



Engagement Report Yorkshire Learning Trust

January 2025

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1. Introduction

Trustees of South York Multi Academy Trust (SYMAT) and The STAR Multi Academy Trust (STAR) have been working together over recent months to explore the possibility of merging the two trusts to form a new Multi-Academy Trust (MAT). Both Trusts have a clear commitment to providing an outstanding education in the heart of their local community and both value the unique qualities and strengths of all their schools.

The founding values of the proposed new MAT will be :

Inclusion

Collaboration

Aspiration

Integrity

The decision to merge followed a period of up to detailed research which had been conducted by the Trusts to help inform their final decision making. In turn this research and the discussions subsequently informed this period of engagement. Consideration was given to what was in the best interests of learners now and in the future as well as what the implications of the decisions would be for staff, parents, and the wider communities that the schools serve.

Following the engagement period and upon final trustee approval, an application will be submitted to the DfE by 17th January 2025. Approval of the merger by the DfE Advisory Board and permission to form a new multi-academy trust, which will be known as **Yorkshire Learning Trust**, we hope would be known by Easter 2025.

Timescales:

The period of stakeholder engagement for both trusts commenced on Monday 18th November 2024 and concluded on Wednesday 18th December 2024.

It should be noted that engagement and communications will continue beyond this period to ensure all stakeholders are fully informed throughout the process and to gauge input and contribution.

Geographic distribution of the proposed Yorkshire Learning Trust schools

The map on page 5 shows the location of the schools from both SYMAT and STAR. There is excellent road connectivity due to the proximity of the schools to each other meaning that travel time between schools will permits staff to meet in support of school improvement and their own professional development. It will also allow for inter-school events for students

The schools involved as part of the engagement were:

South York Multi-Academy Trust:

Archbishop of York's CE Junior School, York
Bishopthorpe Infant School, York
Dunnington CE Primary School, York
Escrick CE Primary School, North Yorkshire
Fulford School, York
Wheldrake with Thorganby CE Primary School, York

The Star Multi-Academy Trust:

Appleton Roebuck Primary School, North Yorkshire
Brayton CE Primary School, North Yorkshire
Kellington Primary School, North Yorkshire
Kirk Fenton CE Primary School, North Yorkshire
Monk Fryston CE Primary School, North Yorkshire
Riverside Primary School, North Yorkshire
Saxton CofE Primary School, North Yorkshire
Sherburn High School, North Yorkshire
Sherburn Hungate Primary School, North Yorkshire
South Milford Primary School, North Yorkshire
Tadcaster Grammar School, North Yorkshire

The Proposed Merged Community



17 SCHOOLS



7000 STUDENTS



1000 STAFF



2. Consultation and Engagement Methodology

The overall aim of the stakeholder engagement process was to ensure that all stakeholders had the opportunity to hear about the proposals, ask questions and to make their views known about the plans.

The objectives were to:

- Provide relevant background information for stakeholders
- Explain the reasons for the proposal
- Outline the pros and cons for the proposal
- Set out the stages in the process of what is involved for both trusts to come together and form the MAT and the associated timelines

The principles laid down by the project team for the engagement were that it should be:

- An open and transparent process
- Accessible to all stakeholders in terms of:
 - The times of the events
 - The media used
 - The language used (jargon-free wherever possible and acronyms fully explained)
 - Well-publicised and advertised

A variety of media were used to consult including:

- Direct communications sent to:
 - Staff,
 - Parent/carers
 - Community Members
 - Local Authorities
 - Trade Unions: NASUWT, NEU, Unison, GMB, ASCL, NAHT
 - Local Schools: primary, secondary and colleges.
 - Local press
- Text messaging, school websites, direct email and online messaging platforms
- Direct meetings held by headteachers and trust CEOs to regularly inform their members of staff
- School/Trust websites hosting engagement information, including stakeholder frequently asked questions.
- Information on how to give feedback or ask questions via an online survey, emailing directly to each trust or various avenues within the schools.
- An invitation to engagement events held across the trusts for staff and parent/carers and other members of the school community

A copy of this engagement report will be uploaded to the respective trust websites to conclude the engagement period. A collation of all questions, answers and feedback comments received across engagement forums is to be compiled, summarised and shared alongside this report.

2.1 Direct letters/ emails / messaging

Letters/emails/messaging introducing the period of engagement were sent electronically to the following groups:

- School staff
- Parent/Carers
- Trade Unions (a copy of the staff letter was sent to them for their information and invitations to the staff meetings were also extended to them)
- Local schools: primary, secondary and colleges.
- Governors/Trustees
- Local Authorities

(Examples of the letters sent for each trust can be found in Appendix 1).

2.2 Publicised events

Staff were kept informed of the proposal through staff meetings and the opportunity to attend engagement meetings at both trusts as follows (invites were also extended to Trade Unions):

SYMAT	Wednesday 27 th November 2024	4.00pm	Fulford School
STAR	Wednesday 27 th November 2024	4.00pm	Tadcaster Grammar School
STAR	Tuesday 3 rd December 2024	4.00pm	Sherburn High School

In addition to the above meetings, Ian Yapp, CEO of STAR held 2 lunchtime drop in sessions at each of the high schools and Steve Lewis, CEO of SYMAT held a session at Bishopthorpe Infant School on 28th November for staff of Bishopthorpe Infant School and Archbishop of York's CE Junior School.

Parent/carer/ community meetings were also held on the following dates:

SYMAT	Wednesday 27 th November 2024	5.30pm	Fulford School
STAR	Wednesday 27 th November 2024	6.00pm	Tadcaster Grammar School

2.3 Consultation & Engagement PowerPoint Presentations

At Appendix 2 are the Engagement PowerPoint presentations which were presented to staff and parent/carers and the community at their respective events:

2A: Staff Consultation Presentation for SYMAT

2B: Parent/Carer/Community Consultation Presentation for SYMAT

2C: Staff Consultation Presentation for STAR

2D: Parent/Carer/Community Consultation Presentation for STAR

2.4 Frequently asked questions (FAQs)

A copy of frequently asked questions (FAQs) for stakeholders was distributed with the direct letters that were sent to staff and parent/carers. A copy was also uploaded to school websites and emailed to the Trade Unions for their information. This is available at Appendix 3.

2.5 Websites

Both SYMAT and STAR updated their websites to offer dedicated information on their proposals and advice on how to become involved in the engagement process and to share any questions, comment or feedback that they may have.

2.6 Press Release

A press release was issued on 18th November 2024 which referred to the trust websites for further details on the engagement process. This was published in the York Press and on the trust websites.

3. Overview of the Consultation Feedback received

3.1 Attendance at Engagement Meetings and Survey responses

Date	Event	Venue	Number in attendance
Engagement Events for SYMAT			
27.11.24	Staff	Fulford School	48 staff 2 unions 1 Governor
27.11.24	Parent/Carers/Community	Fulford School	11 parent/carers 3 community
Engagement Events for STAR			
27.11.24	Staff	Tadcaster Grammar School	11 staff 1 union

27.11.24	Parent/Carers/Community	Tadcaster Grammar School	10 parent/carers
28.11.24	Staff	Bishopthorpe Infant School	10 staff
3.12.24	Staff	Sherburn High School	7 staff 2 unions
Various	Staff	Lunch time CEO surgery sessions at Sherburn High School and Tadcaster Grammar School.	2 staff

Survey Question	Reponses Received
Survey Responses received	
	311
Did you attend one of our scheduled information sharing meetings?	Yes: 77 No: 264
Have you received enough information about the proposed MAT merger?	Yes: 191 No: 49 Don't Know: 71
Do you support the proposal for South York Multi Academy Trust and The STAR Multi Academy Trust to make an application to the DfE to merge and create a new MAT?	Yes: 175 No: 47 Don't Know: 89
Should the merger go ahead, the proposed date would be September 2025. How do you feel about this timeframe?	It is too soon: 77 It is too long: 44 It feels about right: 230

3.2 Themes and Key Messages

Appendix 4 contains the questions, comments and feedback received from stakeholders from the various media used throughout the engagement period and from the stakeholder meetings. Where similar questions have been asked or comments made, these have been summarised within the appendix document to avoid repetition.

A summary of all the responses and the messages contained therein, with implications for the schools and proposed MAT is provided in the remainder of this section.

In the survey, stakeholders were asked to identify opportunities and challenges of merging SYMAT and STAR to form a new trust. The key themes were identified as:

Opportunities

Collaboration: Staff, parents/carers, governors, and trustees recognised the potential advantages of increased collaboration between the two trusts. Sharing expertise, best practices, and resources was seen as a way to enhance experiences for staff, students, and other stakeholders, while fostering greater efficiency within the newly formed organisation. Stakeholders also acknowledged the benefits already gained from being part of a multi-academy trust, anticipating further improvements following the merger.

Efficiencies - Stakeholders highlighted that the merger would create opportunities to streamline operations, enhance cost-effectiveness, and reduce administrative burdens. By consolidating resources, the trust could focus more funding and effort directly on classrooms, teaching, and learning support. The ability to share expertise, knowledge, and best practices across schools was seen as a significant advantage, contributing to more efficient use of staff and operational systems. Additionally, economies of scale were frequently mentioned as a way to optimise procurement processes, simplify systems, and reduce duplication of effort.

Financial Benefits: -Stakeholders recognised the potential for greater financial stability and the ability to pool resources, allowing for more investment in student outcomes and staff development. Improved purchasing power was seen as a key benefit, enabling the trust to secure better contracts, negotiate favourable rates, and maximise financial savings. A stronger financial foundation would ensure that schools within the trust are better positioned to respond to challenges and invest in their long-term growth.

Improved opportunities: The proposed merger was seen as a way to increase opportunities for both staff and students while maintaining financial stability and strategic focus. Students would gain access to expanded facilities across schools in the new trust, providing particular advantages to those in smaller schools. Staff could benefit from greater access to professional development, shared learning, and collaboration with peers.

Resilience: Many stakeholders highlighted the importance of building resilience in response to challenges in the current educational landscape. The merger was viewed as a means to secure the future of both trusts, creating a more robust and sustainable organisation.

Challenges

Autonomy: Survey responses strongly indicated that preserving autonomy at the school level is crucial to stakeholders. Many have worked hard to establish their schools' individual identity and uniqueness, and there is concern about losing these attributes. Negative experiences with more corporate multi-academy trusts were also mentioned as a cautionary example.

Alignment: Stakeholders acknowledged potential difficulties in harmonising the two trusts. Ensuring that the successes both trusts have achieved independently are sustained during and after the merger is of utmost importance. This includes the alignment of policies, procedures, and strategic goals across the new organisation.

Communication: Effective communication was identified as essential to the success of the merger. As the trust grows and involves a larger number of stakeholders, implementing a robust communication strategy will be critical. Stakeholders stressed the importance of maintaining ongoing dialogue and incorporating their voices throughout the process.

Some stakeholders expressed concerns about not receiving adequate information regarding the proposal. However, both trusts emphasised the importance of conducting the engagement period as early as possible in the process. They acknowledged that some questions remain unanswered at this stage as decisions about the structure and operation of the new trust are still being developed. Nonetheless, both trusts are committed to ensuring that all decisions prioritise the best interests of the school communities they serve.

Job Security: Both staff and parents/carers expressed concerns about potential job losses arising from the merger. However, reassurances have been provided that there are no plans for redundancies. Any necessary staff cost reductions will be managed through natural attrition, which has helped to alleviate some concerns.

Size and Geographic Spread: Some stakeholders raised concerns about the new trust becoming too large. However, recent Department for Education guidance suggests that an optimal trust size for long-term viability is approximately 7,500 students—a target this merger brings the organisation close to achieving. Additionally, the geographic spread of schools within the trust and their relative distances from one another were noted as potential challenges.

4 Conclusion and Recommendations

Based on the feedback and data received to date, the emerging conclusion that can be drawn is that **there are no apparent legitimate reasons why the merger of SYMAT and STAR to create a new MAT should not continue according to the timescales outlined.** There is a view that this will be a positive move for both trusts and all the schools involved, but this is not yet shared amongst a small pocket of stakeholders, and it is important to recognise that ongoing communication is going to be extremely important.

Survey response rates from stakeholders at both trust is considered low with an overall response rate of 6.2% and so from this it can be deduced that:

- Stakeholders appear to be generally content about the merger and formation of Yorkshire Learning Trust.
- Stakeholders are content to leave these decisions to the leaders of their schools and trusts.
- Stakeholders of schools that have already recently converted have been through the process before and do not have further questions and queries.

Following the completion of the engagement period it is recommended that:

- Both trusts proceed with the application to merge and form a new MAT.
- A robust communication plan is in place and a range of media are used to further inform/update stakeholders of all the interim milestones and timescales and plans for the MAT as they progress.