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Trust mergers: the why and the how Neil Blundell

With close to 2,000 multi-academy trusts in England out of circa 22,000 schools (over 700 of them are single academy trusts) the variation of size and scale is enormous; so too is what they are designed to achieve. It is a mess and we need to sort it out, thoughtfully.

The case for change

We are seeing a gentle wave of mergers as trusts recognise some of the following:

- As MATs grow, they reach points where life becomes either more or less comfortable. Inevitably, colleagues in small and growing trusts have to do more than one job. This inevitably leads to exhaustion or becomes fragile and people dependent.
- The MAT is surrounded by bigger organisations; they can survive but not necessarily thrive.
- The MAT culture can become self-protective in nature; leadership cares more about the organisation than the children and families it serves.
- The MAT has not achieved scale and is surrounded by others around it that have; it is not able to offer the support that is available in other larger trusts.
- The MAT has not grown intelligently and contains some isolated schools and small clusters which make it challenging to support them.

Why trusts consider merging

In conversations with peers, I hear a consistent set of drivers - rarely about “bigger is better”, and more often about resilience and coherence.

Capacity is often the starting point. In small and midsized trusts, talented colleagues frequently wear multiple hats: school improvement, curriculum, HR, estates, finance, governance support. That can work for a time, but it can become fragile and people dependent. When the system relies on individual stamina, it is a warning light.

Context matters too. Many trusts sit alongside larger neighbours with deeper infrastructure and a broader central team. You can survive in that environment, but thriving can be harder if you cannot offer the breadth of support that other trusts can.

Culture and purpose are another driver. A merger conversation can prompt honest reflection about what is shaping decision making. If a trust's energy is being spent protecting the organisation rather than improving outcomes for children, it may be time to rethink the design - whether through internal change, collaboration, or (sometimes) consolidation.

Finally, *geography and shape*. When a trust contains isolated schools or small clusters spread across a wide area, equitable support becomes more difficult. Over time, that can create uneven experience for pupils and staff.

A Bristol case study: when “successful” still wasn't sustainable

Our trust was one of many serving the wider Bristol area, in a region with a high level of academisation. We had grown steadily over several years to serve around 7,000 pupils and around 800 staff. We were proud of our track record of improvement and of a culture that felt clear and shared.

And yet, when we looked closely, we could see the strain that success can hide.

Primary alignment - curriculum work and school improvement - was strong, but secondary collaboration was not moving at the pace we wanted. Too many people were doing too many unconnected jobs. The risk was not that we would fail immediately, but that we would drift: fatigue would rise, consistency would wobble, and our capacity to keep improving would plateau.

At the same time, the surrounding trust landscape was changing. Larger trusts were growing and becoming more influential. We started to ask ourselves a question that felt both practical and principled: what kind of partner would help us serve our communities better over the next five to ten years?

What we learned from the process

Three lessons stand out.

1) *Start with the “why”, not the structure.* Before talking about models, governance or branding, we kept returning to a simple test: will this help us improve outcomes, broaden opportunity and strengthen inclusion for children? If we could not answer that clearly, we paused.

2) *Be honest about capacity and dependency.* A merger conversation forces you to name the hidden workarounds: the roles covered by goodwill, the processes that live in someone's head, the gaps you accept because “we've always managed”. Naming these realities is uncomfortable - and essential.

3) *Take culture seriously, and take time.* Our search for the right partner was not quick. It involved protracted conversations and careful exploration of values, ways of working and expectations. The more you can surface early - where decisions sit, how schools are supported, how leaders listen, how risk is handled - the better.

What to know and what to do

Mergers are difficult and need additional capacity up front; they also require doing difficult stuff. The following list is not exhaustive but contains some of the issues difficult to manage. Know that the road is long, often energising and fun - yet sometimes ends in disappointment and opportunities missed.

1. Add some additional project management capacity. The central teams can become exhausted by the process on top of already difficult jobs.
2. Sort out quickly who is going to lead - egos get in the way of mergers: who will be CEO, deputy CEO and Chair? Mergers are about doing what is in the best interests of the organization, not the people.
3. Make sure the new Chair, CEO and transition board 'get' strategy.
4. Recognise that good people might be negatively impacted by the process; people will be protected but might be in a competitive job situation. People's egos will be bruised, and some may leave.
5. Establish a cross-trust governance group with the necessary levels of responsibility.
6. Work collaboratively with all stakeholders including the DfE, diocese, staff and parents. Keep people informed and listen carefully.
7. Seek some support from people who have already gone through the process.

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