

# Lessons from growth through a merger

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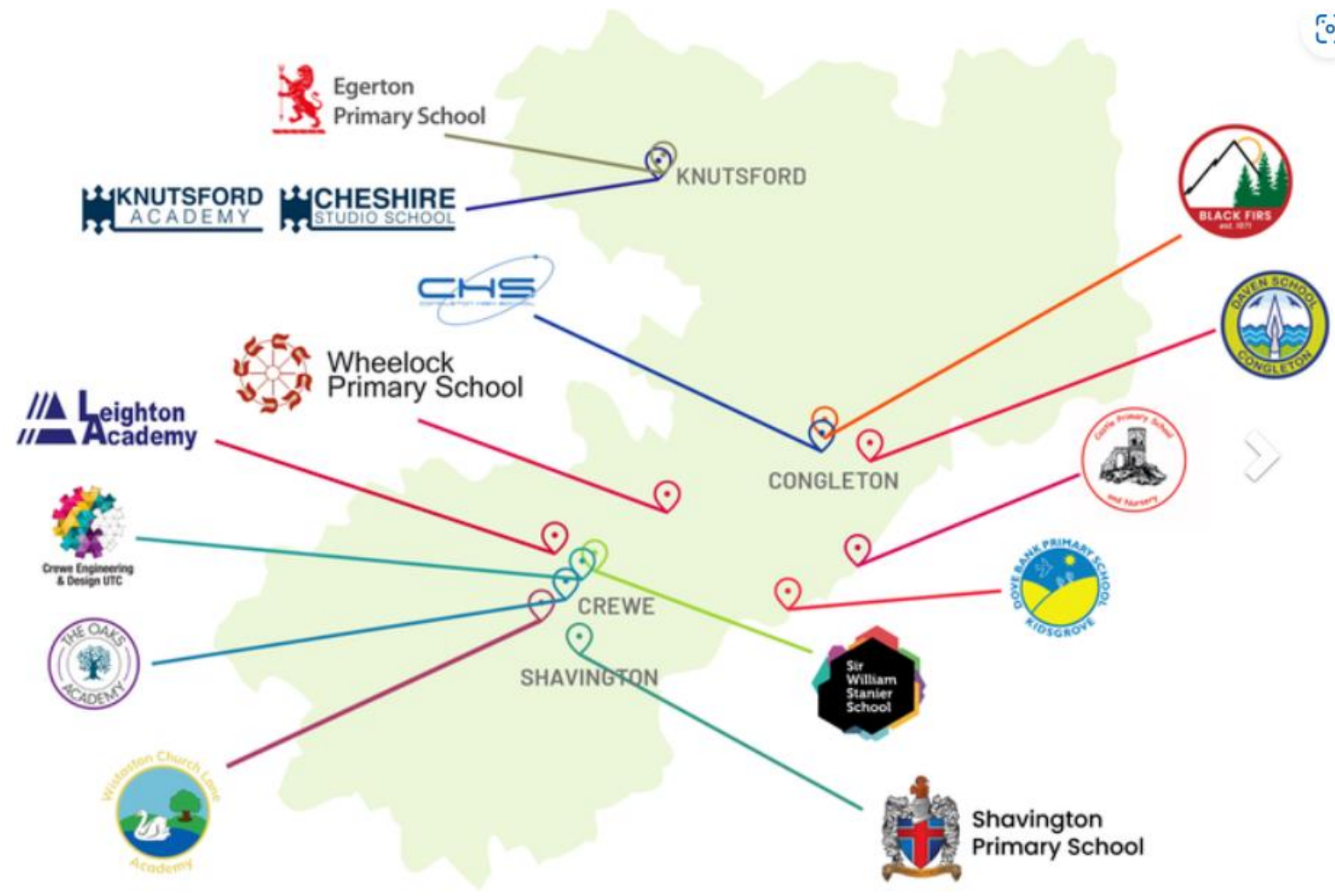
# Brief history

- Trust formed September 2003
- Merger of TLA and TLFLP
- Both trusts had been through several mergers
- This merger was different – true merger



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# TLP SCHOOLS BASED IN CHESHIRE EAST AND NORTH STAFFORDSHIRE



# Growth is really hard

- Lots of time and effort and no guarantee of success
- Did we want to look at individual school growth or scale quicker?
- Effort going into growth means that time and resource needs to be committed
  - Very difficult for a small trust



# Why did we look to merge?

- Both trusts were at capacity and needed a reset
  - Capacity for school improvement was stretched
- Both trusts needed to grow to be sustainable particularly TLFLP
  - Growth was difficult to come by
  - Easy to imagine growth – difficult to realise
  - Risk profile was too high considering the capacity for school improvement
- What kind of trust would you consider merging with?
- What are the opportunities?

# Key Considerations

- Why were we looking at a merger? What is the point?
- How do you find a partner?
- No detriment
  - Find a home for everyone
  - Can you fulfil promises to the schools
- Due diligence – leadership and management
  - Approaches and styles
  - Culture
- Keep it simple

# Merging two organisations is not easy

- Point in time – needs to be the correct time for both organisations
  - Otherwise, it is a take-over, not a merger
- What are we trying to achieve?
- Can't spend too long deciding whether to proceed
- How do we deal with the 'personal' high stakes?
  - What does it mean for me?
- How do we convince everyone else this is a good idea?
- How do we get the communication right?

# Communication

- Language is key
  - Talk in terms of the new trust before it has started
  - Unintended language can derail things
- Cannot communicate too much
  - We needed to do more
- Who is who and what do they do?
  - Assumptions caused issues
- How quickly do the systems and structures merge?
  - Trying to do too much too soon
  - It is complex and takes time
  - Under promise and over deliver



# Process

- Project steering group – Executive teams and Trustees from both trusts
- 1<sup>st</sup> step - Agreed structures – Executive and central team
  - Reduces individual's high risk
  - Built upon other trusts – making it look right
- PSG vital in supporting the process
  - Recommendations to both trust boards
- Communication with RD's office – ensuring meeting their needs

# Governance

- Populating governance structures
  - Combine members
  - Start with trustee committee structure to ensure skills
  - Populate the board via the committees – recommendation via the governance professional to members – keeping executive out of the decision making
  - Creation of a shadow board prior to conversion to allow for decision making to happen before conversion

# What we were trying to achieve

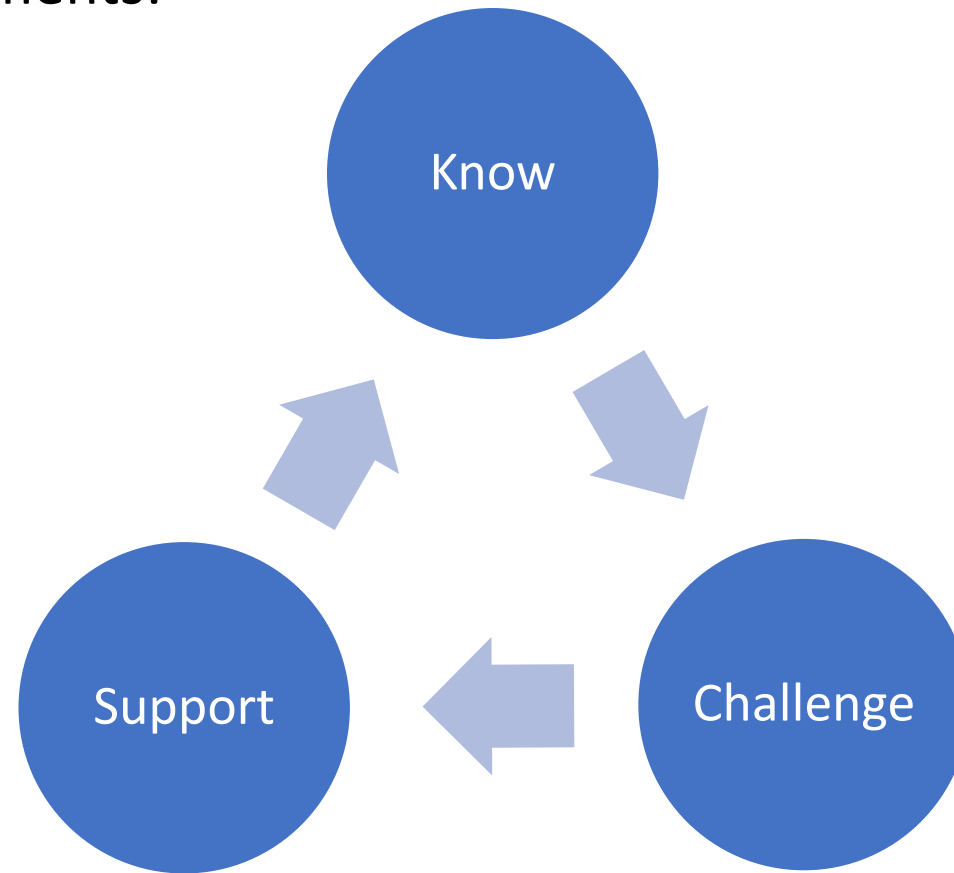
- Have the capacity to support the schools properly – **People**
- Ensure that the workforce we had delivered the best possible experiences for our pupils – **Passion**
- Deliver the very best possible outcomes for all pupils – **Performance**

# Over-arching strategic priorities

Key Driver	Definition
People	To attract, develop and retain high quality staff; build a sustainable long-term talent pipeline for our schools; and become the employer of choice in the education system in our communities, in order to deliver the best outcomes for our pupils.
Passion	Developing a trust culture which ensures our passion for education is reflected in the way our staff, pupils and communities work together to be the best they can be.
Performance	Maintaining a relentless focus on delivering excellent outcomes, securing strong destinations, and supporting the broader development of our pupils, staff, and schools, whilst holding ourselves to account to ensure we are a strong, sustainable, and effective trust

# Our approach to school improvement

- Our approach to school improvement is cyclical, organised around 3 elements:



# School Improvement – Knowing

- Initial detailed fact finding and data consolidation for all schools
- Roundtable discussions and sharing of key matters, school improvement and operational, through central team meetings
- Establishing working relationships between heads and phase leads
- Establishing ways of working with phase leads to drive an integrated approach to school improvement
- School profiles (Bespoke school KPI's)

# School Improvement – Challenging

- Quality assurance visits have already been completed at 4 of the 6 schools now in an Ofsted window
- Key findings/feedback shared both verbally and in written reports
- Integrated Challenge meetings have taken place with 11 schools, to review 2022-23 data, define key priorities for the year, understand barriers to progress, and agree core trust support to deliver these current year priorities
- Model established for target setting, both short and longer term, with all heads



# School Improvement – Supporting

- Extensive support activity has already taken place in the first 11 weeks of the academic year
- This has been defined through pre-existing pre-merged priorities (Safeguarding, SEND, Reading) and challenge meeting agreed priorities and support
- Bespoke subject and aspect support
- Development of school based projects e.g. Nursery provisions





## 6 months in - strengths

- Working in collaboration and sharing expertise – cross phase
- Access to the central team for expert advice – OFSTED support
- Current size work wells in terms of collaboration and both locality works
- Culture, very open in terms of areas that need improvement, supportive and non judgemental
- Made to feel welcome at all schools from a central services perspective – regular KITs
- Audits and reviews working well
- Stakeholders have a voice

## 6 months in – Development areas

- More structure regarding system implementation needed
- More training and guidance needed on systems
- Are we utilising cost effectiveness from our contracts
- More involvement of Trustees in individual schools
- Establishing more common reporting routines to the trust
  - Calendared data drops
  - Standardisation of approaches not ensure effective comparisons



# Lessons learned

- Everything takes longer than expected
  - Can't do everything for day 1
- The trusts need to merge before the actual merger takes effect
- Compromise is key
- No detriment model is preferable – but not set in stone
- Trust executives need to share the decision making
- Over communication is essential
- Have to work within the preferences of the RD's office

# Impact so far

- OFSTED inspections – graded and ungraded all recognised the impact of the trust to date
  - One within 3 weeks of the merger
- We have added an additional school
- We have been recognised by a national awards for
  - Governance
  - SLT
- Culture is of ‘one organisation’



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# Daven Primary School

A Case Study



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# Daven Primary Case study

- Joined 1<sup>st</sup> July 2019 – RI judgement (2017)
  - Turbulence in leadership
  - High levels of deprivation and SEN (most deprived school in CE)
  - Falling rolls
  - Attendance well below national
- Significant improvements initially
- Geography an issue
- COVID hit
- Daven was a key reason to merge

# Daven Primary Case study

- TLA had schools in the same locality
  - Blackfirs Primary
  - Castle Primary
  - Congleton High School
- Allowed for greater school to school support, especially leadership – including pre-merger
- With a small school funding was, and is, an issue. However, we need to support our most vulnerable school





# Daven Primary Case study

- Action on merger:
  - New Headteacher
  - School improvement advisor 3 days a week
  - QA visit by SI team
  - Additional staffing
  - Investment in IT infrastructure
  - Implementation of 'Know, Challenge and Support model'

# Daven Primary Case study

- OFSTED – week 4
- Wasn't the outcome we were looking for, but it was fair
- Recognised the improvements since joining TLFLP as well as the impact of the trust in the first 3 weeks
- *With the support of the trust, the school has started to address the weaknesses in the quality of education that pupils receive.*
- *Leaders, with support from the trust, have developed a clear and ambitious vision for the school. Changes made by trust leaders enable the local governing body to hold the school to account more effectively.*



# Daven Primary Case study

- Did TLFLP do enough?
- Did TLFLP do everything it could do?
- Was the merger the correct decision for Daven?