



Connecting



**CST Annual
Conference 26**

15 & 16 October, ICC, Birmingham

#CSTConf26



Navigating the trust-led system: How to grow with purpose.

Jamie Otter

Partner, Stone King

Alan Warboys

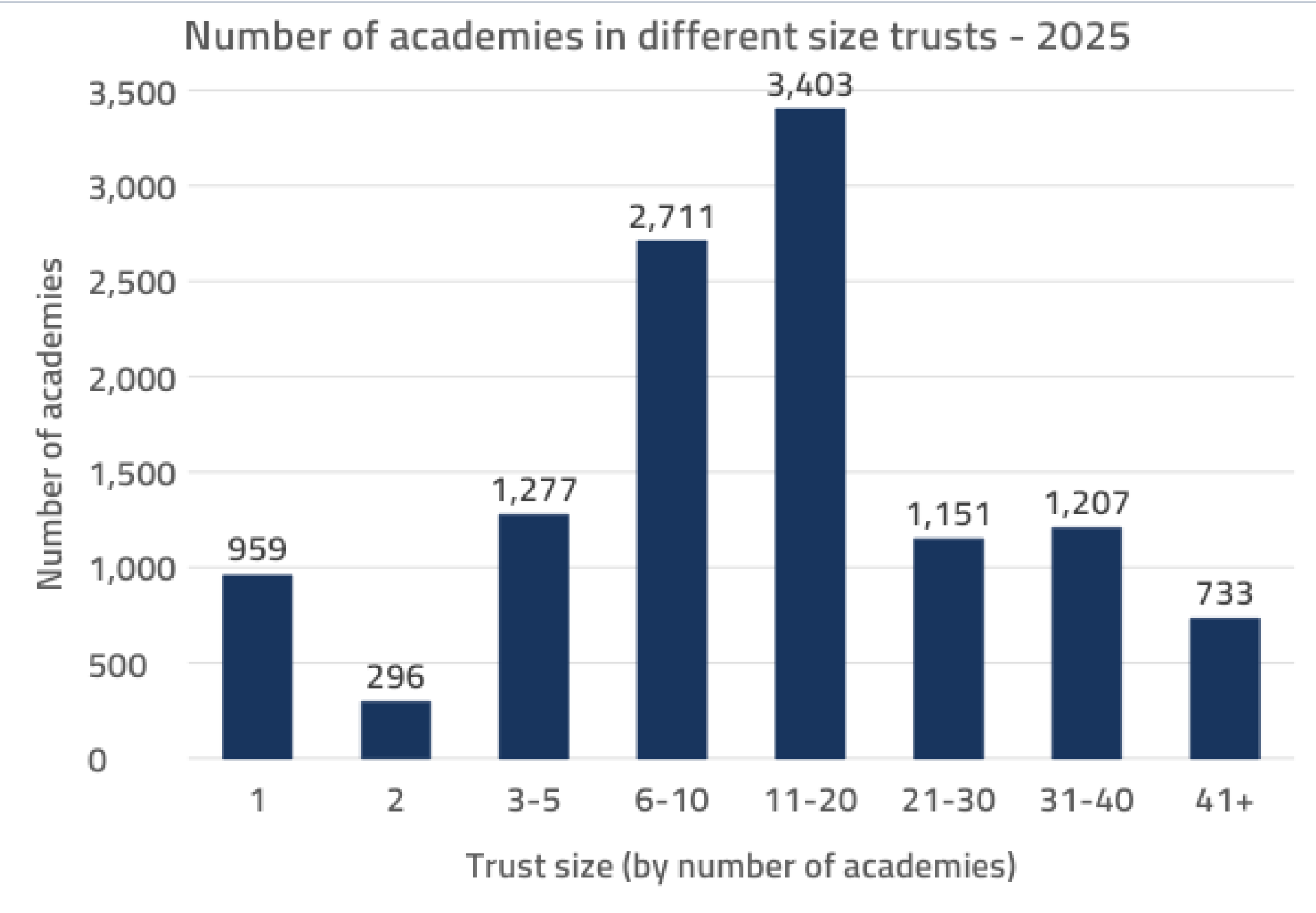
Chief Executive Officer – Place Partnership



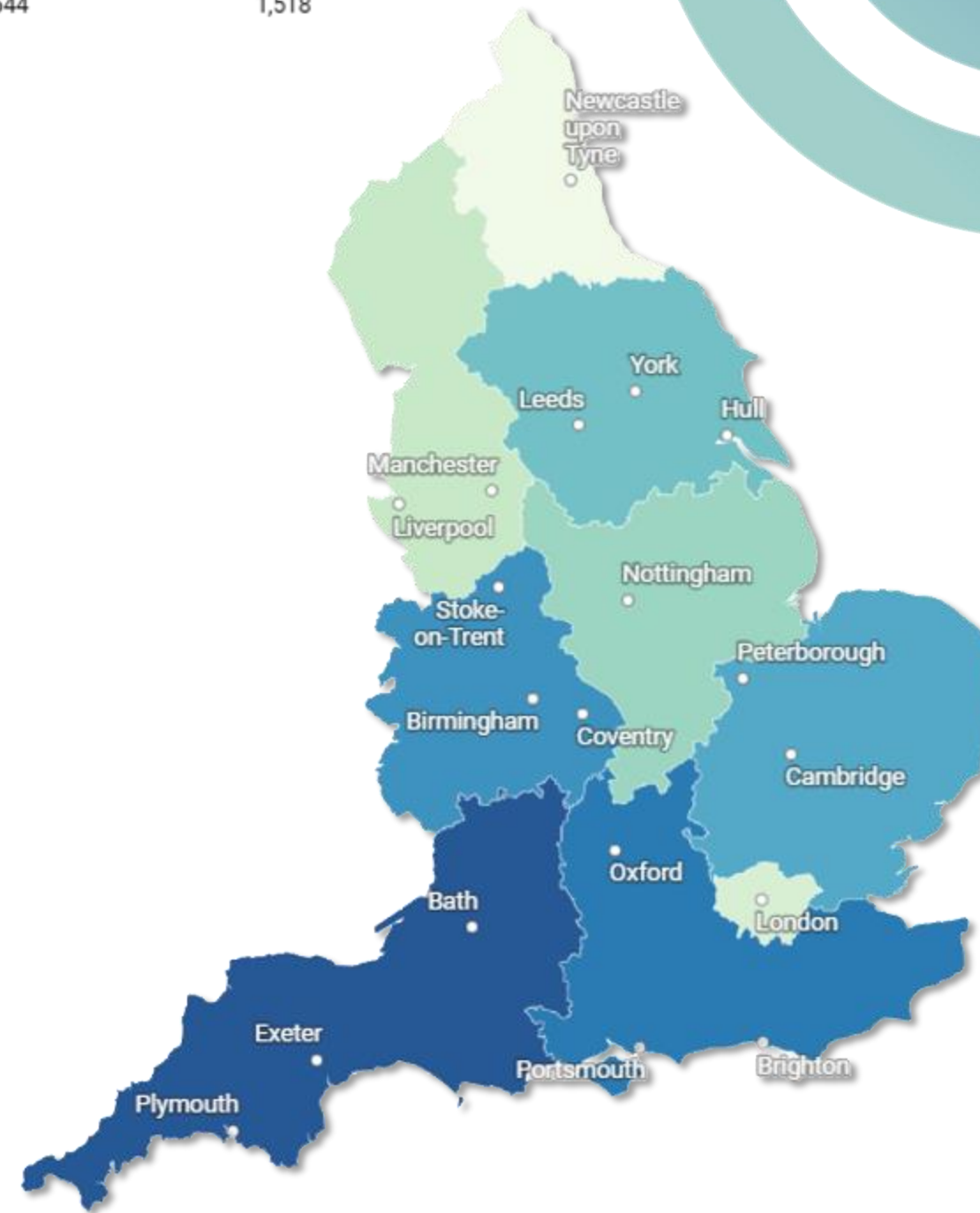
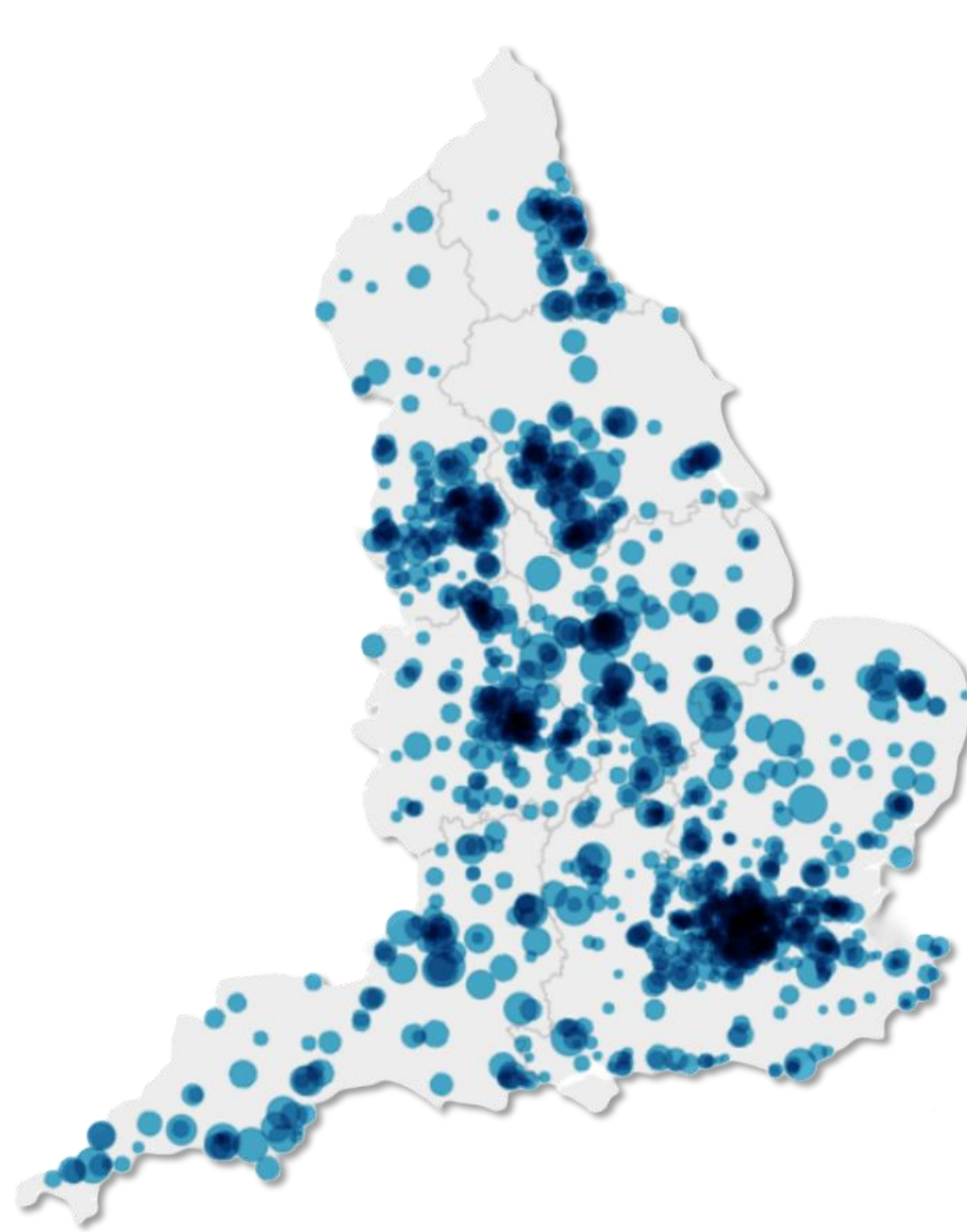
**CST Annual
Conference 26**

#CSTConf26

Changing Face of the Sector



Regional Landscape



CST Annual
Conference 26

#CSTConf26

Growth & the DfE's Commissioning Decisions



- **Raising standards** – Headline metrics: your current GLD, phonics, KS2, KS4, KS5
- **Maximising value** – demonstrating financial and operational stewardship: commercial, assets, workforce, and capability
- **Early years growth** – national priority to establish or expand school-based nursery provision
- **SEND growth and broader inclusion** - evidence of inclusion as a trust-wide norm
- **System contribution** - supporting other schools, sharing expertise, participating in RISE programmes, contributing to place-based improvement
- **Community links** - embedded locally, engaging stakeholders effectively, contributing to local priorities, and supporting strong local identity
- **Geographical coherence** – avoiding isolated outliers or sprawling geographies that undermine school improvement, leadership support, or operational efficiency

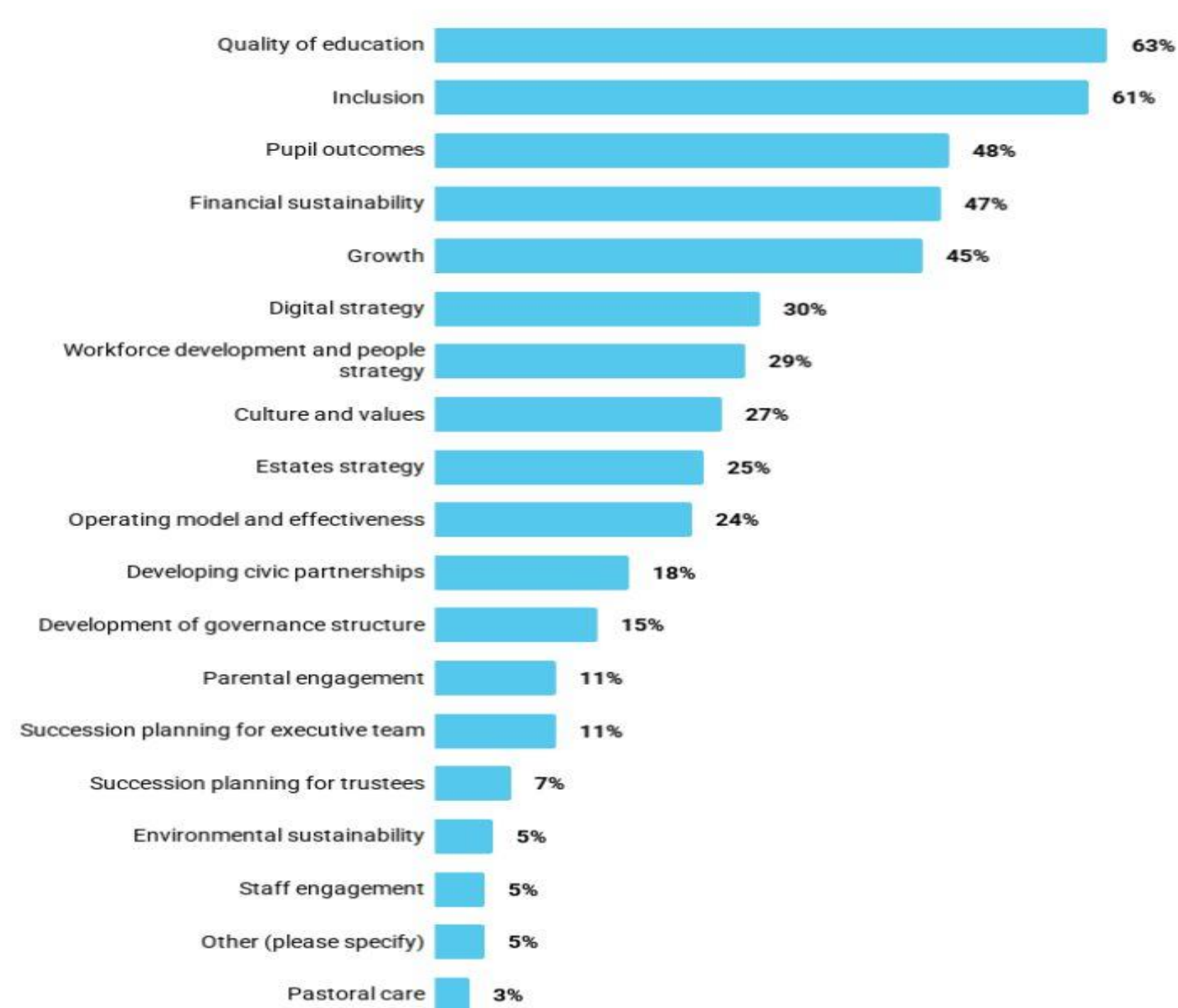


**CST Annual
Conference 26**

#CSTConf26

CST & Edurio – National School Trust Report 2026

What are the top five strategic priorities for your trust in the next academic year?



CST Annual
Conference 26

#CSTConf26

Why Merge?

- Better opportunities for young people
- Recruitment/ development and retention of staff
- Sharing educational excellence
- Organisational resilience
- Economic stability
- Greater influence within school system



The Board's Stewardship

Purpose

What educational and public benefit are we seeking?

Evidence

What supports the assumptions being made

Alternatives

What other options have we considered

Risk and Assurance

What is known, uncertain and capable of mitigation



**CST Annual
Conference 26**

#CSTConf26

The Non-Negotiables?

Identity/ Alignment/ Agency

Leadership and governance

People

Strategy

Structures and Systems

Schools and Communities



CST Annual
Conference 26

#CSTConf26

Due Diligence

- Culture, culture, culture
- Educational
- Legal
- Financial
- Estates
- People



CST Annual
Conference 26

#CSTConf26



Governance Must Evolve

- Explore
- Test
- Implement
- Oversee



CST Annual
Conference 26

#CSTConf26

Five Stewardship Tests for the Board

- **Purpose** – what will this achieved for young people and communities?
- **Partner** – why is this the right organisation?
- **Evidence** – what supports the board's assumptions?
- **People** – what will make integration work
- **Accountability** – how will the promised benefits be measured?





Practical Insights on the Merger Process

A Merger of Equals



Accord
MULTI ACADEMY TRUST

Primary Academies
South Ossett Infants Academy
Horbury Primary Academy
Middlestown Primary Academy

Secondary Academies
Horbury Academy
South Ossett Infants Academy
Ossett Academy
Horbury Primary Academy
Middlestown Primary Academy
Maltby Redwood Academy
Maltby Manor Academy
Ravenfield Primary Academy

Partnership
500
STAFF

Secondary Academies
3,500
PUPILS
1,150
STAFF

MALTBY LEARNING TRUST
Exceptional Experiences. Successful Lives.

Primary Academies
Maltby Redwood Academy
Maltby Manor Academy
Ravenfield Primary Academy
Maltby Academy

Secondary Academies
Maltby Manor Academy
Horbury Academy
Maltby Hall Academy
Ossett Academy
Ravenfield Primary Academy
Maltby Academy

Partnership
96,500
PUPILS
3,115
STAFF

Secondary Academies
5,500
PUPILS

Building a strong partnership with a like-minded organisation.

Allowing greater opportunities to recruit, develop and retain staff.

Sharing excellence across each existing organisation.

Strengthening our existing locality-based hubs Accord (West) and MLT (South).

Why a Merger?

“Will the proposed merger present a better opportunity to realise our ambitions for our young people, staff and communities in the next 10-years, than if we were to continue to operate as we are now?”

This was the question from the outset

It was then important to be explicit with the reason *why*?

Securing a more significant role within the system to benefit young people and staff.

Future proofing and organisational resilience with strength in greater depth.

Growth through consolidating of strength rather than weakness.

Economic sustainability and economies of scale.

What are your non-negotiables?

What are your 'hills to die on' and where do you see areas of compromise to enable a stronger Trust for the future?

- Identity, Alignment, Agency?
- Leadership & Governance?
- People?
- Strategy, Structures & Systems?
- Other Considerations?

Vision, Mission & Values?

**Strangely not one of the explicit
sixty-five questions from the DfE?**

Vision

People belong, place matters, purpose lasts.

Mission

We commit to building a culture where people feel valued, take pride in their place, and hold high expectations because everyone matters.

Values

- 1. Value Our People**
We treat people with care and compassion, build belonging, and hold high expectations because everyone matters.



- 2. Take Pride in Our Place**
We care for our communities and work in partnership, so that people feel connected, supported and part of something to be proud of.

- 3. Act With Enduring Purpose**
We focus on what matters most, our young people, making decisions that stand the test of time.



The Merger Timeline

2024

July 2024

Trustee Approval to Explore the Merger Proposal

November 2024

Initial DfE Discussion

2025

May 2025

DfE Merger Application Submitted

September 2025

DfE Merger Application Approved

2026

September 2026

Legal Transfer Date

2024

Spring 2024

Accord Trustees Review Growth Strategy & 'Non-Negotiables'

July 2024

Trustee Approval to Explore the Merger Proposal

September 2024

Accord & MLT Proposed Merger Sub-Committees Formed

November 2024

Initial DfE Discussion

December 2024

Externally Commissioned Review of the Merger Proposal

2025

February 2025

- Trustee Memorandum of Understanding
- Trustee Merger Board Formed (Terms of Reference Phase 1 – DfE Application)

April 2025

Externally Facilitated Academy Leadership & Executive Team Merger Away Day

May 2025

DfE Merger Application Submitted

June 2025

Stakeholder Engagement & Consultation

September 2025

DfE Merger Application Approved

- Trustee Merger Board (Terms of Reference Phase 2 – Merger Implementation & Legal Transfer)
- Implementation of Aligned Governance Handbooks & Scheme of Delegation

2026

February 2026

Accord & MLT Due Diligence Sign off

May 2026

Legal Documents Submitted to the DfE

September 2026

Projected Legal Transfer Date

2024

July 2024

Trustee Approval to Explore the Merger Proposal

November 2024

Initial DfE Discussion

2025

January 2025

Merger Project Planning Groups Formed – Due Diligence & Onboarding (Finance, HR, ICT, Estates)

Systems Mapping and Phased Alignment Commenced (MIS, ICT, Data, Finance, HR & Estates Compliance)

May 2025

DfE Merger Application Submitted

June 2025

Stakeholder Engagement & Consultation

September 2025

DfE Merger Application Approved

- CEO (Designate) Time Allocation Split Accord & MLT
- Staff Engagement Events for Accord & MLT
- Externally Commissioned Review of Accord & MLT Operating Models

October 2025

Externally Commissioned Review of Executive Leadership Proposals, Executive Pay & Conditions

December 2025

Trade Union Shadow JCNC Formed

2026

January 2026

Trade Union Shadow JCNC – Proposed TUPE Measures, Associate Staff Job Evaluation, Trust Policy Review & Shared Services Restructure Proposals

February to May 2026

Consultation & Implementation of Shared Services Restructure

March to June 2026

Consultation & Implementation of TUPE (Accord Staff)

September 2026

Projected Legal Transfer Date

School Improvement

2024

July 2024

Trustee Approval to Explore the Merger Proposal

September 2024

Informal Trust & Academy Engagement Opportunities Promoted

November 2024

Initial DfE Discussion

2025

Spring 2025

School Improvement Model(s) Review / Due Diligence

May 2025

DfE Merger Application Submitted

September 2025

DfE Merger Application Approved

November 2025

Academy Engagement Events & Focused Visits Commence

December 2025

Directors of Education Appointed

2026

February 2026

Consultation & Implementation of Phased School Improvement Implementation Model (Inception, Year 1, Year 2 & Year 3)

September 2026

Projected Legal Transfer Date

T-Shaped Trust School Improvement Model

TRUST SCHOOL IMPROVEMENT MODEL				
Leadership & Governance	People	High Quality Inclusive Education in our Academies	Enabling Services	Finance
Culture Strategy Governance Non-Executive Leadership Executive Leadership Risk Compliance Internal Audit Legal Health & Safety Charitable Objects Collaboration Civic Duty	Culture Organisational Design Equality & Diversity People Strategy Recruitment Retention PLD Appraisal Workload Well-being HR Policy & Practice Trade Unions	Culture Leadership Collaboration Curriculum Teaching & Learning Assessment Academic Outcomes Vulnerable Pupils Inclusion Behaviour Attendance Safeguarding Personal Development Enrichment & Experience Community Engagement	Culture Project Management Estates PFI Digital & IT Strategy Systems Infrastructure Data & Analytics Marketing & Comms GDPR Catering Cleaning	Culture Financial Strategy Benchmarking Resource Allocation Capital Strategy Reserves Regularity Audit Insurance Procurement Payroll Funding Agreements

Transitional Implementation of the School Improvement Model

TRANSITIONAL IMPLEMENTATION OF THE SCHOOL IMPROVEMENT MODEL (ALIGNMENT 'GOLDEN THREAD')			
Pre-merger (20%)	Year 1 (40%)	Year 2 (60%)	Year 3 (70%)

School Improvement Model Transitional Alignment 'Golden Thread' Over Time



Reference Points

- **CST & Stone King** – School Trust Mergers
- **NGA & Brown Jacobson** – MAT Mergers – A Guide for Academy Trust Leaders & Trustees



Completion is not the finish line



Before Completion	After Completion
Build relationships	Align practice at a sustainability
Test Assumptions	Maintain educational and operational and operational capacity
Map systems and structures	Monitor staff and stakeholder experience
Agree decision making arrangements	Measure whether promised benefits are being delivered



Thank you



Connecting