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Conclusion

CHAPTER 13: THE WAY FORWARD

- 13.1 The Review has undertaken its work within a challenging timescale, and concurrently with the planning of radical and far reaching reforms in the arrangements for the administration of education in Northern Ireland and in aspects of education policy. This coincidence, while presenting the Review with an element of uncertainty about future structures and policy directions, has also given it an opportunity to contribute to the shaping of the educational landscape in Northern Ireland for a considerable period ahead.
- 13.2 We have consulted widely and listened carefully and critically, but with an open mind; this has been a vital part of our approach. The meetings held with the many educational interests proved to be extremely valuable in developing our understanding of substantive issues, and helping us to appreciate their perspectives. We acknowledge again the positive and constructive engagement with all those who contributed to our work. It was clear that they see the Review as an exceptional opportunity to transform key aspects of the education system for the benefit of children and young people.
- 13.3 The initial high-level terms of reference asked us to examine funding of education in Northern Ireland with particular reference to the planning and organisation of the schools' estate in the context of demographic trends and curriculum changes, notably for 14–19 year olds. It has been evident for some considerable time that Northern Ireland's unusually diverse school system has too many schools, and too many small schools, in an estate in need of substantial investment – investment already earmarked for a ten-year period. Surplus places, as a measure of over-provision, are symptomatic of intrinsic structural issues in the education system and of latent weaknesses in planning. There is mounting financial strain, and an increasing cost to many pupils in terms of limitations on their educational opportunity. The inefficiencies resulting from maintaining the existing educational provision, without radically changing the schools' estate, would be unacceptable in view of the excessive recurrent costs that arise from the current configuration of the system of schools.
- 13.4 From our consideration of funding for education in Northern Ireland, we concluded that the main issue is not the total amount spent in comparison with that in other countries of the United Kingdom. The central point is the scope that

exists for more effective and efficient use of the funding that is made available, in order to provide all pupils, irrespective of where they live in Northern Ireland, with an excellent education.

- 13.5 In all our considerations and recommendations we have been guided by the overarching principle that learners' needs and interests are paramount. Our analysis of the issues, taking account of the advice and views that we have received, leads us to the inevitable conclusion that if we are to concentrate financial resources on the quality and breadth of education for all pupils, then we need to transform the current school structure into a system of sustainable schools characterised by the features set out in this report. An excellent education in good schools must surely be the aim of any system of schools. Progress towards that goal begins with sustainable schools. At the same time, we take the view that, particularly in a re-structured system of schools in the context of the reforms of educational administration, there is a strong argument for enhancing the autonomy of individual schools by maximising their delegated budgets.
- 13.6 Area-based planning, led by the Education and Skills Authority within a strategic framework set by the Department of Education, is the bedrock for the strategic approach to planning detailed in this report. This approach is fundamental to our goal of communities served by a set of educationally effective and efficiently functioning sustainable schools which, taken together, meet the needs of all pupils in the community by optimising the use of their facilities for the benefit of all through sharing and collaboration. Importantly, area-based planning of the schools' estate will facilitate planning of curricular provision at local level, and it will also allow for co-ordination of educational planning with the provision of other services, including local government services.
- 13.7 We take the high level of support for the principles underpinning planning of the schools' estate, set out in the consultation paper, as a comprehensive endorsement of our thinking on the way forward to a new era in the approach to planning. The departure from the largely independent planning by each sector to a co-ordinated cross-sectoral approach, with the possibility of a cross-community dimension, represents a fundamental change in the approach to planning that we recommend. Existing sectors will still have the right to continue to represent their interests, needs and perspectives but, in the spirit and practice of the new approach, considering their contribution to the system as a whole.

- 13.8 The process of moving from the current number, size and location of schools to the sustainable schools envisioned for the future will take time, and careful, imaginative, sensitive planning. The change cannot, and should not, be achieved hastily. But it is an inescapable direction of travel, a journey that must be undertaken, and must begin without delay. That is why we are recommending that the Department of Education should proceed with area-based planning from early in the year 2007 until the Education and Skills Authority is established, and that it should draw up a timetable for the key actions and outcomes in establishing and implementing the new strategic approach.
- 13.9 In the course of consultation, and as our thinking developed, it became clear to us that to examine funding and consider planning of the schools' estate without reference to their ultimate function would be at best an incomplete exercise, and at worst a pointless undertaking. That is why we have devoted a chapter to issues of quality in education, the vital importance of good schools, and the priority that must be given to improvement, in order that the quality and standards of all schools are raised to those of the best.
- 13.10 We considered it important to bring together views, expressed in consultation, on the nature and purposes of education of pupils throughout their schooling. We wished to highlight the strong support for an education in the service of both the individual and society – an education concerned with all aspects of human living, contributing to personal fulfilment, civic well-being and economic prosperity. Within a framework of shared core values and principles, we acknowledge perspectives that make for distinctiveness in the educational experience provided by schools, manifest in their ethos, but with scope for each school to develop and maintain its own particular character.
- 13.11 We need hardly state that the aims and spirit of *A Shared Future* are unmistakeable features of the backcloth to this Review. We were asked explicitly to consider matters of integrating education and improving collaboration. Although recognising that integrated schools make a highly significant and distinctive approach to educating children and young people together, we are convinced that all schools, and all the educational interests, need to, and wish to, play their part in the journey towards the goal of *A Shared Future* – “a peaceful, inclusive, prosperous, stable and fair society firmly founded on the achievement of reconciliation, tolerance and mutual trust”.

- 13.12 That is why we advocate a more pervasive and inclusive strategy, focused on the dynamic process of integrating education across the school system. This begins with each school as an inclusive, civilised and tolerant learning community, building mutually beneficial relationships with other schools, and in the case of post-primary schools with Further Education, focused on learning and sharing together. Our argument for this more inclusive and pervasive approach is three-fold: first, the educational case – access for pupils to the full range of the curriculum, to high quality teaching, and to modern facilities; second, the social case – societal well-being by promoting a culture of tolerance, mutual understanding and inter-relationship through significant, purposeful and regular engagement and interaction in learning; the economic case – through cost-effective provision that gives good value for money.
- 13.13 We believe that our recommendations taken together provide a realistic, achievable, yet challenging way forward to bring about the radical and long-term changes that are necessary if the children and young people of Northern Ireland are to be provided with an excellent education, in the broadest sense, in good schools with a secure future. Although we appreciate that rationalisation can be an emotive issue accompanied by a sense of loss, our consultation left us in no doubt that all the educational interests realise that the status quo cannot prevail, that difficult decisions need to be made, and that the time has come for a fundamentally different approach to planning the schools' estate. Building on promising beginnings at local level, the development of more widespread sharing and collaboration between schools and across sectors will require careful nurturing and encouragement. At the same time, the modernisation of the schools' estate presents opportunities for new shared schools and for a variety of approaches to optimising the use of new accommodation and facilities.
- 13.14 These new directions will require visionary, clear, yet sensitive skill and leadership in managing change. In presenting a case to the public for the changes we are recommending, it will be important that the focus is on the real benefits intended, and on how these can be realised, and on the opportunities inherent in sharing and working together, rather than on the difficulties. The public needs to be helped to see that there is a better way, and to take ownership of it. High quality communication regarding the Review's recommendations will be essential for all those, not least children and young people, and the professionals themselves, whose stake in the outworking of any decisions is indeed great.

Glossary

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Appendices

Glossary

ACT	All Children Together
ANIC	Association of Northern Ireland Colleges
ARNE	Assessment of Relative Needs
ASB	Aggregated Schools Budget
AVCE	Advanced Vocational Certificate of Education
AWPU	Age Weighted Pupil Unit
CASS	Curriculum Advisory and Support Service
CCCS	Cross Community Contact Scheme
CCEA	Northern Ireland Council for the Curriculum, Examinations and Assessment
CCMS	Council for Catholic Maintained Schools
CEAIG	Careers education, advice, information and guidance
CFF	Common Funding Formula
CFR	Consistent Financial Reporting
CH	Cultural Heritage
CI	Controlled Integrated
CnaG	Comhairle na Gaelscolaíochta
DCAL	Department of Culture, Arts and Leisure
DE	Department of Education
DEL	Department for Employment and Learning
DES	Department for Education and Science
DfES	Department of Education and Skills
DHSSPS	Department of Health, Social Services and Public Safety
EAL	English as an Additional Language
ELBs	Education and Library Boards
EMU	Education for Mutual Understanding

ESA	Education and Skills Authority
ETI	Education and Training Inspectorate
FE	Further Education
FSME	Free School Meals Entitlement
FTE	Full Time Equivalent
GCE	General Certificate of Education
GCSE	General Certificate of Secondary Education
GIS	Geographical Information Systems
GMI	Grant-maintained Integrated
GNVQ	General National Vocational Qualification
GTCNI	General Teaching Council for Northern Ireland
HMT	Her Majesty's Treasury
ICT	Information and Communications Technology
IM	Irish-medium
ISNI	Investment Strategy for Northern Ireland
KS2	Key Stage 2
KS3	Key Stage 3
KS4	Key Stage 4
LEA	Local Education Authorities
LMS	Local Management of Schools
LTE	Long Term Enrolment
NEELB	North Eastern Education and Library Board
NICIE	Northern Ireland Council for Integrated Education
NINIS	Northern Ireland Neighbourhood Information System
NISM	Northern Ireland Schools Modernisation Programme
NQF	National Qualifications Framework
OECD	Organisation for Economic Co-operation and Development

OSNI	Ordnance Survey of Northern Ireland
PESA	Public Expenditure Statistical Analyses
PFI	Private Finance Initiative
PISA	Programme for International Student Assessment
PPP	Public Private Partnership
PRC	Premature Retirement Compensation
PSA	Public Service Agreement
PTR	Pupil Teacher Ratio
PWC	PricewaterHouseCoopers
RAP	Resource Allocation Plan
ROI	Republic of Ireland
RPA	Review of Public Administration
RRI	Reinvestment and Reform Initiative
SEN	Special Educational Needs
SENCO	Special Educational Needs Co-ordinator
SEND0	Special Educational Needs and Disability (NI) Order 2005
SIB	Strategic Investment Board
SR04	Spending Review 2004
TACOTIE	Towards a Culture of Tolerance: Integrating Education
TRC	Transferor Representatives' Council
TSN	Targeting Social Need
VEP	Vocational Enhancement Programme
VG	Voluntary Grammar
YCNI	Youth Council for Northern Ireland

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INDEPENDENT STRATEGIC REVIEW OF EDUCATION

A Paper Prepared for Consultation

1. In March 2006, the Secretary of State for Northern Ireland announced a Strategic Review of Education, led by Professor Sir George Bain, with the following terms of reference: ***“To examine the funding of the education system, in particular the strategic planning and organisation of the schools’ estate, taking account of curriculum changes, including the wider provision for 14-19 year olds, and also demographic trends.”*** Elaborating on the terms of reference, the Secretary of State asked the Review to look particularly at how new models of schooling can be developed, ensuring that resources are shared in the best way, giving young people the best environment in which to be educated.
2. In addition, the Review was asked to look at how best to encourage and facilitate integrated education as a vital building block towards creating the conditions necessary for long-term peace and stability in Northern Ireland. It was made clear that the particular importance attached to integrating education is not to imply limiting the different ethos that parents want to see in schools, but to focus attention on developing thinking about new ways to work together, and of envisaging approaches to schooling which share resources and guard ethos. The Review takes place against a backcloth of major strategic reforms in education in Northern Ireland and in the context of a future marked by a substantial demographic downturn.
3. The Review attaches great importance to an early dialogue with key stakeholders on a range of matters central to the particular focus of the Review, that is the strategic planning and organisation of the schools’ estate. As implied in the terms of reference, an examination of the funding provided for education in Northern Ireland falls within the remit of the Review. This paper, however, does not focus on funding per se but with that part of the remit concerning the strategic planning and organisation of the schools’ estate.
4. The purpose of this paper is to provide a basis for open discussion that will play a constructive and essential part in examining issues, considering views and perspectives and exploring possibilities for action to achieve a ‘fit for purpose’ schools’ estate that serves

communities well and represents an effective use of public funds for the common good.

5. Government has announced a 10-year programme of modernisation of the schools' estate to bring about much needed improvements. The Department of Education has consulted widely on the recommendations of the report 'New Procurement and Delivery Arrangements for the Schools' Estate' (PriceWaterhouseCoopers, March 2005). That report was commissioned in response to concerns that the scale of change required in the schools' estate, and the need to fund the long-term development and maintenance of the estate, cannot be achieved under existing arrangements without placing an unsustainable demand on capital and recurrent expenditure, with consequential impact on value for money and speed of delivery.
6. It is essential that long-term planning of the schools' estate, both in terms of capital investment and recurrent expenditure, takes account of highly significant factors such as the projected decline in demand for school places, the new curriculum for primary and post-primary schools, the Pupil Entitlement Framework at Key Stage 4 and at post-16, growing over capacity in the schools' system, the needs and aspirations of the various sectors, and the desire to use school facilities as wider community resources.
7. In taking account of these factors it is inevitable that the planning of the development of the schools' estate will entail rationalisation of provision in both primary and post-primary schools, the extent of rationalisation depending on circumstances pertaining in particular geographical areas. The case for rationalisation rests on strong educational and financial considerations. The outcomes of rationalisation could take many forms; various configurations of schools may be educationally and financially justified. The potential for optimising the use of facilities between schools is largely unexplored. In particular, the nature of the post-14 curriculum entitlement is such that collaboration among schools and between

schools and further education colleges would seem to be essential for most, if not all, schools.

8. The stated goal of the capital investment programme is a ***'fit for purpose schools' estate, efficiently delivered and managed'***, where fitness of purpose is measured in terms of sufficiency, suitability and condition of accommodation. Put succinctly, the objective of the estate planning process is to provide a sufficiency of school places through the right mix of schools, of the right size and in the right locations. All schools should have educationally suitable accommodation and facilities which make for a stimulating, safe and healthy learning environment.

9. It is argued that at present this objective is not being achieved, nor is it possible to be realised in a cost-effective manner under current planning arrangements. There is substantial agreement that to overcome the weaknesses in the current planning arrangements authorities will need to adopt a new strategic approach to the management and development of the schools' estate. A new strategic approach to planning on a system-wide basis is envisaged incorporating specific features. The features that appear most pertinent to the purpose of this paper may be summarised as follows:
 - Within the context of guidelines provided by the Department of Education, the planning process should have a specific sector dimension, with school authorities and sectors continuing to represent the needs, expectations and ethos of their sector, and their understanding of the dynamics of local communities, throughout the planning process.

 - High quality statistical data are required to help take full account of various determinants of projected demand and capacity and also to take account of the interactions between geographic areas and sectors.

- The objective of planning for specific geographical areas is the provision, through cost-effective use of capital funds, of a set of sustainable schools which, taken together, meet the expressed needs and projected requirements of each sector and each area.
- In order to achieve this objective, there is a need for mechanisms and processes, integral to all stages of planning, from early formulations to finalisation and agreement on proposals, to enable a critical consideration of the totality of the plans and proposals unfolding for the different sectors. This calls for a more interactive and collaborative approach to planning, a planning dialogue so to speak.

10. A critical examination of the funding of the education system generally and of the structure and organisation of the schools' estate in particular cannot be undertaken without reference to the fundamental purposes and principles of the system.

There is consensus that, in broad terms, the education system should:

- i. provide all pupils with high quality educational opportunities and experiences in terms of curriculum, learning and teaching, through which they achieve high standards in terms of their attainment, personal growth and social development and achieve their potential;
- ii. be vital to social and community well-being, contributing effectively and appropriately to broader social and economic goals and processes;

- iii. accommodate reasonable parental choice in relation to the values and ethos of schools, with due regard to the use of public funds; and
 - iv. provide equitable access for all pupils
11. Aim (ii) is reflected in the report “Towards a Culture of Tolerance: Integrating Education” (TACOTIE) which advocated as a key principle that “it is a seminal purpose of the Northern Ireland Education Service to promote a culture of tolerance and reconciliation and, for schools, to do so in keeping with the particular ethos and circumstances within which they operate. These different approaches should be valued and all schools should be encouraged to provide further opportunities to promote a culture of tolerance.”
12. More recently the document, “A Shared Future: Policy and Strategic Framework for Good Relations in Northern Ireland”, in endorsing the recommendations of TACOTIE, identified movement towards greater sharing in education as a whole as an overarching goal and stressed that “the state must be neutral between competing cultural claims (‘promotion of a culture of tolerance at every level’ and encouragement of ‘integrated education - in its widest sense’”).
13. An effective system of education requires adequate funding. Equally, the funding made available should be used to get the best for pupils, critically in terms of the quality of the education provided for them and the outcomes in terms of the standards they achieve. Consequently, in addition to and consistent with principles of quality, choice and access, questions arise in relation to use made of the funding for education. Fundamentally these questions centre on educational effectiveness but also, importantly, on the economic use of funding, on cost-effectiveness and efficiency. The issues of effectiveness and efficiency are interdependent since inefficiencies in certain aspects of the education system necessarily reduce the resources available for other areas and services of the system.

14. The argument for cost-effective and cost-efficient infrastructure and arrangements rests on the premise that the maximum proportion of expenditure should be directed towards those things that determine high quality and standards. At school level, it is recognised widely that the quality of learning and the standards achieved by pupils are dependent on key factors such as:
- ❑ the suitability of the curriculum to meet pupils' needs
 - ❑ the quality of teaching, leadership and management, and governance in schools (sufficient well qualified, effectively deployed, high performing and motivated teachers)
 - ❑ the quality of the learning environment: suitability and condition of the accommodation, facilities and resources for teaching and learning; an attractive, safe and well-maintained environment
 - ❑ the quality and effectiveness of support services
 - ❑ the confidence and support of parents and the wider community
15. Communities need schools that reflect diversity of aspiration and choice, and which, taken together, are effective in meeting the needs of all pupils, are educationally and financially viable, and are sustainable in the long-term. Working within a framework of the relative stability arising from sufficient and more assured enrolments, and freed from recurring concerns of managing on the edges of viability, headteachers, staff and support services, are enabled to direct their energies towards improving quality and raising standards. Basically, we need an enabling structure of schools which permits access by all pupils to an appropriate curriculum, assures financial stability through patterns of enrolment and empowers schools to concentrate on their core purposes.

16. To summarise, can we aspire to a school system which serves all pupils equally well, configured around key values, principles and goals:

- ❑ communities served by a set of educationally effective and efficiently functioning and sustainable schools, optimising the use of their facilities for the good of all through agreed models of collaboration and sharing;
- ❑ high quality educational experiences and outcomes;
- ❑ equity, accessibility, pluralism, diversity and choice;
- ❑ educational and financial viability;
- ❑ sustainability;
- ❑ maximum expenditure on the things that really matter in respect of quality and standards;
- ❑ affordability;
- ❑ cost-effectiveness; and
- ❑ efficiency and minimisation of 'waste' in capital and recurrent expenditure?

17. How can we accommodate the values, principles and goals outlined above in the planning and use of schools at local level? How can all those with responsibility for shaping the future of education work together to agree a common vision for the school system and a strategy for working towards that vision? How is that vision to be realised at local areas level?

18. There is no underestimating the challenge of making best use of funding to ensure that communities are served well by sustainable, educationally effective and efficiently functioning schools, optimising

the use of their facilities for the good of all through agreed models of collaboration and sharing. Nor should the potential of the opportunity be undervalued.

19. Working and planning together in new ways for the common good will require visionary and courageous leadership, mutual respect, persistent commitment, innovative thinking and, perhaps most of all, skill in developing relationships and building confidence in new ways of working.

Respondents to the Strategic Review of Education

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- *Association of Northern Ireland Colleges (ANIC)
- *Belfast Education and Library Board (BELB)
- *Belfast Trust for Integrated Education (BELTIE)
- *Catholic Bishops of Northern Ireland (Trustees)
- *Comhairle na Gaelscolaíochta (CnaG)
- *Community Relations Council (CRC)
Conference of Religious of Ireland (CORI)
- *Council for Catholic Maintained Schools (CCMS)
Deborah Girvan, Communications and Lobbying Manager, NICIE
- *Department of Education (DE)
- *Department for Employment and Learning (DEL)
- *Education and Training Inspectorate (ETI)
- *Focus Learning Trust (Brethren Community)
- *General Teaching Council for Northern Ireland (GTCNI)
- *Governing Bodies Association (NI) Ltd (GBA)
- *Greater Belfast Catholic Maintained Post-Primary Principals
- *Institute of Directors (IOD)
- *Integrated Education Fund (IEF)
- *Iontaobhas na Gaelscolaíochta (InaG)

*National Association of Schoolmasters Union of Women Teachers (NASUWT)

*North Eastern Education and Library Board (NEELB)

*NI Committee: Irish Congress of Trade Unions (NICICTU)

*Northern Ireland Council for Integrated Education (NICIE)

*Northern Ireland Teachers' Council (NITC):

UTU (Ulster Teachers Union)

NASUWT (as above)

ATL (Association of Teachers and Lecturers)

NAHT (National Association of Head Teachers)

INTO (Irish National Teachers' Organisation)

Ronnie Hassard on behalf of the Governors of Ballymena Academy

*Rural Development Council (RDC)

*South Eastern Education and Library Board (SEELB)

*Southern Education and Library Board (SELB)

*Sports' Council NI (SC)

*Strategic Investment Board (SIB)

*Transferor Representatives' Council (TRC)

*Unison

*Western Education and Library Board (WELB)

*Organisations and individuals who met with the Review Team.

All submissions provided by respondents have been posted on the website www.deni.gov.uk

