

Commission on School Accommodation



Amalgamation of Second
Level Schools

September 2001

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Foreword

Dr. Michael Woods T.D.,
Minister for Education and Science.

Dear Minister,

I am pleased to present you with the Commission's report on the Amalgamation of Second Level Schools. The Steering Group of the Commission, consisting of representatives of the partners in education and representatives of the Department of Education and Science and the Department of Finance, worked most diligently during the past twelve months.

The report is the product of contributions of all members of the Commission. Despite intense discussion and debate, empathy and goodwill prevailed. All members of the group endorsed the report.

Amalgamation of schools has major implications for the school communities involved. Each amalgamation must take account of the unique history, sensitivities and dynamics of the individual case. The objective is to provide an enhanced educational environment for students who can benefit significantly from the outcome. An adequate timeframe and a well-managed implementation are crucial for its success. The newly amalgamated school often acquires facilities for specialist areas of the curriculum, provides students with access to a broader range of teacher skills, and gives students more opportunities for team and group experiences in various aspects of the curriculum. The desired result is a school that serves its students well and that receives full support of staff, parents and the wider community. Amalgamation is most definitely about proactivity, harmonisation and improvement — it is not about decline.

Amalgamations have been helped in recent years by the major increase in the level of capital funding for school buildings and school sites and by the reduction in local contributions.

This report presents a framework of key issues and recommends a detailed model for the amalgamation process together with other recommendations for the future.

On behalf of the Commission I must express our appreciation for the work of Denise Burns whose drafting skills empowered the group to complete its task. We sincerely appreciate the contribution of Eimer Lynch who supported the group with great professionalism and we thank Yvonne Lennon for her considerable contribution to the task.

Frank Murray
Executive Chairperson.

September 2001.

Introduction and Definition

Amalgamation of schools has major implications for the school communities concerned. The objective of an amalgamation is to provide an enhanced educational environment for students with an efficient supply of resources. The outcome of an amalgamation provides students with a more comprehensive curriculum and opportunities for more co-curricular experiences — significant benefits for students.

Experience over the past thirty years clearly indicates that, for the outcome of an amalgamation to be successful, there is need for a comprehensive process of amalgamation, an investment of a range of resources and commitment to resolution of difficult issues.

The desired outcome of an amalgamation is a school that serves all its students well and that receives full support from staff, parents and the wider community.

This report briefly surveys the historical experience of amalgamation and addresses issues that have arisen during this experience. The report draws on contributions from the members of the Steering Group of the Commission. Finally, the report presents a framework of key issues, a model for the process and recommendations for the future.

All the statistical information in this report has been obtained from the Department of Education and Science. Figures for 2000/01 are subject to verification.

The term *amalgamation* is used in this paper to indicate the formation of one school from two or more existing schools. This involves the closure of the existing schools and the opening of one new school that will have, substantially, the staff members and the students of the previously existing schools. The location of the new school may be the site of one of the existing schools or it may be an entirely new site.

Section A

Historical perspective

Section A

Historical perspective

Introduction

This brief review of the history of amalgamations at second level draws on contributions from members of the Commission and from a number of sources listed at the end of this section.

1924 – 2000

In the first Annual Report of the Department of Education, in 1924/25, there were 278 secondary schools, all under the management of religious authorities, as well as 64 technical schools. The Vocational Education Act, 1930 greatly expanded the technical sector. The following table presents the total enrolment and the number of the different types of second level schools in 1969/70.

Number and type of second level schools 1969/70

Secondary	Vocational	Comprehensive	Secondary Top	Total schools	Total enrolment
600	253	6	26	885	198,272

In that same year, 1969/70, the number of schools with fewer than 150 students was 308.

In 1963 the Minister for Education, Dr. Hillery, announced a “new kind of approach” in post-primary education. The reasons he stated were the non-provision of second level schools in some areas, and the fact that “our secondary and our vocational schools are being conducted as separate and distinct entities with no connecting link whatsoever between them.”¹

Dr. Hillery and his successors, George Colley and Donough O’Malley, made significant changes to second level education with this aim of lessening the separation between academic and technical education and of giving greater educational opportunity to all students.

For these reasons, models of the comprehensive school, the community school, and subsequently the community college were developed and schools established from the late 1960s onwards. By 2000/01 the distribution of type of school was as follows:

Number and type of second level schools 2000/01

Secondary	Vocational (including Community Colleges)	Community and Comprehensive	Total schools	Total enrolment
419	247	85	751	345,384

¹ Hillery P. J.: Press conference. 20/5/63 quoted in Randles E.: Post-primary Education in Ireland 1957-1970. 1975. Veritas. Dublin. pages 114-115.

This change in the provision of second level schools reflects the closures, amalgamations and new foundations that occurred in the space of that thirty years.

In 1964, the Department of Education began to provide building grants to secondary schools — a significant development that gradually changed the role of the Department in amalgamations:

This signified a major structural development which gave the Department of Education some control for the first time over the location and size of secondary schools.²

Different catalysts have resulted in amalgamations. The initiative for amalgamation has originated from various sources:

- the patron³
- school management
- local community
- the Department of Education and Science in response to an application for a capital grant for an extension or major refurbishment to a particular school.

Through the experience of amalgamation over the years and extended negotiation among teacher trade unions, management bodies and the Department, there are now in place agreements on some aspects of staffing arrangements in the event of amalgamation (see attachment A).

Commentary

Amalgamations have been haphazard in occurrence and preparation, sometimes causing instability in schools because discussions have continued for years without an outcome, or because capital funds were not available to implement a decision for amalgamation. Obstacles have arisen either before a decision could be taken, or during the implementation of a decision to amalgamate. Experience of amalgamation has varied from being fraught and difficult to being a smooth, simple transition.

Patrons have operated in varying ways, on occasions announcing an amalgamation/withdrawal but more generally engaging in local consultation. Issues that have arisen in the course of amalgamations have been concerns of staff, concerns of parents, type of school and size of school. The loss of school identity of the former schools has at times been a cause of grief for patrons, past students and local communities. This loss often makes the experience of amalgamation a difficult, fraught emotional experience.

In summary, some amalgamations have suffered from a lack of planning, lack of management, lack of finance and lack of support.

² Walsh R. : *The Issue of Rationalisation in Irish Post-Primary Education 1963-96. The Perspectives of the Catholic Church and the State*. Published in Oideas, Fómhar 1999.

³ Historically, the term “patron” has been used for first level and the term “trustees” for second level. In accordance with the Education Act (1998) the term “patron” is used for second level: (i) trustees (ii) board of governors (iii) owners in the absence of trustees or board of governors (iv) Vocational Education Committees. The term “trustees” is used only when the context requires it.

Sources

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Section B

Analysis of issues

Section B

Analysis of issues

Reasons for amalgamation

The desired outcome of an amalgamation is that students have improved access to educational programmes — the provision of more effective educational service to students in a cost effective manner.

The following is a list of reasons that amalgamations have occurred over the years, with varying emphasis at different times. The list is not exhaustive but includes:

- the enhancement of student learning
- the provision of an effective educational programme, particularly as it relates to school size
- decline in the number of religious
- demographic changes that resulted in decline in enrolments
- the desire for co-education
- maintenance of a particular ethos/characteristic spirit
- poor condition of school buildings
- financial concerns
- parental or teacher demand
- the objective of the Department of Education and Science to rationalise facilities.

School type

The issue of school type for the newly amalgamated school has been a significant point of contention in several amalgamations.

Schools differ according to factors such as characteristic spirit, patronage and geographic location.

A particular category based on geographic location is the group of schools that are *stand-alone* which is the term used to designate a school that is the sole provider of second level education in its catchment area. *Stand-alone* schools, of which there are approximately 147 in the country, tend to be small rural schools. Amalgamation is not likely to be a consideration for *stand-alone* schools.

Schools whose characteristic spirit is such that the schools belong to a small group, such as Irish medium schools and Protestant schools, can have similar issues as the *stand-alone* schools. Such a minority school may also be the sole provider of education of a certain type in the

area, may also be small, and not likely to consider amalgamation with a school of a different characteristic spirit.

Statistical reports of the Department of Education and Science categorise second level schools aided by the Department as “secondary,” “vocational” (including community colleges) and “community and comprehensive.” In 2000/01 there are as follows:

Number and type of second level schools 2000/01

Secondary	Vocational (including Community Colleges)	Community and Comprehensive	Total schools	Total enrolment
419	247	85	751	345,384

Secondary schools, educating about 60% of second level students, are privately owned and managed.⁴ Most of these secondary schools are owned by religious congregations and are managed on their behalf by boards of management. About forty are owned and managed by different Catholic dioceses and another twenty-one are owned and managed by Protestant groups. A small number of schools are owned and managed by companies or individuals.

Vocational schools and community colleges are owned by Vocational Education Committees. In the case of community and comprehensive schools, patrons hold the property in trust for the Minister for Education and Science.

Attachment A provides an outline of the patronage of second level schools.

A key issue related to school type that is pertinent in the consideration of amalgamation is the differences in the employment conditions of teachers. These differences include:

1. Posts of responsibility: In voluntary secondary schools, the procedure for appointment to posts of responsibility — with the exception of the posts of principal and deputy principal — is based on the terms of Circular 5/98, which provides for the appointment, following interview, of the most senior suitable candidate. By comparison, in the community and comprehensive schools, vocational schools and community colleges these posts are based on interview, with regard being had in the selection process to seniority and professional development.
2. Difference in legal status: In schools under the patronage of Vocational Education Committees, teachers have officer status under the Vocational Education Acts.
3. Leave of absence: In voluntary secondary schools the provision for uncertified sick leave is four consecutive school days and ten days per quarter. Voluntary secondary schools provide for special leave of five school days per year. These two provisions — which also apply to community and comprehensive schools which resulted from amalgamations — are more generous than the existing provisions in the other sectors.
4. Redeployment of teachers: Arrangements for redeployment of teachers vary in the different sectors, as follows:
 - community colleges and vocational school teachers can be transferred within the Vocational Education Committee scheme

⁴ However, a Ministerial announcement of January 1999 indicates that it is possible that secondary schools in the future may be owned by the state.

- community and comprehensive schools do not have a redeployment scheme in place
- Catholic voluntary secondary schools have in place a redeployment scheme which operates in a limited manner
- the twenty-one Protestant schools have no redeployment scheme.

At times when an amalgamation has been initiated, differences in the above working conditions have been an impediment to the decision for amalgamation.

Differences in working conditions and status are resolved in different ways in a newly amalgamated school, depending on school type.

It is desirable that the staff members of an amalgamated school have the same leave entitlements. However, teachers assimilating into a newly amalgamated school cannot receive conditions worse than those they enjoyed in the existing school. There is need for cross-sectoral consideration of leave entitlements.

There have been moves in the past towards the negotiation of a common redeployment scheme for all second level schools, but such negotiations have not yet begun. The existing redeployment scheme needs to be reviewed.

The difference, noted in number 1 above in the procedure for appointment to posts of responsibility, has been identified as an impediment to amalgamation, whenever a voluntary secondary school is amalgamating with a school of a different type.

The issue of type of school for the newly amalgamated school has been contentious when the new school becomes a publicly-owned school. Historically, amalgamations have resulted in voluntary secondary schools, community schools or community colleges/vocational schools. Attachment B summarises the characteristics of the voluntary secondary, the community college (that is, the designated community colleges and not the vocational schools that may be titled “college”), and the community school.

All Irish schools

Gaeltacht

As gaeltacht schools have a unique role in the promotion and vibrancy of the Irish language, their specific issues should be considered in relation to amalgamation. There are currently more than twenty second level schools in gaeltacht areas.

Firstly, gaeltacht areas differ in the strength of the Irish language as a spoken and living language, within various economic and geographic contexts. In addition, differences occur from mile to mile within gaeltacht areas. Relevant to the issue of amalgamation is the fact that gaeltacht areas differ in:

- the size of the geographic area with its dispersion of schools
- the number of small schools on the gaeltacht borders.

The gaeltacht school plays an important role in the gaeltacht community. It is one of the few supports that Irish-speaking parents have and it is also the only way in which children whose home language is not Irish acquire the language as a living language. Consequently, the language of instruction is not the only language consideration if an amalgamation is being considered, as the social language of the school must also be taken into account. The impact

of closing or amalgamating a school in a small gaeltacht community could in some cases be the demise of the Irish language in that community. The consequences of closing a gaeltacht school, therefore, can impact on the future of the Irish language in general.

Where an amalgamation is being considered for a gaeltacht school, the socio-linguistic factors of the local community of each school should be considered in depth. The probable impact of an amalgamation should be examined in terms of the impact on the language of the community. A school in which Irish is the medium of instruction and the primary medium of social interaction should not be amalgamated with another school where Irish is not the medium of instruction and interaction. An amalgamation of gaeltacht schools should be considered only in situations where the amalgamation is unlikely to have a negative socio-linguistic impact and where the resources can be made available to ensure that the new school will be in a position to provide adequate linguistic support to students, parents, teachers. An amalgamation of gaeltacht schools should be sufficiently resourced to provide an improved quality of education which meets the socio-linguistic needs of the particular gaeltacht area.

Non-gaeltacht areas

The amalgamation of all Irish schools outside the gaeltacht with non Irish medium schools should be considered only in extreme circumstances and where all other possibilities have been explored.

In the case where one of the amalgamating schools has an Irish medium unit, there should be provision for an Irish medium unit in the new school.

Decline in number of religious

Since the 1960s there has been a substantial decrease in the number of religious women and men involved in second level education. Along with this decrease there is a shift in the role of religious who are engaged in a quest as to the most appropriate way for them to invest their resources. The reflection paper *Religious Congregations in Irish Education; A role for the future?* published by the Education Commission of the Conference of Religious of Ireland, (1997, 9) states:

. . . congregations are actively seeking new ways of bringing their distinctive perspectives to bear on the educational enterprise. They are engaging in this search because they know that, in the past, they performed a crucial role in the development of the education system and because they believe that there are new urgent needs in education which perhaps they can meet or, at least, identify and highlight.

The number of religious in voluntary secondary schools declined from 1,804 in June 1985 to 605 in June 1998.

The significance of the role of religious congregations in the patronage of schools has been noted. Ultimately, the reflection and decisions of religious congregations on the particular form of their future involvement in education will have significant consequences for the future of the education system, particularly for the patronage/trusteeship of second level schools.

Many religious congregations are currently engaged in a process of developing new forms of patronage/trusteeship for Catholic secondary schools. In recent years the Education Commission of the Conference of Religious of Ireland has published reviews and guides for congregations in their search for “ways of ensuring that their roles as patrons of schools can

be assumed by others.”⁵ An additional relevant reference by the same organisation is: *The Future of Trusteeship: A review of some options for the way forward* (1997).

Educational programme as it relates to school size

In a speech given at an assembly conducted by the Conference of Major Religious Superiors in 1987, Sister Eileen Randles chronicled the change in understanding of the size of a viable school:

In the early 60s, 336 of the Secondary schools, i.e. more than half — and the majority of Vocational schools — had less than 150 pupils. 150 was the figure then generally accepted as the norm for a thriving school. The Comprehensive schools as initially announced by Dr. Hillery were to have 150 pupils. Now, in 1966, the figure of 400 pupils for the Comprehensive schools was being mentioned — a movement upward which was to have significance as the story of rationalisation proceeds.⁶

In recent years there have been curricular innovations aimed at meeting the needs of the broad range of students completing senior cycle. Providing students with a broad curriculum and as much access to subjects as possible has become a complex factor in school organisation and planning. The current and projected enrolment size of the school is a significant factor in planning the educational programme.

The White Paper on Education: *Charting our Education Future* (1995) stated (page 66):

The breadth of curriculum required for . . . students is difficult to achieve in small schools because of the many options and activities which must be made available. At any rate, most small schools are within multi-school catchment areas and it is clearly inefficient to multiply costly additional curricular provision in schools which cater for the same community.

The Report on the Education Convention (1994) was more specific (page 37):

. . . small schools of less than 250 pupils with, say, 10 to 12 teachers, are necessarily limited in their curricular possibilities, so, if the curriculum options are to be extended, it appears to be a very difficult and very expensive task.

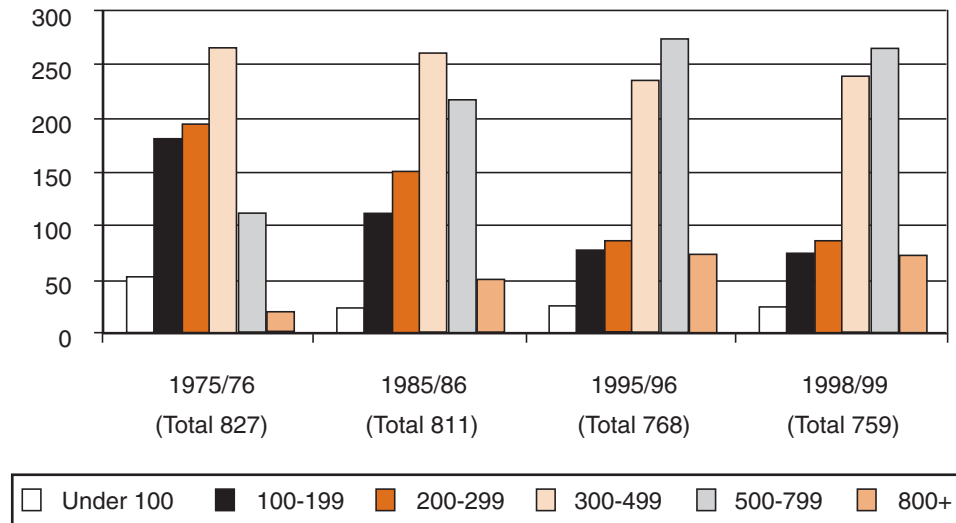
In 2000/01 there were 751 second level schools with a total enrolment of 345,384, giving an average size school of 460. Based on current first level enrolments, in the next eight or so years, second level enrolments will decline significantly. The implication is that many second level schools will decrease in enrolment, notwithstanding other factors such as the efforts to increase retention rate and the number of immigrants.

Figure G (page IX) of the 1998/99 Statistical Report of the Department of Education and Science illustrates the increase in size of school from 1975/76 to 1998/99. That figure is reproduced on the next page.

⁵ Conference of Religious of Ireland, Education Commission: *Religious Congregations in Irish Education; A role for the future?* 1997, page 9.

⁶ Conference of Major Religious Superiors (Ireland): *Rationalisation of Schools, Issues, Opportunities, Goals, Procedures*. Talks given at a Conference Education Assembly, January 1987. page 8.

Second Level Schools Classified by Enrolment Size



There is need for current research on school size at second level that considers:

- adequate educational provision for students, given the increased retention of students to senior cycle and the particular needs of disadvantaged students
- geographic location
- comprehensive and specialist curriculum
- educational outcomes following the amalgamation of schools
- socialisation needs of students
- pastoral care of students
- school organisation, including student access to subjects
- staffing allocation
- staff issues related to school size
- teaching/learning methodology
- developments in the educational use of technology
- school effectiveness
- implications of both “smallness” and “largeness“
- characteristic spirit
- schools in areas of high/low population density
- resourcing and level of financial support
- costs.

Apart from the *stand-alone* schools, there are many locations where amalgamation may be considered as part of the endeavour to offer students a range of curriculum opportunities. On the basis of enhanced curriculum provision, the Department of Education and Science should pursue a proactive role in seeking amalgamation of schools where there are two or three small schools in proximity.

This is not to deny that there may be reasons that amalgamation may not be feasible or desirable. Apart from the stand-alone schools, other reasons that amalgamation may not be feasible or desirable include:

- schools with very different ethos/characteristic spirit
- transport difficulties
- amalgamated school being too large.

It is currently difficult to assess the future impact of the use of technology in second level schools and in distance education. In some countries, virtual schooling services are offering small rural schools access to some subjects through technology. Meanwhile, some websites offer the opportunity to complete a leaving certificate education with qualifications for universities in different parts of the world. Such developments may impact significantly on:

- access to educational opportunity that is less rigidly aligned with chronological age
- pedagogical change
- design of learning sites.

Such developments presage a future for learning centres that will be structured differently from the current model of a second level school.

Concerns of staff

Staffs of schools where amalgamation is being considered may have serious concerns regarding their future employment and conditions of service.

Their concerns usually relate to:

- school type
- working conditions
- permanent positions
- posts of responsibility
- early retirement
- student welfare
- teaching allocation.

Staff should be informed of existing arrangements impacting on their future in a possible amalgamation. The aim of existing arrangements is to protect the conditions of teachers to ensure that their post-amalgamation conditions are not less favourable than their pre-amalgamation situation. Existing arrangements include:

- principals or deputy principals of the amalgamating schools who do not have the post of principal or deputy principal in the new school retain their allowance on a personal

basis, subject to their performing eighteen hours teaching and post duties or twenty-two hours teaching and no duties

- post-holders of either Assistant Principal or Special Duties Teacher retain their post and their allowance in the new school. The tasks involved in the posts of responsibility will be part of the negotiation of the management structure of the new school
- all permanent teachers of two or more years' service and approved ancillary staff are assured of permanent status in the new school.

The Department of Education and Science circular dated July 1997 (C.L. 33/97) outlines some areas of existing staffing arrangements (attachment C):

- filling of posts of responsibility that become vacant in schools preparing for amalgamation
- blocking of posts of responsibility (that is, the new school losing a post of responsibility)
- filling of posts of principal and deputy principal within two years of the proposed date of amalgamation
- filling of teacher posts within two years of the proposed date of amalgamation.

There are also some existing bilateral agreements between the Association of Secondary Teachers, Ireland and specific Vocational Education Committees, governing transfer of members of the Association into community colleges.

All existing agreements relating to staffing arrangements, except for the changes specifically recommended in section E of this paper, should be maintained and honoured.

Staff need support during the whole process of amalgamation and, from an early stage in the process, need access to someone appropriately authorised and informed to address the concerns of staff. The staff should receive detailed information relating to arrangements for staff, posts of responsibility and early retirement.

As an amalgamation may entail a change in patronage/management/employer for teachers and may also involve a change in clientele, teachers may have specific needs for information and development. For example, teachers who may have been teaching in a single sex voluntary secondary school may be appointed to a co-educational community college, community school or voluntary secondary school. There are significant changes in working conditions for such staff (differences listed in the section on *School type* in section B). Staff need to be informed of the differences in characteristic spirit, management structure, teacher status and working conditions. Staff may also require professional development for:

- adjustment from single sex education to co-education
- the integration of school policy on areas such as school organisation.

As staff members are central people in an amalgamation process, adequate attention should be given to their support and preparation during the process. The preparation of teachers in an amalgamation should be facilitated as much as possible. This preparation should include both:

- information on the differences in characteristic spirit, management structure, teacher status and working conditions that teachers will experience in the new situation
- professional development courses for teachers in areas such as school organisation, school policy development, methodology, curriculum.

During the planning for the new school, the experience of teachers, as well as their qualifications in their subject areas, should be respected as far as possible.

Benefits and incentives for amalgamation

The objective of an amalgamation is to provide an enhanced educational environment for the students with an efficient supply of resources.

The outcome of an amalgamation can significantly benefit students. The newly amalgamated school often acquires facilities for specialist areas of the curriculum and gives students access to a broader range of teacher skills. Students may also obtain more opportunities for team and group experiences in various areas of the curriculum. Two aspects of an improved educational environment — staffing and buildings/facilities are considered below.

Incentive — staffing

In order to strengthen incentive for an amalgamation and further enhance the educational environment for students, the Commission believes that benefits for teachers should be improved. These benefits should be in three categories:

1. Enhanced staffing provision
2. Enhanced posts of responsibility
3. Early retirement.

Specific recommendations in these categories are made in section E.

In the interest of enabling amalgamation to occur, the following sectoral differences should be addressed in appropriate fora:

- redeployment of teachers
- leave entitlement of teachers
- criteria for appointment to posts of responsibility.

Incentive — buildings and facilities

A significant element in the decision to amalgamate may be the poor condition of school buildings. As some schools, particularly small schools, have been poorly resourced over many years, the quality and quantity of accommodation can be well below expectations of today. Many schools do not have, for example, the space for physical education or computer-assisted learning. The need for extensive capital input can be the catalyst for consideration of amalgamation.

The provision of improved accommodation and facilities is an important benefit for students and therefore a major incentive for amalgamation. Amalgamation of small schools into a larger unit can be one way of providing improved facilities for a larger number of students.

The early exploration of feasibility conducted between patrons and the Department of Education and Science should establish:

- whether refurbishment of one of the existing schools on its own site, or provision of a new school on a new site is the better option

- implications for land, buildings etc.
- whether minor or major capital funding will be necessary
- availability of and timeframe for funding.

In arriving at a decision to amalgamate, the patrons should seek assurance from the Department of Education and Science that capital funding will be made available to enable any necessary building project to be completed within the required timeframe. This is important because the implementation of a decision to amalgamate can be hindered for years if the necessary funding is not forthcoming and the necessary works are not completed. Such a hindrance causes much instability and low morale in schools.

In the case of an amalgamation that does not require significant capital funding, the maximum period from the date of announcement of the amalgamation to the opening of the new school should be two years.

In the case of an amalgamation that necessitates the provision of a new school on a new site, or a major extension and/or refurbishment on an existing site, necessary capital funding should be available to facilitate the completion of building projects within four years of the announcement of the amalgamation.

Before the decision to amalgamate is taken:

- (a) If the newly amalgamated school is to be located on a new site, the feasibility discussions between the patrons and the Department of Education and Science should establish:
 - availability and cost of a site
 - the necessary funding
 - agreed timeframe for the purchase of the site and erection of new buildings.
- (b) If the newly amalgamated school is to be located on the site of an existing school and there is need for a major extension and/or refurbishment, the feasibility discussions between the patrons and the Department of Education and Science should establish:
 - availability of the necessary funding
 - timeframe for the completion of the works
 - interim accommodation arrangements for the existing school, if necessary.

Agreements on funding and completion dates should be made between the patron and the Department of Education and Science.

The role of the Department of Education and Science

Just as the policy of amalgamation has been part of the history of second level schools in the past, so should it remain an important strategy for the future because of:

- projected enrolment decline
- curriculum developments
- changes in patronage/trusteeship.

The formal role of the Department of Education and Science in amalgamations relates mainly to its interaction with patrons and the allocation of capital funding.

The Department is currently involved in amalgamations at the following stages:

- decision taken and project at construction/refurbishment stage 2
- decision taken and project at design stage 9
- decision taken and design stage yet to commence 6
- decision in principle and Minister to decide on type for new school 1

There are a further nine instances of discussions proceeding between patrons and the Department.

The White Paper, *Charting our Education Future* (1995, p.66) stated that the objective of the Department's policy on rationalisation would be:

To provide second level schools that are large enough to adequately meet the variety of curricular demands, to meet community education needs and to enhance the role of schools in vocational education and training and adult and continuing education.

Because of the need for schools to be *large enough to adequately meet the variety of curricular demands*, there is need for the Department to be proactive in multi-school catchment areas in the monitoring of enrolments. However, it is not possible to be prescriptive regarding school size, because of other factors such as location, the characteristic spirit and the educational programme.

As an application for major capital funding can be an important catalyst for an amalgamation, the Department should examine such applications with attention to making the optimal use of capital funding. Because of the range of factors involved in school size, location, characteristic spirit and educational programme, each application for major capital funding should be accompanied by the School Plan and an evaluation of the educational programme.

Given the range of sectoral interests in second level education, it is important that the Department takes a proactive role to encourage schools to be an optimum size to fulfil the educational and pastoral aims of the School Plan. It is at times necessary for the Department to take the initiative with patrons in exploring the feasibility of an amalgamation where it considers that the schools may not be of appropriate size to meet the educational needs.

Expertise within the Department of Education and Science is required to consider the School Plan and evaluate the educational programme, encourage schools to be of appropriate size and support the functions of patrons and boards of management in the amalgamation process. Tasks of the Department should include:

- monitoring enrolments of schools in multi-school catchment areas
- examining applications for capital funding for general or specialist facilities, particularly through analysis of
 - projected occupancy rates of facilities
 - the optimal use of resources
- initiating feasibility discussions with patrons.

As the process of an amalgamation is complex and protracted, the patrons and boards of management often require the assistance of a person who has the experience and expertise to

support the functions of the different groups involved. The Department should ensure that such support, as required, is made available during the amalgamation process.

Capital funding

The provision of funding for second level school accommodation has increased considerably in recent years:

Year	IR£
1997	38,000,000
1998	57,535,000
1999	92,600,000
2000	120,375,000
2001	129,500,000

Despite the sharp increase in provision of funding, the demand for new and improved accommodation continues to be greater than the supply of capital funds. In nearly all amalgamations, new or additional accommodation is required to accommodate the new school on a single site. The design, tendering and construction phases typically require three years.

Capital funds are allocated to the Department on an annual basis; there is no certainty regarding the level of allocation from one year to the next. This makes it very difficult for the Department to allocate funds to projects over a period longer than one year. Accordingly, it is desirable for the educational capital budget to be allocated on a multi-annual basis of at least three years.

To facilitate the allocation of funds to amalgamation projects, the Department should designate a portion of its capital budget specifically for amalgamation projects.

In recent years there has been an increase in the demand for specialist facilities for areas of the curriculum. A guiding principle in the allocation of capital funding for specialist facilities should be the provision of quality facilities accessible by the optimum number of students, with as little duplication as possible.

Each application for major capital funding should be examined by the Department of Education and Science in light of:

- the School Plan
- an evaluation of the educational programme
- projected enrolments
- co-operation and complementarity with neighbouring schools
- the number of students who will have access to the accommodation
- the rate of occupancy of the accommodation.

Consequently, the possibility and feasibility of sharing facilities in some way should be assessed before capital funding for general or for some specialist facilities is allocated. For example, capital funding for such specialist areas as:

- physical education

- sport
- drama
- music
- science
- computing
- library.

The Department may require that applications for capital funding for such facilities include an assurance that consultations with the patrons of neighbouring schools have occurred to explore the feasibility of sharing facilities. Capital funding needs of neighbouring schools can be considered at the time of an application for major capital funding.

Various configurations can be considered to explore possible arrangements in a given situation. Different ways of sharing facilities that may be explored before allocating capital funding include:

- sharing of specialist facilities by neighbouring and adjoining schools
- two or more schools on one site sharing some facilities (multi-schools campus)
- formation of separate junior cycle and senior cycle schools.

The Department should spend a short time in exploring possible configurations with patrons; such explorations should not delay for an extended period the outcome of the application. Such explorations could lead to a feasibility study for an amalgamation.

In summary, the nexus between school accommodation and the educational programme indicates that the Department should consider applications for major capital funding in terms of the School Plan, the educational programme and the feasibility of complementarity and/or co-operation in the provision of school accommodation.

The Department of Education and Science is currently engaged in a pilot project of Public/Private Partnership (PPP) in the provision, maintenance and management of school accommodation. Amalgamating schools that are participating in this pilot programme have indicated strong support for this mechanism for providing school accommodation. The PPP option for new accommodation may offer opportunities to support the amalgamation process in the future.

Section C

Framework for a model

Section C

Framework for a model

Key issues

The following list of key issues form a framework for the development of a model for amalgamation. The over-arching principle that should permeate all considerations is the educational needs and benefits for young people.

Other issues that should function as a framework include:

- the objective of an amalgamation is to provide an enhanced educational environment for the students with an efficient supply of resources
- the catalyst for an amalgamation may be, inter alia:
 - a decline in enrolments
 - curriculum developments and the possibility that a school may be “too small” to offer an adequate educational provision
 - the need for improvement in site, building and/or resources
 - changes in the circumstances of the patron
 - an application for major capital funding
- the initiative for an amalgamation may come from a variety of sources, such as staff, board of management, patron, Department of Education and Science. Where school size and the availability of curriculum are concerns in a school centre of two or three schools in proximity, the Department should be proactive in seeking amalgamation. However, decision on amalgamation is essentially the decision of the patrons
- good process and effective management of the process of amalgamation are crucial to a good outcome of an amalgamation
- the amalgamation process should be designated in three stages:
 - stage one: preliminary to decision, including data collection and consultation
 - stage two: the decision
 - stage three: implementation of the decision
- significant data should be collected on behalf of the patron during stage one so that a decision can be well founded
- data collection in stage one should include all the implications for teaching and ancillary staff
- feasibility discussions between the Department and the patrons in stage one should establish the availability of funding and completion dates for any necessary capital works
- it is important for school stability that stage one has a limited timeframe

- the decision-making authority for amalgamation belongs to the patrons subject to the ratification of the Minister for Education and Science
- where the newly amalgamated school will be a privately-owned school, the decision on school type belongs to the patron/s subject to the ratification of the Minister for Education and Science
- for the newly amalgamated school:
 - (a) if the patrons agree on the school type, the Minister for Education and Science should ratify the patron position
 - (b) if the patrons can not agree on the school type, the patrons should agree to refer the decision to the Minister for Education and Science on the basis that they will accept the Minister's decision
- the decision on school type should be informed by, inter alia, local consultation
- the issue of transport should be agreed at the time of the decision to amalgamate
- a clear statement of the resource implications, both human and material, should form part of a specific decision for amalgamation
- stage two, the decision to amalgamate, should be publicly communicated with correct protocol and sensitivity for all those affected by the amalgamation
- stage three, the implementation of an amalgamation should be well-structured, well-designed and well-managed. The implementation requires:
 - a timeframe
 - the new patron to ensure the appointment of the board of management and the principal of the new school so that they will be engaged in the planning for the new school well before its opening. The appointment of the board should begin at least twelve months before the intended opening of the new school, so that the appointment process for the principal will enable the principal to take up the post no later than 1st January before the intended opening of the new school
 - a structure that facilitates the ordered participation of parents and teachers
 - clarity regarding the areas of authority of the patrons, boards of management, principals and staffs of the existing schools and the patron, board of management, principal and staff of the new school
 - understanding of the distinction between recommendations and decisions
 - a protocol of communication
 - adherence to agreements between teacher trade unions, management bodies and the Department of Education and Science, particularly in relation to staffing and supports
 - appropriate support and preparation (information and professional development) for the staff of the new school
 - the transfer of appropriate student and staff records
- to enhance the educational environment of a newly amalgamated school, some incentives for staffing should be provided
- closure of existing schools should include ritualising of the history and service of these schools
- in the new school attention should be given to the development of good relationships, the integration of students and staffs and the development of a new school identity.

Section D

Model for the amalgamation process

Section D

Model for the amalgamation process

Stage one: preliminary to decision

Feasibility discussions

Whatever catalyst may cause amalgamation of two or more existing schools to be considered, the initial conferring should explore feasibility so that a local school community consultation can be informed of real possibilities for the future of the schools.

The Department of Education and Science should be proactive in seeking amalgamation in centres where there are two or three small schools, each with limited curriculum. In this situation, the Department should initiate discussions with patrons.

Initial interactions between the patrons of the existing schools and the Department of Education and Science should explore feasibility and capital implications. The Department should guarantee that any major capital works will be completed within four years of an announcement to amalgamate.

Where a patron seeks to amalgamate a school with another that is under different patronage, the patron should explore feasibility with the patron in question in order to establish possibilities in the areas that are the sole responsibility of the patrons — the characteristic spirit, assets and finance. The patrons should also initially confer with the Minister for Education and Science to obtain approval for any potentially new arrangement in patronage.

At the end of the feasibility discussions the patrons should know whether an amalgamation is a possibility.

Before any further process, the patron may find it appropriate to appoint a person to be the local representative of the patron for the purpose of the amalgamation project. If such an appointment is made, it should be in writing. This representative performs the role of the patron in tasks related to the amalgamation process.

School community consultation

Patrons are responsible for the collection of information and for the consultation with the local school community.

The purpose of the consultation with the school community is to:

- disseminate information relevant to the future of the school
- inform patrons of the concerns and opinions of the school community.

Sharing information with the local school community facilitates the community's understanding of any decision to amalgamate. Such understanding is important in the future support for a newly amalgamated school. The consultation informs any subsequent decision for amalgamation as it can address the concerns of the local community. Patrons (or their local representative) should conduct the consultation.

It should be acknowledged from the outset that:

- consultation is distinctly different from decision-making authority, which belongs to the patron. To all those consulted, it should be clearly stated that:
 - the status of the consultation is one of exploring feasibility only
 - the consultation does not guarantee implementation
 - the consultation is concerned with neither a voting process nor a majority position
- raising the issue of school status in a public forum often raises highly emotive issues
- the information and the attendant issues are very complex, so careful reflection on the information is essential.

Local consultation should consist of:

- the dissemination of factual information
- the opportunity to consider the information
- the opportunity to respond to the information by expressing any concerns.

Relevant factual information should be collected by the representatives of the patrons of the schools and disseminated to the local partners who are concerned with any change of status in a school:

- staffs (teaching and ancillary)
- parents and students
- students enrolled in adult and continuing education courses
- students enrolled in post-leaving certificate courses
- wider local school community.

It is very important that staffs are thoroughly informed at this early stage of the policy/practice on the arrangements for staffing for a newly amalgamated school. Staffs should be given information on the provision for:

- appointment of principal and deputy principal/s
- posts of responsibility
- determination of seniority
- enhanced staffing provision
- redeployment and panels
- early retirement
- working conditions related to school type.

With the knowledge and contribution of staff, representatives of the patrons should collect the following information on all staff, including part-time and ancillary:

- name and employment status
- length and details of service with current employer
- length and details of total service
- length and details of service for any teachers participating in career break, job-sharing, study leave or secondment programme
- holders of posts of responsibility with details of assigned duties.

Relevant factual information for dissemination to the local partners listed above may include the following:

- history and culture of the school
- local community services, industry etc.
- socio-linguistic issues of the local community
- patterns of local employment
- demography and enrolments for the past ten years or so and the projected enrolments for the next eight years
- school attendance and retention rates
- student access to transport in the area
- neighbouring schools' enrolments
- issues specific to all Irish schools and to Irish medium units
- condition of property and buildings; repairs and maintenance
- financial matters
- possible future use of buildings
- occupancy of rooms
- facilities and resources
- details of differences regarding school types and possible future patrons
- available teaching skills/specialities
- curriculum — subjects offered and methods of offering subjects for student choice
- state-wide trends in education — curriculum developments
- the range of implications for teaching and ancillary staff
- current situation in meeting needs of students with special needs
- programmes in adult and continuing education
- student academic, vocational, social and pastoral needs
- possible future for the school.

How much information is included in the dissemination to local partners will depend on the local situation, particularly the number, size and complexity of the schools being considered for amalgamation.

The breadth and depth of a consultation will depend on the complexity of some of these issues in the local situation. The focal consideration in the deliberations should be the quality of the educational provision for the students and the community. The consultation should create a scenario which details the educational environment afforded by a possible amalgamation.

In some instances the information and the consultation can be relatively straightforward. For a local school community to absorb the information, consider the implications and give a considered response requires care and attention to the structuring of correspondence, meetings and communications during the consultation phase.

An independent, firm, fair-minded person preferably with local credibility should be engaged by the patron to chair any large meetings. Discussion and debate should be based on the information that has been disseminated, including the possible educational environment afforded by an amalgamation.

The issue of school type should be conducted with as much objectivity as possible. Emphasis should be on the distribution of accurate information on the difference in school type. To support the objectivity and accuracy of information it may be appropriate to circulate written information. Attachment B provides a brief comparison of the models of a voluntary secondary school, a community college and a community school. Following the dissemination of information, the representatives of the patron should gather the concerns and opinions of the following groups:

- staffs of the schools involved
- parents of students in the schools involved
- parents of pupils in the first level feeder schools
- students enrolled in adult and continuing education courses
- students enrolled in post-leaving certificate courses.

As interest groups involved in the consultation may have different perceptions and expectations, the consultation may or may not have a clear result. It will, nonetheless, provide the opportunity for interest groups to voice their concerns that can be taken into consideration during the decision-making.

The period of consultation should not exceed one school year, so that the stability of the schools is not impaired.

Stage two: the decision

The decision for an amalgamation often requires careful weighing of a range of factors, including the outcome of a local consultation.

The dissemination of factual information and the consultation process may mean that the decision of the patrons can be made with relative ease, in the knowledge that the decision has the support of the local school community. On the other hand, conflicting opinions and interests may cause the decision-making process to be difficult. If there are many conflicting opinions and interests, representatives of the patrons may engage in small-group discussion/debate with the local school community regarding their concerns.

A decision to amalgamate should include a decision on the school type and the patron of the newly amalgamated school. If the patrons agree on the school type, the Minister for Education

and Science should ratify the position of the patrons. In the event of the patrons' failing to agree on the issue of school type, the patrons should agree to refer the decision to the Minister on the basis that they will accept the Minister's decision on school type.

The patrons must be sure that transport arrangements can support a decision for an amalgamation, as this has much practical significance for families. If a decision for an amalgamation implies changes to the existing transport arrangements, details of future arrangements for transport must be obtained in writing at this stage of the process.

Patrons should adhere to correct protocol in announcing the decision to amalgamate. Boards of management, staff, parents, students and mature students should all be informed of the decision with respect for their concerns and as much detail as possible at this stage for the future arrangements, including the timeframe for the change. If possible, the reasons for the decision should be included in the announcement.

Stage three: implementation of the decision

Implementation of the decision to amalgamate differs slightly according to the identity of the new patron. If the new patron is a Vocational Education Committee (which is the employer of staff rather than the board of management), tasks performed by the new board of management in other sectors, are performed by the Vocational Education Committee.⁷

An amalgamation should be described as the closing of the existing schools and the opening of a completely new school.

The desired outcome of an amalgamation is a school that serves all its students well and that receives genuine support from parents, staff and feeder schools. For this eventuality there must be:

- informed understanding of the reasons for the intervention in school identity and culture
- the opportunity to acknowledge the loss of the past identity and culture
- the opportunity to participate in building a new identity and culture.

This requires an open process of preparation for the new school that is well-conceptualised, well-designed and well-managed.

Timeframe

The first important element of the implementation of the amalgamation is the timeframe. In order that the newly amalgamated school should have a good beginning, adequate time must be allocated to the preparation.

If major capital works need to be completed, the maximum period from the announcement of the amalgamation to the opening of the newly amalgamated school should be four academic years. If the new school does not require significant funding for capital works, then the period for planning the new school should be no longer than two academic years.

⁷ References to the new board of management in this report refer to the Vocational Education Committee in the instance where the Vocational Education Committee is the new patron.

Whether the new school has a four-year or a two-year preparation, the steering committee (see below) should be established at a time that provides the committee with two years to plan for the school.

If there is no major capital funding involved, and the school has a two-year preparation, then as soon as possible after the announcement of the decision to amalgamate, the steering committee should be established to drive the planning for the new school. The steering committee will help to maintain the momentum for the amalgamation process. The steering committee remains in existence until the new board of management is established. However, the board of management may decide that the role of the steering committee in planning for the new school should continue. In this instance the steering committee remains in existence until the board of management indicates that the role of the steering committee in the preparation work is complete.

The board of management of the new school should be appointed and informed of existing agreements and regulations influencing appointments of staff in an amalgamation. The appointment of the board should begin at least twelve months before the intended opening of the new school, so that the appointment process for the principal will enable the principal to take up the post no later than 1st January before the intended opening of the new school.

Steering committee

The planning structure for an amalgamation should support the closing of existing schools and the opening of a new school. This helps to maintain distinctiveness in the areas of responsibility of the patrons, staffs and boards of management of existing schools and of the patron, staff and board of management of the new school.

For the quality of the planning and support for the new school, it is important to establish a steering committee which co-ordinates the preparation for the new school. The steering committee should include representatives of staffs, parents and the new patron. This steering committee requires members whose availability and expertise match the tasks involved. The steering committee:

- is appointed by the patron of the new school
- is given clearly-stated terms of reference by the patron
- has a chairperson/s, appointed by the patron of the new school, who initiate/s meetings and oversee/s the task of the steering committee
- includes the principals of existing schools
- documents all meetings
- makes recommendations in planning for the new school to the patron
- informs the existing schools on its recommendations
- respects the responsibility of the patrons in dealing with characteristic spirit, property, finances
- establishes task forces for the planning areas involving parents, staff, students and the local school community as appropriate, with each task force including a member of the steering committee
- keeps clear protocol of communication between task forces, new patron, old patrons, boards of management and staffs of existing schools.

The new patron should appoint the steering committee and the chairperson, at least two years before the opening of the new school, to address the areas of planning for the new school. The steering committee acts as the leading agent for the planning, ensuring that appropriate people and protocols are involved in the planning. The steering committee is accountable to the new patron and, when the new board of management is established, the steering committee ceases to exist, unless the board decides that the work of the steering committee should continue for a specified period to complete specified tasks. In that case, the board of management decides when the work of the steering committee is complete.

Depending on the number and size of the amalgamating schools, the steering committee may itself perform the planning tasks or it may establish task forces to address specific areas of planning.

Task forces

Areas that need to be addressed in the planning for the newly amalgamated school and the groups which can be involved in their planning include:

- harmonising the design of the educational programmes from the curricula of the existing schools — staff and parents
- preparation of staff — staff
- the design of staff and student records for the new school — staff
- resources and facilities — staff and parents
- cultural areas such as school name, motto, symbol, uniform, communication, rituals — parents, students and staff.

Members of the task forces need to have the availability and skills for the planning tasks and need to understand their role in formulating recommendations for the steering committee to forward to the new patron. The task forces are not decision-making groups. The task forces should have a clear task and a clear timeframe. Methods and frequency of reporting to the steering committee should be established. While the task forces may use survey techniques etc in formulating their recommendations, they report only to the steering committee.

The task forces enable the significant participation of staff and parents in the planning for the new school. Staff members of the amalgamating schools are able to build professional working relationships as they hold regular meetings to harmonise the educational programmes.

The task of harmonising the educational programmes from the amalgamating schools must reconcile the educational needs of students with the existing programmes and the areas of expertise of teachers. Opportunities should be provided for all the amalgamating teachers to engage in the issue of the educational needs of the students. The task force should collect information from all teachers, with their knowledge and contribution, regarding their areas of expertise — both qualifications and experience. In harmonising the educational programmes of the amalgamating schools, the task force should respect the experience of teachers. A task force working on the harmonising of the educational programmes should liaise with a task force planning the professional preparation of staff.

The professional preparation of staff is a key area in providing the new school with a good start. Teachers are the best assessors of needs and their identification of needs for professional development should be respected.

The task of harmonising the design of staff and student records for the new school implies the formulation of recommendations regarding the information that should be transferred to the new school.

The work of the steering committee and task forces could form the basis of the School Plan for the new school.

Transfer of school records

Information related to the educational potential, achievement and needs of students should be transferred to the new school. Formal documented information on students could include:

- enrolment information
- results of tests
- attendance records.

Information on staff should be collected with the full knowledge and contribution of staff. Information transferred to the new school should include:

- name and employment status
- length and details of service with current employer
- length and details of total service
- length and details of service for any teachers participating in career break, job sharing, study leave or secondment programme
- holders of posts of responsibility with current and past details of assigned duties
- qualifications and teaching experience
- other areas of involvement in the school.

Each staff member should contribute details about themselves and be aware of the details about themselves collected and transferred to the new school. This information may be considered in the harmonising of the educational programmes and the preparation of staff for the new school.

The boards of management of the existing schools have the responsibility of ensuring that proper records are transferred to the new school.

Areas of authority

The importance of clarity regarding areas of authority depends on the size and complexity of the schools that are amalgamating. Where an amalgamation situation is complex and sensitive, it is very important to maintain clarity regarding areas of authority.

The following is an outline of the areas of responsibility of patrons and boards of management.⁸

- the patrons of the existing schools and of the new school must be involved in the areas for which they have responsibility — characteristic spirit, assets and finance
- patrons may find it appropriate to appoint a representative to perform tasks of the patron related to the amalgamation process. This appointment should be in writing

⁸ Note footnote number 7.

- patrons (or their representatives) of existing schools conduct the feasibility discussions, the data-gathering and consultation
- patrons of the existing schools make the announcement of a decision to amalgamate. The announcement should include the reasons for the decision and address the concerns of interested groups
- the boards of management of existing schools should provide specific information and support to staff on the regulations influencing staffing in an amalgamation
- the patron/s of the new school has responsibility for all aspects of the new school until the patron has appointed a board of management for the new school
- the patron/s of the new school should appoint a steering committee and chairperson to conduct the planning for the new school two years before the intended opening of the new school
- the patron/s of the new school receives the planning recommendations from the steering committee until the new board of management is established
- the new patron/s should ensure that the new board of management is appointed at least one year before the opening of the new school and informed of existing agreements and regulations influencing appointments of staff in an amalgamation
- the new board of management has responsibility for the appointment of the principal of the new school; the timing of appointment should enable the appointee to take up the post on the 1st January of the calendar year of the intended opening of the school
- the new board of management has responsibility for the staff appointments, including the deputy principal and the posts of responsibility
- the new board of management has responsibility for the preparation (information and professional development) of the staff of the new school
- the existing boards of management have responsibility for ensuring that appropriate records of staffs and students are transferred to the new board of management
- the existing boards of management provide support for staffs, consider/approve applications for early retirement in consultation with the new board of management, and perform all other closure responsibilities.

A diagram of the areas of responsibility is included after section E.

Protocol of communication

At crucial times in the planning process, the communication of decisions should be authorised only by the patron of the new school.

The steering committee must be in constant communication with the task forces. Lines of communication from the task forces to the steering committee are essential. The steering committee should make regular communication bulletins on the progress of the planning for the new school. The steering committee should also make use of established means of communication such as staff notices, parent associations, board of management meetings, as methods and frequency of communication are very important for the public relations aspect of the planning.

All communication related to the planning of the task forces, their recommendations to the steering committee, decisions made by patrons and boards of management, should reflect and

support clarity in and sensitivity for the roles and responsibilities of the different groups involved.

Staffing arrangements

Attention should be given to three particular areas of staffing arrangements:

- support and information to the staffs of existing schools by the existing boards of management
- correct procedure in the appointment of staff by the new board of management⁹
- appropriate preparation of staff by the new board of management.

The existing boards of management should ensure that the staffs of the existing schools have easy access to information and support in the early stages of the process. From the consultation in the first stage and more specifically, as soon as the announcement for an amalgamation is made, staff need access to information regarding particular concerns, namely:

- permanent positions
- posts of responsibility
- early retirement.

Existing arrangements, some without supporting documentation, are listed in section B of this paper under the heading *Concerns of staff*. Section E of this paper recommends that the existing arrangements, with some amendments, be honoured and also that additional measures related to staffing should be established to provide additional support and incentive for amalgamation.

Staff appointments to the new school are the responsibility of the new board of management or the Vocational Education Committee where it is the new patron. Staff appointments, especially the appointment to posts of responsibility, should honour agreed arrangements.

Any future policy on enhanced staffing and enhanced posts of responsibility for a newly amalgamated school should be honoured by the new board of management/Vocational Education Committee in appointment of staff for the new school.

The board of management and principal of the new school should design and negotiate the management structure, particularly the tasks specific to the posts of responsibility, of the new school in accordance with existing policy.

The new board of management should prepare the staff of the new school through provision of professional development in accordance with the plans for the educational programme of the new school. For example, teachers who will be teaching in a co-education situation and who were previously teaching in a single sex school should receive some preparation. Furthermore, teachers who experience a change of patron, employer and working conditions, should be well informed of the new structure.

Information collected from teachers should include not only their subject area qualifications, but also their areas of experience in year level of students and subject areas. Some teachers may have accumulated much experience in particular areas and may be uncertain and fearful that areas of expertise will not be optimised in the new situation.

⁹ See footnote number 7.

Closure of existing schools

In the closure of the existing schools the responsibility of patrons and boards of management must be kept clear and distinct from the tasks of the new patron and new board of management of the new school. As well as the many practical tasks involved in closing an existing school, including the transfer of student and staff records, the patron and board of management should plan a programme of closure to acknowledge the loss of the culture and identity of the existing schools.

Rituals

Rituals that honour the past free people to accept the new situation.

As the closing of existing schools can be a loss for the whole community of students, staff, past students and local community, it is important to provide the opportunities in appropriate ritual to honour the past and the contribution of the closing schools. This can be done in various ways such as:

- compiling and publishing the school history
- inviting past students to well-advertised and well-planned reunions
- acknowledging individuals, families and groups that the school has served over generations
- ritualising the last bell-ringing etc.
- celebrating a well-planned final school liturgy etc.

Correspondingly, it is very important to appreciate that a new school culture requires specific planning and implementation. For both students and staff who have come from different schools, it is important that integration within the new school and a sense of identity with the new school build quickly. The leadership of the new school will need to give attention to matters of identity and ritual for three to five years after the establishment of the new school.

Good start

In the movement from two or more previous traditions into one new situation it is vital for the school leadership to give attention to the development of good relationships within the school. This is very important in giving the new school a good start.

The principal and board of management of the new school should engage the parents and staff in drawing up a School Plan, which can draw significantly on the planning work carried out by the steering committee in preparation for the new school.

Section E

Recommendations

Section E

Recommendations

The Steering Group of the Commission makes the following recommendations as a group of interdependent recommendations that should be considered as a total unit.

Model for the amalgamation process

1. The model for the process described in Section D aims to:
 - ensure the best outcome for the students
 - respect the authority and interests of all the partners
 - promote harmony and support for the educational endeavour.

The model, including its timeframe for the process, should be implemented for all amalgamations.

School type for the new school

2. (a) The decision on the type of school for the newly amalgamated school should be informed by a range of considerations, including the outcomes of local consultation.
- (b) If the patrons agree on the school type of the newly amalgamated school, the Minister for Education and Science should ratify the patron position.
- (c) If the patrons agree in principle on an amalgamation but can not agree on the school type of the newly amalgamated school, the patrons should agree to refer the decision to the Minister for Education and Science on the basis that they will accept the Minister's decision.

Timeframe for amalgamation

3. (a) If the amalgamation does not require significant funding for capital works, then the maximum period from the announcement of the amalgamation to the opening of the new school should be two academic years.
- (b) In arriving at a decision to amalgamate, the patrons should seek assurance from the Department of Education and Science that capital funding will be made available to enable any necessary building project to be completed within four academic years of the announcement of the amalgamation.
- (c) The steering committee and its chairperson should be appointed by the new patrons at least two years before the intended opening of the new school.
- (d) The new board of management should be appointed at least one year before the intended opening of the new school.

- (e) The principal of the new school should be appointed in time to take up the position full time on the 1st January of the calendar year in which the school will open.

Capital funding

4. (a) The capital budget for Education should be allocated on a multi-annual basis of at least three years.
- (b) Within the capital allocation of the Education budget there should be funding dedicated to amalgamations.
- (c) In the event of an application for major capital funding which may be considered by the Department of Education and Science as a catalyst for amalgamation, such application should be evaluated by the Department in light of:
- the School Plan
 - the review of the educational programme
 - projected enrolments
 - co-operation and complementarity with neighbouring schools
 - the number of students who will have access to the accommodation
 - the rate of occupancy of the accommodation.
- (d) While monitoring the pilot project of the Public/Private Partnerships (PPP) in the provision, maintenance and management of school accommodation, the Department of Education and Science should consider further use of the PPP for future amalgamations.

Research

5. Proactive planning of school provision requires research on school size in order to facilitate decisions on school amalgamations. Furthermore, such research would provide insight into the ways in which small schools need support and resourcing. The Commission on School Accommodation should conduct research on school size at second level that considers:
- adequate educational provision, given the increased retention of students to senior cycle and the particular needs of disadvantaged students
 - geographic location
 - comprehensive and specialist curriculum
 - socialisation needs of students
 - pastoral care of students
 - school organisation, including student access to subjects
 - staffing allocation
 - staff issues related to school size
 - teaching/learning methodology
 - school effectiveness
 - developments in the educational use of technology
 - schools in areas of high/low population density
 - characteristic spirit of the school
 - level of financial support

- resourcing
 - costs.
6. The Department of Education and Science should commission research to document the outcomes of amalgamation where it has occurred in the past ten years. Research should document the results of the amalgamation in terms of:
- educational provision
 - level of integration/identity with the new school of both students and staff
 - school type
 - suitability of accommodation provided
 - implications for staff
 - provision and use of resources, both staff and facilities.

Staffing arrangements in amalgamation

7. The following provisions should apply as a package of measures to encourage amalgamation where it is desirable to meet the needs of students. These recommendations should be fully addressed in the appropriate fora.
- (a) In harmonising, designing and allocating the educational programme for the new school, teacher qualifications, teaching experience and expertise should be respected.
- (b) The In-Career Development Unit of the Department of Education and Science should arrange for:
- the training of the new board of management
 - the preparation of teachers for an amalgamation. This arrangement should include both:
 - information on the differences in characteristic spirit, management structure and terms of employment that teachers will experience in the new situation
 - professional development courses for teachers in areas such as school organisation, school policy development, methodology, curriculum.
- (c) For a transitional period of five years after an amalgamation, a new school should receive an additional allocation per year of two whole-time equivalent teachers to the approved staffing allocation, exclusive of any former principals and deputy principals on the staff of the newly amalgamated school.
- (d) The 1997 circular, C.L.33/97 (attachment C) should be amended to remove the blocking of posts of responsibility by former principals and deputy principals on the staff of the newly amalgamated school.
- (e) The 1997 circular, C.L.33/97 should be amended to recognise the right of all permanent teachers to be assimilated into the new school.
- (f) Other provisions of C.L.33/97 should be retained. These other provisions address:
- filling of posts of responsibility in schools preparing for amalgamation
 - filling of posts of principal and deputy principal within two years of the proposed date of amalgamation.

(g) All teachers in a post of responsibility in existing schools retain their posts of responsibility. For five years after its commencement, the newly amalgamated school should have the following posts of responsibility in addition to the approved allocation:

- two assistant principal posts
- two special duties teacher posts.

After five years, the number of posts of responsibility should revert to the entitled allocation through natural attrition.

(h) As per current practice, former principals and deputy principals assimilated into the staff of the newly amalgamated school maintain their allowance on a personal basis at the rate of the allowance received in their former posts, subject to either:

- 18 hours teaching and appropriate duties; or
- 22 hours teaching.

(i) At the time of an amalgamation, teachers, principals or deputy principals who have at least five years of actual pensionable service (Circular 41/00 on Early Retirement Scheme for Teachers) may apply for early retirement under strand 3, which provides for surplus to requirements. Plans for the new school should be consulted in order to assess whether existing positions will be surplus in the new school.

(j) Authorised ancillary staff (such as caretaker, clerical officer, attendants) should be assimilated/appointed to the newly amalgamated school.

(k) The rights of non-permanent staff will be in accordance with:

- current employment legislation
- national collective agreements.

(l) All existing agreements relating to staffing arrangements in amalgamation, except for the changes specifically recommended above, should be maintained and honoured.

Impediments to amalgamation

8. The following sectoral differences are impediments to amalgamation and should be addressed in appropriate fora:

- redeployment of teachers
- leave entitlements of teachers
- criteria for appointment to posts of responsibility.

Review of amalgamation

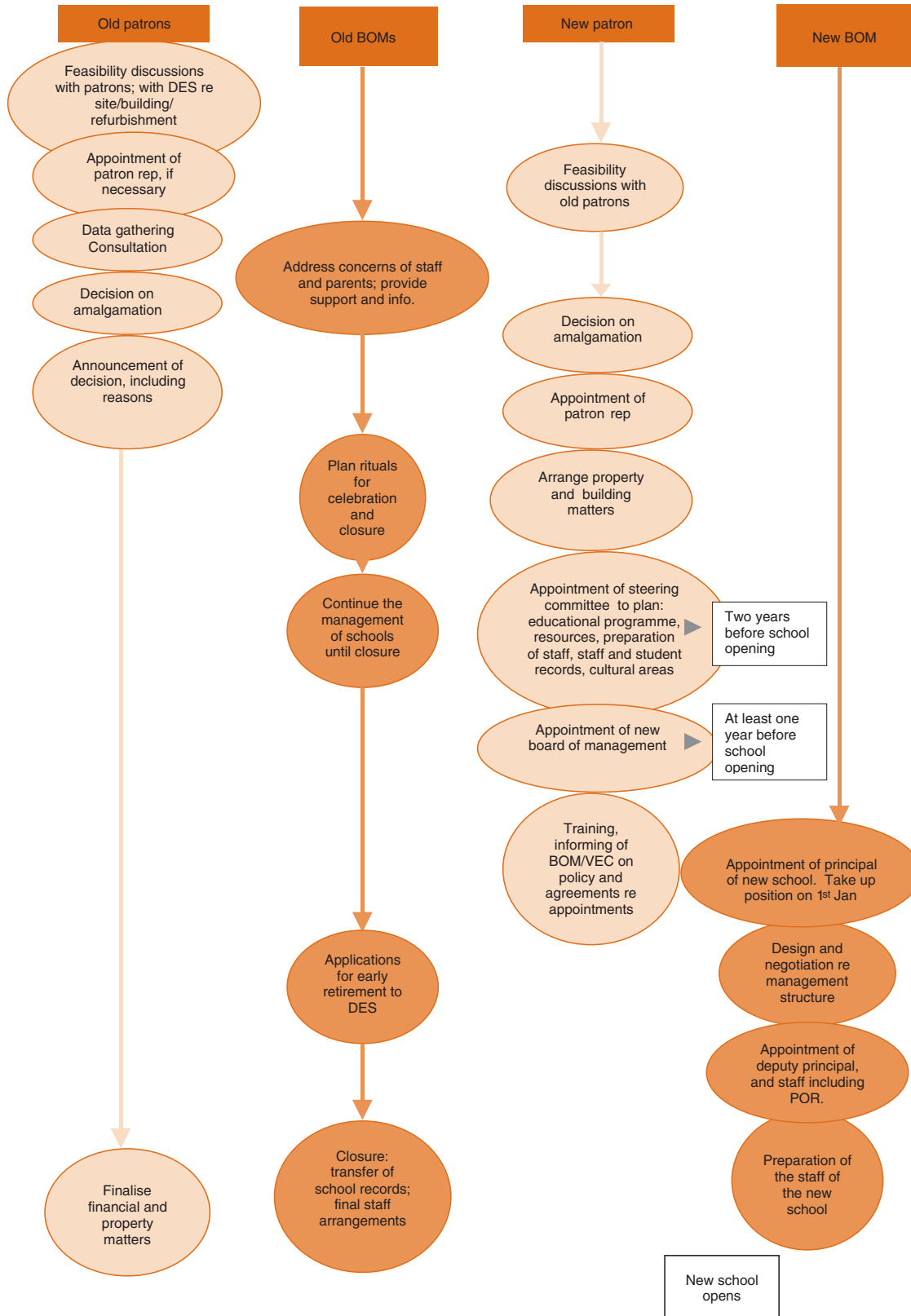
9. Five years after a school is established as a result of amalgamation, the board of management should arrange for an evaluation of the process and outcomes of the amalgamation in order to inform the process of school planning, locally and nationally. Evaluation reports should be communicated to the patron, staff and the Department of Education and Science. This evaluation process should be supported by a grant from the Department.

Department of Education and Science

10. The Department of Education and Science should adopt a proactive role in initiating and supporting amalgamations where the location, enrolments, accommodation and School Plans of the schools concerned indicate that such a course of action is appropriate.

11. Taking account of the provisions of the Cromien Report, the Department of Education and Science should analyse and address the resource and organisational implications of adopting a proactive and supportive role in amalgamation.
12. The Department of Education and Science should brief union, management and parent bodies on school amalgamations. Such briefings should include only the cases where amalgamation has been agreed in principle by the patrons.

Areas of responsibility



Attachment A

Patronage of second level schools

Section 8 (6) of the Education Act (1998) states:

The patron of a school shall carry out the functions and exercise the powers conferred on the patron by this Act and such other functions and powers as may be conferred on the patron by any Act of the Oireachtas or instrument made thereunder, deed, charter, articles of management or other such instrument relating to the establishment or operation of the school.

A range of instruments of governance is in place for the patronage of second level schools.

Privately-owned schools

Religious congregations usually own the site and buildings of their schools. The trustees (usually members of the congregation) hold the property in trust for the congregation. Their function is to maintain responsibility for the ethos, status of the school, property, insurance and financial management, but the majority devolve the day-to-day administration to the board of management which is appointed by and is accountable to the patron. The manual for boards of management of Catholic secondary schools states that the trustees act as “guarantors that the school will continue to be run in accordance with the Catholic ideals and philosophy of the founders.” Consequently, “decisions which might change the ethos and/or status of the school are matters for the trustees alone.”¹⁰ For an understanding of ethos in this context, the following handbook can be consulted: Conference of Religious of Ireland Education Commission: *The Trusteeship of Catholic Voluntary Secondary Schools: A handbook for the leaders of religious congregations* (1996).

The Conference of Religious of Ireland is the representative body of the religious congregations who are patrons of Catholic voluntary secondary schools. The Conference of Religious of Ireland negotiates on matters relating to ethos, status of the school, property, insurance and finance. The Association of Managers of Catholic Secondary Schools is the representative body which negotiates with the Department on behalf of Catholic secondary voluntary schools on matters relating to the day to day management of these schools, although the board of management of each school deals directly with the Department on specific issues relating to the management of the school.

Patronage structure is similar for schools vested in the name of an Archbishop or Bishop who holds the property in trust, and is designated the legal owner of the school. The Episcopal Commission functions as a representative body for the owners of diocesan schools.

Some Protestant and other schools have a board of governors as the governing body of the school. This body fulfils a role of patron fairly similar to that described above.

¹⁰ Council of Managers of Catholic Secondary Schools: Revised edition of the manual. 1991. pages 6 and 7.

Other privately-owned schools are owned by an individual or a group who exercises a similar patronage role to that described above.

The Joint Managerial Body is the representative body which negotiates with the Department on behalf of the management authorities of all the Catholic, Protestant, other denominational and some multi-denominational voluntary secondary schools on matters relating to management of these schools.

Publicly-owned schools

With the second level schools designated as “public” schools — vocational schools, community colleges, community and comprehensive schools — the trustees hold the property in trust for the Minister for Education and Science.

In accordance with the Vocational Education Acts, 1930 – 2000, the vocational schools are under the trusteeship of the local Vocational Education Committee. The board of management in the vocational schools is a sub-committee of the relevant Vocational Education Committee. In the vocational sector, the Vocational Education Committee is the employer rather than the board of management. In other sectors, the board of management is the employer of staff.

Similarly, the community colleges, which were established from the late 1970s onwards, have a board of management that is a sub-committee of the relevant Vocational Education Committee. The community college is under the control of the Vocational Education Committee and is directly accountable to the Chief Executive Officer. As each Vocational Education Committee is autonomous, the details of management arrangements can vary and a number of models exist. Usually, the Vocational Education Committee invites one or two religious congregations or the local diocese to have representatives on the sub-committee that acts as the board of management of the school. The sub-committee usually consists of three Vocational Education Committee representatives, three religious order/diocesan representatives, two parents and two teachers; but there are some variations on this. The religious orders/dioceses involved are not requested to make a financial contribution to the school.

The Irish Vocational Education Association is a representative body that negotiates on behalf of vocational schools and community colleges on issues related to both patronage and management of these schools.

The Deed of Trust of the community schools provides for trustees, with one exception, to be the local Vocational Education Committee and two religious congregations or one congregation and the local diocese/archdiocese. Under the Deed, the board of management is the employer of the staff. The board of management consists of three nominees of the religious trustees, three nominees of the Vocational Education Committee, two elected parents and two elected teachers.

Both the Vocational Education Committee and the religious trustees of a community school are expected to make a contribution to the building costs of the school. This contribution now has a maximum of £50,000 shared between the trustees. Religious trustees are entitled to some reserved posts on the staff, whether the community school is a greenfield or an amalgamating school.

The original instrument and articles of management for the sixteen comprehensive schools provides for a board of management of three, consisting of the chief executive officer of the Vocational Education Committee, a diocesan representative and an official from the

Department of Education and Science. There are variations on this composition, with some comprehensives adding parents and teachers as non-voting members. This model is currently under review and will ultimately reflect the full spectrum of partnership on the board of management.

Each community school and comprehensive school board of management deals directly with the Department, though the Association of Community and Comprehensive Schools functions as a representative body that negotiates on behalf of these schools.

Attachment B

Comparison of models of second level schools

The voluntary secondary school, the community college* and the community school

	Voluntary secondary school	Community college *	Community school
First established		1976	1972
Instrument of governance	Articles of Management (Catholic schools)	Vocational Education Acts 1930 – 2000 Model Agreements	Deed of Trust for Community Schools
Employer of staff	Board of management/ manager of the school	Vocational Education Committee	Board of management of the school
Patron/ Trustees	Religious order/ Diocese Private owner/ Governors	Vocational Education Committee	Usually, <ul style="list-style-type: none"> • one or two religious orders or the diocese • VEC
Status of the board of management	Executive board (where installed)	Sub-committee of the local Vocational Education Committee	Executive board
Composition of board of management	4 nominees of the patron 2 elected parents 2 elected teachers	Usually, 3 nominees of the VEC 3 nominees of religious order or the diocese 2 elected parents 2 elected teachers (Some variations on this)	Usually, 3 nominees of religious order or the diocese 3 nominees of the VEC 2 elected parents 2 elected teachers
Financial contribution of trustees	Contribution now capped at £50,000	Funded by the VEC	Contribution now capped at £50,000 shared by the trustees
Reserved posts for religious	Entitled to some	None, usually	Entitled to some
Status of teachers	Employees of the board of management/ manager	Employees of VEC scheme; officer status under the VEC Act with protection in the event of appeal	Employees of the particular board of management
Working conditions of teachers	(1) Appointment to posts of responsibility based on interview and appointment of the most senior suitable candidate (2) Redeployment scheme in limited operation **	(1) Appointment to posts of responsibility based on: <ul style="list-style-type: none"> • interview • seniority • professional development (2) Teachers can be transferred within the VEC scheme or to the scheme of another VEC **	Appointment to posts of responsibility based on: <ul style="list-style-type: none"> • interview • seniority • professional development (2) No transfer or redeployment arrangement **

	Voluntary secondary school	Community college *	Community school
Representative body at national level	Joint Managerial Body	Irish Vocational Education Association	Association of Community and Comprehensive Schools
BOM interaction with the Department of Education and Science	Direct/indirect	Through the VEC	Direct
Finance	Teachers paid by the DES, part-time and substitute teachers paid by the school capitation grant. 40 fee-paying schools	VEC allocates funds from its block grant; teachers are paid by the VEC; school budget for non-pay items	Teachers paid by the DES, except for part-time and substitute teachers who are paid by the school; annual recurrent funding budget supplied to the school by DES
Auditing	Accounts audited by school accountant; DES audit scheme being introduced	Comptroller and Auditor General audits books of the scheme each year	DES audits the books biennially and the C and A G audits every 3-4 years
Ethos	Denominational; a few multi-denominational	Inclusive, e.g. religious education provided for all denominations	Inclusive, e.g. religious education provided for all denominations
Curriculum	Range from academic to comprehensive	Comprehensive	Comprehensive

* The model of community college described here is the model for the designated community college, of which there are approximately 30. Some vocational schools are titled “college” without being a designated community college.

** For differences in leave entitlement see section B “school type” in the body of this report.

Staffing allocation: in general, the allocation is standard across the above models, except for the Department of Education and Science salaried post for chaplain in community schools and community colleges.

Attachment C

C.L.33/97

**TO BOARDS OF MANAGEMENT,
VOCATIONAL EDUCATION COMMITTEES AND
PRINCIPALS OF SCHOOLS.**

**ARRANGEMENTS FOR STAFFING, AND FILLING OF POSTS OF RESPONSIBILITY
IN THE AMALGAMATION OF SCHOOLS TO FORM A COMMUNITY COLLEGE OR
COMMUNITY SCHOOL.**

The Minister for Education wishes to advise Vocational Education Committees, Boards of Management of Secondary and Community/Comprehensive Schools and Principal Teachers of the terms of the agreement that shall be implemented in future in the case of Community Colleges and Community Schools arising from amalgamations.

Filling of Posts of Responsibility

All A and B Posts of Responsibility becoming vacant before the date of amalgamation in any of the schools scheduled for amalgamation would be filled in a permanent capacity.

Blocking of Posts of Responsibility

There would be no blocking of posts by ex-Principals/Vice-Principals where 1 or 2 ex-P/VP involved. Where more than 2 are involved, posts would be blocked. The following would be the position:

1-2 ex-P/VP	No post blocked
3 ex-P/VP	1 post blocked
4-5 ex-P/VP	2 posts blocked
6 or more ex-P/VP	3 posts blocked

Filling of posts of Principal and Vice-Principal pre-amalgamation

Vacancies for Principal or Vice-Principal arising within 2 years of the proposed date of amalgamation would be filled in an acting capacity only. The approval of the Department must be obtained prior to filling any Principal or Vice-Principal post.

Filling of Teaching Posts

Fillable vacancies for teaching posts arising in the amalgamating schools in the two year period prior to amalgamation would be filled in a permanent capacity. However, teachers appointed under this arrangement would not have an automatic right of assimilation on to the staff of the Community School or Community College and would be subject to redeployment or transfer as appropriate.

Don Thornhill,
Runaí
July 1997.

Appendix A

Membership of the Steering Group

Mr. John Carr
Irish National Teachers' Organisation.

Mícheál Uas. Ó Cinnéide
National Parents Council (Primary).

Mr. Joe Cullen
Department of Finance.

Mr. Tony Deffely
Teachers' Union of Ireland.

Jacqueline Ní Fhearghusa
Gaelscoileanna.

Fr. Nicholas Flavin
Secretariat of Secondary Schools.

Mr. Tommy Francis
Association of Secondary Teachers,
Ireland.

Mr. Pat Gilmore
Association of Community and
Comprehensive Schools.

Mr. Declan Glynn
Teachers' Union of Ireland.

Mr. Seán Grehan
National Parents Council (Postprimary).

Mr. Brendan Griffin
Irish Vocational Education Association.

Dr. John Harris
Protestant Managers/Governors
(Second Level).

Mr. Liam Hughes
Department of Education and Science.

Very Rev. Frank Kelly, P.P.
Catholic Primary School Managers'
Association.

Mr. Joe Kennedy
National Parents Council (Postprimary).

Mr. Charlie Lennon
Association of Secondary Teachers,
Ireland.

Ms. Marian Lyon
National Parents Council (Primary).

Lorcán Uas. Mac Gabhann
Foras Pátrúnachta na Scoileanna
Ián-Ghaeilge.

Mr. Seán McCann
Association of Community and
Comprehensive Schools.

Mr. Sam McClure
Protestant Managers/Governors
(Second Level).

Sr. Teresa McCormack
Conference of Religious of Ireland.

Mr. John McCullough
Church of Ireland Board of Education.

Br. Kevin Mullan
Conference of Religious of Ireland.

Ms. Sheila Nunan
Irish National Teachers' Organisation.

Mr. George O'Callaghan
Joint Managerial Body.

Fr. Dan O'Connor
Bishops' Education Commission.

Ms. Deirdre O'Donoghue
Educate Together.

Mr. Maurice O'Kane
People with Disabilities in Ireland.

Sr. Eileen Randles
Catholic Primary School Managers'
Association.

Mr. Pat Ryan
Irish Vocational Education Association.

Ms. Jacinta Stewart
Association of Chief Executive Officers of
Vocational Education Committees.

Mr. Frank Murray
Chairperson
Commission on School Accommodation.

Ms. Denise Burns
Commission on School Accommodation.

Ms. Eimer Lynch
Commission on School Accommodation.

Ms. Yvonne Lennon
Commission on School Accommodation.