



**Compass**

**Service Definition**

2026/2027

# Overview

Compass is a fully featured, cloud-based Management Information System (MIS) used globally by over 5,000 schools every day to support the efficient delivery of education. The service provides a comprehensive suite of tools designed to streamline school administration and improve day-to-day operations.

Compass offers more than 40 integrated modules covering core areas of school management, including pupil and staff records, reporting, statutory returns, parental engagement, payments, clubs, trips, and communications. Schools can configure the service to meet their specific needs, enabling administrators, teachers, parents, and carers to access the tools and information relevant to them.

By centralising administrative processes into a single platform, Compass helps schools reduce the time spent on administration, improve data accuracy, and support stronger engagement with parents and carers. This allows staff to focus more of their time on teaching and learning.

In addition to its software capabilities, Compass integrates with optional hardware solutions for cashless catering and visitor sign-in. These hardware services connect directly with the core MIS, providing a unified operational experience and reducing the need for separate systems.

The Compass platform is hosted within the European Economic Area (EEA) and is accessible through any modern web browser with an internet connection. Native applications are also available for iOS and Android devices, supporting secure access across desktop and mobile environments for staff, parents and (secondary-aged) pupils.

# Section 1: Service Highlights

## **Single, integrated MIS platform**

Compass replaces the need for multiple, disconnected systems by providing a single cloud-based MIS. All modules share a common data model, allowing school information to be managed consistently and accessed securely across the platform.

## **Centralised engagement for parents and carers**

The Compass Parent Portal provides parents and carers with a single, secure point of access to school communications, payments, trips, attendance, and academic information, supporting improved engagement and transparency.

## **Student wellbeing monitoring and reporting**

Compass includes configurable tools for recording and monitoring student behaviour, wellbeing, and health information. Schools can tailor these tools to align with their policies and reporting requirements.

## **Anytime, anywhere access**

As a cloud-hosted service, Compass is accessible through all modern web browsers. Native iOS and Android applications provide secure, real-time access to school data across desktop and mobile devices.

## **Optional integrated hardware solutions**

Compass supports optional hardware for services such as cashless catering and visitor sign-in. These solutions integrate directly with the core MIS, reducing the need for third-party systems and simplifying operational management.

## **Training and support included**

Compass provides onboarding assistance, documentation, and ongoing support throughout the contract term. Support is available via the Compass service desk between 8:00am and 5:00pm, Monday to Friday (excluding UK bank holidays).

# Features & Functionality

## Compass Compliance

Compass Compliance includes the core Compass modules required by schools to support statutory, safeguarding, and operational compliance. The modules provided vary by school phase to reflect differing regulatory and operational requirements.

**For primary schools,** Compass Compliance includes the following modules:

Attendance; Student, Staff and Parent Profiles; Admissions; People Management (including reporting); Chronicle (behaviour, safeguarding and wellbeing); Statutory Returns; Communications (email, push notifications and SMS); Calendar; Assessments; School Reports; Analytics; School Resources; School Documentation; Room Changes Audit; Daily Organisation (cover); Schedule Builder; Staff Mobile App; Parent Portal and Mobile App; Student Portal and Mobile App; News Feed (basic); and Comment Bank Editor.

**For secondary schools,** Compass Compliance includes all modules available at primary level, plus additional functionality to support curriculum delivery and assessment at secondary and post-16 level. These additional modules include:

Course Manager; Post-16 Information; and Exams (external and internal).

All modules are fully integrated within the Compass MIS, sharing a common data model and access controls. This enables schools to manage compliance activities efficiently, maintain accurate records, and provide evidence when required for inspections or audits, without the need for multiple standalone systems.

# Features & Functionality

## Compass Classic

Compass Classic provides all functionality included within Compass Compliance, along with additional modules that extend the platform's capabilities in the areas of payments, communications, engagement, and operational management.

For both primary and secondary schools, Compass Classic includes **everything available in Compass Compliance**, plus the following additional modules:

Payments; Clubs (including free and paid clubs and wraparound care); Events; Online Meal Orders (canteen); School Shop; PulseUser; Communications (Compass Connect); News Feed (enhanced); Chronicle Digest; Insights and Surveys; Parent Conferences; Resource Bookings; and Group Activities.

These additional modules enable schools to manage financial transactions, enrichment activities, events, and communications within the same integrated MIS environment. Enhanced engagement and insight tools support improved communication with parents, carers, staff, and students, while operational features such as resource bookings and group activities help streamline day-to-day school administration.

All Compass Classic modules are fully integrated with the core Compass MIS, sharing a common data model, permissions framework, and audit controls. This allows schools to extend functionality without introducing separate systems, reducing administrative overhead and supporting consistent data management across the platform.

# Features & Functionality

## Compass Complete

Compass Complete is the most comprehensive Compass package available for both primary and secondary schools. It includes all functionality provided within **Compass Compliance** and **Compass Classic**, along with additional modules designed to support advanced administration, staff development, student support, and operational oversight.

For primary and secondary schools, Compass Complete includes **everything available in Compass Compliance and Compass Classic**, plus the following additional modules:

Seating Plans; PulseAdmin; Class Builder; Body Maps; Interventions; Minutes; Time Card; Issue Tracker; Professional Development; and Continuum.

These additional modules extend the Compass MIS by enabling schools to manage classroom organisation, pastoral interventions, safeguarding records, staff time and development, and internal governance processes within a single integrated platform. Tools such as Interventions, Body Maps, and Continuum support structured monitoring and review of student support activity, while administrative modules such as Time Card, Minutes, and Issue Tracker help streamline internal processes and accountability.

All Compass Complete modules are fully integrated with the core Compass MIS, using a shared data model, role-based permissions, and audit controls. This ensures consistency of data, secure access, and efficient management without the need for additional standalone systems.

# Compass MIS Package Details

## Package Comparison

| Module                                          | Compass Compliance | Compass Classic | Compass Complete |
|-------------------------------------------------|--------------------|-----------------|------------------|
| Attendance                                      | ✓                  | ✓               | ✓                |
| Student, Staff & Parent Profiles                | ✓                  | ✓               | ✓                |
| Admissions                                      | ✓                  | ✓               | ✓                |
| People Management & Reporting                   | ✓                  | ✓               | ✓                |
| Chronicle (Behaviour, Safeguarding & Wellbeing) | ✓                  | ✓               | ✓                |
| Statutory Returns                               | ✓                  | ✓               | ✓                |
| Communications (Email, Push, SMS)               | ✓                  | ✓               | ✓                |
| Calendar                                        | ✓                  | ✓               | ✓                |
| Assessments & School Reports                    | ✓                  | ✓               | ✓                |
| Analytics & Reporting                           | ✓                  | ✓               | ✓                |
| School Resources & Documentation                | ✓                  | ✓               | ✓                |
| Daily Organisation (Cover)                      | ✓                  | ✓               | ✓                |
| Schedule Builder                                | ✓                  | ✓               | ✓                |
| Staff, Parent & Student Portals (Web & Mobile)  | ✓                  | ✓               | ✓                |
| Course Manager (Secondary)                      | ✓                  | ✓               | ✓                |
| Post-16 Information (Secondary)                 | ✓                  | ✓               | ✓                |
| Exams (Internal & External)                     | ✓                  | ✓               | ✓                |
| Payments & School Shop                          |                    | ✓               | ✓                |
| Clubs & Wraparound Care                         |                    | ✓               | ✓                |
| Events & Parent Conferences                     |                    | ✓               | ✓                |
| Online Meal Orders                              |                    | ✓               | ✓                |
| Enhanced Communications (Compass Connect)       |                    | ✓               | ✓                |
| Insights, Surveys & Chronicle Digest            |                    | ✓               | ✓                |
| Resource Bookings & Group Activities            |                    | ✓               | ✓                |
| PulseUser                                       |                    | ✓               | ✓                |
| Seating Plans & Class Builder                   |                    |                 | ✓                |
| Interventions & Continuum                       |                    |                 | ✓                |
| Body Maps                                       |                    |                 | ✓                |
| Time Card & Professional Development            |                    |                 | ✓                |
| Minutes & Issue Tracker                         |                    |                 | ✓                |
| PulseAdmin                                      |                    |                 | ✓                |

# Compass MIS Package Details

## Module Descriptions

| Module                                          | Description                                                           |
|-------------------------------------------------|-----------------------------------------------------------------------|
| Attendance                                      | Mark digital registers and manage school attendance.                  |
| Student, Staff & Parent Profiles                | Maintain central records for students, staff and parents.             |
| Admissions                                      | Manage school admissions and student transfers.                       |
| People Management & Reporting                   | Manage staff records, roles and people-related reporting.             |
| Chronicle (Behaviour, Safeguarding & Wellbeing) | Record and manage behaviour, safeguarding and wellbeing.              |
| Statutory Returns                               | Complete statutory and census returns with built-in validation.       |
| Communications (Email, Push Notifications, SMS) | Communicate with the entire school community easily.                  |
| Calendar                                        | Schedule and manage key school dates and events.                      |
| Assessments & School Reports                    | Track assessment data and produce termly and annual school reports.   |
| Analytics & Reporting                           | Analyse and report on key school data and performance indicators.     |
| School Resources & Documentation                | Store, manage and access school documents and learning resources.     |
| Daily Organisation (Cover)                      | Manage staff availability, cover and location changes.                |
| Schedule Builder                                | Build and manage class and staff timetables.                          |
| Staff, Parent & Student Portals (Web & Mobile)  | Provide secure web and mobile access for staff, parents and students. |
| Course Manager (Secondary)                      | Manage QANs, work placements and course transitions.                  |
| Post-16 Information (Secondary)                 | Record and track post-16 destinations and pathways.                   |
| Exams (Internal & External)                     | Manage internal and external examinations, including seating plans.   |
| Payments & School Shop                          | Manage payments, billing and school shop purchases.                   |
| Clubs & Wraparound Care                         | Create and manage clubs, activities and wraparound provision.         |
| Events & Parent Conferences                     | Manage school events, trips and parent conference bookings.           |
| Online Meal Orders                              | Manage school meals and cashless catering payments.                   |
| Enhanced Communications (Compass Connect)       | Send targeted communications to defined audiences.                    |
| Insights, Surveys & Chronicle Digest            | Gather feedback, run surveys and monitor wellbeing insights.          |
| Resource Bookings & Group Activities            | Manage bookings for rooms, equipment and group activities.            |
| PulseUser                                       | Provide user-level access to insights and key metrics.                |
| Seating Plans & Class Builder                   | Create class groupings and exam seating plans.                        |
| Interventions & Continuum                       | Set up and track student interventions and formative progress.        |
| Body Maps                                       | Record safeguarding and wellbeing incidents using visual mapping.     |
| Time Card & Professional Development            | Track staff attendance and manage professional development.           |
| Minutes & Issue Tracker                         | Record meeting minutes and track issues or actions.                   |
| PulseAdmin                                      | Access admin-level analytics and aggregated reporting.                |

# Section 2: Making the move to Compass

## Purchasing Compass

Purchasing Compass is a straightforward process designed to support schools and trusts in selecting and implementing a Management Information System (MIS) that meets their operational, statutory, and strategic requirements. The process is managed by Compass's experienced sales team, who work collaboratively with each organisation to understand current challenges, future needs, and any specific operational or governance requirements.

During the procurement process, the Compass team will discuss the appropriate service package, modules, and deployment options to ensure the service aligns with the school's size, phase, and objectives. This includes consideration of scalability, onboarding requirements, training, and ongoing support. Where required, Compass can provide a personalised demonstration of the platform, allowing stakeholders to review relevant functionality and understand how Compass can be configured to meet their needs.

Compass supports purchasing through established public sector procurement routes, including G-Cloud, enabling compliant and transparent procurement for schools and trusts.

Schools and trusts can contact the Compass team to discuss requirements or arrange a tailored demonstration using the details below:

**Telephone:** +44 114 697 7000

**Email:** [enquiries@compass.education](mailto:enquiries@compass.education)

**Website:** [www.compass.education/uk](http://www.compass.education/uk)

# Migration, Training and Support

## Migration

The Compass onboarding and training approach is designed to support successful implementation, adoption, and long-term use of the Compass MIS. Whether a school is migrating from an existing MIS, implementing an MIS for the first time, or expanding use of the platform, Compass provides structured support throughout the customer lifecycle.

Each onboarding is led by a dedicated Onboarding Consultant, who works closely with the school's key stakeholders to agree a detailed project plan and manage delivery from implementation through to go-live. The consultant oversees timelines, coordinates activity across Compass teams, and ensures the school is supported at each stage of the process.

Compass provides a comprehensive data migration service, including direct data extraction from the incumbent MIS. The onboarding team works collaboratively with the school to confirm which data sets are required and provides guidance throughout the migration process, including validation and data quality checks, to ensure a smooth transition with minimal disruption.

# Migration, Training and Support

## Training

Training is delivered through a flexible, blended approach tailored to the needs of the school and its staff. Compass's training team works with the school to understand individual roles, experience levels, and priorities. Training is usually delivered remotely through live webinars and pre-recorded webinars before and after go-live to support different user groups, including administrators, teaching staff, and leadership teams.

Additional training is available upon request and can be focused on specific modules or advanced functionality to ensure staff are fully confident using Compass MIS. Further learning resources are available through the Compass Knowledge Base, which includes on-demand webinars, help articles, and instructional videos to support ongoing self-sufficiency and continuous upskilling.

Following go-live, the Compass Customer Success team conducts regular check-ins during the first term to review progress, answer questions, and support effective adoption. Each school is also assigned a dedicated Client Consultant, who oversees the ongoing partnership, provides a consistent point of contact, and acts as a conduit to wider Compass teams for support, training, and service development.

On-site training is available at an additional cost, and further tailored training options can be arranged where required.

# Migration, Training and Support

## Support

All Compass MIS licences include access to comprehensive support at no additional cost, as part of the standard service offering. This provides schools with unlimited and uncapped access to Compass support for the duration of their contract.

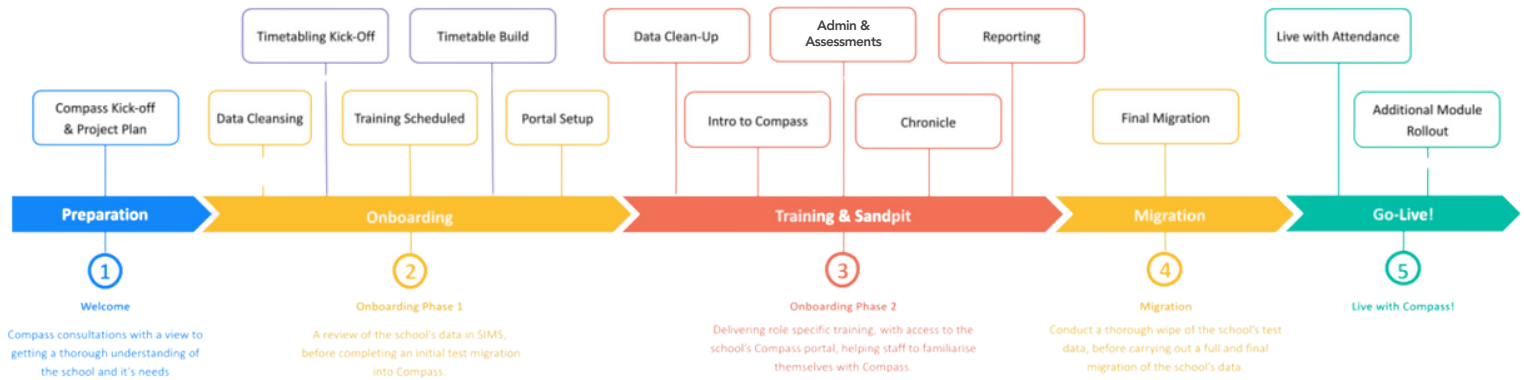
Compass delivers a whole-school service desk covering 1st, 2nd and 3rd line support, enabling efficient issue resolution without unnecessary escalation. Support is available Monday to Friday between 8:00am and 5:00pm (UK business hours), excluding UK bank holidays, and is provided by Compass-trained specialists with experience in both the education sector and the Compass platform.

During peak operational periods, such as census submissions, end-of-year processes, and results days, additional support capacity is provided through Compass's international support teams in Australia and Ireland. This extended coverage enables effective out-of-hours support for urgent and critical issues during these key times.

In addition to direct support, schools have access to Compass's online Knowledge Base, which includes help articles, on-demand webinars, and instructional videos. These resources support self-service where appropriate and enable schools to continuously upskill staff.

Each school is assigned a dedicated Client Consultant who acts as the primary point of contact and oversees the ongoing partnership. The Client Consultant works closely with Compass's internal technical and support teams to ensure issues are managed effectively. Compass can also adapt support arrangements to meet the specific needs of Multi-Academy Trusts and federations of schools, including alternative support delivery via accredited Compass Support Partners where required.

# Onboarding Process



## Stage 1: Preparation – Welcome

The onboarding journey begins with a Compass kick-off meeting, where a dedicated Onboarding Consultant works with the school to understand its structure, priorities, and implementation requirements. A detailed project plan is agreed, setting out timelines, responsibilities, and key milestones. This stage ensures there is a shared understanding of scope, dependencies, and success criteria before onboarding activity begins.

## Stage 2: Onboarding Phase 1 – Data Review and Setup

During the first onboarding phase, Compass works with the school to review existing data within the incumbent MIS. Initial data cleansing is undertaken to support data quality and consistency. An initial test migration is completed, allowing data to be reviewed within Compass. Timetabling kick-off and timetable build activities take place where applicable, alongside the scheduling of training sessions and setup of staff, student, and parent portals.

# Onboarding Process

## Stage 3: Onboarding Phase 2 – Training & Sandpit

In this phase, schools are provided with access to a Compass sandpit environment containing migrated test data. Role-specific training is delivered to administrators, teaching staff, and leaders, covering core functionality such as general system use, compliance areas, Chronicle (behaviour, safeguarding, and wellbeing), and reporting. This enables staff to become familiar with Compass in a safe environment before live use.

## Stage 4: Migration – Final Data Migration

Once the school is ready to proceed, Compass conducts a thorough clean-up of test data and completes a full and final migration of live school data. This ensures that all agreed data sets are accurately transferred and validated, preparing the system for live operation.

## Stage 5: Go-Live – Live with Compass

Following final migration, the school goes live with Compass for core operational use, including attendance. Compass supports a smooth transition during this period, and additional modules can be rolled out as required. Post-go-live support and check-ins help ensure confident adoption and continued success.

# Section 3: Technical Features

## System Requirements

Compass is a cloud-based Management Information System (MIS) accessible via any modern web browser with an internet connection. Effective use of the service is dependent on the availability of suitable devices and a stable internet connection within the school.

Compass is optimised for use with Google Chrome, but is also accessible via other commonly used browsers, including Microsoft Edge, Safari and Firefox. Native Compass applications are available for iOS and Android devices. To ensure access to the latest functionality and security updates, schools are advised to use the most recent version of the browser or mobile application.

## Access and Authentication

The Compass web portal is accessed through a school-specific, unique URL. Schools can select their preferred authentication method to align with existing IT infrastructure, including:

- Locally managed Compass authentication
- Authentication servers (including Active Directory and Azure)
- Single Sign-On (SSO) integration with:
  - Google
  - Microsoft Office 365
  - Azure

For locally managed accounts, password policies enforce a minimum of eight characters, including at least one uppercase letter, one lowercase letter, and one symbol.

Additional security features include:

- **Two-factor authentication (2FA)**, configurable separately for staff, students, and parents
- **Forced account logout**, applicable across both web and mobile access
- **Forced password resets** for locally managed accounts, available to authorised staff users

# Technical Features

## Users and Roles

Compass supports three user types: Staff, Students, and Parents, each with access to functionality relevant to their role. Staff users are further assigned permissions through Role Groups, which allow schools to grant additional access based on responsibilities (for example, Data Manager, Business Manager, or IT Technician).

## Customisation and Settings

Compass provides a highly configurable MIS designed to meet the individual needs of each school. Key areas of customisation include wellbeing and pastoral workflows, behaviour and intervention management, curriculum structures, assessment frameworks, reporting, system preferences, and user portals branded to reflect each school's identity.

As part of a thoroughly scoped implementation, the Compass team works closely with school stakeholders to review existing information management processes and priorities. These processes are then replicated, configured, or optimised within Compass to ensure the system aligns with the school's operational and educational goals.

Compass includes flexible, in-system tools such as configurable workflows, adaptable assessment models, and a custom report builder. Portals for staff, students, and parents can be customised with school branding, including logos and colour schemes, to provide a consistent and familiar user experience. Customisation is controlled through role-based permissions.

Designated Compass administrators within each school can configure system settings at school level, including workflows, assessments, reporting structures, and portal branding, and deploy these configurations across the organisation while maintaining governance and data integrity.

## Data Sharing and Integrations

Compass supports integration with a range of third-party systems to enable schools to continue using preferred external services alongside the core MIS. Data integrations are delivered via secure APIs, with supported integration partners including Wonde and GroupCall.

# Technical Features

## Audit Logs

Register markings can be audited in line with DfE requirements, a large amount of changes are auditable in the UI by school users with appropriate permissions, some requests (eg: which staff member viewed this specific student profile) can be answered by raising a security investigation with Compass

## Platform Uptime and Updates

Compass operates a globally distributed cloud platform that is monitored continuously, 24 hours a day, 7 days a week. The service is designed for high availability and data integrity, with a guaranteed platform availability of 99.9%, excluding planned maintenance. Availability is monitored in real time, and platform performance is formally reviewed on a monthly basis.

Planned maintenance is scheduled outside of school hours wherever possible and is communicated to customers in advance. Over the most recent six-month reporting period, the platform recorded zero downtime against the 99.9% availability target.

Compass also applies defined incident management service levels to ensure timely response and resolution. Critical incidents (P0) receive a response within one hour and are resolved within three hours, with proportionate targets in place for lower-priority incidents. Where service levels are not met, service credits may apply, supported by a Service Improvement Plan and formal contract review where issues persist.

All platform updates, maintenance, and enhancements are managed centrally by Compass Education. This approach ensures continuous improvement of the service while minimising operational overhead for school IT teams, who are not required to manage infrastructure, upgrades, or patching.

# Section 4: Data Protection & Information Assurance

## Data Security

All customer data is hosted in secure, managed data centres within the European Union, protected by robust physical security measures and environmental controls. Data in transit is encrypted using Transport Layer Security (TLS 1.2 or higher), and all data is encrypted at rest to protect against unauthorised access.

Compass holds PCI-DSS Level 1 certification, the highest level of compliance for the handling and processing of payment card data, providing assurance equivalent to banking and financial services standards.

Compass is Cyber Essentials certified and holds global ISO/IEC 27001 certification, demonstrating adherence to internationally recognised information security management standards and a systematic approach to managing risk and protecting information assets.

## Disaster Recovery and Backups

Compass operates a comprehensive backup and disaster recovery framework. Customer data is backed up daily and can be restored to any specific day within the previous 365 days. Beyond one year, backups are retained on a weekly basis for up to five years. These measures support business continuity and rapid recovery in the event of data loss or system failure.

## UK GDPR and Data Protection

Compass is fully compliant with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018, applying the principles of data protection by design and by default across the platform. Compass is registered with the Information Commissioner's Office (ICO) and maintains comprehensive policies and procedures to ensure personal data is processed lawfully, securely, and transparently.

For further information, schools and trusts may contact [enquiries@compass.education](mailto:enquiries@compass.education), marked for the attention of the Data Protection Officer.

## Data Subject Rights

Compass provides tools and processes to support data subject rights under UK GDPR. This includes functionality to securely delete personal data associated with individual users where required. Compass is committed to responding to Subject Access Requests and other data rights requests within statutory timeframes.

# Want to see Compass in action?

Get in touch with Compass today to see  
how you can simplify your school's processes.



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E [enquiries@compass.education](mailto:enquiries@compass.education)