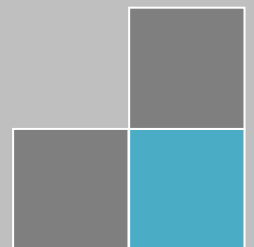




*The*  
**ATLANTIC**  
*Philanthropies*

Sustainability Learning Review 2015

**The Fermanagh Trust**



## Project overview

Established in 1995 the Fermanagh Trust is a community foundation and registered charity that supports community development and the building of good community relations across the County. In 2007 the Fermanagh Trust outlined how the Western Education and Library Board (WELB) and the Northern Ireland Commission for Catholic Education were starting to rationalise the post-primary school estate on a parallel basis. Both were producing plans for their respective sector, with no consideration of the other sector's schools in the locality. Given Fermanagh is a rural county, with a predominance of small schools; this rationalisation had the potential to have a major impact on the County. During this period more than 55% of primary schools and 70% of post primary schools did not meet the enrolment criteria for a sustainable school; therefore there was a high risk of school closures, particularly in rural areas. Furthermore if rationalisation continued on a single sectoral basis (i.e. Catholic schools amalgamating with Catholic schools & Controlled with Controlled) young families would potentially migrate towards their nearest sectoral school (i.e. Catholic/Controlled) leading to a threat of greater demographic segregation in the future. The responses to the WELB post-primary plan revealed a very significant demand for the exploration of cross-sectoral solutions to school sustainability.

## Research and Programme Design

With support from the Atlantic Philanthropies, the Fermanagh Trust completed independent research using three methods:

- Over 400 telephone interviews with parents of school age children
- 10 focus group meetings with 150 community representatives across the County
- Detailed consultation with each school in Fermanagh

The research demonstrated very positive and widespread support for shared education across the County. Ultimately the Fermanagh Trust wished to respond to the needs of the school communities by providing them with an opportunity to pilot shared education, realise the benefits and subsequently explore cross sectoral options for the local area in question.

## Aligning with the Fermanagh Trust

The proposed project aligned with the strategic aims and wider objectives of the Fermanagh Trust. This involved acting as a catalyst for promoting positive community relations; promoting the concept of sustainable communities; and encouraging the development of shared spaces & appropriate infrastructure. It has also involved developing new linkages between schools from different sectors and fostering a greater understanding and mutual respect between Protestant and Catholic communities across Fermanagh.

In terms of performance, the Trust had already successfully challenged the WELB when it attempted to allocate funded places (PEAG) to newly formed nurseries in primary schools. Without such lobbying many cross-community playgroups would have not survived and been replaced with sectoral (i.e. controlled/maintained) early years provision. As a result of the Trust's intervention, there is now a strong community playgroup provision across the County.

## Funding

In terms of financial assistance the Trust received £1.7m from Atlantic Philanthropies, over a period of 5½ years. This funding had a minimal impact on the organisational funding of the Trust as the grant aid was ring fenced for the project and just 2.5 staff were employed for the project. From the outset it was planned as a time bound project, with the aim of mainstreaming shared education (via policy/area planning/practice). The FT would then exit from the funding role.

## Successes

The key successes of the project included the large scale involvement by schools and pupils in Shared Education across the County. Almost all schools in Fermanagh were involved extensively in shared Education, with nearly 5,000 pupils involved in weekly joint classes. The Western Education and Library Board Strategic Area Plan for Primary Schools (June 2013) states that 37 primary schools in the County, out of a total of 42, wish to explore a cross-sectoral model of education for their local area. This is due to their involvement in Shared Education. Success has included the widespread support for Shared Education from politicians, church leaders and local communities. The Fermanagh Council has passed various motions supporting shared education whilst the main church leaders have made statements promoting the value of shared education across the county.

## Reasons for Success

The main success factors (for the Fermanagh Project) were:

- The two pronged approach i.e. the operational implementation of the project, coupled with the advocacy strand. For example, successful case studies and evidence of shared education were required to position shared as a priority in the Programme for Government (2011-2015). This provided the schools a broader mandate to promote shared education. Previously unsure of their respective managing authority's approval, schools acquired the confidence to move forward and increase their cross-sectoral collaborations. The Programme design was particularly successful. Some of the key factors included:
- The funding formula (shared education premium) for partnership grants was commensurate with the level of sharing and as such it encouraged and motivated partnerships to increase their levels of sharing. It also promoted fairness, transparency and equity across all stakeholders involved.
- It was bottom-up with the school communities addressing their own needs, specific to them and not 'top-down'.
- Partnerships were given the independence & autonomy to deliver their own shared education (and not purchase it in from outside), which increased self-sufficiency and built capacity within the schools themselves. This was critical in terms of sustainability, as many of the schools are now equipped with the skills and expertise to continue on their own.

- The Programme model also resulted in a greater sense of ownership and empowerment. This allowed schools to develop relationships and driving forward their vision for future cross-sectoral collaboration.
- The geographic focus of the programme was a great advantage. The advantages spread quickly and to not be involved in Shared Education, became an exception. It soon became the norm to how schools were delivering the curriculum.
- Because it was based locally, local newspapers reported regularly on the progress of shared education within the partnerships. This helped to raise awareness among the public and encouraged schools to further develop the collaborative ethos of the approach.
- The Shared Education Learning Forum (SELF), of which the FT was an active member, along with two other delivery bodies, i.e. Queen's University and the North Eastern Education & Library Board (NEELB) was a critical factor in helping to achieve success. Over a 5 year period SELF acted as a platform to share information as well as undertaking strategic advocacy work.

Finally, in terms of the Fermanagh Trust managing the project, the make up of the Fermanagh Trust was independent and did not include any sectoral interests. This certainly was an advantage and was therefore readily trusted by the schools. The FT also had long track record of working with the local communities so was well versed in the local political terrain.

## Replicating the success factors

These factors were particularly important at the piloting stage of cross-sectoral education in Fermanagh, but these factors may not be applicable when rolling out the Programme on a regional basis. Especially when the Department of Education is currently in the process of mainstreaming Shared Education through the Delivering Social Change: Shared Education Signature Project (DSC: SESP).

However some elements of the Fermanagh Programme design are potentially transferable and have been used in the SESP. Early indications suggest that some elements of the Fermanagh Programme design could enhance the SESP, namely:

- The funding formula
- Greater autonomy, ownership and empowerment
- An independent advocacy voice to further promote the value of Shared Education

In terms of replicating the project across the region, the FT supported the local South West Peace Partnership and rolled out the Fermanagh Shared Education Programme in Cookstown, Dungannon & Magherafelt Council areas. This was completed successfully albeit on a much smaller scale. In addition to advocating for the inclusion of shared education in the Peace 4 Programme, the Fermanagh Trust provided valuable information and guidance to the Special European Union Programmes Body regarding programme design and development. The Peace 4 Programme has provisionally committed €45m to Shared Education.

## Outcomes

The aim of the FT has always been to mainstream shared education. Therefore the most important outcomes of the Project (in association with other partners) are related to the overarching aim and include the following:

- The inclusion of four priorities on Shared Education in the Programme for Government (2011-2015).
- The adoption of the recommendations in the Ministerial Advisory Group (MAG) report on Advancing Shared Education, by the Minister of Education (October 2013).
- The recent passing of the Education Bill (Northern Ireland) 2014, (which brought the 5 Education & Library Boards within the one Education Authority) includes a duty to encourage, facilitate and promote Shared Education.
- The publication of the Policy for Shared Education (Sharing Works) and the draft Bill on Shared Education. Released in January 2015 the Bill includes the power for the Department of Education, the Council for Catholic Maintained Schools (CCMS), the Youth Council for Northern Ireland and the NI Council for the Curriculum, Examinations and Assessment (CEA), to encourage and facilitate shared education.
- The launch of a DSC Signature Project to the value of £25m, which will inform the process of mainstreaming of Shared Education by the DE.
- As noted previously, the Area Plans for Fermanagh primary schools include the exploration of shared education models for 37 primary schools. Therefore the relevant managing authorities (CCMS & WELB) have to explore cross-sectoral options with these schools. This is unprecedented, as the sectors had previously planned the schools estate on a separate basis.
- The inclusion of 10 Shared Educational Campuses, as one of the Key Priority Actions, in the Together: Building a United Community (T:BUC) strategy, launched in May 2013 was another boost for Shared Education. This was further supported in the Stormont House Agreement, which proposed £500m for capital funding for shared and integrated education.

## The challenges of sustainability

There is little doubt that, starting from a zero base-line, there has been significant progress in the mainstreaming of shared education, in a relatively short period of time (6 years). However, there continues to be many challenges to this process. These are represented by:

- ***The Programme for Government:*** The current PfG is nearing its completion date and there is no guarantee that Shared Education will be a priority in the next version.
- ***Delivering Social Change - Shared Education Signature Project:*** Although the DSC: SESP should be one of the main vehicles for mainstreaming Shared Education, there are a number of factors that represent concern as to how effective this will be in reality. The application process could be viewed as bureaucratic for schools and the anticipated recording and monitoring that is involved also appears tedious for schools. The initial calls for applications did not generate the target number of applications, even though it was aimed at schools that had already considerable experience of shared education. One

condition for participation in the SESP is that schools comply with statutory assessment processes. This is creating a difficulty for schools that are engaged in industrial action to boycott statutory assessments. In addition, as the SESP is largely dependent upon funding external to the Department of Education (i.e. £10m from AP and £10m from OFMDFM, with £5m coming from the DE), there is a risk that it will become a fixed term project, which will terminate when the funding stream ends.

- Area Planning:** This was another opportunity to help mainstream Shared Education. The Minister for Education issued a statement to the Assembly in October 2013, that 'Area Planning ... will be central to the delivery of Shared Education'. He added that 'I will make it a priority for my Department to bring forward guidance on a range of sharing options that schools and communities may wish to explore; clear, practical advice on how to bring forward a development proposal for sharing; and guidelines on the development of area plans to ensure that shared education is encouraged'. Despite this, there is evidence of a clear disconnect between area planning and shared education. Since the statement was released there has been limited support from the Managing Authorities to progress the exploration of shared options for the 14 primary schools partnerships in Fermanagh, as outlined in the WELB Strategic Plan
- T:BUC - Shared Educational Campuses Programme:** There are major concerns about the added value of the Shared Campus Programme, especially regarding the implementation phase. The Department of Education appears to be using the same criteria as for the normal capital builds, in terms of pupil numbers and sustainability, with the added stipulation that schools need to show a history of sharing, which will be enhanced through the shared campus. This has two major flaws. Firstly, what will be the incentive for sharing and how will the sharing between the schools be monitored, once the capital build is completed, especially as the schools are sustainable and therefore self-sufficient? Secondly, the assessment criteria demonstrates a lack of understanding of how many shared partnerships are already operating and that two small 'unsustainable' primary schools can together meet the sustainable schools criteria through shared education. For example, by sharing teachers they can meet the minimum number of four teachers as stipulated in the Sustainable Schools Policy for primary schools. And by combining the same year groups across the two schools, they can overcome the problem of having more than two year groups in a single classroom, and provide age-appropriate teaching. The shared campuses programme could provide an appropriate solution to the sustainability of small rural schools, and in doing so strengthen the linkages between the schools, guaranteeing on-going sharing.
- Peace IV Programme – Shared Education Strand:** It appears that this will be managed by the DE and implemented by the Education Authority. Therefore, it is most likely that it will be subject to the same short-comings as the DSC: SESP.
- Shared Education Policy & Bill:** Without the development of indicators and targets, it will be difficult to evaluate or monitor the implementation and impact of shared education.
- Need for independent voice:** The closure of the SELF in April 2015 has left a significant gap in terms of an independent voice and advocate for Shared Education. Shared Education should not become a soft community relations initiative. There is a need to ensure that the DSC Shared Education Signature Project is implemented effectively, focusing both on educational and societal benefits for the wider community. Independent and outsider voices are required to achieve this.

## The Fermanagh Trust & Shared Education going forward

Although the FT had always considered the Fermanagh Shared Education Programme a fixed term project, with the aim of getting it mainstreamed e.g. via the Signature Project and area planning; the FT has given careful and detailed consideration to what role it will play in Shared Education in the future. The journey of Shared Education to date in Fermanagh & elsewhere has been significant. But the Trust believes that the destination has not been reached and that there is still work to do, particularly with respect to two areas:

- The safeguarding the mainstreaming of shared education.
- Furthering the development of shared education especially in area planning.

In terms of the latter, if left up to the sectors/managing authorities, there is evidence that little will be done to progress shared models. There is a need for greater facilitation and support for school community engagement in identifying possible shared configurations for their schools; as well as continued advocacy and lobbying to ensure that the various educational bodies address their responsibilities in relation to facilitating, encouraging and promoting sharing & cross-sectoral collaboration.

In terms of advancing shared education in the future the following strengths and opportunities were identified. These were coupled with potential weaknesses and threats to carrying out this aim:

### Strengths

- Positive & widespread support for Shared Education right across society.
- A Policy & Legislative base for Shared Education.
- School partnerships wishing to develop shared models via area planning.
- Publication of guidance on Jointly Managed Schools by the Department of Education (DE).
- DE also to publish guidelines on range of shared models, for use in area planning.
- Expertise available to design, develop and manage shared education programmes that could be utilized.
- Shared Education Commitments in the PfG (2011-2015).

### Opportunities

- Emerging proposals in WELB area plan for the use of cross-sectoral models in primary school partnerships.
- The availability of Funding opportunities to advance shared education e.g. DSC Shared Education Signature Project, Peace 4, and IFI funding.
- The potential of the T:BUC shared campus programme.
- The allocation of £500 m in the Stormont House Agreement for Shared and Integrated Education capital funding.

### Weaknesses

- Currently there is no body or mechanism that can hold Government, Department & Education Authority to account in delivering on Shared Education.
- There is advocacy expertise in shared education that is currently not being mobilized.
- The Current PfG is due to end and there has been no guarantee that shared education will feature in the new one.

- There is a disconnect between Shared Education Area Planning and Education Authority and Managing Authorities.

## Threats

- Without future resources DSC SESP could become a fixed term project with a limited legacy.
- Too much Bureaucracy and limited support to schools during the implementation of DSC SESP could turn schools away from shared education.
- Shared Education could become tokenistic to fulfill current PfG commitments. The Department of Education may lack the enthusiasm to advance shared education in the future, if it does not feature in the next Programme for Government.

## Rural Centre for Shared Education

Considering the identified needs, the FT has made a strategic decision to continue its commitment to Shared Education. It is determined to work to ensure that the gains that have been made in advancing shared education are not lost and that the momentum continues. To this end it has secured funding (along with its own funds) to include a Rural Centre for Shared Education in its capital build to extend the Fermanagh House premises. Although it is envisaged the Centre will bring in some income through commissioned work on shared education, additional funding support will also be required for staff and running costs. In the meantime, within its own resources, the Rural Centre for Shared Education will continue to advocate for support for school communities in developing cross sectoral linkages.