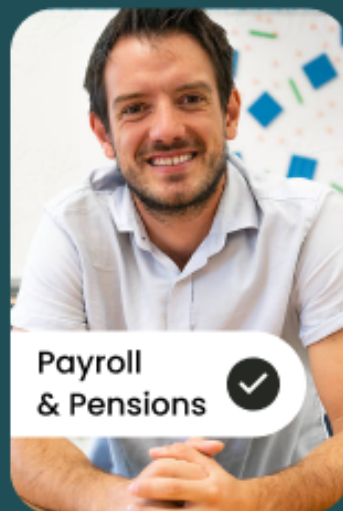
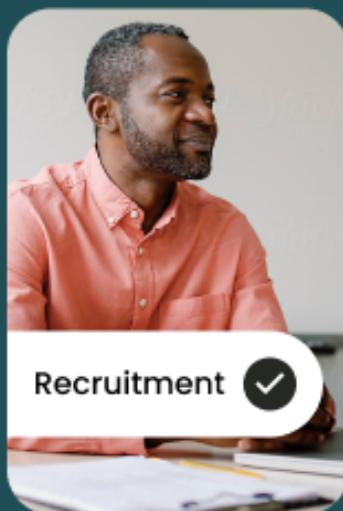
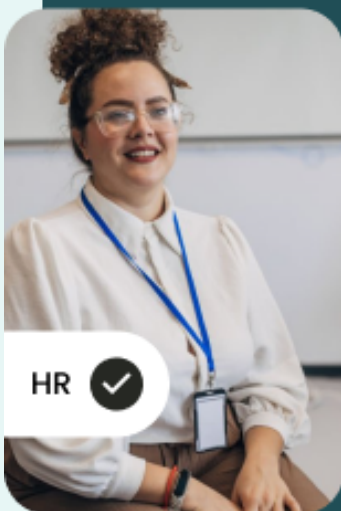


When and why MATs need an HR system

Build stronger foundations for recruitment, performance, payroll and better workforce decisions

Trust leaders share how they've moved away from disconnected HR processes to build a more joined-up way to manage their people – improving visibility, consistency and confidence across every school, with practical steps to help your trust do the same.



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“Spinning too many plates”

“Wearing too many hats”

These two phrases often describe what it feels like to work in HR in education today. With teams stretched across more schools and responsibilities, it can be a real challenge to keep up with people management.

When I started in education HR, I saw the same challenges time and again: staff were overwhelmed by paperwork, manual processes and disconnected information. They spent too much time keeping everyday tasks moving, leaving little capacity for the strategic work that helps schools attract, support and retain great people.

I realised even the most dedicated HR teams can only do so much without the right foundations. As trusts centralise services and continue to grow, the way they manage people needs to evolve too. Processes that once worked well start to hold teams back. Spreadsheets, paper forms, email trails, school-level systems or generic HR software can make it harder to see the big picture, apply processes consistently and give leaders the information they need.

For some trusts, that means moving away from manual processes. For others, it's replacing software that was never designed for the way trusts work. With increasing focus on recruitment, retention, staff development and workforce planning, HR, recruitment, performance and payroll all need to work together around the same, accurate employee data.

That is why we created our full HR suite of education people management software and services: **SAMpeople, SAMpeople Recruit, Payroll bureau and our HR services.**

Together, they help trusts simplify people management, reduce administration and build the connected HR foundations needed to recruit well, support staff, manage performance, prepare for payroll and make better workforce decisions.

The right HR system isn't just about replacing paperwork with digital processes. It's about giving trusts greater visibility, more consistent ways of working, stronger confidence in compliance and the information they need to support their people effectively.

In this guide, we hear from trust leaders on how they've used education-specific software to drive HR excellence across their trust, and set out the steps you can take to do the same.

We hope you find something in this guide to inspire you.



Katie Craker

Katie Craker
Managing Director of
SAMpeople and FusionHR



How recruitment and HR software drives **HR excellence** in trusts

You don't need to wait until recruitment or HR feels broken before reviewing your systems.

For many trusts, the signs appear gradually. Reports take longer to pull together. Schools follow slightly different processes. Absence and turnover trends are harder to compare. Recruitment and onboarding don't feel as joined up. Central teams find themselves relying on manual checks, spreadsheets or individual knowledge to feel confident that everything is on track.

These moments can be a sign that your trust has outgrown its current HR foundations.

A specialist education HR system helps bring the picture together, so your teams can spend less time chasing information and more time using it. With clearer data, more consistent processes and stronger visibility across every school, your trust leaders will have the confidence to make informed decisions and give staff the support they need, when they need it.

Promote consistent HR best practices and centralised processes

Give every school a consistent way to manage HR, while keeping flexibility where it's needed. Trust-wide policies, approval workflows and automated triggers help standardise key processes such as absence management, so teams can work more consistently across every school.

Free up HR teams for strategic initiatives

Self-service tools let staff update details, request time off, track CPD and access documents independently. Automated processes, such as leave approvals and return-to-work reminders, reduce admin for line managers and HR teams. Reporting, BI dashboards and policy management give central HR more time for strategic people work.

Gain a complete trust-wide view of staffing

Central dashboards give trusts clearer visibility of turnover, absence, casework and recruitment activity across every school. Instead of chasing updates school by school, HR teams can spot emerging issues earlier and identify where extra support or intervention may be needed.

Less manual work and peace of mind for your payroll team

Our specialist education payroll team manages the complex work behind every pay run, from payroll processing and statutory reporting to pensions and ongoing support.

Payroll starts with better information when staff details, contract changes, absences and expenses are managed accurately in SAMpeople. This helps reduce manual checks and handoffs between HR and payroll, giving teams greater confidence in every pay run.

Reduce absence and support employees

Automated absence tracking, trigger dashboards and monitoring periods help trusts apply absence policies consistently across schools. With clearer trend analysis, HR teams can spot patterns, support staff earlier and inform a stronger wellbeing strategy.

Enable data-driven recruitment and retention strategies

Clear workforce reporting helps central HR teams understand trends in turnover, absence, performance and recruitment. Using this insight, trusts can identify gaps, target support and make more informed decisions around wellbeing, engagement and retention.

Have peace of mind that HR compliance is being met

SAMpeople helps trusts manage HR compliance consistently across schools, from contractual records and payroll information to SCR updates. Workforce Census requirements are met automatically in line with DfE requirements, and policies and contractual documents can be distributed and tracked for staff acknowledgement, supporting standardisation and compliance trust-wide.

This gives teams clearer oversight and reduces reliance on spreadsheets and manual checks.

How The Arbib Education Trust reduced turnover by 8%



Sarah Casemore, HR Director at The Arbib Education Trust, acknowledges that workload is one of the top reasons why staff leave schools in the UK.^[1] We spoke to Sarah about how SAMpeople has helped them to relieve that.

What prompted your trust to look for an HR system or a new HR system?

We're passionate about staff experience and believe that if we're creating the best environment for our staff, then they're going to give our children the best experience. We're always looking at different ways we can make life a bit easier, more straightforward.

It's common knowledge that the number one reason why staff leave schools is workload. So, as part of our function in HR, we do our best to reduce this.

Did you use an HR system previously or did you move from paper? If you moved from paper, how did this move benefit your trust?

We were using paper before. Our absence requests and approvals were done on paper, so there was duplication, increased workload, and things went missing. There was a lot of inefficiency. At school level, it was difficult to report and it took each school at least a day to pull together. It was really clunky, very cumbersome and the risk of human error was high.

We also wanted to improve our recruitment approach. Paper-based working made it difficult to track what was happening. It felt old fashioned and didn't reflect what we were all about as a modern organisation. Recruitment is an area where schools are really struggling at the moment. It was critical to see what we could do to streamline the process.

What made you choose SAMpeople or what made it stand out from other HR systems that you looked at?

One of the things that made SAMpeople really stand out was that it's been designed by people who understand education. Other HR systems don't deal very well with complicated education HR working arrangements, such as term-time working and pay grades.

The absence module was another real seller for us. I've never seen a system deal quite so well with such unusual working patterns, calculating everything for you.

SAMpeople is really focused on supporting school life.

SAMpeople was the best value for money, with some really impressive functionality; the fact that it could integrate the recruitment and HR system was a real strength.

What impact is SAMpeople having?

SAMpeople has supported us with our strategic objectives. It enables me at a trust level to be able to provide support 'in the moment' to schools. It makes us much more resilient.

The biggest impact is being able to report on turnover. SAMpeople made it really easy for us to look at the reasons why people are leaving. The education sector is facing recruitment and retention challenges at the moment. Retaining good quality staff is more critical than it's ever been.

Last year we managed to use that [turnover] information to drive change, and we've reduced our turnover by 8% across the trust! That's probably the single biggest transformation that we've seen.

The absence module has transformed how we're working to organise cover and handle absence. We're seeing where people are hitting triggers much earlier and this tells us where we might need to offer more support or do something differently.

Have you seen a notable reduction in absence since using SAMpeople?

After the initial set up of SAMpeople, we could track it going down. What's been really helpful and valuable is being able to compare absences year on year, which is driving us to make changes.

For example, for the next academic year we're going to trial a two-week half term in October rather than one week, as autumn term is when we currently see the highest staff sickness absence. We think that will help to make a difference to staff wellbeing and absence and consequently to the quality of education we can provide to our young people. It's driving quite important operational decisions. We're using all of that data in a way that we couldn't previously.



How do you think SAMpeople will help your trust in the long term?

SAMpeople is helping us to constantly improve our practice, making the experience of our staff and students better. SAMpeople is critical to that because it's giving us so much quantitative information about what is going on in our trust.

There are lots of indicators in data that tell you about the health of the organisation, how we're doing and where we might need to focus next. For example, by analysing our demographic data, we can track our progress towards our ongoing commitment to create and sustain an equitable and inclusive working environment for all staff across our trust. That's how I see SAMpeople supporting us.

What advice would you give to a trust who is hesitant to implement an HR system?

Talk to other schools about their experiences. It doesn't have to be a big bang with everything new, you can do it gradually like us. Schools are busy places, we're all really stretched and there's never enough capacity. SAMpeople are brilliant at understanding the pressure of people in schools.

SAMpeople made life a lot easier; but most importantly, it has given us some really valuable organisational insights that are shaping our decision making.

[1] Working lives of teachers and leaders: wave 3, Department for Education 2024

How Priestley Academy Trust streamlines processes and informs people decisions



Mathew Atkinson, Chief Executive Officer, oversees the strategic direction of Priestley Academy Trust and makes sure organisational goals are met. We spoke to Mathew about how SAMpeople has supported HR excellence in his trust.

What challenges did you face before choosing SAMpeople?

We faced challenges managing HR processes across multiple sites. When you're responsible for 350 people across six sites and different line management systems within those, we wanted an efficient system to reduce challenges, such as tracking staff absence and compliance of the Single Central Record and payroll. Our goal was around streamlining those processes and having oversight from the central trust function.

There was a lack of access to real time data across the sites and difficulties in reporting HR metrics. We needed a solution that could help us centralise data so that we can make decisions based on what the data is telling us.

What made you choose SAMpeople over another HRIS?

We chose SAMpeople for the user-friendly interface and the comprehensive functions that sit behind that.

SAMpeople is built for education by people who are involved in education, which is really important.

We have a long standing relationship with FusionHR, so we knew the customer support was good.

We're interested in absence and turnover metrics and compliance tracking, particularly in relation to the Single Central Record, because it's one of the trust's responsibilities to have oversight of the Single Central Record (SCR) for all of the schools. SAMpeople allowed us to do that in a readily accessible format. The SAMpeople SCR is live so I can see any changes that have been made daily. That means you're getting real time data from across the organisation so that you can make decisions and have discussions with leaders in school.

Is SAMpeople making a difference to the way your staff work?

Yes, SAMpeople has reduced our administration workload across the trust, allowing HR teams to focus on strategic initiatives and enhancing staff wellbeing rather than being bogged down in the nitty gritty.

SAMpeople has been a big success across the organisation giving oversight from the central trust function, and bringing consistency.

Certainly for me, I don't know 350 staff inside and out, so I'm able to log on to the system and see data for that individual in one place. I have found that really helpful to get an oversight and understanding of individuals.

I think it's also helpful that our HR provider is from the same company. We're talking the same language, they understand our policies and procedures and that's inputted into the system and taken in account.

What excites you working with SAMpeople?

[With the SAMpeople and Arbor integration] it should be a one stop shop for staff, pupils and processes.

We won't be inputting things into different systems, allowing the data to be more reliable and managed more effectively across the trust. With SAMpeople Recruit in the mix, we can manage the employee journey through the organisation.



What would you say to a trust who hasn't considered getting an HRIS yet?

I'd advise them to consider the long term benefits of investing in a system such as SAMpeople because it can significantly reduce the HR burdens that you might feel as an organisation.

Ultimately, having an HRIS in place, leads to better information. We all know that information is power because that supports your decision-making processes.

Having a system like SAMpeople gives you the capacity and capability to take that HR information and do something meaningful with it.

Why SAMpeople is the UK's fastest-growing education HR system

SAMpeople has been designed and refined by our team of education HR specialists, with over two decades of hands-on experience supporting HR in schools and trusts. Since launching in 2021, SAMpeople now helps over 2,600 schools and trusts across the UK to support their staff, reduce manual workload, increase operational efficiency and oversight, and drive HR best-practice.

Trust level overview with MAT dashboard

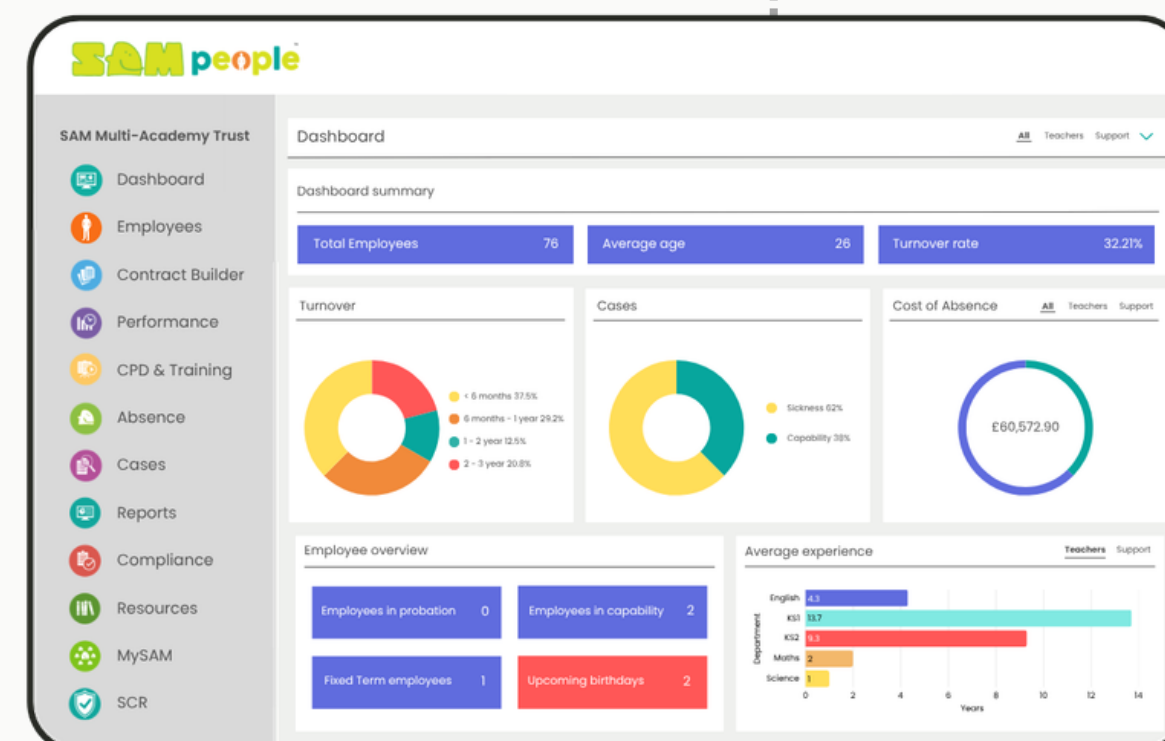
Central teams and senior leadership can access reports, statistics and HR data at a glance with a dynamic dashboard of key HR metrics. Pull reports from across schools, filtering to specific details where required to understand the complete picture of your staff.

Secure GDPR compliant storage

Making SAMpeople your source of truth for all employee information ensures compliance with data protection regulations but also ensures payroll changes are accurately tracked and managed and reported on the payroll export report. With a clear audit trail, HR and payroll teams can eliminate discrepancies and reduce the risk of payroll errors, supporting compliance and transparency. With a cloud based HR system, you can move away from paper based files and searching individual computers and improve data accuracy. HR teams can access information from anywhere anytime, allowing for flexible working across school sites and other locations.

Create consistent processes and policies

With built-in workflows and automated reminders, you can quickly and easily implement consistent processes across the trust. Absence management and return to work meetings are handled consistently from school to school, making sure employees are treated fairly. Share policies trust-wide and communicate changes to employees at the touch of a button.



"The absence management module was most impactful for being able to see across the organisation and understanding trends. It gave us the opportunity to work with school leaders to challenge what the data is saying so that we get the culture right in all of our schools and that all staff are being equally supported."

Mathew Atkinson, CEO, Priestley Academy Trust

Compliance and Single Central Record management

Our Single Central Record and compliance management features give you peace of mind that documents and records are up-to-date. You can focus your attention on what's needed with built-in flags, alerts and expiries. Give each school their own Single Central Record and access these at trust level for reviews and audits.

Help staff self-service with the MySAM employee portal

Our employee self-service portal gives employees a simple way to request leave, manage their personal details, view their CPD and performance objectives and submit additional hours and expenses. With mobile friendly access, encouraging engagement has never been easier.

Build a culture of development where staff can grow

Support continuous performance and development conversations in one place, with clear objectives, progress updates, supporting documents and employee-led contributions. HR teams and line managers can make reviews easier to manage, keep conversations more consistent and give staff more ownership of their development.

Handle complex HR cases with clarity and consistency

Manage sensitive HR cases in one structured, audit-ready place. Built-in workflows, evidence capture, reminders and case bundles help HR teams follow fair processes, keep key information together and stay prepared for meetings, panels or tribunals.

Avoid duplication with MIS sync

Reduce duplication of admin tasks by integrating your HR software and MIS. Data flows between the system to make sure you are always up-to-date.

Getting to know your trust

Choosing a new HR system is an important decision for your trust. It is not just about finding software that can hold employee records. It is about making sure your HR setup gives you the visibility, consistency and confidence to support your people well across every school.

This is why our first step is always to get to know your trust and your goals.

Step 1

Understand your challenges

You will receive a quick call from our team to run over your key details and questions to tailor the demo to you, and your trust.

Step 2

Setting the directions

We'll book you in for a strategy meeting with our team to go over your trust's strategic goals and how SAMpeople will help you to achieve these. It's important to make sure members of your senior leadership are on this meeting (allow 20 minutes for this meeting).

Step 3

Getting to know your goals

Once we've caught up to understand your trust and goals in more detail, we'll book you in for a demo of the system.

Step 4

See SAMpeople in action

After the demonstration, you will receive a tailored business case and proposal to take back to your trust leadership team. From here, our team will be on hand to answer questions and finalise your proposal for SAMpeople.

"The most impactful module has to be the reporting module; being able to get insights into what's going on in the organisation has been genuinely transformational. It is really incredible and something we couldn't do prior to having an HR system. SAMpeople has saved us huge amounts of time as an organisation. That's time that we can spend on more value-adding activity that ultimately contributes to improving teaching and learning in the classroom, which is, fundamentally, why we're here."

Sarah Casemore, HR Director, The Arbib Education Trust

Moving to SAMpeople

Making the move: How to buy SAMpeople

Once your trust is clear on the problem you want to solve, the next step is understanding the best route to buy and implement SAMpeople.

Every trust will have its own procurement policy, approval process and timeline. But for many trusts, the most practical starting point is to explore whether SAMpeople can be purchased through an appropriate framework route, including Direct Award where this is available, permitted and suitable for your trust.

What's in scope?

SAMpeople can support your trust across HR, recruitment and payroll-related processes. But that does not mean everything needs to be procured or implemented at once.

For many trusts, **the best starting point is to build strong HR foundations first**. That means getting employee data, records, absence, compliance, performance and reporting into a more consistent place. From there, you can consider how recruitment and payroll fit into your wider people journey.

SAMpeople Recruit can help connect recruitment, safer recruitment checks, onboarding and employee records, so the journey from candidate to employee is easier to manage.

SAMpeople Payroll can support payroll preparation and payroll services by helping your trust work from cleaner, more accurate HR data

Speak to us early

If your trust is considering SAMpeople, speaking to us early can help you understand what is possible before you finalise your requirements or procurement route.

An early conversation can help you:

- explore the problems you are trying to solve
- understand which parts of SAMpeople are most relevant to your trust
- understand typical implementation timelines and support
- identify the information your trust may need for internal approvals
- explore whether an appropriate framework route may be available

This conversation does not replace your procurement process or your trust's own governance. It simply helps you make a more informed decision before you move forward.

Direct Award

We usually recommend exploring whether your trust can buy SAMpeople through Direct Award via an appropriate framework.

Direct Award can be a clear and efficient route when:

- your trust has a clear need for change
- SAMpeople meets your essential requirements
- the relevant framework allows Direct Award
- your internal governance supports this approach
- your trust can evidence value for money
- the decision is recorded properly
- your software requirement is over the threshold amount

Direct Award is not skipping procurement. Your trust still needs to follow its own procurement policy, check the framework rules and keep the right evidence for internal approval.

Alternative routes

Direct Award will not be right for every trust. Your trust may need to consider a mini competition or formal procurement process if:

- your internal policy requires supplier comparison
- your contract value means a more formal route is needed
- your requirements are more complex
- you want to compare several suppliers
- there is not a suitable framework route available

The most important thing is to understand your options early, before your timeline is under pressure.

A **phased approach** can make change easier to manage and help your trust focus on what is essential now.

Moving to SAMpeople

Your dedicated team from set-up and beyond

Your Programme Manger – with you from the start

Your Programme Manager is your dedicated point of contact while your trust central team and schools onboard with us. They'll work with you to make sure your rollout goes smoothly across your trust.



For example, with Frances’s support, you can build a clear onboarding and rollout plan, confidently prepare your employee data, identify your SAMpeople Champions, and secure stronger buy-in for new recruitment and HR processes.

With you after onboarding

Your Account Manager is here to make sure your SAMpeople package continues to support your priorities as your trust grows.

Your Customer Engagement Manager: If you’re a trust set to grow, you’ll work with a dedicated Customer Engagement Manager after onboarding to help you get the best from the SAMpeople HR suite, champion your needs when it matters, and support your trust’s evolving priorities and goals.

Your Customer Onboarding Partner (COP)

Your **COP** guides your initial setup, manages your employee data setup and supports a confident go-live before handing over to your long-term success team.

Your Customer Education Specialist (CES)

Your **CES** provides additional guidance via the SAMpeople Hub. Get early access to guides, videos, helpsheets and webinars whenever you need self-serve support.

Your Customer Success Partner (CSP)

Your **CSP** helps you implement additional modules, prioritise next steps and expand successful use of SAMpeople across your trust.

Our Helpdesk Team

Our Helpdesk team supports with day-to-day questions, troubleshooting and helps quickly when you need answers fast.

SAMpeople Academy

Use the SAMpeople Academy for **on-demand learning** throughout onboarding.

Specialist support when you need it

“Our onboarding was well supported and smooth. There was always somebody at the end of the phone and that’s continued right through. We feel really supported by the team and the guidance helped us avoid the pitfalls that I’m sure could happen with rolling a system out like SAMpeople.

There were regular reviews as to how we were getting on and pointing us in the right direction. Even last summer I was having a review a couple of years into the contract as to what we’re making the most of and where we might add value.”

Mathew Atkinson, Chief Executive Officer, Priestley Academy Trust

“We took a phased approach to implementation. Moving from paper to a system really highlights what’s good in your data, and where you’ve got some cleaning up to do, but it helped us to improve the quality of our data. We also used the opportunity to look at our processes and standardise our templates across each academy.

We were keen to get MySAM, the self-service employee portal, up and running. This was going to be a change in working and we thought it might be the hardest part, but we had really positive feedback; Staff loved being able to see their information and were quite shocked when they saw some of their own absence information. It’s quite powerful to have that absence information at your fingertips; it really highlights areas you might not have noticed before and helps spark meaningful conversations and actions.

It was nice to get your core system built and then add additional modules around other school priorities at your own pace.”

Sarah Casemore, HR Director, The Arbib Education Trust

What’s next? Get in touch or see us in action

You are ready to take the next step and begin your journey towards implementing an HR system; So, what next?

Get in touch 

Get in touch for a discovery call and demonstration. Our team will discuss your initial requirements, challenges and get you booked in for a demo.



Download our brochure 

Download our brochure to learn more about our HR, recruitment and payroll services and explore our key features.



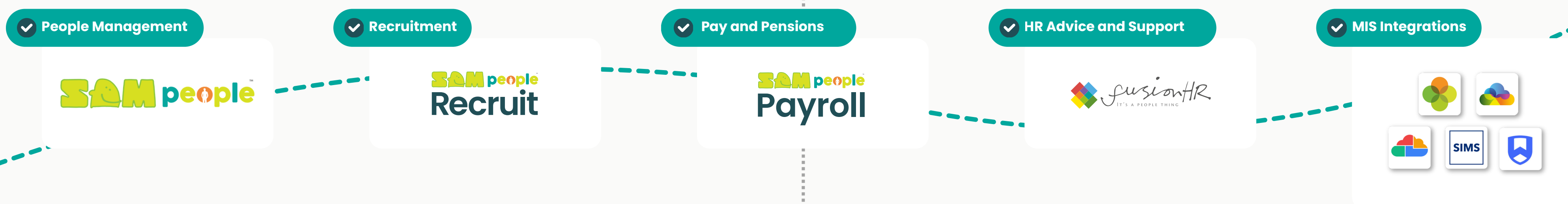
How else can we help you

Simplify and connect the whole employee journey

From hiring to payroll to case management – our suite of integrated products and services help you streamline, support and join up every aspect of people management in education.

"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



We help over 2,600 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.

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

Book a demo or find out more at

→ sampeople.co.uk

→ 01924 907319