



Education Services that Evolve With You

Driven by data, powered by people



01480 431993



epm.co.uk



Hear from the people and teams we work with



Engaging the pensions team to prepare our Teachers Pensions' End of Year Certificate has been transformative for the Trust.



EPM's investigator was the best we've ever had!



We get valued HR support and guidance in a timely and detailed manner.

No query is too small and their expertise on the full range of employee-related matters helps ensure our People function runs effectively.



The DBS & Safer Recruitment team are outstanding - they've gone above and beyond in helping us!



The level of expert advice and guidance as we progressed our Trust expansion from 27 to 38 schools was truly remarkable.



With EPM's support, we're confident we're consistent across the Trust and providing the same support across each school every month.



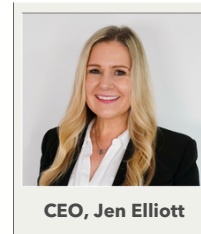
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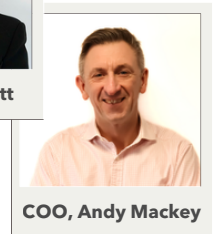
About EPM

30+ years. 2,000 schools. 150+ trusts. One education-only provider.





At EPM we blend specialist people and powerful technology to give you faster answers, better insight and support that adapts with your world. And because we're privately owned, our leadership can pivot fast to meet new sector challenges - offering accredited HR and Payroll & Pensions services, financial expertise, DBS checks and Safer Recruitment advice, trust growth support and flexible, ad-hoc solutions for complex projects.



CEO, Jen Elliott



COO, Andy Mackey

-  **Reduce pressure on internal teams** - we handle as much as you need us to
-  **Natural, supportive extension of your team** - dedicated experts who understand you
-  **Data in one secure location** - complete oversight and evaluation of your linked services
-  **Confidence in compliance** - peace of mind you're getting accurate legislative and best practice advice

Adapt your service provision to reflect your journey



Secure 24/7 cloud-based access to our software

Exclusive customer events, with free membership to nEdEx community

Intuitive software with data-driven insights and expert advice

Education-specific resources - articles, bulletins, webinars, model documents



Training, CPD & Events

Flexible, practical training designed for busy schools and trusts

Our training is built to fit around your day.

Pick up the courses you need, when you need them - from quick, on-demand sessions to deeper topic masterclasses that you can apply straight away.

Missed a webinar or termly update? When you're a customer, you can catch up anytime with our easy-access recordings.



We also offer bite-sized toolkits, including a course designed for those new to HR, giving your team fast, effective learning that boosts confidence and skills without taking them away from their day job.

And, we've also got opportunities to see us in person! Come along to our free events and roundtables to benefit from shared honest and insightful experiences, plus valuable networking time.

In a sector that's constantly changing, staying up to date matters. That's why our subject matter experts share the latest guidance, practical tips and leadership insight - helping you stay compliant, build capability and tackle new challenges with confidence.

Some of our learning options...

Document fraud training in partnership with the Home Office

HIT sessions

Understanding criminal records masterclass

New to HR toolkit

National Education Leaders Conference

Managing investigations training

Termly updates

Safer recruitment admin workshop

Roundtables

On-demand

HR Essentials

This isn't just admin support - it's a reliable, efficient, and compliant foundation for your people processes

Ask about our Payroll & Pensions Service for an integrated solution

The gift of reliable and hassle-free HR admin.

Powered by our smart HR Information System and supported by 50+ HR experts, we take care of the detail so you can focus on leading your people.

Our secure online platform (EPM Connect) lets you receive, review, and sign contracts and letters in just a few clicks - cutting paperwork, speeding up processes, and reducing mistakes. With trust access available, leaders can enjoy a holistic view of data across the whole organisation, to spot trends and make informed strategic decisions.

You'll also get instant access to up-to-date employment documents and policy templates designed specifically for education. And when you need guidance, our experienced team are here to help with contractual matters.

You'll get

- ✓ Unlimited advice on contractual matters
- ✓ Instant access to contractual employment documents, which can be signed online
- ✓ Continuous service date checks and prohibition verifications to meet statutory requirements
- ✓ Two bespoke employment contracts per year, tailored to you
- ✓ Content Hub access - a library of template documents, plus guidance and regular updates sharing legislative changes and sector best practice



Software access included with EPM Connect



Employees module

Centralised employee data, with individual and bulk action capability



Task management module

Distribute automated and tailored tasks, whilst enhancing efficiency, by identifying bottlenecks and trends



Reporting

Visual overviews of key metrics, downloadable data tables and insightful summaries, plus bespoke report building



HR Advisory Support

A model that moves with you - flexible, responsive, and ready to adapt as your plans and priorities change

Unlimited access to specialist HR support whenever you need it.

Backed by 30+ years of education-specific HR knowledge, we help you confidently handle even the most complex employee relations matters.

Your dedicated HR Advisory Team works like an extension of your own staff - offering tailored, practical advice that fits your structure, risk appetite, and ways of working. From disciplinary and grievance cases to performance concerns and safeguarding matters, our timely support ensures your cases are managed fairly, effectively and compliantly.

Plus, with EPM Connect, our bespoke education platform, key stakeholders get real-time visibility of current and historic cases - secured with case-level permissions to ensure confidentiality.

Because our support flexes with your plans and priorities, you get the capacity, insight, and assurance you need to manage HR challenges well; freeing your team to focus on what matters most.



Case management module

View and track the progress of EPM-managed cases with a full audit trail for ultimate transparency

Software access included with EPM Connect

You'll get

- ✓ Guidance and support from a named contact
- ✓ Access to our Duty Manager for urgent queries
- ✓ Advice throughout the entire employee lifecycle
- ✓ Trade union relations support
- ✓ HR policy review
- ✓ Meeting support (available onsite and remotely)
- ✓ Draft invite and outcome letters
- ✓ Settlement agreements and COT3
- ✓ Preparation for employment tribunals
- ✓ Job evaluations (up to two non-teaching roles)
- ✓ Model templates
- ✓ Content Hub access for resources and proactive support
- ✓ Regular review meetings
- ✓ Additional number of agreed days for tailored support

Hands-on support complimented by smart technology across the entire employee lifecycle

Our support adapts as your needs change, so you can meet new challenges and opportunities.

Every school and trust is different, so we combine core HR support with flexible options shaped around your needs and how you operate.

Underpinned by 30+ years of education-sector experience, we provide specialist advice across the full employee lifecycle, helping you manage even the most complex employee relations cases, ensuring smooth, compliant, and well-evidenced processes and outcomes.

We understand the pressures on headteachers, HR managers and trust boards, so we focus on reducing your workload, strengthening compliance, and supporting you to make clear, risk-aware decisions. Our team works seamlessly with yours, aligning with your processes and ways of working.

With EPM Connect, our advanced HR platform, you gain efficiency, better data visibility and reduced admin, with a trust-wide view of your people information - all in one place.

You'll get

- ✓ Guidance and support from a named contact
- ✓ Access to our Duty Manager for urgent queries
- ✓ Advice throughout the entire employee lifecycle
- ✓ Analysis of people data
- ✓ Trade union relations support
- ✓ HR policy review
- ✓ Meeting support (available onsite and remotely)
- ✓ Draft invite and outcome letters
- ✓ Settlement agreements and COT3
- ✓ Preparation for employment tribunals
- ✓ Job evaluations (up to two non-teaching roles)
- ✓ Contractual employment documents, which can be signed online
- ✓ Continuous service date and prohibition checks
- ✓ Two bespoke employment contracts per year, tailored to you
- ✓ Customer Hub access for resources and proactive support
- ✓ Regular review meetings
- ✓ Additional number of agreed days for tailored support

Software access included with EPM Connect



Case management module

View and track case progress, with full audit trail for transparency



Employees module

Centralised employee data, with individual and bulk action capability



Task management module

Automated and tailored tasks by identifying bottlenecks and trends



Reporting

Visual overviews of key metrics, downloadable data tables and summaries, plus bespoke reporting





EPM Connect



Smarter HR & Payroll, all in one place

Book a demo!

EPM Connect brings together an intuitive HR Information System and a streamlined, transparent payroll platform, enhanced by expert guidance from our specialist education team.

It streamlines your HR and payroll processes, gives you real-time insights, and adapts as your organisation grows - all backed by people who understand education inside out. You stay in control, flexing modules and support as your needs change, and using clear, actionable insight to drive confident, informed decisions.

With a modular design, integrated payroll, and on-screen "Show Me How To" guides, EPM Connect makes managing your people easy, efficient, and fully connected.

Employee management



Centralised access to staff records and documents across a single school or entire trust with built-in checks to maintain accuracy

Absence management



Optional self-service reduces admin, while bespoke triggers and reports give you oversight to support early intervention

Case management



Secure management of employee casework across schools and trusts, with configurable permissions and audit trails to navigate progress

Task management



Auto-generated tasks across modules to keep teams on track, with the flexibility to create and assign manual tasks for additional actions

Recruitment



Reduced admin and increased transparency throughout the process, with integration of hires into the employee module

Single Central Record



School and trust-wide visibility of the overall SCR status, with the ability to drill down into missing checks or download detailed reports

School Workforce Census



Automatically imports real-time system data, with built-in validation to highlight incomplete fields and discrepancies

Training & CPD



Assign, track and record training across your organisation, with self-service for employees to take ownership of their development

Performance



Align processes and track progress against objectives, standards, observations and reviews

Time & Expenses



Fully integrated with payroll to reduce admin, with optional self-service for employees to submit their own claims

Report Builder



Ability to create and customise reports, from urgent one-off reports for governor or trustee meetings to reusable monthly templates

Payroll



Seamless integration ensures contract changes, absences and claims flow directly into payroll, with automatic error checks and clear reporting

Ease the pressure with flexible, HR support

HR demands can shift fast - and when something unexpected happens, schools and trusts don't always have the time, capacity, or specialist skills to handle it. Whether you're a large trust with an established HR team or a small school with one HR lead juggling everything, our flexible support helps you stay on track.

We take on the operational tasks or complex cases so you can focus on what matters most.

You choose the level of support, and we tailor it to your needs.

. Investigations . Mediation . Interim Support . Organisational Change . TUPE .

You'll get



Extra capacity when you need it

Support for busy periods, big projects, or sudden pressures



More time for priorities

We handle day-to-day tasks so you can focus on strategy



Flexible, affordable expertise

Specialist skills without the cost of additional hires



Independent advice

Fresh, impartial input for investigations, reviews, and key decisions



Explore our
brochure

Support from the whole EPM team

You're not just getting one consultant - you're backed by a team of education HR, payroll, DBS, finance, governance and MAT-growth specialists. Your dedicated consultant gets to know your organisation and acts as your critical friend, offering honest, practical advice.

And because of our strong reputation and sector expertise, we work effectively with stakeholders and unions, helping you keep communication positive and productive.

Payroll & Pensions

85k+
payslips processed
monthly!

Your dedicated payroll bureau - paying your team accurately and on time

Benefit from a dedicated team of specialists who manage your monthly payroll and pensions with accuracy, efficiency, and full compliance.

You get unlimited remote support from experts who act as an extension of your team, keeping you informed and aligned with the latest legislation.

With 70+ education-specific payroll and pensions specialists, trained through leading bodies like Chartered Institute of Payroll Professionals (CIPP) and The Payroll Centre, you can rely on consistent, accurate processing. Our BACS-approved Payroll Bureau, audited every two years, ensures payments are made securely and in line with all sector and legislative requirements. We're also CIPP Payroll Assurance Scheme (PAS) accredited, so our processes are consistently reviewed, robust, and fully compliant.

You'll also benefit from secure system access with permission levels configured to your roles and requirements - with full audit logs so you always know what's changed and when.



Effortless compliance

Monthly administration, record keeping, year-end, pension support for TPS and LGPS



Pioneers in pension partnerships

Working with 80+ funds we collaborate to automate and streamline data submission



Extensive reporting

In-depth monthly reports, plus dedicated reporting to support year-end processes and pension audits



Specialist pensions support

Essential tasks, monthly submissions to contribution band assessments & auto-enrolment monitoring



Combine your services for:

- ✓ CIPP-accredited expertise to ensure high standards and statutory compliance
- ✓ Contribution band assessments and auto-enrolment monitoring
- ✓ Secure, 24/7 cloud-based platform for payroll management, submissions, and progress tracking
- ✓ BACS payments meeting LGPS/TPS deadlines
- ✓ Seamless HR integration where updates automatically flow through to payroll - saving time and reducing errors

99%

**DBS applications
completed in
just 7 days**

Take the stress out of safeguarding with support that goes beyond box-ticking

DBS checks are essential for keeping your school safe - but they shouldn't slow you down.

We take the hassle out of the process, giving you quick, clear and worry-free support so recruitment stays on track and your team isn't overloaded.

With our simple, paperless DBS portal, you can complete pre-employment checks easily and track everything in real time. You'll get instant updates, access to prohibition and Section 128 checks for comprehensive vetting, plus downloadable invoices for full transparency.

But we don't just process forms - we oversee your applications. Our team will speak to the police or DBS if needed, advise on filtering rules, and guide you through every step. From understanding DBS regulations and interpreting advice, to specific case support, alongside queries relating to Ofsted inspections and overseas checks. And because it's a transactional service, you only pay for the checks and support you use.

You also get unlimited access to our DBS Helpline, where friendly, knowledgeable specialists answer your questions (however simple or small), explain the rules in plain English, and help you interpret results with confidence.

Our team genuinely cares about safer recruitment and getting it right. They're experienced, approachable, non-judgemental - and always ready to make DBS checks simpler, faster, and clearer.

You'll get

- ✔ Secure DBS portal with restricted school access
- ✔ Unlimited helpline support from DBS experts
- ✔ The ability to seamlessly complete pre-employment checks, including Section 128 and prohibition checks
- ✔ Real-time reports on the status of DBS applications
- ✔ Flexible reporting to assist with tracking applications and compiling your SCR



Speeds up recruitment decisions and reduces pressure on internal teams



Reporting for reassurance and transparency



System integration for easy tracking



Specialists on hand to provide practical advice for DBS and safer recruitment



Safer Recruitment Audit

Meet your safeguarding responsibilities - fully aligned with KCSIE and Ofsted

Recruiting safely isn't just a statutory obligation exercise - it's key to protecting pupils and creating a safe, supportive school environment.

But keeping up with safer recruitment rules, Ofsted expectations, and the latest safeguarding standards can be confusing. Whether you're preparing for inspection, improving your processes, or simply want reassurance, our expert consultants will guide you through a clear, thorough audit of your recruitment practices.

With extensive experience in school safeguarding and recruitment compliance - including the latest statutory requirements and best practices (cue KCSIE) - we'll spot any gaps, help you fix them quickly, and strengthen your approach so you're fully confident and inspection-ready.

What we do

Visit your School or Trust to carry out a hands-on review of your recruitment practices, including:

- ✓ a sample (or full) assessment of employee files
- ✓ your website
- ✓ your Safeguarding/Child Protection and Safer Recruitment Policy
- ✓ the Single Central Record (SCR)
- ✓ recent recruitment records and processes
- ✓ compliance checks

You'll be given clear, actionable feedback - with practical next steps to meet your safer recruitment obligations.

Strengthened safeguarding by closing gaps before they become issues

Confidence you're compliant with the latest rules and guidance

Check out our Safer Recruitment training options to help staff understand and apply recruitment processes

Better inspection readiness and reduced risk of negative Ofsted findings

Higher, more consistent recruitment standards

Lower the risk of unsafe recruitment decisions



MAT Formation, Mergers & Conversion

Planning ahead?

Take a look at our Due Diligence service

Expert project support for your academy journey and the next big step

Managing a trust project can be complex and time-consuming - but you don't have to do it alone. Our experienced team gives you the guidance, expertise and extra capacity you need to keep your project on track, avoid risk and make the most of the opportunities your project brings.



You'll get

Guidance through every stage of the process:

- ✓ Support in shaping a strong, clear application to join or grow a trust
- ✓ End-to-end project management, leading meetings and managing key relationships to achieve agreed timelines
- ✓ Identifying and tracking risks, with practical guidance on how to mitigate them
- ✓ Handling consultation and communication with parents, staff, and trade unions
- ✓ Clear guidance on contracts and SLAs, including TUPE



Flexible, skilled capacity to ease pressure on internal teams



Access to wider expertise across HR, finance, and education growth



Fresh, independent perspective to strengthen decision-making



Funding Application and Bid Writing

£2.4+ million
secured for customers in just 3 years!

Specialist support to help you secure the funding you need

Grants and funding can unlock huge opportunities for your School or Trust - but the application process is often long, competitive and complex.

We know exactly what funders look for and how to shape a strong, evidence-based bid that aligns with their priorities.

With our extensive sector experience, knowledge of LAs and DfE insight, we carry out robust research, consult with stakeholders and help you build a compelling, well-structured case for investment.



Expert guidance increases success of bid



Access to wider education specialists for added depth



Reduces pressure on internal teams



You'll get

- ✓ Expert support to craft strong, criteria-aligned applications
- ✓ Stakeholder engagement support with consultation, communication and summary reporting
- ✓ Market research knowledge, including local competition, demand and requirements
- ✓ Expert advice and guidance to ensure applications are completed in line with requirements
- ✓ Project management support to lead and manage all aspects of the project
- ✓ Act as a main point of contact with the DfE where required



Central Service Reviews

Clear, independent review to strengthen your Trust's central services

We understand that every trust needs to run efficiently, deliver value for money, and stay compliant - but as every trust is different, we tailor every review to your exact needs.

Whether you want to check how efficiently your central team is operating, understand the impact of your offer, or get an objective view on recent or upcoming changes, we're here to help you make confident, well-informed decisions.

Our experienced team takes a practical, honest look at your structures, systems, and ways of working. We review how trust and school-based business teams work together, assess staffing levels and workload, evaluate operational efficiency, and introduce (or refine) meaningful performance measures.

Working with trusts of all sizes nationwide, we use sector insight and proven best practice to give you clear, actionable recommendations. The result? Stronger central services, better support for your schools, and improved efficiency, accountability and value across your Trust.

You'll get

- ✓ Bespoke review of roles, responsibilities, policies, procedures, and systems
- ✓ Assessment of in-house capacity vs bought-in services
- ✓ Evaluation of central trust vs in-school administration activities
- ✓ Stakeholder feedback on current operations through surveys and/or interviews
- ✓ Value-for-money review of central services against the recharges made to each school, using benchmarking data, with recommendations on the fairest recharge calculation method
- ✓ Clear report for the Trust Executive with findings, good practice and actionable recommendations
- ✓ Presentation of the review to your Trust Board



Independent, expert insight with an objective evaluation



Practical recommendations that boost efficiency and value



Stronger compliance, governance, and accountability



Optimised structures and staffing aligned to Trust goals



Better use of team capacity for current needs and future growth



Confident, well-informed decision-making

Pair your review with our Due Diligence support for a complete, end-to-end picture



Due Diligence

Practical due diligence across finance, HR, and Governance

When merging, joining a trust or taking on new academies, you need a clear picture of what you're stepping into. Our team carries out thorough, independent due diligence across Finance, HR, and Governance so that you can move forward with confidence.

We review every key area, highlight potential risks and check compliance with all legal and regulatory requirements. You'll receive a concise, RAG-rated report that lays everything out clearly - giving leaders the insight they need to make smart, well-informed decisions.

Your report will help you:

- ✓ Spot key risks early across finance, HR, governance and operations
- ✓ Decide whether on-site due diligence is needed
- ✓ Give senior leaders and the Trust Board clear, evidence-based insight
- ✓ Support constructive, objective conversations and maintain positive relationships

Governance

A review of:

- Governance structure, terms of office and recruitment needs
- Committee Terms of Reference to understand delegation of responsibilities and the considerations for assimilation
- Skills audits to highlight strengths and gaps at a trust and local level
- Effectiveness of the current governance arrangements and how the Headteacher and SLT are held to account.

Finance

A review of various documents, including:

- Finance turnover statement
- Annual budget and MTFP
- Pupil numbers and future projections
- Staffing budgets aligned with the MTFP
- All current contracts and SLAs.

HR

Includes a review of:

- Current staffing structure (roles, pay, grades and contract terms)
- Any disciplinary, grievance, conduct and performance issues, and equal pay claims
- Opportunities to strengthen central services against the individual needs of the School and forecasted risks.



Occupational Health

Keeping your staff healthy, safe and supported



Natiowide coverage, trusted clinical standards, and practical OH support.

Our partnership with Everwell gives schools and trusts access to flexible, high-quality Occupational Health services delivered by one of the UK's most established providers.

With over 25 years' experience and a nationwide network serving 1,000+ clients, Everwell offers fast, professional support that helps you protect staff wellbeing and keep your organisation running smoothly.

Their accredited clinicians provide workplace, remote and face-to-face services, giving you timely, practical advice that's easy to apply in a school setting. So, whether you need a full-time comprehensive workplace-based OH service, a single sickness absence referral, or a company-wide Occupational Health Assessment service, support is tailored to each organisation's need.

Their focus is simple: supporting employee wellbeing, reducing absence, and helping staff return to work safely and effectively.

Support for your organisation



Management referrals

Independent assessments from qualified clinicians on fitness for work and reasonable adjustments to support a safe return



Pre-employment screening

Fast, confidential fit-to-work checks (online or face-to-face) to flag any recommended adjustments before new starters join



Ill-health retirement

Robust, thorough medical assessments across a range of schemes, to ensure clear and fair decisions backed by strong clinical evidence



Employee Assistance Programme

Unlock the full potential of your workforce



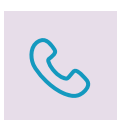
Expert counsellors, nationwide coverage, flexible packages, and high-quality support from our trusted partner.

Our EAP partner, Wellbeing Solutions, is the UK's longest-standing independent provider, supported by a nationwide network of 2,000+ accredited counsellors. No matter where your employees live or work, face-to-face support is always close by.

They offer flexible EAP packages, clear pricing, and quarterly usage reports for every customer. Every caller receives a full counselling session, backed by customer-friendly 12-month contracts.

All counsellors are accredited, experienced, and trained in a range of approaches - from CBT and solution-focused therapy to NLP and EMDR - ensuring tailored support for every individual.

With consistently high clinical standards, they deliver fast access, reliable coverage, and support your staff can truly trust.



24/7 counselling helpline



Driving EAP awareness



Counselling guaranteed



Employee portal & app



Flexible contracts



Detailed reporting

Support for your organisation

- ✓ Dedicated EAP account manager you can contact directly
- ✓ Tailored HR portal
- ✓ Quarterly reports showing your teams use
- ✓ Consultancy support from in-house clinical and employment law experts
- ✓ Clinical safeguarding and whistleblowing support
- ✓ Managed counselling referrals included



Finance Support

Specialist finance support that adapts to your School or Trust - partnered with EduFin

EduFin

. Financial due diligence . System implementation . Budget reviews . Strategic assessments .

Finance services designed exclusively for schools and trusts.

We provide flexible, education-focused finance support through our partnership with EduFin - giving you access to the right expertise exactly when you need it. Whether you're a single academy, a growing MAT, or a maintained school, we deliver a blend of strategic leadership, hands-on financial management, and project-based expertise to keep your organisation financially strong and fully compliant.

You'll have access to senior finance leaders (including interim CFOs and experienced consultants) who work closely with your CEO and leadership team to shape sustainable financial strategies, improve resource planning, and ensure alignment with DfE and ESFA expectations. Plus, we take care of essential day-to-day operations such as monthly management accounts, statutory returns, and Academy Trust Handbook compliance, so your processes remain efficient, accurate and audit-ready.

And when you're facing a specific challenge or transition, we step in with targeted project support - from financial due diligence and system implementations to budget reviews and strategic assessments.



Led by education finance specialists who deliver practical, compliant solutions



Uncover savings, fix inefficiencies, and strengthen long-term financial performance



Clear roadmaps that help your team sustain progress long after the project ends



Discovery Notes

Sometimes you need spare paper to jot down notes and contact details - especially when you're out and about and want to take your findings back to the office. So, that's exactly what this page is for!

Ask our team to share their contact details and make a note of the services you're interested in exploring more.

Contact me on

.....

.....

.....

Services I'm interested in

.....

.....

.....

.....

On-hand support, just when you need it

DBS	Interim HR Support	Funding Applications & Bid Writing	Ad Hoc HR Advice
TUPE	Strategic Finance Leadership	Safeguarding Audit	Strategic HR Support
Central Services	Retainer Days	HR Training	Operational Finance Management
Interim Finance Support	Restructure Support	MAT Formation, Mergers & Conversions	Investigation Support
Notetaking	Training, CPD & Events	Job Evaluation	Policy Review
HR Meeting Support	Due Diligence	Mediation	Senior Leadership Recruitment

Talk to our team about your bespoke service requirements



Your FREE Education Leaders' Network



**Join 1,800+
community
members**

A national network association for school and trust leaders where education voices are **amplified, best practice is **shared**, challenges are **openly discussed**, and success is **celebrated**!**

National conferences

Roundtables

nEdEx Hub

Networking

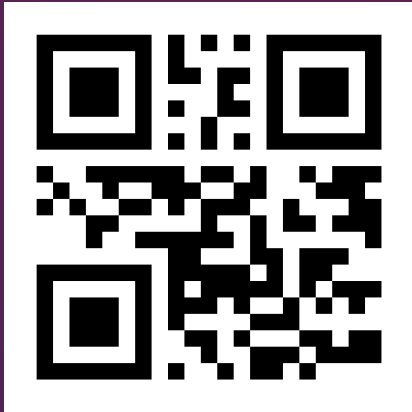
Recognition

Thought leader insights

Live webinars

powered by ep^m 

Talk to us About Your Journey With EPM



01480 431993



epm@epm.co.uk



epm.co.uk



[epm-limited](https://www.linkedin.com/company/epm-limited)

