

HR Consultancy Services for Education

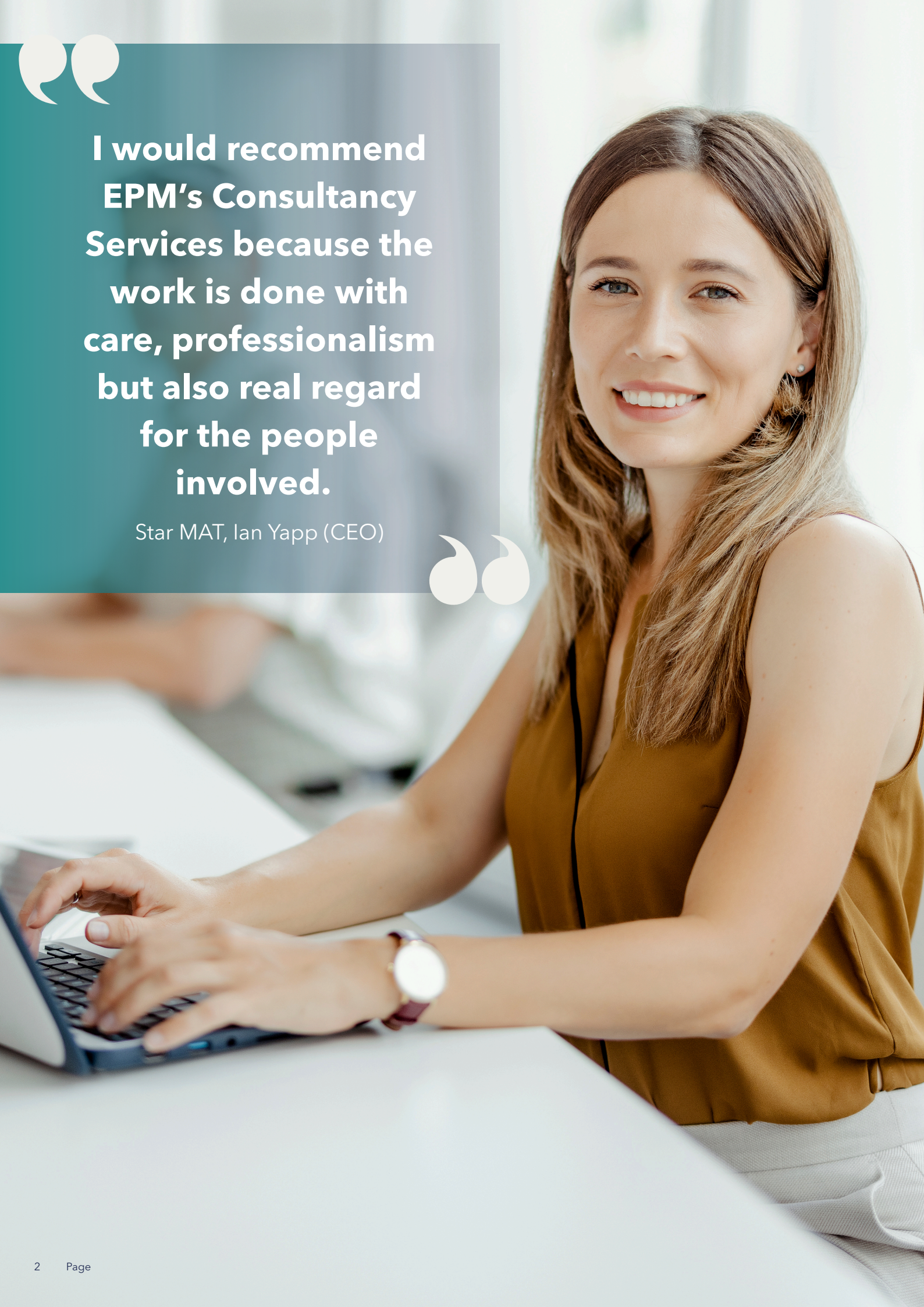
Supporting continuous improvement in schools and trusts





**I would recommend
EPM's Consultancy
Services because the
work is done with
care, professionalism
but also real regard
for the people
involved.**

Star MAT, Ian Yapp (CEO)



Contents

Why Choose EPM for HR Consultancy	4
HR Meeting Support	5
Notetaking	6
Investigation Management	7
Mediation	8
Job Evaluation	9
CEO/Headship & Senior Leader Recruitment Support	10-11
TUPE	12
Organisational Change and Restructure Support	13
Harmonisation	14-15
Ad Hoc HR Advice	16
Policy Review	17
Interim HR Support	18-19
Retainer Days	20
Insights Discovery	21
HR Audit	22
Education Leaders Toolkit	23

Why Choose EPM for HR Consultancy?

Ease the pressure and keep things moving with our flexible, expert HR support

HR needs can change quickly, so striking a balance between full-time expertise and flexible outsourced support is crucial.

An unexpected event can strain existing resources and demand immediate expertise and capacity that's not always available internally, or even affordable within a full-time role.

You might be an established trust with a large, experienced HR team, or a smaller school with a single HR Manager responsible for everything. Wherever you sit on the scale, our dynamic support allows you to focus on what matters most.

Concentrate on the areas that make the best use of your skills while we handle the operational tasks or more complex matters.



Tailored HR solutions built around you



Added capacity: Need extra support during peak times or with a strategic project? We'll build solutions for you.



Operational freedom: Boggled down by the day-to-day tasks? We free up your time to focus on the bigger priorities and projects.



Flexible and affordable: Our service flexes with your needs, to bring specific skills without the cost of additional hires.



Impartial advice: Fresh perspectives matter - from independent investigators to external reviews of a plan, project, or document.

Our team

When you work with EPM, you're not just getting one person - you're tapping into a team of experienced professionals.

You'll be matched with a dedicated consultant who gets to know your organisation, and brings expertise in education, HR best practice, and employment law.

Backed by specialists in finance, payroll, MAT development, leadership, and governance, we have a carefully selected network of Associates to support a wider range of education challenges.

As your critical friend, we provide you with invaluable advice - holding honesty and professionalism at our core. And, our strong reputation, enables positive collaboration with stakeholders and unions so you benefit from smooth and effective communication.

HR Meeting Support

Clear, confident guidance for well-documented, unbiased outcomes

HR meetings can be challenging, especially when dealing with complex, sensitive, contentious and high-risk cases, where trade unions attend formal meetings to represent their members. Our support allows you to focus on the conversation, knowing the process is sound and you're backed by people who understand the bigger picture.

Whether you're leading an attendance meeting or managing a formal hearing, our consultants are there with you - in person or remotely - to provide real-time advice, answer HR-related queries, and ensure your policies, procedures and practices are followed before, during, and after your meetings.

What we do

- ✓ Review documents and identify next steps
- ✓ Support the drafting of questions for investigation meetings
- ✓ Draft outcome letters for School/Trust approval
- ✓ Draft reports for hearings, after investigations
- ✓ Attend the HR meeting to provide professional HR support for the Case Manager
- ✓ Ensure the meeting aligns with:
 - employment law
 - best practices
 - your School's policies, procedures, and practice
- ✓ Keep the meeting focused and compliant with legal, statutory and procedural requirements
- ✓ Advise attendees of their roles and parameters



Benefits

Meetings are more effective with HR support

Leaders feel supported, confident, and less anxious

Added expertise streamlines resolution for clearer & faster outcomes

Employees are treated fairly and impartially by an external expert

Expertise in employment law and employment tribunals, provides legally sound foundations for action

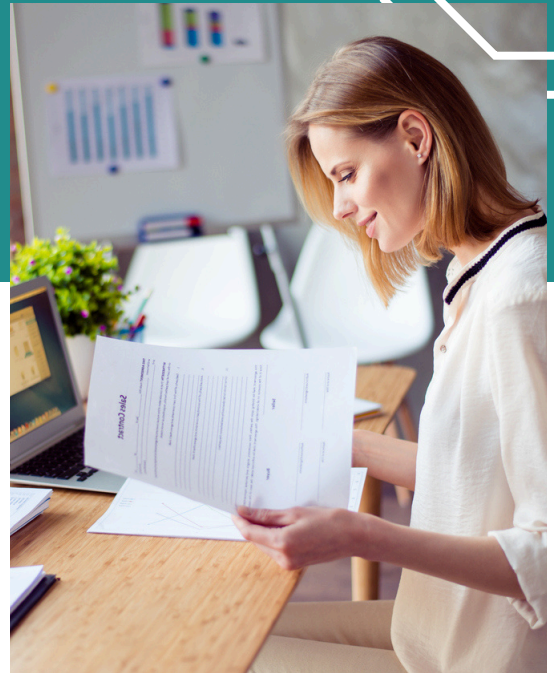
Notetaking

Support transparency with clear and accurate meeting records

Detailed meeting records can be crucial down the line, or in an employment tribunal. And, sometimes, it's not appropriate or fair to ask a member of staff to take notes.

Our service provides a discreet, reliable solution that captures the tone, essential points, and outcomes of your meeting with clarity and precision, no matter if it's a formal hearing, investigation, or governors meeting.

With us handling the notetaking, your team can focus on the conversation without distraction, confident that nothing important will be missed.



**Need extra support?
Our Meeting Support
service gives you the
confidence you need**

What we do



Attend meetings on-site, at requested locations, or remotely



Capture all pertinent points to provide clear, structured notes



Agree the notes with the meeting lead before they're shared

Benefits



Meeting notes are clear, accurate and well-organised



An impartial notetaker avoids the risk of bias



Employees trust the meeting is being recorded fairly

Investigation Management

Over 200 trusted independent investigations per year



When sensitive issues arise – from grievances and complaints to complex safeguarding or whistleblowing cases – our expert consultants provide a confidential, impartial investigation service that's fair, thorough, and follows ACAS guidance.

We understand that no two investigations are the same.

From low-level concerns to multi-staff and high-risk cases, we get to know the scope and nuances of each situation. We work with the Commissioning Officer to align with your policies and procedures, ensuring the process is compliant, respectful, and minimises disruption.

What we do

Appoint an experienced Investigating Officer, who will:

- ✓ Review documentation
- ✓ Draft investigation plan
- ✓ Arrange on-site/remote interviews with witnesses and subject
- ✓ Conduct interview preparation
- ✓ Follow up enquiries
- ✓ Produce a formal report with supporting documentation

Benefits



Objectivity and a rigorous external investigation



Clearer & quicker outcomes



All parties feel the process is handled fairly



Reduces internal pressure and frees up teams



Expertise in TRA hearings, employment law, and employment tribunals, provides legally sound foundations for action

Mediation

Restore workplace harmony, guided by trained and accredited mediators

Want to
strengthen team
dynamics?
Explore our
Insights Discovery
Service

Workplace conflicts between co-workers, departments, or line managers and their direct reports can escalate quickly.

While formal grievance procedures have their place, they don't always lead to lasting resolutions – especially in cases involving inappropriate behaviours from multiple employees. Mediation may instead form part of an informal resolution process.

Our qualified and experienced mediators are committed to supporting your schools or trusts in moving past disputes, improving communication and restoring productive working relationships.



What we do

- ✓ Provide an impartial mediator who manages the process
- ✓ Meet with each employee to understand their perspective and clarify what they want from the process
- ✓ Arrange a meeting with all parties, with the aim of reaching an agreement/resolution

Benefits



Avoids lengthy grievance cases and legal costs



Reduces risk of internal conflict and personal strain



Impartial mediator ensures unbiased discussions



Gives confidence to parties involved, for an effective and open discussion



Reduces stress on internal employees who may have been expected to conduct mediation



Encourages agreed resolutions to rebuild healthy working relationships

Job Evaluation

Unbiased support to help grade roles consistently and confidently

We work with schools and trusts across the country to carry out impartial Job Description Evaluations that are clear, consistent, and aligned with your pay structure.

Whether you need a single role assessed or a review of your entire library, our experienced HR consultants ensure each role is carefully reviewed, moderated by our panel, and mapped against your preferred pay scale (we use a range of recognised schemes - including NJC, endorsed by trade unions).

If you're creating a new role, we'll also help you capture key responsibilities and benchmark the post either within your structure or against similar roles in the area.

What we do

- ✓ Review job descriptions and person specifications to clarify responsibilities
- ✓ Evaluate and moderate roles using your chosen scheme
- ✓ Provide a summary report of the evaluation outcome



**Need a full pay
review or
harmonisation?
We've got a
service for that!**

Benefits



Impartial external assessment of role grading



Access to independent advice from education HR specialists



Minimises risk of legal proceedings

CEO/Headship & Senior Leader Recruitment Support

Flexible recruitment support when you need it most

Finding the right senior leaders is vital in shaping the future success of your School or Trust.

With extensive experience in education recruitment, we support the appointment of senior leaders across teaching and supporting positions including Headteachers, Executive Headteachers, CEOs, CFOs and Directors - helping you attract and select the best candidate for your needs.

From guidance on defining the role, managing appropriate search and advertising activities, and organising selection, we provide expert assistance at every step.

Stage 1: Needs analysis

We help define who you're looking for by supporting your governors/trustees and directors in assessing organisational needs, reviewing or establishing job descriptions and person specifications, and setting competitive salaries.

Stage 2: Advertising

We advise where to advertise and help draft your advert to effectively sell your organisation to prospective candidates and provide all information to apply for the role.

Stage 3: Shortlisting

We can assist with the assessment process and support drafting a selection matrix based on the person specification, collating and circulating application forms, providing template letters, and managing reference requests.

Stage 4: Assessment days and selection interviews

We guide you in designing and delivering effective tasks, structuring interviews and assessment days, and managing the administration and process smoothly.

Stage 5: Final selection

We help you make informed, compliant hiring decisions and avoid potential claims from unsuccessful candidates.

Benefits



Creative solutions



Objectivity for effective
and fair selection



External, independent
expertise



Compliant process that
meets best practice
standards



Reduced pressure on
internal teams and those
expected to lead the process

**Don't be without
the support you need,
our **Interim HR Support**
can offer the leadership
capacity you need when
you're waiting to
fill a role**



TUPE

Clear, expert support through every step of the process
- before, during, and after the transfer of employees

Whether you're welcoming a school into your Trust, merging with another Trust, or transferring a service like catering or cleaning, the employer is responsible for ensuring compliance of statutory TUPE regulations. From pre-transfer checks to post-transfer queries, our support ensures everything runs smoothly.

We help you understand which employees are transferring, what terms and conditions apply, their pay structures, allowances, and any outstanding or expected claims, so that changes or relevant measures are known before the transfer.

With a focus on clear communication, we'll handle the process with professionalism and empathy (all the way through to onboarding).



What we do

- ✓ Thorough pre-transfer due diligence
- ✓ Identify transferring employees to clarify their T&Cs
- ✓ Offer ongoing advice & guidance
- ✓ Provide TUPE FAQs on request and handle post-transfer queries
- ✓ Consult and negotiate with trade unions
- ✓ Engage with staff and hold employee briefings
- ✓ Manage transfer-related restructures
- ✓ Provide a matrix to compare incoming contractual T&Cs with Trust standards

Benefits



Accelerated process



Frees up leadership time to increase capacity and ease workload



Reduces risk of unexpected liabilities or non-compliance



Smooth transition with minimal disruption

Thinking about job descriptions?
Our Job Evaluation Service can help

Organisational Change and Restructure Support

Smart, strategic restructures to meet today's challenges and prepare for tomorrow

We're here to help you make confident, people-centred decisions. Whether you're responding to budget pressures, rethinking your leadership structure, or planning for long-term sustainability.

Our expert consultants have hands-on experience in managing change across schools and trusts, taking account of changing demands, new technology, and the benefits of in-house verses outsourced services. We'll get to understand your current structure, challenges, reasoning, and aspirations. Together, we'll design options that are financially viable, legally compliant, and aligned with your educational goals, all while minimising disruption to your staff, pupils and wider school community.

What we do

- ✓ Planning meetings to understand goals, current structure, and challenges
- ✓ Explore local, operational and school-wide strategic and operational management arrangements, alongside changing demands, workforce plans, succession strategy, and improvement plans
- ✓ Consider risks and propose alternative structures compliant with local/ operational/ financial constraints
- ✓ Develop project timelines
- ✓ Draft job descriptions, person specifications and pay structures, as appropriate
- ✓ Advice and support with stakeholder reports / presentations (e.g. Board/trade unions)
- ✓ Support formal consultation processes

Benefits



Experienced team providing bespoke advice and support



Cross-functional expertise to look at proposals from all angles - finance, governance, education strategy and support



Impartial independent advice



Ease workload pressure in your School/Trust



External assessment of risks, implications, and options, presenting clear guidance, advice and recommendations for each proposed organisational change and restructure

We also provide a Settlement Agreement Drafting Service and TUPE support

Harmonisation

From pay and policies alignment to shaping job structures, manage change to achieve your desired outcomes



Following a school academising to join a trust or a trust merger, you may need to consult and negotiate with employees before imposing changes to terms and conditions. We'll guide you through the process to review differences/alignments, risks and implications, plus help you explore your options to plan a way forward that's fair, compliant, and aligned with your long-term goals.

From job descriptions and pay comparisons to annual leave entitlements, term-time formulas, and TLR payments - we help you engage employees in the process, ensuring they understand the changes and benefits available to them.

What we do

Discovery meeting to agree project scope, priorities and reporting needs

Detailed desktop review of relevant documents and/or pay, highlighting differences and alignments across the Trust

Present an actionable report outlining the findings, risks, opportunities and recommendations

Agree the next steps and build a project plan for stage 2 based on your accepted recommendations, this could include:

Job Evaluation Harmonisation

Conduct a job evaluation and review any proposed changes for legal and practical impact. This may include:

- ✓ Draft new job descriptions and person specifications for the roles identified
- ✓ Provide a report with the outcome of the job evaluations and final copies of Job Descriptions and Person Specifications for approval by the Trust
- ✓ Analyse the impact of moving staff to the agreed roles/pay scales
- ✓ Provide/review a consultation paper/presentation to outline the proposed changes
- ✓ Provide templates letters for staff and attend consultations with them

Additional harmonisation priorities may include:

- ✓ Pay structure
- ✓ Pay policy, pay scale, allowances and entitlements
- ✓ Leadership structure
- ✓ Holiday and other entitlements



Benefits

Ease pressure on internal staff workload, allowing them to focus on core responsibilities

Independent assessment of risk and legal position ensures informed decision-making, compliance with statutory duties, and protection of the School's long-term interests

Collaborative, goal-focused approach helps you achieve your strategic objectives efficiently and effectively, while building internal capacity

Need help to keep things ticking over?
Get tailored support with our Retainer Days

Ad Hoc HR Advice

The advice you need, when you need it

Even the most capable teams come across situations that need an expert ear or fresh perspective. Our consultants can support you through everything, from routine employee relations and casework cases to more complex challenges like restructures, investigations, harmonisation, dispute resolution, pay and recruitment.

We understand education inside out – bringing deep sector knowledge together with practical HR expertise, employment law know-how, and statutory frameworks. Whether you need a quick steer, a critical friend, or full support through a high-risk situation, our team is here to complement your in-house team when it matters.

You set the direction, we add the capacity, capability and clarity, exactly when you need it.



What we do

- ✓ Listen and understand your needs
- ✓ Tailor support to your risk appetite, policies, and culture
- ✓ Offer clear, practical advice, guidance and support across all areas of HR and people management
- ✓ Help you make informed choices with confidence
- ✓ Work proactively with you, to improve your people management

Benefits



On-demand HR support whenever you need it



Unbiased, independent advice



Achieve the best possible outcomes



Increase confidence in handling complex issues



Stay compliant and up to date with the latest legislation



Reduce workload pressures when needed

Need year-round support?

Ask about our annual HR Advisory Service

Policy Review

Compliant, up to date, and aligned with your needs and values

Outdated or unclear policies can lead to confusion, compliance risks, and unnecessary tension. We'll help you review, revise and create policies that don't just tick boxes, but actually support the way you want to work.

Whether you're refreshing a few key documents or reviewing your entire policy suite, we'll work closely with you to ensure your policies are clear, relevant, and fully aligned with current legislation and the needs of your School or Trust.



What we do

- ✓ Get to understand your culture, challenges, and goals
- ✓ Audit and review current policies and procedures - giving practical recommendations based on legislation and best practice
- ✓ Help the implementation of your suite of policies if needed
- ✓ Support the creation of new policies based on our extensive experience
- ✓ Ensure the language and approach aligns with the culture and values of your School/Trust

Benefits



Stay compliant with current legislation and meet statutory requirements



Reassurance that your policies align with recent changes (useful if you've changed strategic direction or restructured)

Need more admin support?

Ask about our HR Essentials Service to lighten the load

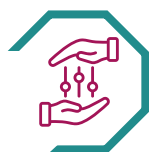
Interim HR Support

Extra expert support to keep things running smoothly

Facing a busy term? Covering a vacancy or unexpected absence? Managing a project that needs more capacity? We're here to help your School or Trust continue to deliver - even through periods of change or transition.

Get flexible, added capacity, without the pressure of a permanent hire. From HR admin to senior leadership cover (including HR Director), our experienced consultants step in quickly and confidently to provide tailored, on-demand support that fits your needs.

Key features of our interim HR support include:



Tailored support

Whether you need one day or five days of support, we provide exactly what you need - no matter if it's increasing HR capacity or filling a leadership gap.



Seamless integration

Our consultants act as an extension of your team, ensuring smooth collaboration and that all HR functions are managed according to your School's policies and processes.



Direct access

You'll have direct, mobile access to your dedicated consultant for ongoing support, providing you with the flexibility and responsive communication needed to keep things running smoothly.



Regular updates

We invite you to weekly meetings, where we'll review progress, address concerns, and ensure that tasks are completed on time and in line with agreed objectives.

What we do:

- ✓ Provide support at a variety of levels
- ✓ Flex and tailor the support to match your workload and need
- ✓ Offer direct mobile access to your allocated consultant
- ✓ Weekly update meetings to ensure allocated work is on-track
- ✓ Complete activities in line with the organisation's policies and agreed processes

Benefits



Experienced, qualified support



Flexible capacity to fill gaps or respond to peaks



Less pressure on your internal team, acting as a seamless extension of your own



A fresh pair of eyes to bring perspective



Support from the wider EPM team - bringing expertise in payroll, governance, and more



Need regular support?

**We provide
contracted HR support
for both HR Admin
and Advisory**

Retainer Days

Budget for the additional HR support you need at a time that suits

Giving you the flexibility of expert HR support, with the confidence of knowing it's already budgeted for. Whether you're planning a major project, navigating unexpected challenges, or want to boost your internal capacity, our retainer option ensures you're always covered.



You choose how and when to use your days – and if your priorities shift, we'll change with you. It's a cost-effective, adaptable way to make sure you have trusted support on hand.

What we do

- Provide support at a variety of levels in a range of areas
- Tailor support, based on your needs
- Complete all activities in line with the organisation's policies and agreed processes
- Weekly update meetings to ensure allocated work is on-track

Benefits

- ✓ Experienced, qualified support
- ✓ Flexibility to use your days as and when needed
- ✓ An extension of your existing team, offering a fresh pair of eyes
- ✓ Support from the wider EPM team
- ✓ Reduces pressure on internal staff
- ✓ Discounted rates based on the number of days you buy

Pre-purchase a set number of days at a discounted rate

Insights Discovery

Strengthen relationships, boost team effectiveness, and make smarter recruitment decisions

Every team is made up of individuals with different ways of working, thinking, and communicating. With the support of our accredited practitioner, Insights Discovery helps your staff understand these differences – and harness them for stronger collaboration and performance.

Based on the psychological work of Dr Carl Jung and validated by the British Psychology Society, this powerful tool gives each person a unique profile that explores their style, strengths, challenges, and how they can thrive in a team.

Whether you're building a new team, improving communication, or looking to recruit with more clarity, Insights helps unlock a deeper understanding of how people work – and work together.



What we do

- ✓ Overseen by an accredited practitioner, create individual profiles based on delegate evaluations
- ✓ Run an immersive and interactive workshop, where we'll:
 - explore the core theories behind Insights
 - analyse individual personality profiles
 - examine personal styles and team composition
 - engage in meaningful group discussions
 - facilitate interactive and fun team-building games.

Benefits



Profiles created and workshop undertaken by accredited practitioner



Improves individual and team effectiveness



Improved self-awareness and stronger team cohesion



Effective collaboration and communication to develop a common language



Supports in resolving conflict, team building and recruitment



It's fun! People enjoy the journey

HR Audit

Peace of mind to stay compliant, improve processes, and support your people

It's easy for policies and processes to fall behind. By reviewing your HR framework, you can strengthen people management, support staff wellbeing, and build a more resilient workforce.

Choose the areas relevant to your needs and we'll carry out a focused review offering clear, actionable guidance based on compliance and recommendations for improvement.

What we do:

Safer Recruitment and HR file audit

Audit personnel files, website, Safer Recruitment Policy, SCR and other documents to ensure full compliance with safer recruitment and data retention requirements.

Absence, capability and conduct

Review absence management processes and data, as well as conduct and capability, and how HR provides effective support for line managers.

Policies and procedures

Comprehensive review of your policies and procedures.

Recruitment

Assess starter and leaver processes, onboarding experience, and recruitment materials.

HR provision

Assess your provision, including operational support, staffing structure and L&D offering.

Strategic support for the trust board

Review provision of strategic HR support for the SLT/Board

Support staff pay and performance management

Review current pay structure, management of incremental rises and performance-related pay, annual leave entitlements, salary calculations and appraisal process.

Benefits



Improved HR processes and compliance



Risk reduction



Impartial, expert advice



Flexibility



Commitment to fair, transparent and well-managed HR practices, supporting morale and trust

Education Leaders Toolkit

Tailored training for HR and people management skills that fits your role, your goals – and your School



Developed with a deep understanding of the unique challenges faced by education leaders, our CPD-accredited training equips you with the people management skills to confidently manage your team.

With 10 flexible, interactive modules to complete over 12 months (or one academic year), you'll build the confidence, knowledge, and tools to handle real-life HR scenarios with clarity and care.

Each module takes just 1-1.5 hours and includes a short test of understanding at the end. While all 10 modules must be passed to get the toolkit certificate, each module is designed as a standalone course, ensuring you can focus on the areas most relevant to your role and your School/Trust.

Your 6 core modules:



Introduction to HR



Disciplinary and Grievance Procedures



Effective Absence Management



Managing Challenging Employees



Teaching & Support Staff Terms of Employment



Performance Management & Appraisal

Pick 4 additional modules to suit you:

- Recruitment & Selection
- Flexible Working and Leave of Absence
- Statutory Family Leave
- Bullying & Harassment in the Workplace
- Finance for Middle Leaders
- Managing Under Performance
- Whistleblowing Disclosures
- Conducting Workplace Investigations
- Antibribery Policies
- Absence Management Masterclass
- Introduction to Safeguarding
- Change Management

Each module is available for individual purchase. Discounts are available for full toolkit purchases, or a bespoke selection of 10 modules.



01480 431993



epm@epm.co.uk



epm.co.uk



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

