches, muscle aches, lowered immunity. This can impact energy levels and the ability to be present.

Emotional

Sadness, anger, frustration, guilt, anxiety, irritability, numbness, despair. These emotions can impact interactions with students, colleagues, parents.

Behavioural

Withdrawal, increased absenteeism or presenteeism (physically present but unproductive), reduced productivity, isolation.

Grief is highly individual, and it can manifest in many ways; it doesn't always look like sadness. Understanding the potential impacts of that helps us as employers to respond with empathy and adjust our expectations of employees.

The importance of supporting grief and the benefits of a policy

Supporting grieving colleagues creates a healthy, resilient school. However, it's important to remember we are not therapists. Our role is to provide compassionate support and understanding, and resources to support them. It's not to *fix* somebody's grief.

As an organisation, it's your responsibility to signpost employees to bereavement policies, making them aware of the support available. If you don't have a policy, there will be useful advice in this article to begin creating one. In addition to a bereavement policy, explore training for managers and staff. Bereavement charity Cruse offers Grief First Aid training, similar to mental health first aid training, but particularly for those who are experiencing grief and loss.

The benefits of having support in place are:

- Improved wellbeing and morale: Staff feel valued and cared for.
- Reduced absence: Acknowledging grief and helping staff process it leads to a quicker, effective return to work.
- Retention: People stay where they feel supported.
- Improved school culture: Promote psychological safety and sense of community and belonging by having support processes in place, building a caring school culture.
- Long-term productivity: Supported staff are more likely to build back up to their full capacity.

Small ways to support grieving colleagues

Sometimes, it can be difficult to know the best way to support colleagues who are dealing with grief.

But there are some key ways you can show your support in times of need:

Reach out. Quite often, there's worry around someone going through grief: Should we say something? Shouldn't we say something? Is it best to say nothing? But by just telling them how sorry you are to hear the news, they understand that you appreciate that they are going through a difficult time.

Listen to them. Let them talk about what's happened. Sometimes people need to tell the story many times to process what's happened.

Share personal stories and memories. A lot of people find personal stories or memories of the person meaningful. If you've lost a student or staff member, explore creating cards or letters featuring your favourite memories and experiences.

Respect their need for space. Sometimes people just need company while grieving, but others may want to be on their own. It's important that we understand what that individual's particular needs are.

Offer practical help with work tasks. Returning to work following a grief period or bereavement can be quite daunting. Admin and work tasks might have built up, so offering help to support a colleague through their tasks will help ease the pressure.

Be flexible and understand emotional fluctuation. Grief might not always show up as sadness. Some staff members will launch themselves into the work as a coping mechanism. Others might experience anger or frustration and can be quite irritable, impacting interactions with students and colleagues. Be flexible and understand that everybody grieves differently, and what they need or want from you may change from day to day. Be guided by them and keep in touch.

Check in regularly. A quick check in to see how a colleague is doing and whether they want to talk let's them know you are thinking about them.

The 'Growing Around Grief' model

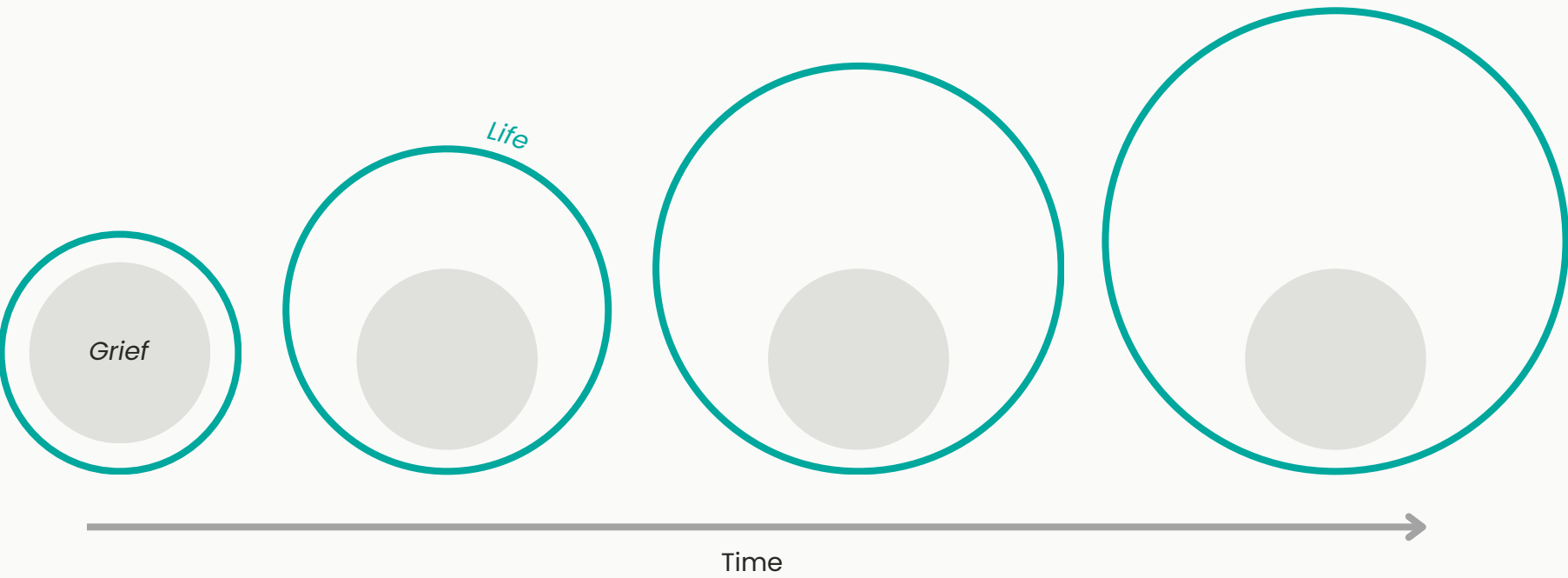
When we talk about grief, quite often people put a timeline on their grief: *"I'll feel better when I get back to work... I can't still be upset in 6 months."* The Growing Around Grief Model challenges that idea. It was created by a grief counsellor called Lois Tonkin.

A client she worked with drew a circle that represented her life, and shaded it in to indicate the all-consuming grief that she was experiencing. Based on society's expectations around grief, she thought that as time went by, her grief would shrink and become a much smaller part of her life.

But what happened was really different. The grief stayed just as big, and the circle stayed just as shaded. Instead, her life grew around it. There were still times when she felt really intense grief. But there were other times when she felt she could live elements of her life in the space that was outside of the circle.

It's an insightful model, showing that, actually, grief doesn't go away. We adapt to what our new way of life might look like, while bearing in mind that grief will always be there, and can still become all-consuming. This view of grief doesn't tell somebody that it will go away in time. It doesn't tell them that they will be over it. It acknowledges that there will be some days when you feel it strongly, but there'll also be days when you can move on.

The Growing Around Grief Model shows how we can still grieve a loss but also carry on with our lives. There might be triggers along the way, and support in the workplace might be needed without a definitive timeline.



Graphic showing Tonkin's theory

Procedures for support

Make it clear how staff and senior leadership can support employees and students who are grieving. Encourage staff to be aware of bereavement policies and procedures to give them confidence in providing support. Grief doesn't have a timeline, so having a procedure in place helps to provide a consistent level of support throughout the staff or students' return to school.

Immediate and mid-term support:

Offer practical help with admin

Returning to work after a bereavement period can mean that work and admin have piled up. Offer to support them to clear this or assign a colleague as a 'buddy'.

Make them aware of additional support available

Advise and signpost them to the contact for further support. Check what your Employee Assistance Programme (EAP) offers, as they often have grief and bereavement counselling, and financial or legal advice. Research charities and create a signposting sheet.

Acknowledge death-related admin

Death comes with a long to-do list (registering deaths, arranging funerals, notifying people). We need to recognise that concentration levels may be impacted. They might need time out in working hours to manage estates, or take on caring responsibilities.

Be proactive, not invasive

We need to use a lot of empathy with them. We need to listen more than we talk. They may not want to talk about it, and that's okay.

Plan the Return to Work communication

Have conversations about how they would feel coming back to work. Would it be useful for you to speak to colleagues in advance to manage expectations? Providing reassurance helps ease pressure and worry.

Offer practical flexibility

Acknowledge that they may need some time off and, where possible, be flexible. Consider there might be some difficult, significant dates, especially in the first year (first Christmas, first birthdays).

Collaborate using a phased return

A phased return allows them to ease back into work. However, continue to support them after a phased return.

Adjust workload and hours

Can some of the duties be covered? Temporarily reducing hours helps to accommodate a smooth transition back into the workplace. Alternatively, they might want to explore a new flexible working arrangement after their loss.

Acknowledge the difficult times

Showing you remember and acknowledge difficult grief periods can be comforting. Saying something simple like, "I know it would have been your dad's birthday this week. If you need anything, just let me know."

Schedule check-ins

Give colleagues a key point of contact who has a full overview to support them. Be patient and supportive through fluctuations in mood or performance. Discuss how they want to be supported moving forward - do they want to power through with little interaction, or appreciate someone holding space for them? Be aware of the physical, cognitive, behavioural and emotional symptoms of grief.

Building a supportive school environment

A supportive school environment allows a grieving colleague to return to work comfortably. There are some ways you can make this easier for staff:

- **Inform the team (with permission):** If a grieving colleague is happy for the team to be informed, pass on a message to manage expectations and reduce assumptions. Say something like, "Mrs Smith might be off for a while because there's been a personal loss. Please be mindful of her situation."
- **Guide staff on support:** Allow colleagues to offer to cover break duties, or have a quiet coffee.
- **Avoid demanding cheerfulness:** Allow space for people to have their emotions. Staff don't need to feel like they've got to 'cheer up' grieving colleagues and are comfortable with allowing emotions.

Self-care when supporting grieving colleagues

Supporting others through grief, especially in education, can be emotionally draining. It's important to acknowledge that you can't be everything to everyone. It's okay to say no, step back, and signpost colleagues to the others. We aren't counsellors.

The feelings of loss and grief may impact you, too. It is completely normal to be overwhelmed by the amount of support required. Have somebody you can talk to and keep a strong team around you to help you manage a grieving colleague. It's emotionally demanding work, so give yourself some grace. You can't do everything.

Collective loss in the school community

When the loss impacts the entire school community (death of a pupil or colleague, major incident), a different approach is often needed. Below are ways to support a school community through collective loss:

- **Open communication from leadership is key.** You need to be honest and provide timely information as to what's happening.
- **Hold commemorative activities:** Memorial spaces, a book of remembrance, or shared honouring activities provide a space for shared grieving.
- **Professional support for staff:** Bring in external counsellors for staff if needed, beyond your EAP, so that they learn how to process their emotions and understand feelings of guilt or regret.
- **Equip pastoral teams to support students** who are grieving, as that indirectly supports the staff.
- **Flexibility and understanding:** Acknowledge that the whole school morale and productivity may be affected for a period of time, and that that is okay.

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