

## **IPAT/LAT MERGER CONSULTATION**

### **FREQUENTLY ASKED QUESTIONS**

#### **1. Which Trust initiated the merger discussions and why?**

IPAT approached LAT for an initial discussion about the potential to merge in December 2025 and LAT was very happy to engage. As a small organisation, whilst IPAT has performed well over the past few years in driving school improvement and securing an improved financial footing, operating budgets remain very tight and further development work is increasingly difficult to fund, particularly at primary school level (primary schools attract less per pupil funding than secondary schools). Merger with a larger, local, primary trust is a good option to explore to secure future sustainability and ongoing success for current and future children attending the schools in both trusts. An IPAT/LAT merger is particularly exciting as there is a close synergy between how both our trusts support our schools, our staff and our communities. We share the same vision and values for pupils and staff, at the heart of which is a commitment to a strong culture of excellence through collaboration and to promoting an inclusive approach for our most vulnerable children and families.

The Department for Education ('DfE'), in its recent White Paper, 'Every Child Achieving and Thriving', announced its intention to move towards a system where all schools are in fewer but stronger, regionally coherent trusts. Mergers and merger discussions are taking place up and down the country to achieve this aim. Having recognised our mirrored challenges and opportunities, IPAT and LAT intend, subject to consultation, to come together and use their enhanced scale, governance and high-quality leadership to innovate and drive excellence in standards and inclusion. Jointly, we want to be able to support more children, families and communities in Leicestershire and to do so by offering a distinctive and supportive local culture that is different from many of the larger national trusts.

#### **2. What are the benefits of merger?**

- Increasing our capacity to drive for excellence in our classrooms and by sharing knowledge, skills, expertise and resources we aim to improve educational and personal development outcomes for all children;
- More funding being devoted to learning from the economies of scale that a larger trust can achieve;
- Enhanced SEND support, resource and provision; and collectively building a new, trust-wide Inclusion Strategy, which includes drawing upon the local

authorities' (Leicester City Council and Leicestershire County Council) new 'Experts at Hand' programmes.

- The ability further to strengthen and broaden our curriculum (including co-curricular activities – sport, music, art, debating etc.), widening the opportunities our children can engage in;
- A more robust model of school improvement that focuses on the strengths and areas for development of each school, ensuring every school is a giver and receiver of support;
- Access to a larger school improvement central team to deploy targeted and specialist support and challenge to schools and school leaders, facilitating the sharing of best practice between them;
- Increasing our ability to provide professional development opportunities and enhanced career pathways for our staff;
- Improving the financial stability and long-term viability for our schools;
- More effective use of public money by allowing us to cut costs by sharing services, therefore directing more of our income to the classroom and teaching and learning.

### **3. Is this the right time to consider a merger of IPAT and LAT?**

Yes; both trusts have been considering their future development and have spent considerable time looking into options. LAT has been looking to grow their current family of 19 schools further over the past few months; more growth will result in future-proofing the schools and trust. At IPAT, building further capacity to support their staff and children is becoming an issue due to their small size and limited resources.

LAT has generated significant surpluses in the last two academic years and has been able to make some key strategic, structural changes including the introduction of Area Directors of Schools (who provide focused support and challenge to suitably small groups of school within the trust and work closely with local governing boards), Area Finance and Operations Managers, and further key trust-wide appointments: Head of Safeguarding, Head of Inclusion, Head of EYFS and Head of People & Culture, who each in turn lead strong professional networks across their schools and outside the trust. IPAT has been invited to join these networks at no cost from August regardless of the merger proposal.

Unfortunately, the economic climate has begun to take its toll on IPAT as a smaller trust that has not been able to grow its school and pupil numbers for several years and IPAT is posting a deficit this year and a further deficit is projected for next year. The two trusts are as confident as they can be in volatile political and economic conditions (e.g. the DfE's very recent announcement that it is withdrawing primary school Sport & PE grants from 1 January 2027), that the merger process will end IPAT's financial operating

challenge without negatively impacting on LAT schools given the cost savings that can be made operating as a larger organisation. With the financial position set to be resolved, the larger, combined trust would gain considerably in bringing together our school improvement expertise and dedicated staff teams. Whilst IPAT is now facing increased financial challenge, the trust has been able to achieve effective school improvement over the past few years, which will add strength to the future, combined school improvement model and capacity.

Since the publication of the DfE's Schools' White Paper earlier this year, our regional DfE team in the East Midlands, is actively encouraging and supporting trust mergers and consolidation of MATs. The evidence gathered over the last 20 years demonstrates clearly that high quality, regionally coherent trusts are capable of delivering better pupil outcomes and have greater capacity to strengthen community ties and to collaborate effectively with other trusts and regions, working together to support vulnerability as well as enable the fullest reach of strong practice.

#### **4. Has the decision to merge been made already?**

No. Whilst both Boards of Trustees are strongly in favour of this merger, there is a formal process to be followed. Importantly, the proposal not only needs to consider the views of our stakeholders, but it also needs to be supported by the Diocese Board of Education ('DBE') and the DfE Advisory Board that serves the East Midlands Regional Group. The DBE has granted conditional consent already. It is the Advisory Board that will have the final say in whether the proposal to merge should go forward.

#### **5. What is the latest timescale for the merger to happen if it proceeds?**

Given that we have had to amend and restart the consultation process, we do not envisage that we would formally merge until early 2027, if we proceed. This will provide enough time for stakeholder engagement and a more detailed consultation with staff and for us to consider, and take action upon, any issues arising from feedback.

#### **6. Is there a cost to the merger process?**

Yes, there will be costs as the DfE does not provide funding for this process. Any costs of merger will be met by our trusts equally. These are significantly outweighed by future cost savings to be made as a result of merging.

#### **7. If the merger goes ahead how will it affect staff?**

At the point of merger, all IPAT staff would transfer to be employed by LAT as there needs in law to be a transfer from one trust to another. They will be protected to transfer on the same employment terms and conditions, including pensions. This is legally covered by the Transfer of Undertakings (Protection of Employment) Regulations (TUPE). We will run a full TUPE consultation with staff and unions next term depending upon the outcome of this initial stakeholder consultation. Unions have already been informed of the proposed merger and are in contact with both trusts and our staff.

We have already confirmed that there is no risk of redundancy for any school-based staff at either trust and their roles would be unaffected upon merger. Indeed, one of the many positives to the proposed merger is that we retain all of our capable and committed school-based colleagues and create enhanced opportunities for professional development and career progression. Where opportunities arise in the new trust, all colleagues will have the opportunity to apply for positions should they so wish.

Executives at both trusts are continuing to work on the details of the options for the central team's organisational structure post-merger to be presented for trustee consideration and approval. A combined trust will only need one Chief Executive Officer ('CEO') and one Chief Financial & Operations Officer ('CFOO'), which represents a cost saving to the two trusts. IPAT does not currently have a permanent CEO in place; the Deputy CEO was appointed on a short, fixed-term contract to fulfil the role on an interim basis following the resignation of the previous CEO at IPAT in December. Accordingly, the current, permanent CEO at LAT would be the CEO of the Trust post-merger. The CFOO at IPAT, who started his employment in January 2026, is due to leave at the end of September following his recent, unrelated resignation and LAT will be supporting IPAT by sharing their current CFOO under a service level agreement from October until the trusts' future partnership becomes clear.

IPAT's central team is lean and, as we have worked through the due diligence process, we have not identified any risk of redundancy to either trusts' central team colleagues below executive level. We are therefore pleased to confirm at this point that no staff at either trust, other than executive officers, are at risk of redundancy as a result of the proposed merger.

**8. Will a wide range of staff be required to travel to trust premises throughout Leicestershire if the trusts merge?**

Upon merger, colleagues based in schools will remain in their current roles and work in the same location. Colleagues employed in the central teams will be required to travel, as appropriate, to additional schools at times. LAT's central team office is in Wigston and IPAT's central team office is in Sapcote, which are only 10 miles apart. We are intending to retain both office spaces and continue to encourage and support flexible, efficient working practices for all central team staff between trust offices, in schools and

at home. Most of our wider trust meetings will be online or hybrid to eliminate unnecessary travel and the risk of losing valued colleagues.

Integration of all staff into one team moving forwards is important and a number of staff introductory meetings have already taken place with more scheduled for early next term. Both trusts rightly have staff well-being as a core priority, and we will work closely with all of our colleagues to ensure a positive and considerate transition process.

#### **9. Will the curriculum change at IPAT if the trusts merge?**

IPAT introduced the CUSP Primary Curriculum (Curriculum with Unity Schools Partnership) for most academic subjects three years ago and it has been a significant part of their school improvement drive. Whilst it remains important to assess the impact of that investment in each subject area on an ongoing basis and ensure it remains good value for money, the two trusts have no intention to make any curriculum changes at IPAT as a direct result of the merger. Indeed, many LAT school also use CUSP for Science, Humanities and creative subjects including Art and Design Technology. LAT is implementing CUSP Science across all of its schools from August 2026. Both trusts have much they can learn from each other in terms of their experiences and progress made over the last few years, and we will seek to draw on collective strengths as we move forwards. We will also continue to learn alongside and with other local, regional and national trusts; the professional generosity and collaboration within the multi-academy trust sector is a key strength and has driven rapid advancement in standards and outcomes, including in some of the most challenging contexts.

#### **10. Who would sit on the Board of Trustees post-merger?**

We have been corresponding with stakeholders on this issue over the past few weeks as we have sought to resolve a recent dispute between the two trusts and the Diocese Board of Education. The DBE has now re-committed to the original consultation proposal that all currently serving members of both Trust Boards are welcome automatically to continue to serve on the combined Board post-merger.

#### **11. How will local governance be affected by the proposed merger?**

Both Trusts have quite recently reviewed and revised local governance in line with sector guidance, and our structures and schemes of delegation are similar. Accordingly, little change is anticipated. Importantly, both trusts remain firmly committed to ensuring strong and effective local governance is in place at every school with a thorough understanding of local context, the ability to support and challenge school leaders appropriately, positive relationships and communications with parents, carers and local communities and a clear path for local voice to be heard by the Trust's central team and Board of Trustees.

## **12. Would schools have to change their names, logos or uniforms?**

No, there will be no change to the name, logo or uniform of any school as a result of the merger. As we shared earlier, we are open to a new name for the post-merger trust depending on the importance stakeholders attach to this consideration. We would not spend significant resource on a major re-brand.

## **13. Would the term and holiday dates or the timings of the school day change?**

All local schools are asked to set the same or similar dates in the interest of parents who may have children at more than one school. Both trusts' calendars have always been very much in line with local schools throughout Leicestershire and this will continue. Some synchronised calendar dates will allow us to plan shared training and development on Inset days each year, eg. our annual Trust Conference.

## **14. How would pupils be affected?**

Pupils will not notice any immediate difference; they will be in the same uniform in the same classrooms with the same teaching staff as at the start of the academic year. We will continue to strive for an outstanding education for all our children in every school. Over time, children will benefit from improvement in the way they are taught and supported to learn and make good progress, academically and personally, which will result from greater focus and investment in strengthening our curriculum and pedagogical approach, more training opportunities for teaching and support staff, and also from participation in wider opportunities across the trust.

## **15. Would we get more money through this process?**

We will continue to receive the same amount per pupil as we do now (subject to annual review by DfE). However, through increasing the size of the trust, by this merger, we will be able to achieve greater economies of scale which ultimately means more funding going into learning and pupil experience. For example, reduction in the number of executive officers; the trusts have legal retainers each with a different law firm but we would only need one contract for legal services in future; LAT have developed in-house IT & Digital; Governance & Compliance; People & Culture; and Marketing & Communications Departments but IPAT outsource these professional services currently. It would be advantageous to have in-house shared services in future and we can also look to align significant catering and cleaning contracts and further educational contracts and subscriptions making additional savings.

**16. How would the larger trust ensure that individual schools see a financial benefit at local level?**

Both trusts operate a fully transparent process for annual funding allocations, and we are firmly committed to equitable distribution of resource aimed at meeting the needs of all of our children and staff at each of our schools and supporting the delivery of focused school-level development plans as best we can collectively. We aim to eradicate any postcode lottery within the county and ensure children experience and have access to an excellent education at every one of our schools in Leicestershire, where they are supported to reach their potential in the primary phase and be well-prepared for the secondary phase.

There are several small schools with mixed-age classes in both trusts and we remain firmly committed to supporting them as best we can. Small schools are increasingly vulnerable to decline and closure in the unfavourable prevailing economic climate and with the falling birth rate; this is particularly the case if they are outside of sustainable and supportive trusts that understand their importance and value. We are very proud of what our pupils and colleagues achieve together in our small schools (working in collaboration with other schools), and provided there remains sufficient demand for pupil places and the schools are viable and not placing an unfair and unsustainable burden on other schools, we'll continue to support them to thrive.

**17. Would a merger change the trusts' relationship with other schools and the community?**

No, both of our trusts are committed to being at the heart of our community; local schools for local children. we will continue to work with other schools and trusts within the region.