Managing recruitment and retention in schools

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Contents

Navigating recruitment and retention in the education sector

Siobhan Hammond, BA(Hons) CiPD
Director of Operations (People Services)
FusionHR and SAMpeople

Schools across the UK are suffering in a recruitment and retention crisis. Twelve out of seventeen subjects fell below recruitment targets last year, continuing the post-pandemic trend of severe under-recruitment for secondary.[1] High stress and workload are driving talented leaders and educators out of the sector, and school leaders are battling tight budgets and rising employer costs.[2] This complex landscape places immense pressure on school leaders, who are tasked with filling critical roles under challenging financial and time constraints.

It's no surprise that recruitment and retention are high on the agenda for schools. Yet, for many school leaders, navigating this period can feel overwhelming and isolating.

This guide aims to empower you with the strategies you need, not just to survive, but to thrive. Our education HR and recruitment experts provide practical, actionable advice on how to create cost and time-efficient recruitment processes and develop robust, long-term retention strategies to secure your school's most valuable asset: its people.

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

All the best,

Siobhan Hammond, BA (Hons) CiPD

[1] *The Teaching Workforce: Summary of research, NFER, 2025*

[2] *Increasing teacher numbers: Secondary and further education, House of Commons, 24-25* and *Schools and colleges in the 2025 Spending Review, IFS, 2025*

The People Strategy Series

for schools and MATs

We're excited that The People Strategy Series is returning for the 25/26 academic year.

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Before you begin - Key dates and requirements

An effective recruitment process is essential for attracting and keeping the best talent in your workforce. Our first chapter will take you through everything you need to consider before beginning your recruitment process.

Resignation dates

Before starting a recruitment campaign, you should be familiar with the resignation and start dates for teachers and headteachers (Unless you are part of a MAT that does not follow the Burgundy Book - however, most do).

- **Teacher resignation dates:**
  - Resign by 31st October to start on 1st January
  - Resign by 28th February to start on 1st April
  - Resign by 31st May to start on 1st September
- **Headteacher resignation dates:**
  - Resign by 30th September to start on 1st January
  - Resign by 31st January to start on 1st April
  - Resign by 30th April to start on 1st September

Safer Recruitment training

At least one member of your interview panel should be trained in Safer Recruitment, with regular refreshers. Safer Recruitment training allows your interview panel to be more confident in their skills, awareness and knowledge to identify potential threats to your school and students.

Further information on these responsibilities can be found in the Department for Education statutory guidance, Keeping Children Safe in Education.[1]

Identifying a role requirement and getting approval

A role might be identified due to a resignation, or you might consider a new role from expansion or a restructure. It could also be following a flexible working request, and the increasing pressure on employers to agree to a more flexible way of working.

In order to get vacancy approval to recruit a new staff member, school leaders typically have to pull together a range of documents and information to present to the governing body, senior leadership team (SLT), or a designated panel. Compiling these documents means you can present a comprehensive and well-justified case for recruitment that is financially viable and aligned with the school's strategic goals and safeguarding policies.

Here is a breakdown of what school leaders normally have to prepare for vacancy approval:

Justification and needs analysis:

- A clear explanation of the vacancy: Why does this role need to be filled? Is it a replacement for a departing staff member, or is it a new post created due to a change in school needs or curriculum? Even a "replacement" needs careful consideration; rather than just a like-for-like, it is an opportunity to consider the role profile.
- An analysis of the impact if the post isn't filled: What would be the consequences for the students, department, or wider school community? This is often a crucial part of the business case.
- Consideration of alternative solutions: Have you considered whether the role could be combined with another, filled on a part-time basis, or absorbed by existing staff?

Financial and budget information:

- Budget approval: School leaders must demonstrate that the school has the funds to cover the new staff member's salary and associated costs (e.g., National Insurance, pension contributions).
- Cost analysis: This includes the proposed salary scale, any potential allowances (e.g. TLR for teachers), and the cost of the recruitment process itself (e.g. advertising fees). Consider whether there is an additional cost of employing part-time workers for the role or having a job-share arrangement.
- Long-term financial planning: Especially for a new post, leaders may need to show how the cost will be sustained over the next few years, often with reference to a 3-5 year financial plan.

Role definition documents:

- Job Description: A clear and detailed document outlining the responsibilities, duties, and reporting lines of the role. This must be up-to-date and reflect the current needs of the school. Make sure safeguarding responsibilities and commitments are clear.
- Person Specification: This document outlines the essential and desirable qualifications, experience, skills, and personal attributes required for the role. These are what candidates will be shortlisted against. Consider how the criteria will be assessed throughout the recruitment process.

Alignment with school policies and legislation:

- Safeguarding: All recruitment in schools is underpinned by the Keeping Children Safe in Education (KCSIE) guidance. The vacancy approval process must demonstrate that all safeguarding protocols will be followed, including the need for appropriate vetting, Safer Recruitment training for panel members and the school's commitment to safeguarding.
- Equality and Diversity: The recruitment documents must be free of any discriminatory language and align with the school's commitment to equal opportunities.
- Governing Body approval: The school's scheme of delegation dictates who has the authority to approve a vacancy. For senior roles, this may require a full meeting of the governing body.

Writing a great job advert

You've got your vacancy approval - now to showcase that job to candidates!

A job advert is typically the first thing a candidate reads when they apply for a job with you. You have less than 15 seconds to engage candidates before they move onto the next job advert, so yours must be eye-catching, effective and punchy![1]

Crafting the perfect job advert:

Keep it concise and scannable →

Candidates often skim job adverts, especially on mobile devices, and shorter posts tend to receive more applications per view. Aim to keep your advert under 700 words to quickly engage candidates. It's important to make the content easy to scan using bullet points and focusing on key elements. Remember that writing your job advert is very different from writing a job specification. You should think about the key criteria that are essential for the role and include elements that will encourage applicants to apply. Avoid using attachments - any wording in an attachment will NOT be picked up in a search by a candidate or create an alert for the potential applicant via a job board algorithm.

Use a clear and simple job title →

The job title is the first thing a candidate sees, and it's essential for attracting the right people. Use simple, precise titles without jargon, acronyms, or abbreviations, as candidates typically search for standard titles. Consider what your ideal candidate would search for.

Be specific with the location →

Vague location information can reduce the number of applications you receive. Specifying a full town, county, and postcode can attract more applications. This helps job seekers plan their commute and increases the likelihood of relevant applications.

Always display the salary →

Salary is a major factor for job seekers, and transparency can boost application rates. Avoid relying on pay scales, as these will not be picked up in searches by applicants.

Include essential information →

Be honest about job requirements to avoid disappointment and high turnover. Essential information includes the job title, location, responsibilities, qualifications, and salary range.

Include attractive information →

Such as flexible working, and also include the culture, values, and ethos of the school. The type of school will help too. Highlight benefits like health coverage, parental leave, and paid time off, flexible working times or hours, as these are key for retention.

Proofread and optimise for mobile →

A well-formatted, error-free advert makes a professional impression. Nearly 70% of job seekers now complete applications using mobile devices, so make sure your application process is easy to complete on a mobile phone.[2]

Some key checks before publishing your job advert include:

- Are the dates correct, or have you included when you will close the campaign and conduct the interviews?
- Is there any new information to add? Has anything changed since you wrote the advert and specification?
- Have you included keywords to help with online searching?
- Have you and a colleague proofread the advert?

[1] 9 Job Description Statistics to Keep in Mind for 2025, Insights Global, 2025

[2] 2024 Recruitment Marketing Benchmark Report, appcast, 2024

Effective vacancy advertising

Your advertising campaign should include a timeline with key dates for potential candidates, such as the advert closing date, interview dates, and the start date. This makes sure the process is fair for all candidates and avoids last-minute 'drop outs', eg, the candidate may be on holiday when the interview dates are planned.

It is best practice to advertise every vacancy both internally and externally to give all employees and candidates a fair chance to apply.

Advertising platforms like education-specific jobs boards and the DfE's Teaching Vacancies online are examples of where you can advertise externally. You should also make the most of your school website, social media channels and local groups for advertising - these are free forms of advertising which can bring down your cost to hire rates significantly. You might also consider being in contact with your local university, which may offer school-based teacher training programmes.

Recommend a friend schemes are also great for attracting candidates, as well as utilising your parent network. By being creative and thinking 'outside the box' you could be saving money from your budget that could be used elsewhere.

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Moving to interview

Conducting effective longlisting and shortlisting

The purpose of longlisting is to identify which applicants meet the essential and desirable criteria for the job. Shortlisting then identifies which of those candidates the panel wishes to interview. Scrutiny of all applications is an important part of the Safer Recruitment process. According to KCSIE, the same person should shortlist and interview. This is to avoid any information that requires further scrutiny being missed. It is advisable to have someone to "manage" the recruitment process end-to-end.

Longlisting typically takes place when there is a significant number of applicants. Depending on the scheme of delegations or recruitment process, it may be that a recruitment administrator long lists and the panel short lists, or the panel does both.
Use the same panel to shortlist and conduct interviews. This helps make sure shortlisting decisions aren't subjective. Using the same panel to shortlist and conduct the interview also reduces the risk of a data breach (as it minimises the number of people who will have access to sensitive personal data).

Applications should be anonymised to make sure the characteristics that can identify the candidate or their protected characteristics are removed. The statutory code of practice for employment from the Equality and Human Rights Commission (page 243) explains that selection should be based only on information provided in the application form. You could do this by avoiding sharing applicants' personal details with those who are shortlisting, but there's no requirement to do so. This will reduce the possibility of discrimination, as such information could allow the panel to find out about a person's protected characteristics.

Set a timeframe for your shortlisting panel to have their recommendation for the interview ready by. This should fall in line to give a window and reasonable notice to send out interview invites and to allow candidates to prepare for the interview and any tasks that you may want them to complete before they attend. This timeline should also allow for the gathering of documents/checks and reference information ready for the interview date. Technology can help alleviate the administrative burden involved in document gathering and reference chasing (more in our software chapter).

Shortlisting criteria and scoring matrices

The scoring matrix identifies how strongly each candidate has met the essential and desirable criteria set out in the person specification. Shortlisting should also pick up on any employment gaps, inconsistent referees, experience/qualification inefficiencies, and motives for working in education. Panels should always record the long and shortlisting scoring on a matrix to demonstrate a fair process.

Use fair criteria and rely only on evidence outlined in the application. Make your system clear and straightforward. Shortlist your candidates based **only** on:

- Criteria taken from the person specification
- Skills and experience that are outlined in the application

By doing this, if you're challenged on your process, you'll be able to show:

- Decisions were based on relevant criteria and evidence
- You've considered each candidate fairly
- Where a candidate wasn't shortlisted, it's because they didn't meet the requirements

If someone challenges your shortlisting decision, you usually don't have to investigate. However, if you're challenged on grounds of discrimination and fail to investigate and respond, you could risk having a claim made against you in an employment tribunal.

Moving to interview

How to use a shortlisting grid

Add all the essential criteria from the person specification in your job advert. You can tick to indicate where criteria are met. Alternatively, use a scoring system to help you decide the extent to which a candidate meets particular criteria.

For example, you could use the following scoring system:

0 – No evidence to meet the criteria
1 – Evidence does not fully meet the criteria
2 – Evidence meets the criteria
3 – Evidence exceeds the criteria

Make sure at least 2 people are involved in the shortlisting process (see paragraph 220 of Keeping Children Safe in Education (KCSIE) 2023).

Only shortlist the most suitable candidates. For example, if you usually shortlist 6 candidates, and only 4 meet all the essential criteria for the role, don't put 2 unsuitable candidates on the shortlist just to meet a quota. You should just interview the 4, or consider extending the deadline for new applicants.

Managing candidate assessments and interviews

Interview questions should be designed to test if candidates meet the requirements of the job description and person specification, and should be the same for each candidate and should include at least one question written in line with the Warner Report (Safeguarding following William Vahey case). It is advised that the interview panel consist of an odd number of members, experienced in interviewing and recruitment. The interview will also help to explore a candidate's motivations for working with children. It should also be designed to enable the panel to explore any gaps in employment, discuss any relevant (unfiltered) criminal history, reference concerns, online searches, etc (as per KCSIE).

Assessment tasks, such as presentations or psychometric testing, can be used to identify skills and abilities related to the job. It is recommended to keep these under 3 tasks, as this can be intimidating for the candidate. Assessments should only utilise pupils where appropriate and necessary.

You may wish to conduct an 'interview day' to minimise disruption to your staff. This can also mean that candidates stay fresh in the panel's mind, and the process keeps up the fast pace required.

Promoting equality, diversity and inclusion

To attract the best talent, your selection processes must be broad and inclusive, based on open and fair criteria. Focusing on the skills and experience outlined in the person specification can help avoid unconscious bias.

Making an offer and providing a great induction

Once you have selected your preferred candidate, a conditional job offer should be made, subject to pre-employment checks, including:

- DBS check (enhanced), plus a barred list check for those working in regulated activity
- Right to work in the UK
- Pre-employment medical questionnaire
- ID checks, overseas checks, any relevant prohibition checks (teaching or management)
- References and qualifications - It is important to check this information against that provided by the candidate to spot any discrepancies
- Original birth certificate

It is also essential to request a reference from the employer where the candidate has most recently worked in a regulated activity (if not their current employer). If their current employer isn't in the education sector, you should go back to their most recent education sector employer for teachers.

Top tip:

To keep this process moving forward, have a checklist ready of what you have received back and what is outstanding.

The induction: Onboarding your new hire

The onboarding process can be daunting for new employees and admin-heavy for HR managers. Having a clear and structured onboarding process gives your new hire the best start in their new role. It helps make the new employee feel valued and also sets the scene of what it means to work for your school. You can communicate the things that matter and ensure that no important information is missed.

Before planning a new onboarding process, consider interviewing employees via a survey or in person to gather feedback on their experience. This feedback can be vital to inform what your upcoming onboarding process will look like.

Once a new onboarding process has been developed, having a checklist or tracker to go alongside it can help to keep things on track. You may wish to create this digitally or on paper, but a digital tracker allows everyone involved in the onboarding process to see what's happening at any time.

Here's an example onboarding timeline you can tailor to your school:

Onboarding timeline

Before a new hire's first day →

- Send a welcome pack with key information: start date, contact person, dress code, parking, etc.
- Provide access to systems - email setup, HR portal, mandatory training and any relevant platforms
- Assign a buddy or mentor to support them during their first few weeks

First day →

- Welcome meeting with leadership or line manager
- Give a tour of the school - include key locations like staff room, classrooms, and IT support
- Introduction to team members and key contacts
- Provide a clear schedule for the first week, including training sessions and shadowing opportunities

Week one →

- Complete safeguarding and compliance training - make sure all mandatory sessions are completed
- Carry out role-specific induction - tailored sessions for teachers, support staff, or admin roles
- Conduct check-in meetings - daily informal chats to answer questions and offer support. Use their assigned buddy/mentor to help here
- Set short-term goals to help them feel productive and focused

First month →

- Regular feedback sessions with their line manager or mentor.
- Encourage reflection - ask what's going well and what could be improved
- Introduce professional development opportunities and CPD pathways
- Celebrate milestones - acknowledge their first month with a small gesture or recognition

Ongoing support →

- Offer opportunities for collaboration across the MAT or within departments
- Conduct regular wellbeing check-ins to make sure they feel supported emotionally and professionally
- Encourage involvement in school life - PTA, extracurricular activities, or community events

> **Top tip:**
>
> Once a new hire has been through your onboarding process, it can be beneficial to ask them how they found the process and if they would suggest any improvements.

Retaining quality talent

Recruiting to retain means having an effective recruitment process that reflects the values of your school or MAT, bringing in high-quality talent who match these values. During recruitment, the candidate experience is important because it can build a positive reputation for your school.

In the education sector, it is known that high workload and stress and/or poor wellbeing were the two most commonly cited reasons for teachers and leaders considering leaving the sector - reported by 90% of teachers and leaders last year.[1]

It is important to work with Senior Leadership Teams to develop key retention strategies to keep key talent in your organisation. If employees feel supported, happy and motivated to succeed, they are more likely to progress their careers at your organisation.

Identifying wellbeing concerns and becoming proactive

One of the main reasons teachers leave is due to excessive and unmanageable workloads. The pressures of the job have become unbearable for many.

Undertaking wellbeing surveys and reviewing your wellbeing strategy can help improve employee engagement, morale and satisfaction. Regular wellbeing surveys conducted every 6 months can provide you with direct feedback from employees about what's working and what's not. If you are using an Employee Assistance Programme, this is a great way to assess if you are getting a return on your investment. Tweaking the strategy regularly in response to feedback highlights to employees that you are taking their views seriously and ensures you are getting value for money from the wellbeing service.

You might consider giving staff more control over their working patterns, such as flexible PPA time, TOIL or opportunities to work virtually for certain tasks. Implementing flexible working can help retain talent by improving the work-life balance and can reduce sickness absence.

Technology can also help support wellbeing strategies by tracking absences and managing return-to-work meetings with line managers (more in our software chapter).

Supporting career progression

Some colleagues may leave to pursue their careers elsewhere, particularly if they feel they have reached their ceiling. Capturing information from your performance management cycle can help you identify colleagues who are ready for their "next steps". Knowing where your employees are in their careers and performance cycles can mean that you can succession plan to support them and are not caught off guard when an employee moves on to another organisation.

Beyond stepping up the ladder to traditional leadership roles, it can be hard to have a clear framework for career progression.

You can address this by:

Creating a skills-based pathway: This allows teachers to specialise in areas like pastoral care, curriculum design, or special educational needs (SEN) without necessarily taking on a senior leadership team (SLT) role. This recognises expertise and provides alternative routes for professional growth. If employees know the skills required to take the next step, they are more likely to be motivated to work towards it.

Developing a "middle leader" programme: Train and empower aspiring leaders by giving them responsibilities like leading a subject or a key stage. This provides them with valuable experience and prepares them for future leadership positions. You could also consider offering coaching and mentoring by pairing aspiring leaders with experienced members of the SLT or other senior staff. This one-on-one support can help them develop specific skills and gain a deeper understanding of leadership.

When advertising vacancies, it is important to make sure that employees are encouraged to apply as internal applicants. This provides a clear and easy way for employees to take that next step - and possibly even deterring them from moving to another organisation.

How software can streamline recruitment and support retention

The impact of HR and recruitment software can be immense when used to its full potential. The real value comes when you use them together, creating smoother processes, developing better employee experience, reducing duplication, and giving leaders the clarity to support better and retain their staff. SAMpeople and SAMpeople Recruit integrate seamlessly to give school and trust leaders clear and streamlined processes.

Here are 5 ways that HR and recruitment software can streamline recruitment and support retention in your school.

Provide a great candidate experience

Using an education recruitment software, like SAMpeople Recruit, means that potential candidates can apply via an easy-to-use portal. Candidates can view your available jobs on a branded vacancy page and log in to receive communications about jobs and their current applications.

Reduce chasing and administration

Onboarding new employees can produce a long list of administrative tasks. Scanning ID and documentation, uploading these documents and inputting data can take up the time of HR managers in schools. When using recruitment software, before you have reached the offer stage, candidates have begun to upload their documentation and input their personal details, taking away the need for you to manually scan ID documents. References are chased automatically via the system, and HR and compliance information is pushed straight through to SAMpeople (if using together) - no more emails and phone calls chasing a reference.

Peace of mind that you are following best practice

Education HR and recruitment software, like SAMpeople, has best practice and legislation guidelines built in - have peace of mind that recruitment, onboarding and people management is compliant across your school. Meet Safer Recruitment requirements with confidence and carry best practice through to your HR system, where the Single Central Record is automatically updated when new hires are onboarded.

Identify wellbeing concerns

When your team uses efficient systems for tracking absences, monitoring wellbeing trends, and managing employee paperwork, it not only improves data accuracy but also builds toward a healthy and thriving workplace. When staff feel valued and supported, everyone benefits — lower absences, stronger retention, and a boost in morale.

A tool like SAMpeople means you can: track key life stages, set up reminders for check-ins, manage flexible working or phased returns and promote EAPs.

Tracking absences automatically and managing return-to-work meetings on time, means you can support the root causes of absence and wellbeing concerns much quicker. Pull absence reports in seconds for leadership and strategy planning, and review HR data to signal wellbeing concerns or strategy success. Use SAMpeople's training module to track mental health and wellbeing training for senior leaders, helping them to better support their teams.

Support career progression

Systems like SAMpeople can help manage employees from their first day to retirement with extensive HR modules, including tracking and logging performance management.

Regular appraisals and feedback boost motivation, align goals, and help staff feel valued. Done right, they drive engagement, professional growth, and better outcomes for your schools and trust. Real-time dashboards, progress tracking and integrated performance data mean you have full visibility, consistency and accountability, driving meaningful two-way conversations.

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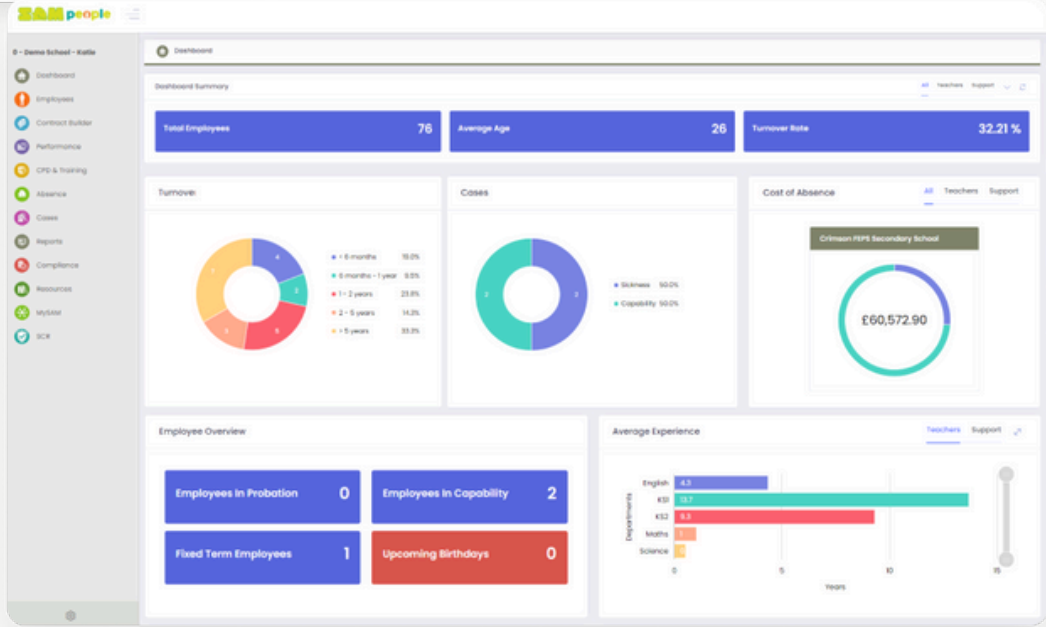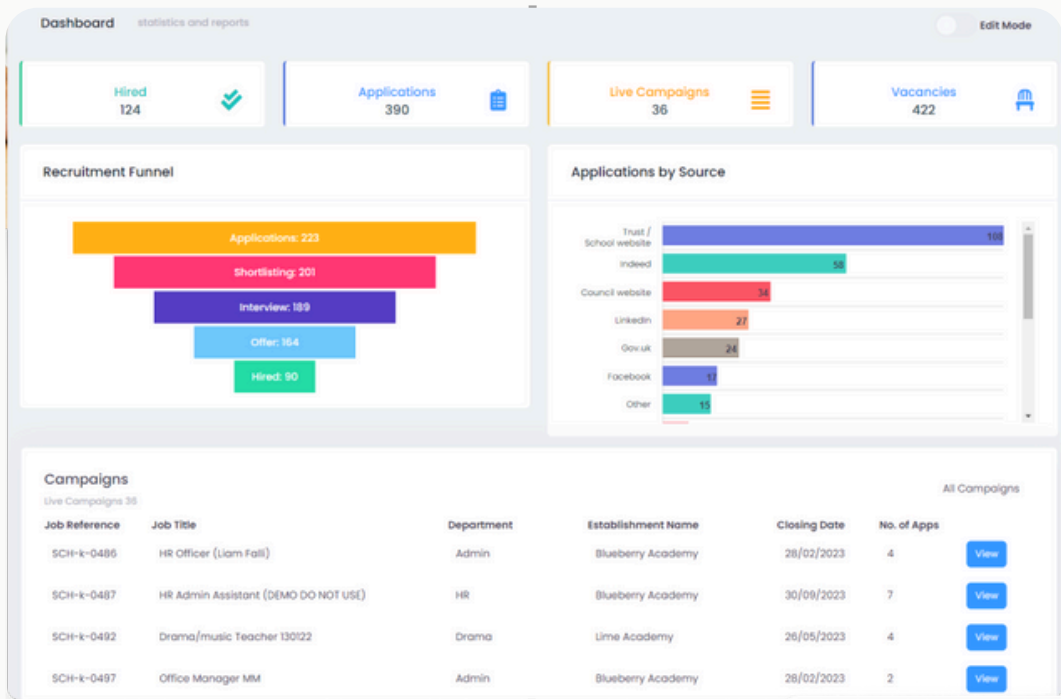
How SAMpeople Recruit optimised Raleigh Edcuation Trust's hiring process

Schools and trusts are using SAMpeople Recruit to streamline their recruitment processes and make onboarding easier with SAMpeople's integration. If your school is part of a trust, using SAMpeople Recruit means vacancy approvals are simplified, and central HR teams can provide informed support throughout the recruitment process with clear oversight.

Raleigh EDUCATION TRUST
Empowering through education

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

SAMpeople Recruit has been instrumental in delivering part of our people strategy to systemise the recruitment process. We have recruited 142 staff from 894 applications since we started in April 2022.

Before SAMpeople Recruit, a lot of our time was spent on shortlisting, chasing references and going back and forth to set up interviews. Vacancy requests were approved on paper as part of a lengthy process.

Now, the process is online and streamlined, everything is so much more effective.

Previously, we would have to meet with candidates to gather information, but now they can upload everything online prior to the interview, which saves lots of time."

It is very methodical, easy to manage and follow, guiding candidates through the correct process. To be able to just touch a button to send out for references is by far the biggest time saver. The impact has been that references are received in a timely manner. SAMpeople Recruit sends automatic reminders every 24 hours for those who have not returned them, saving more time.

As Safer Recruitment Accredited Trainers, SAMpeople and FusionHR have thought of everything. SAMpeople Recruit provides a systematic approach, so you can't move on until a check has been completed.

SAMpeople Recruit has solved a lot of challenges for us, and since we started using the software, we have managed to hire 142 people with ease.

It has been brilliant in saving time and money. It helps to reduce the worry around recruitment and the numerous safer recruitment checks. I would absolutely recommend it, without a shadow of a doubt."

Hear from our schools and trusts...

"SAMpeople Recruit really allows us to stand out from the crowd. We can exploit the unique identities of our schools while maintaining a shared ethos. We are able to customise our vacancy page so it can truly reflect the character of our trust and schools. The candidates go on a highly professional journey through the portal, and this culminates in successful candidates being onboarded seamlessly with all details and safer recruitment documentation being uploaded directly into SAMpeople. We would highly recommend this product."

**Elizabeth Gregory,
Operations Manager, Equals Trust**

"As a trust of six schools, finding the right people quickly while ensuring they align with our culture and values has always been challenging. Since adpoting SAMpeople Recruit, our hiring process has become faster and also far more strategic. We've seen a marked improvement in candidate quality, with a more seamless experience for both applicants and our hiring leads. The platform's efficiency and smart features have allowed us to attract the best talent while maintaining our commitment to excellence."

**Mathew Atkinson,
CEO, The Priestley Academy Trust**

"SAMpeople and SAMpeople Recruit have significantly reduced HR paperwork and improved visibility to manage HR so much better. SAMpeople Recruit has also made a difference to our recruitment process for ourselves, candidates and reference providers. Many fantastic processes to make it much quicker, more thorough and with better oversight. The ongoing support has been invaluable, too, from their team."

**Hazel Goodwin,
School Business Manager, Ruskin Community High School**

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"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

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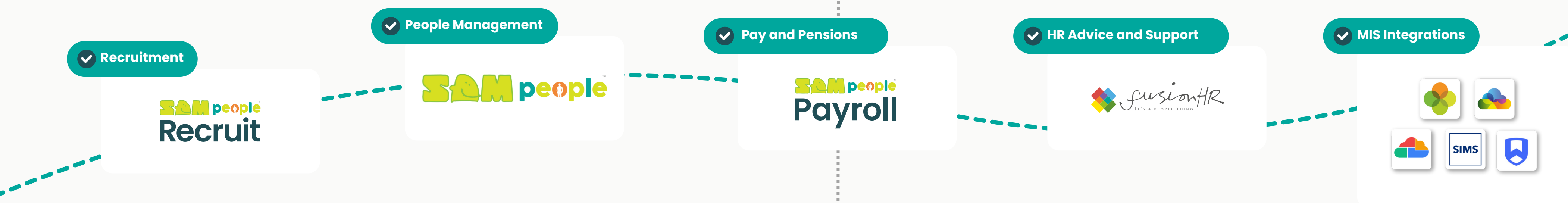
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