

'We believe this is the way to do it': Exploring the City St George's merger

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About the authors

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Methodology

Interviews were conducted with members of City St George's leadership team, who were responsible for delivering the merger process. We also spoke to the Chairs of both Councils and the Chief Executive of City St George's Students' Union.

Interviews were carried out with:

- ▶ Professor Sir Anthony Finkelstein, President, City St George's
- ▶ Professor Elisabeth Hill, Deputy President and Provost, City St George's
- ▶ Helen Watson, Deputy President (Operations), City St George's
- ▶ Julia Palca, former Chair of City's Council, now Deputy Chair of Council, City St George's
- ▶ Christine Swabey, former Chair of St George's Council, now Deputy Chair of Council, City St George's
- ▶ Matthew Swales, Chief Financial Officer, City St George's
- ▶ Philip Gilks, Chief Executive, City St George's Students' Union
- ▶ Dominic Davis, Director of Strategy and Planning, City St George's
- ▶ Natasha Bennett, Director of Change, City St George's

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Foreword

Professor Sir Anthony Finkelstein, President, City St George's, University of London

As President of City St George's, University of London, I am pleased to provide a Foreword for this report, which examines the background to our recent merger.

City St George's is spread across three campuses in Clerkenwell, Moorgate and Tooting. We educate more than 27,000 students from over 170 countries. The University is now one of the largest higher education destinations for London students and one of the most significant suppliers of the health workforce in the capital.

The merger is timely, given the pressures faced by our universities and the NHS. It will create exciting opportunities, through linking existing strengths in medicine and health to expertise across the academic spectrum from business, law, science and engineering, to policy, communication and the arts. These interactions will generate educational and research benefits, as well as advantages of scale, which will enable City St George's to have a major impact on society, not least in healthcare.

The historic merger has immediately brought increased reach and scale, and in the longer term will enable more investment in facilities, research and student experience than would be possible for two smaller standalone universities.

Discussions around mergers are now front and centre in sector discussions. Since we carried out our own merger, we have seen the news that the Universities of Kent and Greenwich are now exploring their own formal collaboration, which may lead to the creation of a new university group. This is a new model that brings together the two universities under one structure, while allowing each university to retain its own name, identity and local presence.

We also welcome recent work by Universities UK and others on the transformation agenda and hope this report can play a part in these discussions.

Above all of these, however, it reflects a strategic intention to shape and develop a vision of 'technical' and 'professional' education in the UK and to bring to the sector a model of what such education, and universities that are committed to it, can look like.

I hope colleagues across the sector will find this report useful, instructive and, perhaps, inspiring.

Executive summary

On 1 August 2024, City, University of London, and St George's, University of London, legally merged. This marked the first large-scale merger of two UK universities in over a decade. The new multi-faculty institution, known as City St George's, retains a distinctive focus on professional education and research at the frontier of practice.

That point of legal merger marked the culmination of two years of discussion, negotiation and planning, and the development of a bold strategic vision for the new institution. The merger has seen the creation of the new School of Health and Medical Sciences – a leading centre for healthcare education, research and innovation. It brings together a rich legacy of expertise from both institutions to shape the future of healthcare.

This report reflects on the journey from the initial discussions in late 2021, through to the present day, where the process of integration is well underway. The merger has not only created a new School, but will see the integration of professional services, management of a combined estate and the creation of new university-wide research and education opportunities.

Senior figures directly involved in the merger have contributed to this report, reflecting on the process, highlighting some of the challenges faced and outlining their hopes for the future as a combined institution. They have also offered recommendations based on their experiences, which may be useful to those in the sector considering adopting a similar strategy.

Table 1: Merger timeline

End of 2021	Exploratory discussions begin between St George's and City
22 February 2024	Merger agreement signed by St George's and City
1 August 2024	Date of formal legal merger to create City St George's, University of London
August 2024	Ongoing integration of policy, people, functions and systems, through post-merger integration plans, underpinned by change management and communications
March 2025	Launch of the new City St George's, University of London brand and awareness campaign
1 August 2025	Unified structure for School of Health and Medical Sciences in place

Introduction

City, University of London and St George's, University of London officially merged on 1 August 2024 – the first large scale merger of two UK universities since the 2013 merger of the University of Glamorgan and University of Wales, Newport, which became the University of South Wales.

Another merger the year after saw the Institute of Education (IoE) merged with University College London (UCL) in 2014, becoming the UCL Institute of Education, a faculty of UCL, creating London's largest higher education institution.

Looking even further back in time, in 1995, Queen Mary and Westfield College merged with St Bartholomew's Hospital Medical College (Barts) and The London Hospital Medical College to form the current Faculty of Medicine and Dentistry. This followed the 1989 merger of Queen Mary College with Westfield College. (The institution now operates as Queen Mary University of London.)

The merger between legacy City and legacy St George's has joined St George's historic medical school in Tooting with City's School of Health and Psychological Sciences, in Clerkenwell, London, to create an integrated School of Health and Medical Sciences.

The merger has drawn together two historic universities with different origins but with similar values. St George's was founded in 1733 and is the oldest medical school in England, starting from its base in Hyde Park Corner, while City started life in 1894 as the Northampton Institute in Clerkenwell, providing for the education and welfare of the local population. Both universities have taken pride in their diverse range of students, and in the opportunities they have given to so many who may be, for example, the first in their family to attend higher education.

The newly created School of Health and Medical Sciences is a leading centre for healthcare education, research and innovation, bringing together a rich legacy of expertise to shape the future of healthcare. The merger also enables wider collaboration with disciplines across legacy City's existing

Schools, in areas including Business, Law, Communications, Science and Technology and Policy and Global Affairs.

Previously, St George's specialised in educating doctors, paramedics, physician associates, biomedical scientists, radiotherapists, radiographers, physiotherapists and occupational therapists. An important part of the identity of St George's, and the experience of its staff and students, is its co-location on the Tooting site with a significant tertiary hospital, St George's, Epsom and St Helier NHS Foundation Trust.

Meanwhile City's School of Health and Psychological Sciences was known for its strengths in Nursing, Midwifery, Speech and Language Therapy, Optometry, Counselling, Radiography and Psychology.

Now united, the School offers an unparalleled breadth of healthcare disciplines, fostering collaboration to drive progress in treatment, population health monitoring, workforce development, leadership, policy and advocacy. This unique combination of expertise positions the School as a true 'health powerhouse' for students, researchers and the NHS.

The resulting City St George's is a multi-faculty institution with a distinctive focus on professional education and research at the frontier of practice. The combined institution has more than 27,000 students, 4,000 staff and a turnover in excess of £400 million.

Exploring the opportunities

Initial discussions between the two parties started in the final quarter of 2021. Then Chair of St George's Council, Christine Swabey, recalls how a merger had been considered before by the University but had not come to fruition:

Historically, St George's had engaged with a number of other universities on merger discussions over quite a long period of time, but none were seen through to completion. As a consequence, we were the only free-standing hospital-based medical school in London outside a multi-faculty institution. I felt we had an opportunity here that needed to be seen through because the challenges of going on alone were becoming increasingly evident.

Earlier in 2021 we had been in merger conversations with another university, when I was approached by City's then Chair of Council, who said, 'I think we're a really good fit for you'. That initiated a series of conversations initially between the Chairs and then to broader Council and executive teams.

Then Chair of Council, Julia Palca, recalls the initial appeal at City for a merger with St George's:

It was to enhance City's offering and hence also City's reputation. I felt it would enhance not only our health school but as the reputation of the combined health and medical school grew, it would also enhance the reputation of our other schools. That would have three potential benefits – one is to increase the number and quality of student applications, and the second the quality of academic staff. The third benefit would be on the quality of research outputs.

Christine recognised the potential in City's approach:

My personal view was that there was a very compelling proposition from City and an obvious strategic fit with St George's. In this instance there was hardly any overlap at all between the two universities, so it was obvious that this was a merger of joining the institutions together to extend this portfolio of the professions. The principal areas of healthcare City was involved in were not replicated at St George's. Between us, we covered pretty much all the relevant professional disciplines within the healthcare and medical science sector.

I thought that was extremely exciting and it also meant there was a real opportunity to preserve all that was good about St George's. We have a very special offer within London across the medical sciences, and I felt we would be completing a significant gap that City had in offering professional education.

The strategy that City had suited us, and I think we made sense to City. If it were just another multi-faculty organisation that is hard to really get excited about. I thought if I could see it and understand the benefits, then that's the basis for a good conversation around the Council table and something most importantly that we could put to staff and students. Mergers are incredibly hard to pull off, and as a basis you must have a compelling proposition. I thought it was something that we can get people behind. I wanted it to be cast iron rationale – that doesn't get you over the line but if you're absolutely persuaded by the strategy, then that puts you in a good place.

For City, there were other benefits from considering a merger of the two institutions. Deputy President and Provost, Professor Elisabeth Hill, saw how students would benefit:

There was a lot of synergy between the two institutions, particularly the diverse student body. By merging, we could build degrees and other opportunities for students to learn in a multidisciplinary health and medical environment that would better map workplace teams that students would move into after graduation. Equally, students across all areas of the merged university would be able to benefit from wider study opportunities in broader disciplines. A more extensive range of extra-curricular opportunities would also be available.

For Deputy President (Operations), Helen Watson, a merger expanded City's geographical reach:

City's local recruitment was mainly 'hyperlocal', which is quite typical of London. As City, we had a lot of international students, but we didn't have so many students from south of the river. If you think of where our Clerkenwell Campus is placed with the Elizabeth line, Farringdon and Angel stations – we're accessible from north, east and west London. Tooting brings us south of the river as well.

Chief Financial Officer, Matthew Swales, saw it as an opportunity to build resilience in a changing higher education climate:

Operating at scale gives you a level of resilience. In a challenging financial environment, diversification also reduces overall risk and means you are much more able to weather individual setbacks. That scale also helps with profile – it really translates when you start talking about 25,000 students plus. It puts City St George's on the map in a way that neither legacy City nor legacy St George's were before. It's an acceleration of our organic growth and strategic plans.

Director of Strategy and Planning, Dominic Davis, considered the research potential a major draw:

There's a certain lustre that exists around medical schools, and that's in part due to research and the benefits medical research brings. The research opportunities that come with being part of an interdisciplinary institution are massive. For instance, around 40% of all research income that's distributed nationally is within areas that existed at legacy St George's. That means City didn't have access to significant amounts of research funding. A bigger profile brings opportunities for additional resources, and to invest in scale and to influence.

Assessing the risks of a merger

Multiple risks were discussed and debated during Council meetings and among the Executive at City. Elisabeth Hill outlines some of the early considerations:

There was a question of whether both institutions had the willingness, confidence, courage and capacity to do something that was so unusual in the sector. Something that was going to be challenging and disruptive, albeit fascinating and yielding great opportunities in the future.

There was an obvious risk around how much it would cost in the short term and whether that was possible. Another potential risk at this early stage hinged on whether we could make the longer-term vision real. Could you create the kind of structures, but particularly the cultural integration, that would be needed to really maximise on merger opportunities, rather than just being something that happened but nothing really changed?

Another significant risk was that a merger of this kind was without precedent in the recent past. As Helen Watson notes:

There isn't a 'mergers playbook' in the higher education sector – so you're designing the plane as well as building it and flying it all at the same time.

Could we develop the financial headroom we needed to integrate? Without financial headroom, we can't make the infrastructure investments, and that is a key risk.

This is something Julia Palca is very conscious of:

We knew that St George's was pretty much breaking even, but we also knew that it was a university which needed very significant investment. As a consequence of that investment, we had to consider the risk that we would need to divert investment from other schools, towards the Tooting campus.

As Chief Financial Officer, Matthew was responsible for providing Council with many of the assurances they needed to proceed merger discussions to the next stage:

The risks that legacy City saw in the merger were identified through the due diligence process and significant joint financial planning. These informed the pre-conditions of merger and drove a series of activities and interventions in the lead up that were designed to give both Councils assurance around the viability of the combined institution.

How did we want to reflect financial performance as a precondition of merger? It was effectively adherence to the joint financial plan. Establishing a common understanding of that picture and ensuring delivery through the period of merger

negotiations was the primary role of the CFO in the process. This included the need to secure adequate financing for the combined institution and the transfer of legacy St George's existing loan facilities over to City St George's.

Given the criticality of finances in the decision to merge, a number of protections needed to be built into the merger agreement as well. What would trigger a breach of merger terms? What would give either institution, in particular, the right to say 'no, this is now outside our risk appetite' but in a way that would be readily understood by the other side? A necessary mechanism, but one that meant the stakes remained high throughout the process.

Another risk considered was the amount of time and energy it would take staff to deliver the merger, according to Dominic Davis:

It takes a huge amount of focus of the people working on the merger – really relentless focus to get it over the line. So, a risk of doing it is the bandwidth required to make it happen and then be a success. It's a significant amount of time that has understandably taken colleagues away from other activities.

Helen Watson agrees:

When you're doing something this big and complicated, you also have to ensure that you have the resources in place to make sure all the many day-to-day critical activities in a university keep running.

Consideration was also given to the risk of not proceeding with the merger.

Elisabeth Hill explains:

The theoretical risk of not doing it was that City lost the opportunity to grow its reach and expertise. We would lose the ability to do interesting interdisciplinary activities in research, teaching, enterprise and innovation. Some might say that you could just do that through strategic partnerships and collaborative working, but those things never get you as far – if you are in one institution you can ‘unblock the blockers’.

Matthew Swales agrees:

It’s opportunity loss. Legacy City was strong on brand, really strong in its target demographic. It had a clear mission, and it was growing organically. But the profile of City St George’s gives transformational, step-change growth and a platform to operate across a broader spectrum of markets and student demographics. It gives you more opportunity to grow in different directions at the same time.

Dominic Davis echoes the ‘opportunity loss’ sentiment:

True strategic opportunities don’t come around very often – my feeling was that if we didn’t do it now, we’d probably miss the opportunity forever.

Helen Watson adds:

Financially things aren’t going to get any easier in the sector and the risk then is that a university with around 20,000 students is not sustainable. London is a very crowded market, and City was classic ‘squeezed middle’. The Russell Group have a market, and they can always reach into ours, and the post-92 universities

have more efficient staffing models by and large. That puts City in a vulnerable position if we don't seek out these sorts of opportunities.

Long-term resilience was a concern for St George's, as Christine Swabey explains:

One of the challenges of selling it was that we were in an OK position financially. We were not in crisis; we weren't in deficit. We didn't have those 'burning platforms' that might force you to think about merger. That's not the same as saying that we were resilient financially. I think if you projected forward 10 years with all the challenges that are common in higher education, it was going to be increasingly difficult to remain financially self-sufficient and it was going to be increasingly constraining. We had done extremely well in balancing the budget year-on-year, but at the expense of inadequate investment in the infrastructure, and in terms of human resources.

All of our subjects are high cost and that was a constant concern to me that we would be challenged to deliver our core objectives of providing the quality of education and research and the breadth we would like. There was a separate issue about scale, when you looked at how research in medical sciences is evolving. We were small. We were good, with really good quality and impact, but scale matters in research.

Signing the merger agreement

At their respective Council meetings in February 2024 both City and St George's voted to enter into the negotiated merger agreement. What started out as a strategic discussion and exploration between two universities, at that point became a very practical process with multiple

considerations. The end point of this next phase was to become legally and regulatory compliant by 1 August 2024 and to do so within the guidrails set out in the merger agreement.

The merger agreement required:

- › the transfer of all of St George's business and assets, including properties, IP, goodwill, students, staff and all other contracts that could be transferred;
- › City to assume all of the liabilities of St George's, including bank debt;
- › that on completion, City would change its name to City St George's, University of London and that St George's would be dissolved.

The merger was subject to a number of conditions, including:

- › obtaining regulatory approvals from the Privy Council, Office for Students, Department for Education, and General Medical Council, among others;
- › obtaining a licence from the NHS Trust to assign the leasehold properties;
- › both Councils agreeing to the financial arrangements within the terms of the merger agreement; and
- › the Competition and Markets Authority (CMA) being satisfied that the merger did not breach competition law.

Matthew Swales recalls the considerable work involved in delivering what was required by the merger agreement:

We had to carry out extensive due diligence across Tooting's complex NHS estate and ensure that Council were sufficiently informed around the assets — and any associated risks — that they would be assuming responsibility for. Operationally we also had to novate what we had identified as business-critical contracts to the new institution and establish a combined insurance portfolio that covered both campuses.

Navigating the process of integrating after legal merger

An important part of the integration process was the appointment of the University's President. The appointment process for the President of the merged institution was undertaken by both the Councils of City and St George's and led by an independent Chair, supported by an external executive search agency.

Legacy City's President, Professor Sir Anthony Finkelstein, was selected to lead the merged institution, effective from 1 August 2024. Until this date, both Anthony and Professor Jenny Higham, Vice-Chancellor of St George's, remained leaders of their respective universities, working together to establish the initial phase of the merged institution in August.

City's Change Support Unit, led by Director of Change Natasha Bennett, became involved in the integration process after legal merger was completed on 1 August 2024. Natasha says:

It's important to distinguish between 'integration' and 'integrated'. We are integrating, and this will by necessity be a long-running process. I met an academic from the new School and something she said really helped – she said all the focus was on the wedding and not on the marriage. There was so much work over the previous two years to get us to the point of legal merger. There may be some institutional learning about when the process of integrating could and should realistically start and how these expectations should be shared. Agreements made as part of the negotiations included utilising City's existing academic structures, governance approach and many processes by default, in readiness for the post-merger implementation.

We have a strong governance framework and processes in place overseen by the University Integration Board. The School Integrating Group oversees all elements of the establishment of the School of Health and Medical Sciences, alongside the

Workstreams Integration Group responsible for the delivery of all aspects of institutional operational integration.

Alignment of expected benefits with the City St George's strategy highlights that the merger is part of the overarching corporate strategy and that related opportunities are institution wide, with all schools expected to contribute to the realisation of benefits.

In the short-term, the functional nature of integration will present benefits around the effectiveness of working and operational efficiencies for the new School and the wider University, with oversight from the Integration Programme Board. In the medium- to long-term it is expected that opportunities presented by integration, as part of the 'powerhouse' vision, will have a more strategic and wider reach.

Core workstreams are managing all aspects of integration inclusive of policy, people, functions and systems and this work is ongoing.

Helen Watson notes some of the differences between the two institutions which need to be worked through:

Our governance and academic structures were very different, and the former institutions' IT systems currently remain completely distinct. Culturally we are also quite different. For example, as a smaller institution, St George's could rely a lot on personal relationships to get things done. City was much larger and more devolved and therefore couldn't quite operate in the same way.

We anticipated that we would find processes, structures and approaches at St George's that we would want to embed at City St George's. As we go through the process of integrating Professional Services, for example, we're aligning our Admissions function to sit within Marketing and External Relations, rather than Academic Services – aligning with the model in place at St George's. As we work through all the functions and processes, we will aim to take the best bits from each institution.

Professional Service Directors (PSDs) have been appointed for the merged functions and have started developing their plans for integration. Helen Watson says:

We have a very formal, robust process in place, where each of the Professional Services Directors (PSDs) is charged with developing a blueprint for their integrated service which will provide unified support across all our campuses; there are also cost saving targets built into the model. These would have been inevitable anyway, bearing in mind the financial pressures the HE sector is under; the larger scale we are now operating on should make them easier to deliver.

We are following a conventional restructuring approach with mapping and matching processes including with a competitive process if more than one individual is mapped to a post. It's what we've already done for the PSDs and Senior Leadership Team. We've been very clear from the start that we are appointing on the basis of the best person for the job, not on the basis of quotas from each institution.

Alongside the integration of people and structures, bringing together systems and processes is a huge challenge. As Dominic Davis notes:

It's testing every single process that exists at each institution and asking, 'how does this process stand the test of merger?' That's a huge amount of work. There are hundreds of processes and more than 300 policies we've identified, and lots of tacit knowledge and understanding. One of the challenges that comes from this is access to high quality information on which we can provide senior management with timely and reliable insight.

Creating the new School of Health and Medical Sciences

The work to create an integrated School of Health and Medical Sciences has been complex. Elisabeth Hill explains:

There's the challenge of managing the short-term focus and getting things set up, balanced against the long-term focus of what you need to do now to achieve the potential in the longer term. The process of merging isn't easy, and there has been challenge around what is the best way of doing things – how to support staff in the process, how to realise a properly integrated single school structure, how to create a new community of staff and students.

We've set up the school leadership team, which establishes the structure of the school, drawing in all of the academic activity of health and medicine across the two legacy institutions. We encouraged people from across both institutions to apply for these leadership roles, and the academic leadership draws from both legacy organisations. Simultaneously we've established new academic departments and have moved all the academic staff into one of those eight departments.

At the same time, staff are delivering teaching, assessments, placements, and research across two legacy parts of the School, correctly applying the academic regulations, policies and process that are in place and ensuring that they are well informed of changes that would impact the approach they should take, or advice given to students.

It's a continuation of 'business as usual' while also setting up this new single structure that will then evolve itself to realise the great potential of being together.

Natasha Bennett adds:

We had two very distinct health schools that needed to come together, and there's a lot of emphasis on the student perspective and the views from students from the legacy organisations on the merger. Close working with the Students' Union is critical.

Staff can see the opportunities and synergies, and how these academic functions are being brought together, but inevitably there are more questions and focus on day-to-day practice and the practicalities of working together.

Cultural integration is a long and difficult journey

Melding the cultures of two distinct organisations, each with a proud history and established identity, is a massive undertaking. Elisabeth Hill explains how staff have been feeling:

It has been unsettling for many in the short-term. Generally, among academics there is a sense of being able to understand the vision and the strategy for the merger, but a lot of anxiety around the short-term impact. It prompted questions such as 'Will I still be able to teach my courses? What does it mean to be in an academic department? Can I still do my research? Will I still have a job?'

Among professional services staff there has been a bit more uncertainty about their jobs, and what your job will be within the professional service. Even if you get the rationale of the merger, it doesn't take away how you feel about the risk to yourself and your job security.

Matthew Swales agrees that in the very early stages of integration, staff communication had been a challenge:

Given the nature of our merger, on day one everything changed but for many the day-to-day felt exactly the same. Stability through the merger was enormously important but over time that uncertainty about the future can translate into anxiety and in some cases frustration. Many operational discussions boiled down to the question: 'What's my new role?'

Natasha Bennett adds:

For staff in professional services, I think it's a case of 'I can understand where we're going, but I don't know yet how I will personally be impacted.' We must get the designs right for futureproofing the single organisation. We're trying to get the balance – we need the best of both from each university. This needs to include demonstrable opportunities for staff.

In the build-up to merger, the language was of mergers and of equal partners. I'm not sure the narrative could have been any different earlier, because we probably wouldn't have got to the point we needed to get to. The reality may feel very different now – some in Tooting might say it was an acquisition and not a merger.

Helen Watson agrees that the initial messaging did not necessarily depict how some staff are now feeling:

We did a lot in the early stages of describing our vision as a merger of equal partners, particularly in terms of academic strategy. That sense of being taken over has been more acute now as the gap between vision and spirit and structural necessity

has become clearer. And there is a reality that the majority, but not all, of senior appointments so far have been legacy City appointments while key members of staff at legacy St George's have moved on to other opportunities.

Elisabeth Hill explains the thinking behind leadership recruitment for the new School and the need for an independent figurehead:

After merger, we recruited an externally appointed Executive Dean to lead the integrated School of Health and Medical Sciences. That was important because it meant the School would be led by somebody who was associated with neither one university nor the other in the past.

Other senior roles in the School have drawn from both legacy St George's and legacy City staff, and the integration of the two Councils saw the appointment of independent members from both legacy universities. Previously Chairs for their respective institutions, Julia and Christine are now Deputy Chairs for City St George's.

Elisabeth Hill adds:

It's helpful to look back and see that structural approaches and processes that were pre-agreed to operate in a particular way have been useful in making progress. They have set out a roadmap that has helped edge people forward and keep us clearly on the journey to that bigger ambition and vision that was shared.

Julia notes one of the challenges of communicating a merger:

It's very difficult to control the messages which are given at another institution. Perhaps a lesson learned would be to try and understand what those messages might be, if possible,

to influence them, but certainly to anticipate them and react accordingly.

Natasha knows that bringing together two cultures will take time:

Culturally, people will hold on to the symbols and stories that are part of defining their identity. I am hopeful that people can hold onto and not lose the enormous pride, history and legacy which exists in both organisations. Our shared challenge is to bring that together and build something stronger as part of a much bigger and ambitious joint organisation.

Moving forward with optimism

All those who contributed to this report see a bright future for a joint institution. Christine Swabey notes the warm welcome legacy St George's has received from legacy City's schools:

I'm terribly optimistic about the new institution – it's just so exciting to see the other schools and how positive they are about the opportunities of working more closely with St George's. There's been an overwhelmingly positive welcome and evidence already of research collaborations and students coming together across different disciplines. That is so encouraging. People are excited to tell you about what they do, and you just keep thinking of the endless possibilities that there are to do interdisciplinary work, whether it's through research or through education.

Elisabeth Hill adds:

It's the ability to deliver in the longer term, really innovative teaching, assessment and research programmes, that lead

through into innovation. Creating impact locally, nationally and internationally.

Matthew Swales says:

It's put an injection of energy into the organisation. City St George's gives us a platform to rally around. It's a concept that has encouraged focus on what the potential for the joint institution could be, rather than just continuing to evolve as an individual institution and it has turbo-charged the level of ambition in our planning.

Helen Watson says the response from sector colleagues has been interesting:

We are seen as being the institution that had the vision to jump in a slightly different direction. Everybody else is battenning down the hatches, making major cost cuts and we've said, 'We believe this is the way to do it.'

Bringing together two Students' Unions

Alongside the work to create an integrated School, the merger has also brought together the two Students' Unions. Philip Gilks is the Chief Executive for the new City St George's Students' Union:

Normally when you do things in the sector, there would be someone else who is in a similar position, and you'd have another CEO to chat to. But in this case, I don't know of a Union who has merged in this way or scale in recent years.

A lot of what we are doing has felt like it was for the first time – we've taken two fully fledged Students' Unions, each with CEOs and delivering various functions and services and

bought them together to form a new Students' Union. Because of our comparatively smaller scale, we have also been able to merge much faster than the Universities. There is naturally less bureaucracy, and we have been able to just get things done. It's fair to say this has been more challenging for the legacy St George's Students' Union staff where change has been more extensive, because their management, messaging, uniforms and even every policy and process has changed. However, staff are also now seeing the restructuring process happening in the University, and it isn't going to impact them in the same way as we got over most of those hurdles some months ago.

During the process, we've often felt like we were the bearer of bad news to students, and it can feel like we are stuck in between the University and the students – and our role is translating things in both directions. Many legacy City students – perhaps excluding those in the new health school – may not have fully realised the merger, aside from noticing a change in the logo. Obviously at legacy St George's and the students in Tooting, it has been felt much more strongly. The reality is that many feel they've lost their identity and who they are as an organisation. That's not necessarily true, but we need to do more to make them feel a bigger part of the decisions, versus having decisions done to them. I think there is a lot more we can do to bring them on board over the coming months and years.

One of my big takeaways from this is that there should be clear communications and transparency from the outset – the message to St George's students and staff before the merger was that 'nothing is changing for at least 12 months', and then in reality, for some they feel everything has changed for them within a year. There has been a difference in the messaging post-merger and this affects how people feel.

To address this, Philip Gilks and colleagues within the University have established regular meetings between the Students' Union and key staff in the new School, which will help communicate with students about some of the positive benefits from the merger, such as the huge investment in the Robert Lowe Sports Centre:

We will try to be more frequent in our communications, and also more responsive. We want to get the balance right, of really recognising and honouring the St George's history, but also recognising that things are different. Because they were a small institution their cultural identity is much stronger than City's. The relationship between staff and students is different, their connection to the hospital site in Tooting is strong and their alumni community is more engaged. This creates a stronger identity for them than we've ever probably really understood at City. You don't want to lose that, because that's what they love. That sort of affinity to a place is harder at City because it's such a big university – students are never just in one building; they are spread over campus. It's just a different experience.

Throughout the process, Philip was able to draw on his strong relationship with the University's senior leadership:

We have a really positive and constructive relationship with the University. Having that open dialogue with the senior members of the University and their support was vital as we went through our merger. They made sure that we had sufficient funding around legal costs and transfer agreements, rebrands and so on.

Any students' union going through a merger should work out what support from their university looks like, and who that support person is, because there are going to be issues that need to be addressed. Who has enough power and oversight to know what to do?

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Recommendations

Contributors shared their personal reflections on the process, future lessons and advice for a counterpart potentially going through a similar process. These are summarised below.

- You should **have a positive and strategic logic for merging**. Doing it from a position of financial trouble is an entirely different proposition.
- **Agree a set of merger principles** at the start to be adhered to throughout the process and try not to deviate from these.
- **Be clear about your governance structure**, both for the project and for the institution you are going to be at the end of it. Everybody should be aligned to that.
- **Break it down into stages** – the exploratory stage, the merger agreement stage, the ‘getting to day one of the merger’ stage and the integration stage. It is important to see the different phases and rally people to focus on each.
- **Due diligence is fundamental**, so that your Council feels fully informed of the risks, opportunities and finance required.
- Decisions made as part of **the merger will have an impact on what the university can and cannot do** for years to come.
- **Deadlines are important** – without deadlines you do not have urgency or leverage. Deadlines generate urgency and the need to make decisions.
- Get your financing in place and **be clear about how much you are going to need to spend** on integration.
- **Do not skimp on the people needed to do professional change management**, whether that’s in-house or you are outsourcing support.
- **Be sensitive to where the other party is in their journey** and never underestimate the importance of relationship-building and thinking about people as people.

- › Give early consideration to the impacts of change and how you will handle these. **Be as transparent with staff as you can** about what is happening and how it will feel for the first year or two.
- › Your **students' union** will be following a similar process – **make sure you give them the support they need.**
- › **Communication is key** – be really clear what you are communicating to whom and why.
- › **Maintain the focus on what the merger is about academically** – providing more and better opportunities to deliver excellent research and education. That will motivate people even while some of the structural necessities feel painful.

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The merger of City, University of London and St George's, University of London was a historic event for both institutions. This HEPI report reflects on the merger, from its initial discussions through to the present day. Including extracts from a series of interviews with colleagues at City St George's, the report highlights both the challenges faced and aspirations for their joint future. The report concludes with a series of recommendations for those in the sector considering a similar strategy.

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