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Education

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AN ROINN

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MÁNNYSTRIE O

Lear



INVESTOR IN PEOPLE

Transformation

An Information Pack for Schools



FOREWORD/INTRODUCTION

Purpose of this Information Pack

The purpose of this pack is to explain what is meant by integrated education and transformation, identify key issues which are likely to arise and how they might be addressed, outline the legal and administrative processes and requirements and provide details of the various sources of advice and assistance available. The pack is primarily intended for use by Boards of Governors of schools and school Principals either considering or in the process of transformation.

This information pack does not purport to give any authoritative interpretation of the law.

CONTENTS

Foreword/Introduction

PHASE ONE - PRE-BALLOT PREPARATION AND BALLOT

Integrated Education and Transformation	1a
Brief History of Integrated Education Policy	1b
Integrated Schools in Northern Ireland	1c
Timetable for Transformation	1d
Legal Requirements	1e
Awareness Raising	1f
Available Funding to Assist the Transformation Process	1g
Pre-Ballot Assessment of Support	1h

PHASE TWO - DEVELOPMENT PROPOSAL

Departmental Procedures and Requirements	2a
Transformation Development Plan	2b
The School Prospectus	2c

PHASE THREE - TRANSFORMING - IMPLEMENTING THE ACTION PLAN

Implementation of the Transformation Development Plan	3a
Training	3b
Addresses for Advice and Information	3c

Glossary

INTEGRATED EDUCATION AND TRANSFORMATION

What is Integrated Education?

Integrated schools use all aspects of the school environment to give equal recognition to and promote equal expression of the two major traditions and other cultures in Northern Ireland. They welcome children from other cultures and are open to those of all faiths and none. Integrated Education is about encouraging young people to recognise what they have in common as well as understanding and respecting differences, thereby helping them to develop an unbiased attitude towards others. Emphasis is placed on promoting the worth and self-esteem of all individuals within the school community with the core aim of the integrated school being to provide each child with a caring, self fulfilling educational experience which will enable him/her to become fulfilled and a caring young person.

What is Transformation?

Transformation is a process of change of status of an existing school to integrated status arising from a desire to provide an integrated school in an area. The process is determined through consultation with the local community and a decision by parents expressed through a parental ballot. The changes that will be brought about in the transforming school will be dependent on whether the school is in the primary or post-primary sector, its size and composition and what progress towards integration the school feels it has already made.

Transformation is, as defined in the Education Orders, the acquisition of grant-maintained or controlled integrated status by an existing school. The change of status of a school occurs on a specific date, determined by the Department. However, transformation should be viewed more as a series of gradual and definite changes, undertaken with the support of the entire school body, both before and after the actual date specified by the Department. The ultimate aim is recognition of the school as a fully integrated community.



BRIEF HISTORY OF INTEGRATED EDUCATION POLICY

The Dunleath Act 1978

In 1974 the “All Children Together” (ACT) group was established to promote the idea of schools that would be shared by the whole community. They hoped that existing schools would change their recruitment and ethos to become integrated. They were successful with the assistance of Lord Dunleath, in having a Bill passed in the House of Lords in 1978. The Education (Northern Ireland) Act 1978, later to become known as the Dunleath Act, allowed schools to change their status in this way. In 1978, as a result of the Act, Article 5(2) of the Education (NI) Order 1978 inserted a new Article 11A into the Education and Libraries (NI) Order 1972. This new Article enabled the Department to approve a proposal for a change of character of a school. However, **transformation** could only be initiated by Boards of Governors and no school successfully took advantage of the Act.

The First Integrated Schools, 1981-1989

In 1981 ACT opened the first integrated school, **Lagan College**, with 28 pupils in a scout hut at Lisnabreeny on the outskirts of Belfast. The school now has 1068 pupils and remains the largest and best known integrated school in Northern Ireland. In 1985 another two integrated schools were opened in Belfast by parents groups followed by a further 7 schools by 1989. The schools were independent and were funded through Charitable Trusts, Foundations and voluntary fund-raising.

Prior to the Education Reform (NI) Order 1989, there was no specific category for integrated schools within the existing legislation. Proposals from integrated schools for grant-aided status were therefore considered against the existing rural and urban viability criteria for voluntary and controlled schools. Lagan College was awarded grant-aided voluntary maintained status in 1984 and a further 4 integrated schools were grant-aided by 1989. By that date around 1,400 pupils were enrolled in 10 integrated schools (5 grant-aided and 5 independent).

The Education Reform Order and Accelerated Growth 1989-1996

The major boost for integrated schools resulted from the decision in 1989 not to have Grant-Maintained schools in Northern Ireland in line with proposals in England but to create new Grant-Maintained Integrated schools. New statutory measures in the Education Reform (Northern Ireland) Order 1989 provided the following:-

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- a. a statutory duty on the Department to “**encourage and facilitate**” the development of integrated education; (Article 64)
 - b. powers to provide **recurrent** funding from the date of acquisition of grant-maintained integrated status which means that an integrated school has met the Year 1 or Year 8 enrolment criteria receiving immediate recurrent grant;
 - c. power to support a **body** who has as an objective the encouragement or promotion of integrated education - a role carried out by the Northern Ireland Council for Integrated Education (NICIE) since 1991.

Grant-Maintained Integrated schools are not eligible for **capital** grant until they have demonstrated they can **sustain** a viable enrolment, i.e. 3 consecutive intakes at the minimum level. Arrangements have, however, been made to assist new integrated schools with **early day capital funding** - when they are initially established and before they become eligible for capital grant. Assisted by the charitable trusts (the Nuffield Foundation and Joseph Rowntree Trust) but funded mainly by public and European moneys, the Integrated Education Fund (IEF) was established in 1992 to help schools with capital costs. A loan facility of up to £21m has been agreed between NICIE, the IEF and a consortium of the main local banks. This is available to fund capital development at schools which have been approved by the Department. In addition, the Department provides recurrent grants to individual schools equivalent to the interest charges on the loan as “rent” payable to NICIE for the accommodation.

These measures assisted the acceleration of the growth of the integrated sector from under 2,000 pupils in 10 grant-aided and independent schools in 1989 to over 12,000 pupils in 37 schools in 2005 - an increase in schools and enrolments of over 500%.

Review of Integrated Education Policy 1996, and Growth to Date

Due to mounting pressure on the school’s capital budget arising from the growth of new Grant-Maintained Integrated (GMI) schools, a review of integrated education policy was launched in February 1996. This resulted in the raising of the minimum viability criteria for new schools and the introduction of measures to encourage schools to pursue the transformation route to integrated status.

For new integrated primary schools the required minimum intake was raised from 15 to 25 and the long-term enrolment (LTE) from 100 to 175. For new grant-maintained integrated colleges the minimum intake was increased from 60 to 100 and the LTE from 300 to 500. Similar changes were made to the viability criteria for Irish-medium schools which are kept in line with those for integrated schools.

To encourage transformation, the policy document **A Framework For Transformation** was published in February 1997. This requires schools wishing to transform to demonstrate reasonable prospects of achieving, over the longer term, a minimum of 30% of their enrolment drawn from the relevant minority tradition. No pre-existing level of integration is necessary, but to ensure that transformation is well grounded from the outset, schools must attract at least 10% of their first year intake from whichever is the minority community (ie Catholic or Protestant) before final approval is granted. Changes to the composition of the Board of Governors are also necessary. The policy provides for reviews after 5 and 10 years. Modest recurrent financial assistance for transformation is provided to schools by the Department.

Following representations from the integrated sector, the viability criteria for **post-primary schools** were further revised in February 1998. The minimum intake was reduced from 100 to 80 and the minimum long-term enrolment from 500 to 400.

Following further consultation, the Minister announced (in December 2000) his decision to reduce the viability criteria for integrated (and Irish-medium) schools. Initial thresholds were reduced to intakes of 15 for new schools in Belfast and Derry and 12 for developments elsewhere. These initial thresholds will be the key to recurrent funding for schools, but will not bring immediate entitlement to capital funding. Instead, it was decided to set medium-term targets - intake levels of 20 in Belfast and Derry and 15 elsewhere - and to link capital funding to these medium-term targets.

Changes to the viability criteria for integrated (and Irish-medium) post-primary schools were announced by the Minister on 31 October 2001. Integrated (and Irish-medium) post-primary schools that achieve a year eight intake of 50 pupils are now eligible for funding from the Department.

As a result of these policy developments, the integrated sector has continued to develop. There are now 56 grant-aided integrated schools with a combined enrolment of almost 17,000 pupils, around 5% of the school population

The Education (NI) Order 1998 repealed those provisions of the Education Reform (NI) Order 1989 which prohibited integrated pre-school provision from acquiring grant maintained or controlled integrated status, and afforded an opportunity for the voluntary playgroups established at integrated primary schools the opportunity to apply for conversion to statutory provision. A significant number of such groups sought to avail themselves of this facility and as a result statutory nursery provision is, or will be, available at 12 of the 22 grant-maintained integrated primary schools. This level of provision of nursery units, some 66%, is significantly in excess of the level in other school sectors.

INTEGRATED SCHOOLS IN NORTHERN IRELAND

There are currently 56 integrated schools throughout Northern Ireland accounting for around 5% of the total school population. Thirty-seven of these schools hold grant-maintained integrated status, 19 are controlled integrated and of these 19, 17 are schools that have undertaken transformation.

In 1991 the first schools to be granted integrated status as transformed schools were Brownlow College in Craigavon and Carhill Primary School in Garvagh. Since then the number of schools seeking to transform has increased significantly and in September 1998 the greatest increase to date occurred with 6 additional schools achieving integrated status.

The attached lists details the names and locations of all the integrated schools in Northern Ireland.

The definitions of the different type of integrated schools can be found in the glossary.

GRANT-MAINTAINED INTEGRATED PRIMARY SCHOOLS AS AT 1 SEPTEMBER 2005

School Name	Board Area	School Address	Principal	Telephone Number
Acorn IPS	North-Eastern	110 Victoria Road Carrickfergus Co Antrim BT38 7JL	Mr R Gilmour	028 9336 0115
Braidside IPS	North-Eastern	87 Fry's Road Ballymena Co Antrim BT43 7EN	Mr R Scott	028 2564 7899
Bridge IPS	Southern	Ballygowan Road Banbridge Co Down BT32 3EL	Mr C Graham	028 4066 2055
Cedar IPS	South-Eastern	Kilmore Road Crossgar Co Down BT30 9HJ	Mr W M McKnight	028 4483 0009
Corran IPS	North-Eastern	Blackcave Road Old Glenarm Road Larne Co Antrim BT40 1TP	Ms M Blacklaw	028 2827 3455
Cranmore IPS	Belfast	47 Finaghy Road North Belfast BT10 6JB	Mrs H Farrimond	028 9066 4410
Drumlins IPS	South Eastern	9-17 Antrim Road Ballynahinch Co Down BT24 8AN	Ms J Marshall	028 9756 3755
Enniskillen IPS	Western	Drumcoo Enniskillen Co Fermanagh BT74 4FW	Mrs A M Kerr	028 6632 6799
Hazelwood IPS	Belfast	242 Whitewell Road Newtownabbey Co Antrim BT36 7EN	Mrs J Houston	028 9077 0421
Lough View IPS	South-Eastern	63 Church Road Castlereagh Belfast BT6 9SA	Ms M Butler	028 9040 1347
Maine IPS	North-Eastern	93 Portglenone Road Randalstown Saintfield BT41 3AH	Ms S Minford	028 9447 8766
Millennium IPS	South-Eastern	139 Belfast Road Lisdoonan Saintfield Co Down BT24 7HF	Mrs M Roulston	028 9081 3688

School Name	Board Area	School Address	Principal	Telephone Number
Millstrand IPS	North-Eastern	33 Dhu Varren Portrush Co Antrim BT56 8EW	Mr P Reid	028 7082 3090
Oakgrove IPS	Western	Rectory Field 19D Limavady Road Londonderry BT47 6JY	Ms A Murray	028 7134 9644
Oakwood IPS	South-Eastern	48 The Cutts Derriaghy Co Antrim BT17 9HN	Mrs O Frost	028 9030 9920
Omagh IPS	Western	9 Ballynahatty Road Dergmoney Omagh Co Tyrone BT78 1PN	Mr E Bullick	028 8224 2008
Phoenix IPS	Southern	46 Chapel Street Cookstown Co Tyrone BT80 8QD	Mr S McKernan	028 8675 7096
Portadown IPS	Southern	1 Kernan Road Portadown BT63 5RR	Mrs K Magee	028 3835 0754
Roe Valley IPS	Southern	153 Roe Mill Road Limavady BT49 9EX	Ms A Quinn	028 7776 8695
Saints and Scholars IPS	Southern	Killuney Park Portadown Road Armagh BT61 9HG	Ms A Mackin	028 3751 0113
Spires IPS	North-Eastern	84 Moneymore Road Magherafelt BT45 6HH	Mr P Trainor	028 7963 1014
Windmill IPS	Southern	Old Eglish Road Dungannon Co Tyrone BT71 7BE	Mr I Moore	028 8772 7277

GRANT-MAINTAINED INTEGRATED COLLEGES AS AT 1 SEPTEMBER 2005

School Name	Board Area	School Address	Principal	Telephone Number
Armagh IC	Southern	39f Abbey Street Armagh Co Armagh BT61 7EB	Mrs C Connolly	028 3752 2944
Drumragh IC	Western	1 Donaghanie Road Omagh Co Tyrone BT79 1PN	Lady R Salisbury	028 8225 2440
Dungannon IC	Southern	21 Gortmerron Link Road Dungannon Co Tyrone BT71 6LS	Mr A Dolan	028 8772 4401
Erne IC	Western	Drumcoo Enniskillen BT74 4FY	Mr T Noble	028 6632 5996
Hazelwood IC	Belfast	70 Whitewell Road Newtownabbey BT36 7ES	Mrs N Campbell	028 9077 4202
Lagan IC	South-Eastern	44 Manse Road Castlereagh Belfast BT8 6SA	Mrs H McHugh	028 9040 1810
Malone IC	Belfast	45 Finaghy Road North Belfast BT10 7AG	Mr S Leonard	028 9038 1988
New Bridge IC	Southern	25 Donard View Road Loughbrickland Banbridge Co Down BT32 3LN	Mr P Agnew	028 4062 5010
North Coast IC	North-Eastern	21 Cloyfin Road Coleraine Co Londonderry BT52 2NU	Mr J J Frizelle	028 7032 9026

School Name	Board Area	School Address	Principal	Telephone Number
Oakgrove IC	Western	Stradreagh Gransha Park Clooney Road Londonderry BT47 6TG	Mrs M Cowan	028 7186 0443
Shimna IC	South-Eastern	5a King Street Newcastle Co Down BT33 0HD	Mr K Lambe	028 4372 6107
Slemish IC	North-Eastern	Larne Road Ballymena Co Antrim BT42 3HA	Dr R Jennings	028 2563 0156
Sperrin IC	North-Eastern	39 Pound Road Magherafelt BT45 6NR	Mr A Rowan	028 7963 4177
Strangford IC	South-Eastern	Old Carrowdore Castle Woodburn Road Carrowdore Co Down BT22 2GB	Miss E A Rowe	028 9186 1199
Ulidia IC	North-Eastern	Victoria Road Carrickfergus Co Antrim BT38 7JL	Mr E G Martin	028 9332 9601

CONTROLLED INTEGRATED PRIMARY SCHOOLS AS AT 1 SEPTEMBER 2005

School Name	Board Area	School Address	Principal	Telephone Number
All Children's IPS	South-Eastern	The Walled Garden King Street Newcastle Co Down BT33 OHD	Mrs J McMeekin	028 4372 2098
Annsborough IPS	South-Eastern	51 Ballylough Road Castlewellan Co Down BT31 9NN	Ms Lynda Brown	028 4377 8630
Bangor Central IPS	South-Eastern	Castle Street Bangor Co Down BT20 4ST	Mr A G Redpath	028 9146 0513
Carhill IPS	North-Eastern	78 Carhill Road Garvagh Coleraine BT51 5PQ	Ms C Doherty	028 2955 8635
Carnlough IPS	North-Eastern	9 Harbour Road Carnlough Ballymena Co Antrim BT44 0EU	Mrs E S Farrell	028 2888 5272
Forge IPS	Belfast	20 Carolan Road Belfast BT7 3HE	Mrs J M Hardy	028 9049 2177
Glencraig IPS	South-Eastern	Seahill Road Holywood Co Down BT18 0DJ	Mr D Hewitt	028 9042 1492
Glengormley IPS	North-Eastern	166 Church Road Newtownabbey Co Antrim BT36 6HJ	Mr J Houston	028 9083 2786

School Name	Board Area	School Address	Principal	Telephone Number
Groarty IPS	Western	17 Coshquin Road Londonderry BT48 0ND	Mrs V E Thompson	028 7126 7889
Hilden IPS	South-Eastern	4 Bridge Street Hilden Lisburn Co Antrim BT27 4RZ	Ms E I Brennan	028 9260 5357
Kilbroney IPS	Southern	15 Cloughmore Road Rostrevor Newry Co Down BT34 3EL	Mrs D Moorehead	028 4173 8491
Kircubbin IPS	South-Eastern	22 Cooks Brae Kircubbin Newtownards Co Down BT22 2SQ	Mrs E E Breen	028 4273 8491
Portaferry IPS	South Eastern	High Street Portaferry Newtownards Co Down BT22 1QU	Mrs J M C Smyth	028 4272 8523
Rathenraw IPS	North-Eastern	Rathenraw Estate Stiles Way Antrim BT41 2TA	Mr H Clements	028 9446 3979
Roundtower IPS	North-Eastern	Durnish Road Antrim BT41 2TH	Mr P Scott	028 9446 8672

CONTROLLED INTEGRATED COLLEGES AS AT 1 SEPTEMBER 2005

School Name	Board Area	School Address	Principal	Telephone Number
Brownlow IC	Southern	Tullygally Road Craigavon Co Armagh BT65 5BS	Mr E J Lemon	028 3834 2121
Down Academy	South-Eastern	12 Old Belfast Road Downpatrick Co Down BT30 6SG	Mr R Johnston	028 4461 2115
Fort Hill IC	South-Eastern	Belfast Road Lisburn Co Antrim BT27 4TL	Miss M Getty	028 9266 3670
Priory IC	South-Eastern	My Lady's Mile Holywood Co Down BT18 9ER	Mr I L G Arbuthnot	028 9042 3481

TIMETABLE FOR TRANSFORMATION

The following timetable applies to allow for the determination of development proposals in good time before parents have to express a preference as to the school in which they wish their children to be enrolled under the primary enrolment or secondary transfer procedure.

<u>Before the beginning of September*</u>	-	Ballot of parents
<u>By 9 September</u>	-	Submission of a Development Proposal to ELB
<u>By 30 September</u>	-	Publication of an advertisement in a newspaper - (see Article 92(4) of the 1989 Order)
<u>30 November</u> (or two months from date of publication of Development Proposal if sooner)	-	Closing date for objections - Relevant supporting data from the school to be lodged with the Department
<u>By mid-January**</u>	-	Completion of assessment of proposal by Department; decision announced

* It is suggested that this is not done during the July and August school holidays, as many parents eligible to vote may be unavailable to do so.

** This mid-January date is **not statutory, whilst the Department aims to have a decision on all Development Proposals within 6 weeks of the end of the statutory 2-month objection period** - the decision may be earlier or later than mid January depending on the individual circumstances attached to a particular school. The effective date for transformation will be determined by discussion between the Department and the school.

LEGAL REQUIREMENTS

The Ballot

Acquisition of Grant-Maintained Integrated status - Article 68 and Controlled Integrated Status - Article 90 Education Reform (Northern Ireland) 1989

Eligibility	<p>GMI - Controlled, Voluntary Maintained, Independent (Independent school may become grant-maintained integrated but not controlled integrated).</p> <p>CIS - Controlled, Voluntary Maintained.</p>
Not Eligible	<p>GMI - Special, Other Voluntary, school established in a hospital, school identified for closure.*</p> <p>CIS - Special, Other Voluntary School Identified For Closure * and Independent.</p>
Initiation of Process	<p>1. Board of Governors Initiate</p> <p>Board of Governors decides by resolution passed at a meeting of that Board to hold a ballot (see Article 36(2) of the 1996 Order).</p> <p>2. Parents Initiate</p> <p>Board of Governors receive a signed request by a number of parents of registered pupils at the school equal to at least 20% of the number of registered pupils at the school on the date on which the request is received.</p>

* This is a school for which the Department has approved a proposal to discontinue the school, that is a school which falls into Article 68(3) of the Order.

The Board of Governors pass a resolution to hold ballot.
Immediately notifies:

- i. the relevant Education and Library Board (see Article 87(3) of the 1989 Order);
- ii. if voluntary, the Trustees; and
- iii. if a Catholic Maintained school, Council for Catholic Maintained Schools (CCMS).

Timing of the Ballot

Not earlier than 28 days and not later than 3 months from the date of the resolution or such longer period as the Department may approve.

All bodies (i., ii. and iii. above) must be notified in writing of intention to ballot.

More than one ballot cannot be held in any school year unless the Department gives consent in writing.

Provision of Information

The Board of Governors must supply on request a list for inspection of all parents of registered pupils to a parent for the purpose of a ballot except those who have submitted in writing a request not to disclose information about them. A charge may be made for the supply of a list but inspection of the list is free of charge.

The Ballot

The Electoral Reform Services (ERS) is the “Prescribed Body” who will conduct the ballot. It is a secret postal ballot.

The Board of Governors must ensure that, through the ERS, each person entitled to a vote is:-

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- given the information on the process and the implications of such a vote;
 - informed of his/her entitlement to vote in the ballot; and
 - given opportunity to do so.

Same information must be available for all school staff.

The Board of Governors must consider the Department's guidance **ie ballots not held in the July and August school holidays.**

Counting the Vote

At "First Ballot" 50% or more must vote otherwise "Second Ballot" must be held before the end of the period of 14 days beginning with the day on which the total number of votes cast in the first ballot is determined.

Payment of Ballot Expenses

The Department may pay or reimburse Boards of Governors the whole or part of the expenses incurred in respect of the ballot.

Management Structures of Different School Types in Northern Ireland

Controlled	Controlled Integrated*	Controlled Integrated**	Grant-Maintained Integrated	Catholic Maintained (Capital Grant) 85%	Maintained (Catholic) 100% (Capital Grant)
9, (16,24)	14, (21)	14, (21)	16, (24)	10, (18, 27)	9, (18, 27)
4 Transferors	2 Transferors 2 Catholic Trustees	4 DE	6 Foundation Governors (including 2 parents)	6 Trustees	4 Trustees 1 DE
2 Parents	4 Parents	4 Parents	4 Parents	1 Parent	1 Parent
2 ELB	4 ELB	4 ELB	4 DE	2 ELB	2 ELB
1 Teacher	2 Teachers	2 Teachers	2 Teachers	1 Teacher	1 Teacher
9	14	14	16	10	9

The Principal is a 'non-voting' member of the Board of Governors and additional to these 'voting members'.

* This is a controlled integrated school, which has transformed from controlled or Catholic maintained status

** This is a controlled integrated school, which has transformed from voluntary maintained status

AWARENESS RAISING

Key Groups and Key Issues

For the process of transformation to be successful it is important that the concept of transformation is introduced in a sensitive and understanding manner to all the different groupings in the school community. This will enable them to examine the appropriateness of transformation for their school and ensure their support throughout the process.

The impetus for transformation may come from a number of sources, for example, the Board of Governors, Principal, staff or parents. The Governors and Principal have key roles to play in guiding the school through the transformation process.

Governors are obliged to ensure that the option of integration for their school is fully investigated and all the implications of such a change considered. The pace of transformation should be carefully controlled and time taken to allow the Governors and the Principal to consult and receive guidance from bodies experienced in the process of integration. Access to information and advice is available from the bodies listed later in this information pack.

a. Staff

As major stakeholders all staff, teaching and non-teaching, should be informed, consulted and their understanding of the process should be clear. Issues relating to enrolment, employment, ethos, resources, curriculum and any other concerns that the staff of the school may have, should be addressed at an early stage so that staff are fully aware of the extent and pace of change which will occur should a decision be made to transform.

b. Parents

The Board of Governors should explain clearly to parents their reasoning for considering transformation and where it relates to the overall development of the school. Opportunities should be afforded to parents to express their views and concerns and have them dealt with in a sensitive and sympathetic manner. It is appropriate for the Governors in the first instance to write to all parents outlining proposals for the move towards integrated status in simple but meaningful terms. This should be followed by parents' evenings which should allow individuals the opportunity to voice either their support or concern about aspects of the transformation. Boards of Governors and Principals are not expected to deal with all of these issues on their own; NICIE, the TRC and the ELBs will be pleased to assist in any way possible.

c. Pupils

In some of the schools considering transformation there may already be children from both traditions, in others, however, it may only be the Year 1 (ie 1st year in primary school) or Year 8 (1st year in a post-primary school) intake that will have a religious balance. The involvement of pupils in primary and post-primary schools will be different depending upon their level of awareness and understanding. In post-primary schools for example senior pupils might be encouraged to discuss their views on the proposals for change within their school or provide a different perspective on how these changes might be implemented. It may be possible for links to be initiated with other integrated schools or joint activities explored: these associations may prove valuable as the school awaits approval for integrated status following the submission of a development proposal.

d. Local Community

The local community is interested in what is happening within a school embarking on transformation. While the Governors will wish to use the local press to promote the change to integrated status and to inform the community of a possible change to integrated status they should be aware of the interest and concerns of other schools and give careful and sensitive consideration to their views.

e. Local Churches

The support of the local churches is important for any successful transition to integrated status. Integration is about equal recognition for all traditions and local clergy should be invited and encouraged to play an active part in the religious dimension of the transforming school. For some schools this may involve establishing links with churches they may previously have had no involvement with.

AVAILABLE FUNDING TO ASSIST THE TRANSFORMATION PROCESS

Funds to assist the transformation process are available from two sources:-

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The Department has secured additional resources for transforming schools to assist with the process. These funds can be used to help redress any imbalance in the religious composition of the teaching staff; for in-service training and networking with other integrated schools, and for books and materials required to reinforce the school's commitment to formal integration. The school will be invited to make application at the beginning of each financial year, providing the funds continue to be available.

The Department may also reimburse the Boards of Governors for the fees of the

Electoral Reform Services for services in connection with holding the ballot.

INTEGRATED EDUCATION FUND (IEF)

The Integrated Education Fund is a financial foundation which raises funds and administers grants with the aim of increasing the number of integrated places.

Transforming schools can apply to the Fund for a grant to help with the additional costs of the Transformation process including marketing/promoting the new status and awareness training for all staff.

For further information on grant making programmes please contact the Fund.

Future Grants

The IEF is currently conducting a major fund-raising campaign to raise £10 million. This funding will be spent on integrated schools both new (new build and Transforming) and existing. The main objective is to ensure that sufficient places in integrated schools are available for at least 10% of the school population by 2008. Transforming schools that need funding to help the growth in places will be encouraged to apply to the IEF for financial assistance. The Fund will continue to work with other interested bodies to increase awareness of the transformation process and integration in education. In addition the IEF will maintain the support for research, publication, development and dissemination of models of good practice and the sharing of experience.

PRE-BALLOT - ASSESSMENT OF SUPPORT

This involves discussions by the senior management team to look at transformation in the context of school development. This should then lead on to discussions with staff groups. The focus of these discussions will be on school development and an examination of possible outcomes. Having completed this process the findings should be fed back to the Governors who can explore the issues further.

The process can be moved forward by having discussions with all staff. A number of steps need to be taken:-

- Seek advice for Governors from ELBs/NICIE/TRC.
- Talk with parents' groups who are already involved with school, eg Parent Teacher Association, Voluntary helpers and Supervisors.
- Ensure that staff have the information necessary to answer queries from pupils and parents.
- Contact other local principal colleagues so that they are informed from a reliable source other than rumour.
- Use informal contacts to inform local clergy of thinking.
- Hold parent meetings to discuss issues, concerns and to answer queries. End with an informal session for example tea/coffee to allow individuals to raise questions they would not ask in public.
- Visit or talk to schools that have transformed or are GMI.
- Discuss the feedback and decide the way forward at a Governors' meeting at which a quorum is present. However, it would be appropriate if the meeting at which the decision was taken was attended by most if not all of the Governors.

In so far as it is possible the outcomes of transformation should be explored and the practicalities of implementation identified. This can be facilitated by addressing the following questions:-

- What will transformation mean for the school?
- How will the expectations of “new” pupils and parents be balanced with and honour commitments to any apprehensive existing pupils and parents?
- How will the cultural changes involved be addressed and what will they be?

Further consultations should be timebound as the final decision will be taken by the parents through the ballot.

Boards of Governors must ensure that a ballot is held in certain specified circumstances – see Article 69(4) of the 1989 Order.

Do not allow the decision making to run on and on - all that is being done is making a decision in principle whether or not to ballot - it is the parents who decide finally.

The main considerations for the Board of Governors at this stage of the process are:-

- the possibility of becoming integrated;
- the implications of such a change; and
- deciding whether parents should be consulted through a ballot (not applicable where parents have requested this) about their willingness to agree to such a change.

Pre Ballot - Preparation for the Ballot

Once the Board of Governors has taken a decision to hold a ballot careful preparation is required. The Education and Library Board for the area is informed and a postal ballot is organised. Electoral Reform Services oversee all the arrangements for the Ballot. All parents of children attending the school have the right to vote and the Board of Governors must prepare their names and addresses for Electoral Reform Services.

DEPARTMENTAL PROCEDURES/REQUIREMENTS

General

As a minimum, the Department will expect schools to aim to develop a broad and balanced integrated curriculum and whole school ethos which gives equal recognition to and promotes equal expression of the two major traditions in Northern Ireland.

Procedures/Requirements

Ballot

Once agreement has been reached by the Board of Governors/Principal/parents on the desire for transformation, arrangements have been made by the Department for Electoral Reform Services (ERS) to conduct ballots of parents for GMI or CI status. These ballots are always secret ballots, conducted entirely by post. It should be noted that ballots may not be conducted by any agent other than ERS. The cost of the ballot may be met by the Department. The Board of Governors may ask the Department for an extension to the closing date of the ballot to allow them to complete preliminary preparations. It is advisable that ballots should not be held during the July and August school holidays.

If a simple majority of those who vote in the ballot are in favour of applying for the proposed new status and at least 50% of those eligible to vote have done so, the Board of Governors must submit a development proposal for transformation to integrated status. However, if less than 50% of those eligible to vote have done so, the ballot will be disregarded and ERS will inform the Board of Governors of this as soon as possible. In this instance a second ballot must be held within 14 days, the result of which will be decisive, irrespective of the turn-out. In this eventuality, ERS will advise about the precise arrangements. ERS inform the Department and the school once the result of the ballot has been determined.

The Board of Governors consult with the Department regarding date of proposed implementation of new status.

Development Proposal

If the result of the ballot shows a simple majority of votes cast in favour of seeking integrated status, a Development Proposal should be submitted to the Education and Library Board under Article 92(1) of the 1989 Order. The Department requires this to be done by 9 September in accordance with Article 92(3) of the 1989 Order. Relevant supporting data in the form of the action plan from the school should also be sent to the Department.

Timetable for Submission and Consideration of Development Proposals

The following timetable applies to allow for the determination of proposals in good time before parents have to express a preference as to the school in which they wish their children to be enrolled under the primary enrolment or secondary transfer procedure.

<u>Before the beginning of September*</u>	-	Ballot of parents.
<u>By 9 September</u>	-	Submission of a Development Proposal.
<u>By 30 September</u>	-	Publication of an advertisement in a newspaper - (see Article 92(4) of the 1989 Order).
<u>30 November</u> (or two months from date of Proposal if sooner)	-	Closing date for objections. Relevant supporting data from the school to be publication of Development lodged with the Department.
<u>By mid-January**</u>	-	Completion of assessment of proposal by Department; decision announced.

ALL OF THE ABOVE DATES ARE THE LATEST ACCEPTABLE TO THE DEPARTMENT

If any part of the process can be completed earlier, permitting earlier consideration and decisions, this will be advantageous. In particular, the Board of Governors should avoid conducting the ballots of parents during the July and August school holiday months to encourage maximum participation.

* It is suggested that this is not done during the July/August school holidays.

** This mid-January date is **not statutory, whilst the Department aims to have a decision on all Development Proposals within 6 weeks of the end of the statutory 2-month objection period** - the decision may be earlier or later than mid January depending on the individual circumstances attached to a particular school. The effective date for transformation will be determined by discussion between the Department and the school.

Departmental Criteria for Assessing Published Development Proposals

When the two-month statutory period for lodging objections with the Department has ended, the Department will complete its assessment of the proposal. In particular the Department will wish to be satisfied about the school's commitment to integrated education and its potential to make a successful transformation. The Department will take the following key factors into account.

Preparation	The Department will expect the school to provide written evidence of the steps taken in preparation for the ballot of parents.
Ballot	The results of the statutory ballot of parents will be considered as indicative of the degree of support within the school for the school's proposal.
Planning	Schools will be required to provide the Department with a detailed action plan for implementation to achieve successful transformation.
Viability	The Department will assess the long-term viability of the school.
Integration	Schools must demonstrate the ability to achieve a minimum of 10% of their 1st year intake drawn from the minority tradition (Protestant or Roman Catholic) within the school's enrolment and the potential to achieve a minimum of 30% in the longer term.
Alternative Integrated Provision	The existence of other integrated schools in the area and their ability to meet demand will be taken into account.
Impact of/on Other Schools	The impact of a change to integrated status on other schools will be assessed.

Objections

Expressions of opposition to the proposal received within the statutory two month objection period will be taken into account (see Article 92(5)).

Support

Any expressions of support will also be taken into account.

Affordability

The cost of the proposal in terms of accommodation, staffing needs etc will be considered.

Decision

Following completion of assessment of proposal by the Department a decision to grant conditional approval is announced in time to inform parents' choice of school for their children in the following school year.

Review

The Department will initiate a progress review after no more than 5 years to assess progress towards an acceptable religious balance (ie reasonable numbers of Catholic and Protestant pupils) in enrolments, intake, staff, and Governors, changes in the curriculum and the development of the transformation process in the school as a whole. The Education and Training Inspectorate will undertake a focused "audit" which will inform this review. The findings of the review, along with any corrective action deemed necessary, will be reported back to the school. Subsequent progress will be monitored and a further formal review undertaken after 10 years (or sooner where the Department deems it necessary).

Assistance

The Department has established a limited budget to assist transforming schools with those elements of their development plans which have resource implications. The Department does not wish to be prescriptive about how these resources should be deployed. It will be a matter for the schools to assess their own requirements and submit detailed bids to the Department's School Policy and Planning Branch. For example, bids might include support for the development of curriculum materials, INSET, publicity costs, additional staff costs, books and materials. Approved resources will be allocated to Boards for earmarked addition to schools' normal LMS budgets.

TRANSFORMATION DEVELOPMENT PLAN

Introduction

1. Transformation to integrated status will be a major undertaking for any school. The implications will be far reaching and affect every aspect of the school's life and work: it should not be regarded as merely a change of name.
2. Therefore, an important part of the Department's assessment of a school's commitment and ability to transform successfully will be consideration of its Transformation Development Plan. The Department does not wish to be prescriptive about the range of issues a school would need to address or the types of action necessary for successful transformation - these will depend on the character and size of the school, the existing degree of religious balance, and the nature of the local community. However, the Department regards the framework set out below as a model Transformation Development Plan. Schools may, of course, have their views on how best to approach the planning process and the Department would encourage schools to be realistic as well as innovative in their approach.
3. As part of the Department's assessment of proposals, schools will be required to submit their plans for consideration. The Department may also invite representatives of Boards of Governors to make oral representations in support of their proposals.

Transformation Development Plan

4. A 3-phase process may be identified as follows:-

Phase 1: Pre-ballot preparation and ballot

Phase 2: Development proposal and conditional appraisal

Phase 3: Transforming - implementing the action plan

Phase 1: Pre-ballot preparation and Ballot

5. Pre-ballot preparation is vitally important and it is during this phase that schools should:-
 - seek to identify their existing strengths and weakness which may help or hinder the transformation process;

- assess the strength of support in the local community for integration; and
- assess the impact of the change on other schools.

6. In considering these issues, schools will wish to consult widely and seek advice from the appropriate authorities such as ELBs, TRC, CCMS and NICIE. The aims of this process should be to develop a clear understanding of the changes that would be necessary within the school and the action that would be required in the local community to give the school a reasonable prospect of successfully transforming. It is on the basis of this initial assessment that schools should raise parents' awareness of the challenges and opportunities presented by transformation before proceeding to a formal ballot. When it is proposed to hold a ballot schools should proceed to develop detailed plans for transformation.

Phase 2 - Development Proposal and Conditional Appraisal

7. In this phase the Schools' Development Proposal is prepared and published and a Transformation Development Plan is drawn up. Depending on the outcomes of Phase 1 - Pre-ballot preparation and ballot, schools' plans might require detailed attention in a number of key areas. These include:-

i. Within the School Community

Management - issues such as, reconstitution of the Board of Governors co-option of members of the minority religion on the school's enrolment; possible secondment of staff from another school to improve religious balance in teaching staff if necessary.

Organisation - issues such as school name, uniform, badge, policy on flags and emblems etc may require consideration. Library stock and curriculum materials may require review. Amendment of admissions criteria.

Curriculum - review of policies in key areas such as religious education, sport, music and cultural awareness, history, languages and literature.

Governors and Parents - awareness raising/training to create a sense of ownership of and responsibility for the transformation process.

Pupils - pastoral care/peer mediation issues may need consideration. Extra-curricular activities may require review.

Staff Development - in-service training, secondment opportunities and awareness raising, may require consideration. Training and support for the development of mutual understanding and conflict resolution.

ii. In the Wider Community

Schools - forging links with other schools in the area especially those of different management types; potential for attracting applications from the minority religion in the school's enrolment.

Support Organisations - formalising links with ELBs/NICIE/TRC etc.

Wider Community - general awareness raising, specific links with local community interests such as churches, political and community representatives. School open days/nights etc. Increased cross-community involvement etc.

8. Working groups/teams may be established to draw up detailed plans on those issues identified as requiring attention. These groups may consist of teachers and governors and, if appropriate, representatives of other organisations such as ELBs, NICIE, TRC etc. Plans should include an assessment of any resource and timing implications. For example, action may be required in a number of areas, but time and other resources necessitate an ordering of priorities.

Phase 3: Transforming - implementing the Transformation Development Plan

9. It will be a matter for Boards of Governors to take final decisions on the plans they wish to implement. In considering these, Governors will wish to have regard to priorities, resource implications, time-scales and target setting.

10. Bids for limited financial assistance may be made to the Department. These may include resources to cover the costs of additional teaching staff, development of curriculum materials, books, publicity, INSET etc. Any bid should be accompanied by appropriate supporting material.

11. Governors will wish to review progress on different aspects of their plans as appropriate. As well as monitoring, on an annual basis, the degree of religious integration achieved by schools, the

Department will conduct a progress review after 5 years informed by a focused audit conducted by the Education and Training Inspectorate, followed by a formal review of integrated status after 10 years. If schools are experiencing difficulties at progress review stage, the Department may suggest a remedial action plan.

THE SCHOOL PROSPECTUS

The process of transformation to integrated status by a school is an ideal opportunity to review and update the school prospectus. A new prospectus can prove a valuable tool to promote the new status amongst existing parents, potential parents and the wider community.

It is likely, due to the Department of Education timetable for transformation, that schools will be undertaking the revision of their prospectus while awaiting final approval for integrated status. Although this may appear unusual, it is a necessary process and one that is accepted by the Department, which acknowledges the need for transforming schools to publicise their change of status.

A new prospectus is an ideal medium through which the school can launch its new name or new badge (if appropriate). It is also an opportunity to reinforce to parents the quality of existing provision within the school as well as the positive changes which can be anticipated as a result of integration. Much of the new prospectus will contain elements of previous school publications and will follow the general formula employed by other schools. However, there are specific areas to which the principal and governors will wish to draw parents' attention. The inclusion of the areas listed below will depend on whether the transforming school is primary or post-primary.

Opening address from the Principal and/or Chairperson

This should include affirmative statements relating to the integration process and the aspirations of the school for the future.

Admissions Criteria

These must address the need for future enrolments to meet the requirement that the school is likely to attract reasonable numbers of both Catholic and Protestant pupils.

RE Statement

Schools should clearly inform parents what provision is being made for religious instruction within the school and how preparation for the Catholic Sacraments will be facilitated.

Curriculum Statement

This may contain details of proposed new extra-curricular or curricular subjects. It may also include particulars of the school's commitment to Education for Mutual Understanding and/or cross-community links with other schools.

Board of Governors

The new structure for the Board of Governors should be included in the prospectus. The make-up of a Board of Governors is set out in Schedule 4 to the 1986 Order as amended by Article 89 of the 1989 Order and Schedule 5 to the 1998 Order.

Printing a new prospectus is a costly business. The Integrated Education Fund may provide special funding to assist transforming schools with the costs of producing a new prospectus. Further advice and guidance on the content of the school prospectus is available from the NICIE and ELB's.

IMPLEMENTATION OF THE TRANSFORMATION DEVELOPMENT PLAN

Phase Three is when the Transformation Development Plan is implemented. It is about managing a process of change in which the transforming school seeks to persuade all sections of the community that they will be afforded parity of esteem and opportunity.

Each transforming school will need to be sensitive to the realities of the local situation though it is likely that all transforming schools will wish to address the following issues:-

- **Management** - how balanced representation can be achieved on the Board of Governors; how the management, control and ethos of the school are such as are likely to attract to the school reasonable numbers of both Protestant and Catholic pupils; how balance can be achieved at senior management level and in other staffing.
- **Ethos** - how the existing ethos can be developed to take account of the presence in the school of a growing minority community; how pupils will be encouraged to value one another and have the confidence to express their own views whilst appreciating the views of others; how this internal Education for Mutual Understanding can be encouraged to develop through the daily informal contacts through which many friendships can flourish on a basis of mutual respect. Transforming schools may wish to consider how events such as assemblies, concerts, awards evenings, parents evenings, sports, arts etc can contribute to an integrating ethos. They may wish to re-design their badge and uniform. They may wish to develop policies on the flying of flags and the wearing of emblems. They may wish to reconsider which charities they support, what public holidays they observe and how the environment of the school, both external and internal, reflects an integrated ethos.
- **Curriculum** - how the integrated curriculum can be defined; how each area of study and individual subject can contribute to this; how the curriculum can be enriched to ensure parity of esteem for all cultures represented in the school; how the pastoral care policy of the school reinforces the integrated ethos.
- **Public Relations** - consideration needs to be given to how all communities can be informed about the changed status. Job advertisements, other notices and general publicity may need to appear in media that targets all communities.

Continue to Address Concerns of Key Partners

It is most important, that once a school has gained integrated status and an Action Plan is being implemented, that the school continues to address the many concerns of all the key players (such as parents, teachers, other staff, pupils, the churches, wider community etc). Many of the same questions posed at the outset of the process by parents, Boards of Governors, teachers and the community will continue to be raised. If the transformation is to be a success, a willingness to listen and a sympathetic approach to all concerns is essential.

Many additional points will be raised in the light of the experience gained. These must also be dealt with professionally and sensitively. It is essential to consider the needs and expectations of the existing school population as well as the new needs and expectations of the new intake to the newly transformed school.

TRAINING

Introduction

Experience of transformation to date has indicated that each transforming school is unique, both in the way that it approaches integration and in the support required to sustain effective change. Training for staff and governors is required as an important component of the transformation process but a programme that is appropriate for one school may not necessarily be suitable for another. Factors such as type of school (primary or post-primary), size, pupil composition, location and current practice within the school will determine the form that training will take and the time at which it should be carried out.

It is anticipated that the training programme will evolve as the school moves through the different phases of transformation, from pre-ballot to implementation of the action plan for integration and beyond. While INSET days may be used to deliver some of the training for transformation it is appreciated that teachers also have to deal with current education initiatives and these must be given due priority. Schools are expected therefore to use a proportion of the funds made available to them by the Department or the Integrated Education Fund to implement a specific transformation training programme.

Establishing a Programme of Training

The delivery of the training programme for transforming schools will principally be through officers of NICIE and the ELBs although it is possible that staff from other integrated schools or representatives from bodies involved in cross-community relations may also be included. It will be important to involve TRC at appropriate stages. The content of the training and the nature of its delivery will be discussed in advance between the principal and appropriate officers; this will permit the programme to be tailored to the needs of the individual school and its staff.

The main areas of the training are listed below under general headings that can be further broken down into more discrete topics. There is no compulsion on schools to address every module but the programme recognises issues that may arise as the schools progress along the transformation route. It is also important to note that the order in which the modules are delivered and the time which will be allocated to them is not pre-determined; these factors will depend entirely upon the identified requirements of the school.

Training Modules

1. Preparing for integration and assessing resourcing requirements.
2. Developing the integrated ethos and reviewing school policies.

3. Integration across the curriculum.
4. Looking at difference.
5. Investigating strategies for conflict resolution.
6. Review of progress and planning for the future.

Training should be participative and interactive, its emphasis being to assist staff to use their experience and expertise to evaluate school initiatives and take ownership of each stage of the transformation process. Whole school training may be necessary in some instances.

Ancillary Staff

Depending on circumstances principals may wish their ancillary staff to attend all or part of the training. It may also be possible for the training providers to develop a short programme that is specially adapted for non-teaching staff.

Governors

The Board of Governors should take every opportunity to inform itself about integrated education and the effect that it may have on the school in the short and long-term. Governors may wish to explore, from their own perspective, elements of the training programme early on in the transformation process; this will help the Board in supporting the principal and staff throughout. If full approval is granted the composition of the Board of Governors will change and the numbers of elected governors will increase: this may also be an appropriate time to implement training. As with non-teaching staff it may be necessary for the training providers to devise a specific programme for the Governors in individual schools which will reflect their particular needs at the time of the request.

School Exchanges and Job Shadowing

The principal may find it beneficial to send a member of staff to another integrated school or to invite an experienced teacher from an existing integrated school to visit the transforming school. The exchange of experience and expertise which such an exercise offers may prove of mutual benefit to both parties. Much good practice already exists within the integrated sector. While not all approaches will suit all schools the transfer of knowledge between professional staff can contribute greatly to each school's development. Schools interested in establishing links with other integrated schools can be facilitated through NICIE and the ELBs whose officers will assist both visitor and host schools in devising a targeted and focused programme for the duration of the visit depending on the identified needs of the school which is transforming.

ADDRESSES FOR ADVICE AND INFORMATION

Belfast Education and Library Board

40 Academy Street

BELFAST

BT1 2NQ

028 9056 4000

Western Education and Library Board

Campsie House

1 Hospital Road

OMAGH

Co Tyrone

BT79 0AW

028 8241 1411

North-Eastern Education and Library Board

County Hall

182 Galgorm Road

BALLYMENA

Co Antrim

BT42 1HN

028 2565 3333

South-Eastern Education and Library Board

Grahamsbridge Road

Dundonald

BELFAST

BT16 0HS

028 9056 6200

Southern Education and Library Board

3 Charlemont Place

ARMAGH

BT61 9AZ

028 3751 2200

School Policy and Planning Branch

Department of Education

Rathgael House

Balloo Road

BANGOR

Co Down

BT19 7PR

028 9127 9286

Council for Catholic Maintained Schools

160 High Street
Holywood
Co Down
BT18 9HT 028 9042 6792

Northern Ireland Council for Integrated Education

Aldersgate House
13-19 University Road
BELFAST
BT7 1NA 028 9023 6200

Integrated Education Fund

41 University Street
BELFAST
BT7 1FY 028 9033 0031

Transferor Representatives' Council

The Education Centre
1-3 Cadogan Park
BELFAST
BT9 6HG 028 9068 2946

Electoral Reform Services

The Election Centre
33 Clarendon Road
LONDON
N8 0NW 020 8365 8909

GLOSSARY

CCMS	Council for Catholic Maintained Schools
CIS	Controlled Integrated Status
ELB	Education and Library Board
ERS	Electoral Reform Services
EUSSPPR	European Union Special Support Programme for Peace and Reconciliation
GMI	Grant-Maintained Integrated
IC	Integrated College
IEF	Integrated Education Fund
INSET	In-service training
IPS	Integrated Primary School
LTE	Long-Term Enrolment
NICIE	Northern Ireland Council for Integrated Education
RE	Religious Education
TRC	Transferor Representatives' Council

Transformation - An Information Pack for Schools



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Education

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