INVESTING IN A BETTER FUTURE:

THE INDEPENDENT REVIEW OF EDUCATION IN NORTHERN IRELAND

VOLUME 2

Independent Review of Education

December 2023

CONTENTS

INTRODUCTION FROM PANEL

In October 2021, we were presented with a unique opportunity – to review an entire education system and suggest how it might be improved. Our remit gave us the opportunity to take an overview of education in Northern Ireland as a whole. On the other hand, a timescale of 2 years means that there are inevitably aspects which have not received the attention we would have liked. Our hope is that this Report sets out a clear vision for change.

Education in Northern Ireland has great strengths. Most young people experience success in its schools and many then go on to achieve highly in its colleges and universities. Levels of attainment exceed those in the other UK jurisdictions. International comparisons are highly favourable. At every level, a talented and dedicated workforce makes a huge contribution.

However, there are weaknesses. Many can, at least in part, be attributed to lack of funding. Too many young people, disadvantaged by poverty, emerge from the period of compulsory education under-skilled and underqualified.

Education is the greatest investment any society makes in its own future. Responsible citizenship, prosperity and fulfilled lives depend on it.

In a world changing at an unprecedented pace, peace and prosperity depend on education more than ever before. Northern Ireland can be a 21st-century success but only if it develops a capacity to operate at the cutting edge of knowledge and has a workforce that is constantly extending and refreshing its capabilities.

From our different perspectives, we have a shared passion for education and its capacity to change society for the better. When we refer to "investment" in education, we include investment in knowledge, social cohesion, creativity, wellbeing – both physical and mental – and caring for and helping others. Success in each of these areas will bring great economic as well as societal benefits.

Additional spending will not of itself guarantee better outcomes. Investment will have to be carefully targeted and outputs carefully measured. In our Report we set out recommendations for the major educational issues we have identified during our Review. We believe many of the changes will require additional funding, although there will be some medium-term savings. However, we firmly believe the future prosperity and wellbeing of Northern Ireland requires commitment to sufficient funding of education.

We should like to thank the many people who have helped with our Review; those who provided evidence or contributed to our many meetings; staff from schools, colleges and other educational institutions; young people and youth organisations; officials from government departments and arm's-length bodies; academics; members of sectoral and advocacy organisations; employers and trade unions and many others. In particular, we must thank our excellent secretariat. We have relied on their unfailing support at all stages. Without them, there could be no report.

TASK

Origin of the Review

The Independent Review of Education ("the Review") was commissioned in response to commitments contained in New Decade New Approach[1] (**NDNA**). NDNA stated that the Executive should "establish an external, independent review of education provision, with a focus on securing greater efficiency in delivery costs, raising standards, access to the curriculum for all pupils, and the prospects of moving towards a single education system"[2]. NDNA did not define what it meant by "a single education system". However, in an appendix, it implied that there should be greater collaboration within what is a diverse system.

> *The education system has a diversity of school types, each with its own distinctive ethos and values. However, it is not sustainable. The parties acknowledge the progress made in developing new models of sharing, cooperation and integration. There is a desire to build on this as a basis for delivering long term improvements in the quality, equity and sustainability of the system. The parties agree that the Executive will commission and oversee an independent fundamental review with a focus on quality and sustainability. The educational experience and outcomes for children and young people are the most important factors[3].*

NDNA made further commitments relating to education including the following:

> *To help build a shared and integrated society, the Executive will support educating children and young people of different backgrounds together in the classroom[4].*

Furthermore, NDNA explained that, for the purposes of the Review, education should be construed as meaning "education for children and young people in early years, primary, post-primary or further education settings"[5]. In addition, it should include all aspects of the system "including Sectoral Bodies, ETI, curriculum, area planning, 14–19 strategy, Entitlement Framework, teacher training and the interface between Higher Education and Further Education"[6].

The Terms of Reference[7] for the Review indicate that "the review will consider key aspects of education policy and delivery within the remit of the Department of Education as well as key aspects of post-16 education and training. This will require close engagement with the Department for the Economy in respect of their remit for further education, higher education and vocational education and training."[8]

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1 *New Decade, New Approach* (January 2020), [New Decade, New Approach](#)
2 *New Decade, New Approach* (January 2020), p.7.
3 *New Decade, New Approach* (January 2020), p.43.
4 *New Decade, New Approach* (January 2020), p.7.
5 *New Decade, New Approach* (January 2020), p.43.
6 *New Decade, New Approach* (January 2020), p.43.
7 Independent Review of Education (2021). Terms of Reference. Available at: https://www.independentreviewofeducation.org.uk/key-documents/independent-review-education-terms-reference
8 Independent Review of Education (2021). Terms of Reference, p.7.

The Terms of Reference conclude by indicating that the final Report is to:

- Assess the educational journey currently experienced by children and young people; the support services available to teachers and institutions; and the effectiveness of education services at a strategic level.
- Provide an evidence-based assessment of the barriers to raising standards and improving learners' wellbeing; improving support to teachers and institutions; and improving the design and reducing inefficiency and ineffectiveness in educational delivery.
- Offer strategic recommendations to improve educational outcomes and wellbeing, improve support to the system and increase efficiency and effectiveness of delivery of education "with a particular focus on a single education system".
- Set out a clear vision of what high-quality and innovative education will look like and indicate the actions needed to make this vision a reality.
- Indicate any financial implications and measurable outcomes.

Appointment of the Panel

The Department of Education (DE) Minister, Michelle McIlveen MLA, appointed the Panel in September 2021 following an open recruitment process[9] chaired by DE Permanent Secretary, Dr Mark Browne[10].

The Panel members are[11,12]:

- Dr Keir Bloomer (Chairperson)
- Sir Gerry Loughran (Vice-Chairperson)
- Marie Lindsay
- Robin McLoughlin OBE
- Isabel Nisbet.

They have been working on a part-time basis since October 2021[13] and are supported by a secretariat provided by DE.

Implications of the Terms of Reference

This current Review is unique because of the extent of its remit. Apart from some elements of university and adult education, nothing is specifically excluded from our consideration.

All countries regularly update their education policies, frequently in response to recommendations made by committees of inquiry or review groups. However, few countries attempt to undertake a review of their education system as a whole. Reviews usually focus on limited aspects such as assessment, pupil welfare, or, as recently in Northern Ireland, underachievement.

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9   The Selection Panel was responsible for ensuring the Code of Practice, issued by the Commissioner for Public Appointments Northern Ireland (CPANI), was adhered to.

10   The Selection Panel also included senior officials in DE and DfE, as well as an independent member provided by CPANI.

11   In line with the CPANI Code of Practice, applicants identified potential conflicts of interests via the application process. The Selection Panel assessed these during the appointments process.

12   About the Panel: https://www.independentreviewofeducation.org.uk/about-panel

13   Posts were remunerated.

There is an obvious reason for this. Reviewing an entire system is an extraordinarily difficult and time-consuming task. We were to complete our Review within 2 years. This has been achieved only by operating at a high level of generality. Our Report does not provide the detail that usually features in such documents.

However, there is an advantage in a wholesale review of this type – and it is a very important one. A succession of piecemeal reviews of the kind common in other jurisdictions runs the risk that the system will become confused and incoherent. Furthermore, it is in the nature of such reviews that they cannot challenge the system as a whole. They inevitably accept much of the *status quo* while suggesting gradual and limited change in a specific area. By contrast, we have sought to take an overview and present a coherent vision of the system as a whole.

Approach to our work

We decided at a very early stage that we should draw on the broadest range of opinion and evidence. We have, therefore, consulted very widely, meeting with a very large number of individuals and organisations. We made clear that anyone with an interest in education was welcome to contact us and provide written material should they wish to do so.

As part of our consultation we launched a survey on 9th December 2021, which was open to responses until 4th February 2022. The purpose of the survey was to gather views on the purpose of education, the definition of a good system, the strengths and weaknesses of the current education system and the priorities for the Review. It helped shape the work plan and assisted with thinking on vision and key areas of inquiry.

In total 1,234 responses were received to the main survey and 98 responses to the children's version. The full analysis document can be accessed here.

During our work we have attempted to meet with a wide range of stakeholders representing different groupings and with different viewpoints. We held a series of oral evidence sessions where we engaged directly with more than **775** individuals at over **180** meetings across **95** days from October 2021 to August 2023. Where possible these sessions were in person, but some were conducted virtually. The meetings were held under the *Chatham House Rule* to allow all participants to engage freely during the sessions. These sessions included the following:

- 73 school leaders from both urban and rural areas across all regions of Northern Ireland, including leaders from pre-schools/nursery, primary schools, post-primary schools, special schools and Education Other Than at School (EOTAS) centres;
- All further education (FE) college principals and other college staff;
- More than 180 young people including in schools, youth clubs and through advocacy groups (i.e., Northern Ireland Commissioner for Children and Young People (NICCY) Youth Panel and Northern Ireland Youth Assembly);
- 83 officials from eight government departments and agencies;
- 24 Members of the Legislative Assembly (MLAs) and other political representatives from six political parties[14];
- 103 representatives from 16 Arm's-Length Bodies (ALB)/Non-Departmental Public Bodies (NDPB);

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14 Including each of the leaders of the political parties that would be eligible to form the next Executive based on current party strengths, e.g., Sinn Fein, DUP, Alliance and UUP.

- 87 individuals from 18 employers and associated groups;
- 34 academic experts;
- 6 representatives from Great Britain and Republic of Ireland government departments;
- Representatives from 24 third-sector groups across Northern Ireland; and
- Ten trade and teaching unions; ten children's organisations/charities; four universities and university colleges; one medical expert; and 19 other interested parties/organisations.

A full list of the organisations the Panel met with is at **Appendix 1**.

Many of those we met provided presentations or briefing papers. We also received 52 submissions from a range of organisations and individuals. The list of those who provided submissions is at **Appendix 2**.

We also considered a wide range of research, briefing papers and other information as part of this Review.

In addition, the following additional pieces of work were commissioned, and supported the work of the Review:

- A literature review of previous reviews and existing research concerning educational provision in Northern Ireland (Roulston et al., 2021).
- Country Policy Review and Analysis: United Kingdom (Northern Ireland) (European Agency for Special Needs and Inclusive Education, 2021).
- Parental Engagement Consultation Report (Parenting NI, 2021).
- EA One Youth Conference Report (EA, 2022).
- Impacts of academic selection in Northern Ireland – literature review for Independent Review of Education (Pivotal, 2022).
- Inspiring Digital Learning – A synthesis of research related to digital technologies in Northern Ireland's schools (Innovation Forum, 2023).

All of the above are available on the Independent Review of Education website.

The publication of our interim report[15] in October 2022 offered another opportunity for comment. It set out a series of issues that we considered to be of major significance. It also indicated our view of excellence in education. This view met with approval and is reiterated in the opening sections of Volume 1 of this final Report.

The main purpose of this final Report is to provide greater insight into our thinking and to set out our conclusions and recommendations. We have followed broadly the same structure as in the interim report, using the same ten main issues as a framework.

A review of this type inevitably generates recommendations that can only be implemented over an extended timescale. This is not solely because of the constraints of affordability, important as these are. There is a limit to the human capacity to bring about change over a short period. Indeed, many of the workload problems inherent in the education systems of numerous countries including Northern Ireland arise because of a tendency to ignore this fact.

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15 *Excellent Education for all: Interim Report of the Independent Review* (October 2022). Available at: https://www.independentreviewofeducation.org.uk/key-documents/excellent-education-all-interim-report-independent-review

We have adopted a timescale extending over some 20 years or so. Our timescale is deliberately chosen. It is long enough to allow for transformational change but not so long that it pretends to anticipate a future about which, in reality, we can know little. It allows scope for significant change depending on additional expenditure but ensures that our suggestions for immediate action remain practicable.

We have decided to produce our final Report in three separate (but linked) documents. This is to ensure the Report is as accessible as possible but also provides a full overview of our considerations and rationale for recommendations or a particular approach. The documents should be read together.

- **Volume 1** is an overview of the entire Review and summary of our thinking. It details our task, our vision for excellent education, priority areas for reform and the key recommendations.

- **Volume 2** (**this document**) provides fuller detail on the priority areas we have identified for reform, our discussion on each topic and our rationale for our recommended course of action. Each chapter of Volume 2 contains a full suite of recommendations, including the key recommendations within Volume 1.

- **Volume 3** includes a number of **Appendices** that provide further background information relevant to the Review.

This document (Volume 2) is largely structured around the ten core items we identified in our interim report[16]. These were explained as being the key issues to be addressed in this our final Report. Comments subsequently received suggested that educational professionals and the public at large agreed with these priorities.

These issues are:

- Early years.
- Disadvantage.
- Learner support, inclusion and wellbeing.
- Curriculum, assessment and qualifications.
- Transitions and progression.
- Further education, higher education and lifelong learning.
- Supporting the education workforce.
- Structures and single system.
- Institutional governance and accountability.
- Funding – sufficiency, efficiency and impact.

Within each of these chapters, we seek to cover a wide range of relevant topics that have been highlighted to us during our Review either by stakeholders or through the consideration of evidence.

Within each chapter, we have sought to draw out key "conclusions". These are used to summarise text and/or highlight an important finding by the Panel. Each chapter concludes with a list of

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16   *Excellent Education for all: Interim Report of the Independent Review* (October 2022). Available at: https://www. independentreviewofeducation.org.uk/key-documents/excellent-education-all-interim-report-independent-review

recommendations or actions relevant to the topic. However, a list of our "key recommendations" is provided in Volume 1.

Of course, even with a lengthy report there will be some matters, rightly important to stakeholders, that we have not commented on. This is not to diminish those matters; rather it is reflective of our broad Terms of Reference, and limited timescale and human resource.

To aid the reader, an overview of statutory bodies involved in education in Northern Ireland is provided at **Appendix 3**.

Context for the Review

Many of the concerns that we seek to address in this Report are common to all developed countries. These include helping people to adapt to and flourish in a rapidly changing society and economy, raising standards of achievement, reducing the impact of disadvantage, encouraging learning throughout life and enabling the education system itself to make use of emerging technologies. There are, however, aspects of our remit that are unique due to either place or time.

The financial context

It is no exaggeration to say that the education system in Northern Ireland faces a financial crisis. A legacy of cuts in spending have resulted in a significant gap between expenditure in Northern Ireland and in other jurisdictions of the UK.

The 2023/24 budget for the DE, as announced by the Secretary of State (SoS) for Northern Ireland in April 2023, was **2.5% less** than that for the prior year budget[17]. This compares unfavourably to the 6.5% planned rise in the English schools budget[18]. DE estimates a funding pressure of over **£500m** in 2024/25. The constrained budget has a severe impact on outcomes with DE limited in its ability to deliver a balanced budget in 2023/24 even with cuts to valuable services[19]. There is an oft-cited myth that "only 60% of education funding goes to schools", and that efficiencies could be achieved by delegating more funding to schools. However, when the school services funded via the Education Authority (EA) block grant[20] are accounted for, it is shown that 87% of the DE budget goes directly to schools.

Aside from the pressures experienced by DE, there are wider "education" pressures with the Department for the Economy (DfE):

- Since 2011/12, Further Education (FE) expenditure has declined by **6%** in real terms with a **33%** decline in capital expenditure.
- While spend on Higher Education (HE) in 2020/21 saw a **25%** real-terms increase compared to 2019/20; there has been a **28%** real-terms fall in expenditure since 2010/11[21].

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17 Based on a comparison of the opening 2023/24 budget as per the SoS's Written Ministerial Statement of 27 April 2023 to the opening 2022/23 budget as per the SoS's Written Ministerial Statement of 24 November 2022.

18 School funding: Everything you need to know - The Education Hub (blog.gov.uk)

19 Department of Education protects funding for vulnerable children and young people | Department of Education (education-ni.gov.uk)

20 Services such as special education and additional educational needs (special schools, SEN in mainstream and Pupil Support); C2K and PPP and other initiatives; School meals; Transport; Payroll, HR, ICT, Accounts; Rates for schools; School-based staff substitution; Other costs such as school crossing patrols, school library service, school development service, music service and legal services.

21 Information provided by DfE.

We acknowledge that are some inefficiencies in the way resources are currently used. We have identified these in our Report and recommended how they should be dealt with. It is important to stress, however, that they are limited in scale. Tackling existing inefficiencies does not represent a way of filling the funding gap.

Tackling the immediate funding shortfall is important but it is insufficient. Education is society's investment in its own future. This is particularly true in the case of a post-conflict society with a legacy of industrial decline. The case for spending on education as a way of promoting future economic prosperity is obvious. However, education also promotes a better quality of life. Its impact on personal wellbeing and social cohesion is positive and vital. Spending at an early stage on education often obviates the need for more expensive and less effective later interventions in areas such as health, welfare and criminal justice.

Education as a necessary and effective investment in the future is the central theme of this Report.

The historical context

Northern Ireland is a post-conflict society. Although it has experienced a quarter-century of peace, tensions are still present. Phrases like "religious differences" or "different community backgrounds" describe a more complex situation in which people see their identities in potentially conflicting ways and have widely differing hopes and visions for the future. At the same time, there is much goodwill and a determination to avoid returning to the troubled circumstances of the past.

All this implies a greater role for education in Northern Ireland than in most other jurisdictions as an agent for social cohesion and peaceful co-existence. Promoting the public good is a vital consideration at all stages of education.

The political context

A further aspect of the local context is the unique political system, which can operate effectively only on the basis of a consensus and willingness to collaborate. Making progress requires political commitment and the ability to take difficult decisions. The political context makes this incredibly challenging.

Education policy and delivery (perhaps to a unique extent) interlink with and support the delivery of a wide range of other policies and services. Some of the changes that are necessary require both cross-departmental agreement at a government level and cross-community agreement at a local level. Progress requires a willingness to compromise on the part of both politicians and the community as a whole.

The educational context

Northern Ireland should be proud of a track record of high achievement and build on the many areas of excellent practice. Overall, it is the highest performing of the four UK jurisdictions both in terms of promoting excellence and reducing failure. It also performs well in international comparative surveys. However, more could be done to provide greater support for learners at risk of disengaging from education and those vulnerable to disadvantage.

The evidence conclusively demonstrates the close link between disadvantage and low educational achievement. Many of our recommendations are designed to combat the impact of disadvantage but there is no simple single solution.

On an annual basis over £2bn is spent on education in Northern Ireland. However, limited and unsatisfactory measures are used to determine the effectiveness of this spend. Too often, examination attainment at GCSE and A Level are viewed as the only indicators of success but these are insufficient as measures of the system as a whole. Given the importance to the individual and society of educational success, there is a need for measures of accountability that give better assurance to learners, parents and the taxpayer that money is being spent effectively and the system is achieving its objectives.

Such measures of success need to go beyond attainment at 16 or 18 and consider the whole education journey. Although it is important to assess progression at each stage, such assessments should also consider the "distance travelled" by the learner and the "value added" by the institution. Measurements should also go beyond cognitive attainment and consider the whole development of the learner.

The workforce context

Northern Ireland benefits from highly trained, highly motivated staff across all stages and all sectors of education. The education workforce would be the envy of many nations. However, there is a feeling that they are being frustrated by a lack of support and overwhelmed by an increasing workload and a content-heavy curriculum.

Educational institutions are complex organisations. The task of leading them is highly demanding. It is imperative that leaders are well supported, including via professional development, and that bureaucratic demands are minimised. There are signs of difficulty in recruitment to senior posts, possibly because of workload pressures and the desire for greater work–life balance. This should be of significant concern.

We are extremely concerned that for a prolonged period, "action short of strike" taken by various teachers' unions has resulted in a lack of performance data and a loss of accountability. Urgent steps are needed to end this situation. These will include addressing the causes of the industrial action.

The community context

There are many different forms of separation within our schools, which we comment on throughout the Report. Education has a positive role to play in promoting social cohesion and such forms of separation must be diluted in future years for the benefit of all of society.

A chief concern for Northern Ireland is that school enrolments demonstrate significant division of learners on the grounds of religion or community background. Our analysis suggests than in 2021/22, 85% of primary school learners and 76% of post-primary learners attended a school where the minority group comprised less than 10% of the enrolment. In 2011/12, the equivalent figures were 90% for primary school pupils and 84% for post-primary school, indicating limited change over a 10-year period.

As in many other countries, there is also separation by socio-economic status, seen most clearly in post-primary education. In particular, grammar schools selecting pupils for admission based on their score in a transfer test, alongside a policy of open enrolment, has resulted in an unequal distribution of learners entitled to free school meals. We also see special educational needs as another area of division.

There is therefore a need to develop capabilities and skills within both institutions and sectors to work with others. At present educational institutions in Northern Ireland are frequently in competition with each other. Embedding an ethos of collaboration is a pressing necessity.

The technological context

We do not pretend to be able to foresee the future but we can be confident in predicting that the context in which education is delivered will change dramatically over the next 20–30 years. Technological change has been a constant feature of the past few centuries but the pace of that change is accelerating. Even during the period of our Review, artificial intelligence in the form of chatbots has generated public interest and demonstrated the need for change in some forms of assessment. Such change has implications both for the economy and for learning.

To date, technological change has had only a limited impact on the educational process. Fundamental aspects of the organisation of education remain little altered. The academic year with its many rigidities has not changed. The default method of grouping learners in classes, largely on the basis of age, remains a dominant feature. However, over a 20-year timescale it seems likely that we shall see unprecedented changes in the way schools, colleges and other educational institutions go about their business.

The current education system is too slow to react to the evolving world. It needs the capability to adapt in terms of curriculum, teaching methods, preparation of learners for rapidly changing workplaces and an ability to offer reskilling opportunities throughout learners' lives.

The Covid context

There are aspects of the Covid-19 legacy that may become more significant over time. In particular, the impact of the lockdown obliged educational establishments to be innovative to a highly unusual degree, demonstrating an unsuspected capacity for rapid change. The pandemic provided a learning opportunity for the system as a whole and the lessons must not be lost.

Distance learning briefly became a ubiquitous feature of the system. In the case of school-age learners, the home–school partnership assumed a new priority. Perhaps most importantly, blended learning involving a mix of class learning, group work, tutoring and self-study emerged for many learners and teachers not merely as a useful temporary expedient but as offering positive educational advantages.

The environmental context

There is real concern about the impact of climate change and a sense of urgency about acting before it is too late.

This demands change in two areas. The first is *education for sustainability* – reflecting environmental issues in curriculum and assessment and preparing young people for careers in the green economy. The second is *achieving sustainability in the delivery of education itself*. This will have an impact on the education estate (including nurseries as well as schools and colleges), education infrastructure (including transport), procurement and educational activity carried out in the home and in the community.

CHAPTER 1 – EARLY YEARS

Introduction and context

1.1   Early years services offer a unique opportunity to build the foundations for future learning and development leading to long-term positive outcomes in education, health, economic activity and contribution to wider society. Brain development, which in other species would take place *in utero*, takes place after birth in humans. The first 2–3 years of life see a vast number of neural pathways being laid down. These provide the basis of later cognitive and emotional development. The building blocks for basic skills and competences are put in place[22]. Investment in these services will bring substantial rewards.

1.2   There is a global trend towards greater investment in early years. Indeed, this has been highlighted by the recent *Fair Start*[23] report. We agree with its recommendations relating to early years and believe that it is desirable to develop them still further as explained throughout this chapter and as set out in our recommendations and proposed actions.

1.3   The Organisation for Economic Co-operation and Development (OECD) publication *Investing in high-quality early childhood education and care*[24] identifies three broad rationales for investing in this area of provision:

- There are significant economic and social payoffs.
- It supports parents and boosts female employment.
- It is part of society's responsibility to educate children, combat child poverty and help children overcome educational disadvantage.

1.4   We share these views. In addition, we would emphasise the potential of early years provision in the timely identification of special educational needs.

1.5   Many children come to school ill-prepared for learning[25]. They lack the necessary educational or cultural capital. The nature of their previous interaction with adults, a limited exposure to formative experiences, a lack of contact with books or the experience of being read to by parents combine to create and exacerbate disadvantages. The most obvious are in the area of speech and vocabulary. However, there tends also to be a more general lack of fundamental concepts, making it difficult to benefit from the activities of the classroom. This can be described as a lack of knowledge – not knowledge as facts but as the residue that remains from experience of the world. Looked at in this way, the knowledge that arises from early experiences is a prerequisite of future knowledge.

1.6   Policy and services for the early years are developed and delivered by different government departments, primarily health and education, although others are involved. Ante-natal and immediate post-birth services are rightly focused on health. The Department of Health (DoH), in addition to medical support when needed, provides ante-natal courses, a series of health/developmental check-ups, and a universal midwifery and health visiting service. It also collaborates with other agencies to deliver an extensive range of support activities

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22   Functional brain development in humans | Nature Reviews Neuroscience
23   https://www.education-ni.gov.uk/publications/fair-start-final-report-action-plan
24   https://www.oecd.org/education/school/48980282.pdf
25   Childhood poverty and early cognitive development in the UK (suttontrust.com)

both before and after birth. By age 3, the emphasis is more on cognitive development and seeking to ensure that children are ready to begin school.

1.7 Early years services in Great Britain, Northern Ireland and the Republic of Ireland vary widely with each nation using different terminology and offering different levels of provision. The different school starting ages across these nations also has an effect, with learners in Northern Ireland in school from age 4. **Table 1.a** provides an overview.

Table 1.a: Early years offers in Northern Ireland, Great Britain and Republic of Ireland – hours per week for 2-, 3- and 4-year-old childcare/early education/pre-school

	Title (generally used)	2-year-olds (38 weeks)	3- and 4-year-olds (38 weeks)		Notes
		Generally targeted at children from disadvantaged backgrounds	All parents	Working parents (16+ hrs per week)	
Northern Ireland	Developmental Programme for 2–3-year-olds / Pre-school Education Programme (PSEP)	Targeted provision in disadvantaged areas (Sure Start – at least 7.5 hrs per week)	12.5 hrs part-time	12.5 hrs part-time	A range of additional two-year-old support is also available in Sure Start PSEP mainly accessed by 3-year-olds as children aged 4 are of compulsory school age and in school.
			22.5 hrs full-time	22.5 hrs full-time	
Scotland	Early Education and Care	30 hrs	30 hrs	30 hrs	
England	Childcare	15 hrs (New offer of 15 hrs for children of working parents from April 2024, extended to 30 hrs from Sept 2025 for children of working parents from age 9 months to starting school)	15 hrs	30 hrs	The early years foundation stage (EYFS) sets standards for the learning, development and care of children from birth to 5 years old.
Wales	Early Education and Childcare	Targeted provision in disadvantaged areas (Flying Start – maximum of 12.5 hrs per week)	At least 10 hrs early education	Up to 30 hrs of childcare	Working parents can access up to 30 hours of childcare for 48 weeks
Republic of Ireland	Early Childhood Care and Education	n/a	15	15	Supporting the development and educational achievement of children through high-quality early education, with particular focus on the target groups of the disadvantaged and those with special needs.

1.8   An example of collaborative working between DE and DoH can be seen in the delivery of the Sure Start programme. DE has policy responsibility and fully funds the programme (£30.6m in 2023/24) with DoH responsible for administration (on behalf of DE), via 38 Sure Start projects across Northern Ireland. Sure Start provision caters for families in Northern Ireland's most deprived areas. It involves a wide range of services for very young children and their families.

1.9   Sure Start is delivered by 38 Sure Start projects across Northern Ireland, each providing services reflecting the following six priorities:

a.   Outreach and home visiting services.
b.   Support for speech, language and communication development.
c.   Support for families in centres and in the home.
d.   Good-quality play, learning and childcare services both on a group basis and, where necessary, in the home.
e.   Primary and community health care and advice.
f.   Support for children in the community.

1.10   Each project has a manager and a board whose responsibilities include determining what mix of services will best meet the needs of the area and planning support for children and families based on an individual assessment of needs. However, it is important that all six priorities are consistently pursued throughout Northern Ireland. This approach has a number of important benefits. It ensures that there is an effective tier of management at a relatively local level. It is flexible enough to meet local circumstances and, where resources are not sufficient to meet all needs, it offers a fair mechanism for allocating services. It already provides a basis for collaboration between learning/care and health services.

1.11   We therefore recommend that the Sure Start structure be used as a base on which to build more extensive early years services. Over time, Sure Start projects should be resourced to provide up to 20 hours per week of childcare free of charge for children aged below 2 years in families experiencing poverty where this enables a parent to take up paid employment. The provision could be made either in a state nursery or by buying a place from a private provider.

Supporting parents

As first educators

1.12   Parents and carers are their child's first educators. They need to be supported in this vital role. Support should begin before birth, continue in the early years and throughout the years of schooling. Supporting parents means empowering and equipping them to develop good parenting skills and creating a learning household where the child can thrive.

1.13   The extraordinary plasticity of the brain in the first years of life means that its development is open to external influence, whether for good or ill. The environment in which babies are living and their relationships with parents and others are immensely important. Adverse experiences greatly increase the likelihood of poor physical and mental health as they grow and develop in later life. The child's capacity to pay attention and absorb vital information

is similarly affected. Research[26,27] has demonstrated the importance of being exposed to frequent speech and an extensive vocabulary. A rich and varied experience both of life in the family and of the wider world builds up the educational capital that will later support the development of knowledge and understanding[28].

1.14   The child's experience in the first few years of life can thus have an enormous influence on later success at school and in adulthood. Children are born ready to learn but they are dependent on parents and others close to them to create the kind of environment which best supports that learning. They learn best when protected from neglect, abuse and deprivation. They need intensive stimulation through positive interactions with others and with the world around them.

1.15   It stands to reason, therefore, that emphasis needs to be placed on the very early stages of learning by helping parents to help their children. This, of course, needs to continue during the learner's journey through school. Informed and engaged parents are best placed to support informed and engaged learners.

1.16   Close cooperation with parents supports the child-centred, play-based pedagogy of the early years. Parents can also offer opportunities for structured play and can observe and support the learning process. Communication between the parent and the early years setting can help both to capitalise on these observations.

1.17   Partnerships with parents are fundamental. This means much more than good communication within the home. In some instances, it will involve helping to develop parenting skills. This might require outreach into homes. There are international examples of pre-school programmes that offer parents an opportunity to participate directly in the work of the nursery, working alongside staff for, say, one day a week.

1.18   Strong partnerships have been developed with many parents in Northern Ireland through Sure Start projects. They promote the physical, intellectual, social and emotional development of pre-school children to ensure they can flourish at home and when they get to school. Sure Start supports parents to maximise their children's all-round development. It aims to enhance parenting skills, thus supporting the development of positive relationships between parents and children, and the effective functioning of the family. Sure Start helps the early identification and support of children with emotional, learning or behavioural difficulties.

1.19   Fundamentally, parents/carers are central to the development of learners and need to be supported. This support begins pre-birth and should continue throughout their child's education journey but with increased focus in the early years. Examples of such support could include health visiting (which we discuss later), engagement between the early years setting and the family, provision of information from a specified agency, and targeted intervention programmes, such as reading clubs. Parents appreciating their core role in education is of vital importance for the entire education journey of the learner.

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26   Hart, B. and Risley, T. R. (1995). *Meaningful differences in the everyday experiences of young American children*. Baltimore: Paul H. Brookes & Publishing Co.

27   Hart, B. and Risley, T. R. (2003). *The early catastrophe: The 30 million word gap by age 3*, *American Education*, 27(1), 4–9.

28   The Timing and Quality of Early Experiences Combine to Shape Brain Architecture: Working Paper No. 5 (harvard. edu)

1.20 Expansion of early years provision needs to be done in a measured way that balances the role of the parent and the role of the early years professional. Therefore, when extending provision in the early years, including childcare, it is important to consider the quality of service as well as its duration. Decisions need to be made about how services should be funded and the extent to which they should be paid for or subsidised by the state.

Panel conclusion

Children are born ready to learn but they are dependent on parents and others close to them to create the kind of environment which best supports that learning. They learn best when protected from neglect, abuse and deprivation. They need intensive stimulation through positive interactions with others and with the world around them. Parents and carers need support to fulfil their role as the first educator.

Investing in early years

Expanding provision

1.21 The child's experience in the first few years of life has an enormous influence on the outcomes they achieve at school and in adulthood. James Heckman makes the case for investment in education at the earliest opportunity. The "Heckman Curve"[29] demonstrates that the rate of return on educational expenditure is highest at the earliest stages and progressively declines thereafter. It is thus appropriate to regard expenditure on early years as investment. Investment in the early years benefits everyone. It benefits the learner but also benefits wider society. The Early Intervention Foundation report published in 2018[30] estimated that in Northern Ireland failure to intervene at an early age was resulting in £536m of avoidable expenditure across a range of public services. Good-quality early years provision reduces the incidence of school failure, which in turn can reduce problems of economic inactivity, poverty, anti-social behaviour, crime, etc.

1.22 A report by the Centre for Effective Services (CES) noted that "Cost-benefit analyses conducted in the US of high-quality early care and education programmes have reported returns of $2.50–$16 for every $1 invested. The National Economic and Social Forum (NESF) projected the benefits of investment in early care and education in the Republic of Ireland to be between €4 and €7 for every €1 invested. These estimated returns were calculated from measured educational outcomes (such as improved educational attainment, reduced need for special education provision), declining juvenile crime rates, and projected savings due to future participation in the labour force, increased attendance at third-level education and reduced prosecution and victim costs relating to adult crime"[31].

1.23 In many jurisdictions, there have been moves to increase early years provision[32]. The normal approach has been to extend services first into the pre-school year and then into the year

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29 http://www.heckmanequation.org/content/resource/heckman-curve
30 https://www.eif.org.uk/report/the-cost-of-late-intervention-in-northern-ireland
31 Prevention and early intervention in children and young people's services: Ten years of learning
32 For example, in Norway, universal entitlement to early childhood education (ECE) for 1-year-olds was implemented in 2009. In Germany, the legal right to a place in ECE for children over the age of 1 came into force in 2013. In Spain, the *Educa3* programme was given an initial budget of EUR 100m for the period 2008–12 to increase the number of places in ECEC services for children from birth to 3 years. Meanwhile, in Korea, free childcare for 0–2-year-olds was introduced from March 2012 (OECD Education at a glance 2022).

before. This has significant merits but does not focus sufficiently on the period of most rapid brain development and plasticity in the earliest years. We believe that emphasis needs to be placed on the very early stages of learning and on supporting parents to fulfil their role as first educator.

1.24 High-quality early years provision enriches the experience of all children. It improves learning overall while simultaneously helping to narrow the gap between more and less advantaged children. In addition, investment that could improve access to special educational needs (SEN) services and provide support for other specific types of need (as experienced by disadvantaged families, newcomers and Roma/travellers) in early years could provide a significant long-term saving as well as improving long-term outcomes for children.

Panel conclusion

Early years services are an investment by society in its future. There is significant research evidence about the importance of early interventions in the earliest of years. Proposals to expand or improve the quality of early years services will have immediate cost implications but their long-term consequences will be financially positive. Additional investment should avoid duplication of service.

The Executive should progressively increase funding in early years and see it as an investment for the long term.

1.25 Quality early years provision should be available from a very early age to all families who wish it. This will require a significant expansion of current services.

1.26 It has been suggested that Northern Ireland's early years provision lags behind the rest of the UK. However, this view often fails to take account of the fact that learners start formal education earlier in Northern Ireland and the value this has in terms of early childhood development. Furthermore, Northern Ireland has a universal Pre-School Education Programme (PSEP) that provides places for all children whose parents want it in their pre-school year, generally between the ages of 3 and 4. The extent of the provision varies according to setting, with children receiving either a minimum of 12.5 or a minimum of 22.5 hours per week over a 38-week period. This is not a compulsory stage of education but uptake exceeds 90%[33].

1.27 In September 2022[34], it was announced that all children aged 3 to 4 would be entitled to a minimum of 22.5 hours of pre-school education. We welcome this plan but recognise that it will require significant funding. At today's costs, it is estimated that this expansion could cost up to an additional £35m per annum[35]. We strongly urge the Executive to provide the necessary resources as soon as possible.

1.28 When evaluating early years programmes in other UK jurisdictions, Northern Ireland, and the Republic of Ireland, we have identified crucial gaps in provision in relation to 2–3-year-olds. Therefore, a long-term goal for Northern Ireland should be to establish a programme for 2-year-olds that offers up to 20 hours of pre-school education per week for 38 weeks. This, coupled with the proposed expansion of provision for 3-year-olds, would represent a

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33 Pre-School Education Places | Department of Education (education-ni.gov.uk)
34 McIlveen announces move towards 22.5 hours of funded pre-school for all children | Department of Education (education-ni.gov.uk)
35 Assumes full participation of all eligible children. Costs are estimates and subject to further analysis and revision.

significant investment in early childhood development, with an estimated annual cost of up to £110m[36].

1.29   Priority should be given to disadvantaged backgrounds, followed by a move toward more universal provision. A targeted 2-year-old programme for children from disadvantaged backgrounds could cost up to £40m per annum[37].

1.30   Phasing in the amount of provision offered may be another approach. At first, 12.5 hours could be offered for 2-year-olds to manage expenses and build capacity, with a targeted programme (for those in disadvantage) costing an estimated £18m per annum and a universal programme of 12.5 hours per week estimated to cost £65m per annum.

1.31   Therefore, the Programme could be phased as follows:

Phase 1	Targeting	2- and 3-year-olds classed as disadvantaged to receive up to 12.5 hours and 22.5 hours per week respectively.
Phase 2	Expanding	All 2-year-olds to receive up to 12.5 hours per week and all 3-year-olds to receive 22.5 hours per week.
Phase 3	Full Provision	All 2-year-olds to receive up to 20 hours per week and all 3-year-olds to receive 22.5 hours per week.

1.32   The Executive could consider introducing a graduated charging model. Such an approach would allow for more rapid expansion of services for families in greater need.

Panel conclusion

There is a general global trend to extend provision in the early years and we believe that Northern Ireland should do likewise. This will take time but provision can be expanded on a staged approach. Children from disadvantaged homes should be prioritised.

Improving quality

1.33   Early years services need to be of high quality. This requires investment in the workforce in the form of training and subsequent professional development. While early years education needs to be viewed as an integral part of the wider education system, its unique pedagogical approach and specific workforce needs must be recognised.

1.34   Research studies demonstrate that excellent early years services have an enduring positive impact on educational performance, particularly the performance of disadvantaged children[38]. Average or sub-standard services have limited or no such impact[39]. This has important implications for the composition, qualifications, professional development and

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36   Assumes full participation of all eligible children. Costs are estimates and subject to further analysis and revision.

37   Assumes full participation of all eligible children. Costs are estimates and subject to further analysis and revision.

38   Tackling disadvantage in the early years - Education Committee - House of Commons (parliament.uk)

39   A literature review of the impact of early years provision on young children, with emphasis given to children from disadvantaged backgrounds. Melhuish 2004.

leadership of the workforce. All early years staff, whether professional or para-professional, should have appropriate skills and qualifications at the point of entry and should have access to continuing high-quality professional development thereafter.

1.35   The quality of leadership is of the utmost importance. It depends on a range of personal qualities as well as on standards of prior education and qualifications. Currently, statutory provision is teacher-led and supported by classroom assistants trained to a minimum standard of Level 2. Within non-statutory provision, leadership is, at minimum, Level 5 relevant qualification plus 2 years' experience (for the most part) and supported by team leaders/supervisors at minimum Level 3 relevant qualification. In both statutory and non-statutory settings, most nursery/classroom assistants are required only to hold qualifications at Level 2 (i.e., GCSE or equivalent). Pay for lower-qualified staff is generally around the national minimum wage. There are limited opportunities for professional development or promotion. There is a need for greater consistency in provision across both sectors.

1.36   In the long term, all early years provision should be graduate-led[40,41,42,43]. In many cases, this will mean that nurseries will be led by teachers. However, it is important that these teachers have appropriate experience and training related to early years. It is not enough for leaders to achieve a minimum standard of qualification if that qualification is not relevant to early years education. Therefore, we would wish to see successful completion of an appropriate supplementary qualification made mandatory. Other professional backgrounds may be equally appropriate particularly in the very early years.

1.37   A fully developed programme of in-service training should be introduced, allowing staff to refresh and improve their skills and obtain additional qualifications. This should be accompanied by the introduction of an improved career structure, enabling more staff to progress to positions of greater responsibility. The end goal would be that all staff working in early years settings have a professionally appropriate qualification at Level 3 or above.

1.38   Looking to the longer-term future, there will inevitably be substantial changes in the labour market. These cannot be foreseen with any degree of accuracy. It seems likely, however, that many areas of employment will be affected by automation and the impact of artificial intelligence. However, jobs which rely on human qualities such as empathy and interpersonal skills are not likely to be threatened in this way. Working with young children will become an increasingly important source of income for many families. Our proposals for enhancing the professional standing of this kind of work will thus serve an important economic purpose as

40   Pedagogues (who make up 60% of staff in Danish centre-based early childhood education and care [ECEC] provision) are degree-educated. Jensen, J.J. 2017. "Denmark – ECEC Workforce Profile". In *Workforce Profiles in Systems of Early Childhood Education and Care in Europe*, edited by P. Oberhuemer and I. Schreyer. Available at: DENMARK_ECEC_Workforce.pdf (seepro.eu)

41   Ireland is moving towards a graduate-led ELC workforce. Government of Ireland (2018) *First 5 A Whole-of-Government Strategy for Babies, Young Children and their Families 2019-2028*. Available at: gov.ie - First 5: A Whole-of-Government Strategy for Babies, Young Children and their Families 2019-2028 (www.gov.ie)

42   People working in ECEC in Estonia are expected to have graduate or postgraduate qualifications. Pascal, C., Bertram, T. and Peckham, K. (2019). *Integrated early years systems: A review of international evidence*. Wales Centre for Public Policy. Available at: Integrated-Early-Years-Systems.pdf (wcpp.org.uk)

43   Research in England identified a small but positive association between the presence of a graduate in settings (mainly driven by those with Qualified Teacher Status) and children's later Early Years Foundation Stage Profile scores and that these benefits did not fade over time. Archer, N. and Oppenheim, C. (2021). *The role of early childhood education and care in shaping life chances: The changing face of early childhood in the UK*. Nuffield Foundation. Available at: Role-early-childhood-education-care-life-chances-Nuffield-Foundation.pdf (nuffieldfoundation.org)

well as helping to create better services for very young children.

1.39 The effect of such changes would be to raise the quality but also the cost of the service. We do not see the full programme as affordable in the immediate future but would wish to see the process started at an early date. The cost implications of a gradual expansion of in-service training opportunities, for example, could be very limited in the short term.

Panel conclusion

As with all education services, quality is a key concern and is dependent on the skills of the educators. All early years educators should be appropriately trained and valued. This means improved initial training and improved opportunities for professional development, leading to higher standards of service.

Standardisation

1.40 Within the Pre-School Education Programme there is a mixed model of service delivery with both statutory and non-statutory provision. The present mixed-economy model involving a range of different providers works well with ETI reports demonstrating the quality across the system. The mixed model of statutory (nursery schools and nursery units) and non-statutory (voluntary, community and private provision) enables the service to be flexible in response to changing levels and patterns of demand, bearing in mind that pre-school provision is non-compulsory and that parents do not necessarily make decisions on their preferred pre-school settings in the same way as they do for example on their preferred primary schools.

1.41 While this creates a flexible model of delivery it has given rise to inconsistencies. These include differences in the following:

- Employment model.
- Child:staff ratios.
- Hours of provision (with no option for full-time places in the non-statutory sector).
- Funding levels and methodology.
- Administrative support and IT infrastructure.

1.42 In terms of the funding level and methodology, statutory provision is funded via the Common Funding Scheme whereas non-statutory is by rate per child, reviewed annually. This means that statutory providers receive some additional funding for certain categories of children such as those from disadvantaged backgrounds, newcomers, travellers and children in care. It also means that funding is linked to the Age Weighted Pupil Unit (AWPU), which can increase and decrease. The end result is that funding for a part-time funded pre-school education place differs depending on setting[44].

1.43 Different staffing ratios apply in the statutory and non-statutory sectors. In the former, the child:staff ratio must be 13:1 or better (set by DE). This gives rise to the normal arrangement of a nursery class consisting of two staff with 26 children. In non-statutory settings, a ratio of 8:1 has been set by DoH. A more favourable ratio may be needed where younger children are involved but it is not clear why differing ratios should be applied purely on the basis of sector.

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44 In 2021/22 it was £2,265 in a nursery school, £2,123 in a nursery unit attached to a primary school and £2,001 in a non-statutory setting.

1.44   We cannot find any justification for these different arrangements pertaining in the statutory and non-statutory sectors in relation to funding, child:staff ratios and qualifications/entry requirements. It is important that children receive a high-quality service, regardless of the provider. The current arrangements relating to funding, staff ratios and qualifications in the public sector should be applied to private sector provision as soon as possible.

1.45   In the longer term, and once arrangements have been harmonised, there may be value in moving to a unified delivery model that supports improved learner outcomes and delivers value for money. There are obvious economies of scale when a nursery unit is attached to a primary school as opposed to a free-standing provision. There are also added benefits in terms of integrating pre-school and primary education and removing the need for separate admissions processes for these stages.

Panel conclusion

Currently there is a mixed service-delivery model for pre-school education, with both statutory and non-statutory providers. This approach may have benefits but it also presents an opportunity for inconsistency of provision regarding funding, child:staff ratios, qualification standards and other matters. Arrangements should be harmonised, as far as possible, to ensure services are equitable and provide the best environment for the learner.

An integrated service

1.46   The expansion of provision and increased investment recommended in this Report presents a significant opportunity for Northern Ireland. It is important that such investment be used to best effect and the full benefits of a high-quality early childhood service realised. This can best be achieved through a cross-departmental/multi-agency approach.

1.47   Responsibility for policy and services for early years currently sits in different government departments, primarily DoH and DE. There are, of course, other Executive departments that have an interest in early years policy and delivery. For instance there are links to employment (Department for the Economy (DfE)), welfare support (Department for Communities (DfC)) and community cohesion (Department of Justice (DoJ) and The Executive Office (TEO)).

1.48   The current arrangements represent traditional departmental boundaries, rather than being designed with the end-user in mind. There is evidence of good joint working across health and education services. However, the departments have different objectives and priorities, with DoH focused on the health needs of the child and DE on learning and preparation for school. There is also a risk that early years services can be unintentionally seen as low priority in both departments, with DoH naturally focused on acute care and hospitals and DE on school-age learning.

1.49   Early years services need greater priority across the entire Northern Ireland Executive. In addition, there needs to be a more integrated and child-centred approach in the early years and greater prioritisation, including the ring-fencing of funding. The transition in service focus from health to education should be seamless with the agreed objective being to support the overall development of the child both in terms of health and cognition.

1.50 Such an approach is already embodied in the Children's Services Co-operation Act (Northern Ireland) 2015[45], which has the great advantage of allowing the pooling of budgets from different services[46]. The Act is not confined to collaboration between education and health but can facilitate joint working with other services such as children's social work.

1.51 Concurrent with this Review, Professor Ray Jones carried out a Review of Children's Social Care Services in Northern Ireland[47], commissioned by the then Minister of Health. We were pleased to engage with Professor Jones on a number of occasions to consider potential synergy between the two separate pieces of work and linkages between our emerging findings. The theme of greater integration of children's services across education and health (as well as others) is one that we specifically discussed with Professor Jones. A major recommendation in his final report is the creation of a single region-wide organisation for statutory children and families social care services. There is potential synergy in the implementation of that recommendation and our own thinking in relation to greater integration of early childhood services.

1.52 We have considered how more effective collaboration between education and health services might be achieved and have concluded that, such is the importance of early childhood development it should ultimately become the responsibility of a single dedicated and unified agency. Such an agency could take charge of health visiting services, support for families, regulation of childcare and a range of education and childcare provision but would not be responsible for medical services. In respect of early childhood services it would have responsibility for:

- Effectively using resources and investing in future provision.
- Providing and commissioning services.
- Supporting and engaging with parents.
- Supporting families, including those who are "hard to reach".
- Promoting wellbeing and emotional health.
- Identifying developmental problems and providing effective support.
- Recording information and sharing as appropriate.
- Identifying future training and staffing needs.

1.53 Such responsibilities could sit alongside other learner support services that currently reside in the Education Authority, namely, learner support (i.e., special educational needs support), pupil wellbeing and protection, and Youth Services. The end goal would be a learner-focused body tasked with leading on early intervention and learner support, providing wraparound services for children and young people from pre-birth to adulthood across health and education.

1.54 The overall objective of the service would be to work with families, settings and schools to secure the successful all-round development of each child. Children develop at different speeds. An early priority for the service would, therefore, be to review the suite of developmental assessments to ensure that they take place at the most opportune times and take account of the full development of the child: physical, emotional, social and educational.

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45 Children's Services Co-operation Act (NI) 2015
46 Section 4, Children's Services Co-operation Act (Northern Ireland) 2015.
47 Report of the Independent Review of Children's Social Care Services in Northern Ireland | CSCS NI Review (cscsreviewni.net)

1.55   Chapter 3 of this Report deals with the complex issues relating to special educational needs (SEN). Criticisms are frequently made of the current arrangements for these services. A new learner-focused agency could make a significant contribution to service improvement. We recommend that a **single Early Intervention and Learner Support Agency** be established. This is explained further elsewhere in the Report, including in Chapter 8 – Structures and a single system.

1.56   Early years settings have insufficient access to specialists such as educational psychologists and speech therapists. Special needs are often not formally diagnosed until long after they are manifest, assessments take too long and, as a result, intervention is seriously delayed, almost certainly resulting in less effective treatment and greater long-term costs. Processes for diagnosing special needs and possibly proceeding to statementing are unclear in the non-statutory early years sector. An enhanced, integrated Early Intervention and Learner Support Service would provide an opportunity to tackle these problems as well as providing consistent support for the child as they move into and through formal education.

1.57   The new service should operate in the context of a broader strategy to combat disadvantage, poverty – especially child poverty, and social exclusion. Although the development of such a strategy lies largely beyond our remit, we are firmly of the view that a central component must be a successful education system which, as far as possible, equips everyone to participate in properly remunerated employment. The economic and social benefits of such an approach would be transformative, underlining that spending on effective educational provision should be seen as an investment rather than a cost.

1.58   The new service should be integrated *vertically*. In other words, it should be able to meet the needs of children and families throughout the whole period between conception and the end of formal education. At the same time, it should be integrated *horizontally*, providing a seamless experience to the service user. It should be easily accessed with any point of contact being able either to meet the family's needs or introduce them immediately to the appropriate branch of the service. An important element in an integrated service is the flow of information. The development of protocols allowing the conveying of necessary information while respecting privacy and meeting legislative requirements would be an essential early priority of the service.

1.59   This Early Intervention and Learning Support Agency would have responsibilities for the management of:

   - Parental support and engagement.
   - Sure Start management and Pre-School Education Programme.
   - Learner Support Services (i.e., SEN support).
   - Pupil wellbeing and protection.
   - Youth services.
   - Emotional health and wellbeing.

1.60   Many countries see the importance not only of extending early years services but also of ensuring that they are organised and delivered in a more integrated manner, even where provision is shared among the public, voluntary and private sectors[48]. However, none has yet succeeded in taking a fully comprehensive approach, including education, care and health services within a single easily accessed service. Adopting the approach laid out in this Report

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48   Integrated-Early-Years-Systems.pdf (wcpp.org.uk)

could see Northern Ireland emerge as a leader in this very important area.

1.61   The service we envision cuts across DoH and DE and would include services traditionally health focused (i.e., health visitors) as well as services which are education focused (i.e., Education Authority (EA) pupil support services). Establishing such an agency may involve transferring staff across departments, contracting of services between separate delivery bodies[49] and a joint management arrangement across two departments. This may be problematic but the potential benefits justify the effort to overcome difficulties. The end point should be a single, integrated service – even if this takes an extended period to establish.

1.62   In the short term, joined-up working between health and education is a prerequisite to any expansion in provision. Arrangements should be put in place to strengthen existing collaborative practices. We would envisage the establishment of an **Early Years Partnership Board**, chaired by DE and DoH Ministers. Its functions would link to those described earlier but it would also be responsible for managing a ring-fenced fund for early years provision, delivering an expansion in services, improving quality through workforce development and ensuring a synergy in improving the health and cognitive development of children in the early years.

Panel conclusion

The life of a child from 0 to 4 years old (and beyond for that matter) does not operate within public service boundaries or silos. It is essential that health and education services (and others) work hand in hand for these vital years. This means collaborative working on policy development, service delivery and funding.

The long-term goal should be an integrated Early Intervention and Learner Support Agency which would provide a range of services for children and young people from pre-birth to youth. This would include health visiting, SEN support, emotional health and wellbeing, and youth services. This would be user focused, responsive and capable of working across traditional departmental boundaries.

In the short term, partnership working across health and education should be promoted to maximise the potential of the expansion of early years provision. This would include the management of a ring-fenced budget to protect early childhood services.

Health visiting

1.63   An integrated service-delivery model with health visitors working with other childhood professionals has the capacity to enable early diagnosis of emerging difficulties in learning or other areas of development. It is important that those conducting the assessments in the very early years are equipped to diagnose and deal with problems associated with cognitive development as well as delays in physical development. This strengthens the argument for closer working arrangements among health visitors, midwives, speech and language therapists, educational psychologists, occupational therapists and others. It also has implications for their training and subsequent professional development.

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49   For example, an education-managed ALB could buy in services from Health Visitors and Community Midwives to support cognitive development in early years.

1.64   It must be recognised, however, that while many developmental difficulties can be diagnosed at age 2 or even earlier, there are other needs which are difficult to identify in the very early years and others again which develop only later.

1.65   At present assessments of development are carried out at several stages. These begin with a series of health assessments in the first eight weeks of life. There is a further health check at 14–16 weeks followed by a third at 7–9 months. A comprehensive health assessment is carried out at around a year. At 2–2.5 years the assessment includes speech and language. The health visitor is the key figure throughout much of this programme and is almost always a welcome figure in the home and a source of useful advice to parents.[50]

1.66   The Expert Panel responsible for the *Fair Start* report was concerned about a shortage of health visitors. They found that some 14% of the seven developmental checks expected to be carried out between birth and age 3 were not taking place[51]. These assessments are the responsibility of the five health trusts. During 2020/21, 22% of planned reviews did not take place, although the impact of the Covid-19 pandemic should be borne in mind when considering this statistic. DoH has reported that the first three reviews carried out in a baby's life (up to 14–16 weeks) have now returned to pre-pandemic levels. This is not true of the 1-year assessment and the 2–2.5-year assessments where testing remains at a much lower level. It would appear that implementation is variable[52]. While these reviews may be of lesser significance than earlier reviews from a health perspective, they are crucial in relation to cognitive development, for example, in relation to speech and language. We therefore endorse the relevant Fair Start recommendations and welcome DoH plans to implement Delivering Care Phase 4 Health Visiting[53]. This will reduce health visitor workload from 250 cases to 180 cases per person. It is of fundamental importance that all developmental checks be carried out within agreed timeframes and immediate support provided where problems are encountered.

1.67   We firmly believe that the programme of assessing beyond 6–9 months should be reviewed to ensure that cognitive development is properly tracked. This might involve a change in timing of existing tests or the introduction of an additional test. Cognitive development must be fully tracked for the first 2.5 years of a child's life, especially during the later assessments. This will have implications for the initial training of health visitors and for the in-service professional development available to them.

1.68   These early development checks are of fundamental importance for both health and education. They are among the earliest contacts between the state and the child, and they are intended to ensure that child, and family, receive the support they need to give the child the best start in life. They should be a priority for the entire Executive.

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50   Department of Health (2017). Delivering Care Phase 4 Health Visiting. Available at: Delivering Care Phase 4 Health Visiting (hscni.net)

51   Delivering Care Phase 4 Health Visiting (hscni.net)

52   Healthy child, healthy future: health review statistics for Northern Ireland 2020/21 | Department of Health (health-ni.gov.uk)

53   Delivering Care Phase 4 Health Visiting (hscni.net)

> **Panel conclusion**
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> Health visitation is an absolute priority within early years services with its reach and impact extending well beyond health. This should be recognised and greater priority given to ensuring that the required developmental checks take place, needs are identified and parents/families are supported.
>
> Fundamentally, health visitors are a key pillar in early intervention and cognitive development.

Providing affordable childcare

1.69 Evidence demonstrates that young children flourish when they spend time with parents/carers. However, many parents need to return to the workforce and therefore require access to affordable childcare. Many parents need support to deal with rising childcare costs incurred to allow them to return to the labour market. The provision of childcare for the purpose of accessing employment is an economic priority rather than an educational concern. However, given our concern regarding joined-up policy making and integrated services, especially in the early years, and the high level of public interest in the topic, we feel it is important to offer comment.

1.70 There are important economic benefits in enabling parents to return to the workforce. These benefits can be accrued by both the state and families. The benefits for the family are likely to be greater in the case of those experiencing poverty. However, they may require greater assistance with childcare costs (including state intervention) to allow a return to the workforce. The state could assist such families by buying places from private providers or by creating extended day places in some state nurseries. In either case, the provision could be via a sliding scale of charges ranging from entirely free via subsidies to full cost (dependent on means testing).

1.71 Government already provides financial support towards the cost of registered childcare for eligible families. Eligibility and the level of financial support available will depend on a number of factors including, for example, household income, cost of childcare, working hours, number of children. There is a mixture of financial support available for parents, including UK-wide and Northern Ireland-specific schemes. The following financial support schemes are UK-wide:

- **Universal Credit (UC)** is replacing Tax Credits as the main means-tested benefit for adults of working age. This benefit provides claimants with up to 85% of their eligible childcare costs for children under 16 years old (17 years old for children with disabilities); however, as this is a means-tested benefit the amount that a household will actually receive will be dependent on household income and circumstances. Parents must be working but there is no minimum number of hours.

- **Tax-Free Childcare (TFC)** allows eligible working families to claim 20% of their childcare costs, up to a maximum of £2,000 per child per year (£4,000 for a child with a disability), from the Government. The scheme is available to parents of children under 12 years old (17 years old for children with disabilities), and both parents must be in employment or one parent in a single-parent household, each earning up to £100,000 per year. TFC cannot be claimed if parents are in receipt of Universal Credit. The support available increases with the number of children in the family.

- **Childcare Voucher Scheme** allows eligible parents to sacrifice up to £243 per month of their salary, before tax and National Insurance Contribution deductions, to buy vouchers to pay for their childcare costs for children under 16 years old (17 years old for children with disabilities). This can be a saving of up to £933 per year, per parent. The number of children in a family does not affect the maximum salary a parent can sacrifice. The Childcare Voucher scheme is only accessible to those employees whose employer offers the scheme. The Childcare Voucher scheme closed to new entrants in October 2018.

1.72 Despite this support, both parents and childcare providers that we have engaged with are concerned about rising costs which could negate any economic benefit of parents returning to the workforce. These rising costs may bring into question the viability of some childcare services. A 2021 report by Employers for Childcare[54], based on a survey of 2,200 parents and childcare providers in Northern Ireland, noted that the average cost of a full-time childcare place was £170 per week (£186 per week for a day nursery and £166 per week for a childminder). 71% of childcare providers surveyed reported that they are either just breaking even or making a loss. Almost a third of childcare providers describe their current financial position as "distressed" or "struggling", meaning that they are at immediate risk of closure or are focused on survival over the next 12 months. 41% of parents report regularly having to use means other than their income to pay for childcare including savings, overdrafts, credit cards and even payday loans – rising to 55% of lone parents.

1.73 DE commissioned independent research on childcare services which considered the cost of childcare[55]. The research found that:

> *across all types of childcare provision, the average full time weekly rate reported by providers was £146 per child. This was lower than the average weekly fees reported in the 2021 Employers for Childcare, NI Childcare Survey … Private group childcare settings reported the highest average cost (£171 a week on average), compared to self-employed providers (£153) and voluntary/community providers (£106).[56]*

1.74 In terms of profitability of the childcare sector, the DE research (from a survey of local providers) found that:

> *around half of the respondents were roughly breaking even, 26% were making a loss and 18% were making a profit. However, it should be noted that these figures include voluntary/community providers that often have social objectives as their primary goal, rather than profit. When excluding these providers from the analysis, the proportion of respondents to the provider survey who were making a profit in 2022 increases to 23%, with 56% roughly breaking even and 21% making a loss. This means that 77% of private providers (childminders, Approved Home Childcarers and group settings) were not making profits, which was still an increase from the 2021 estimate that 71% of providers were not making profits (breaking even or making a loss).[57]*

1.75 There are currently plans in England that will provide working parents of children aged 9

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54 Northern Ireland Childcare Survey 2021 - Employers For Childcare
55 Review of Childcare Services in Northern Ireland – Final Report – February 2023
56 Review of Childcare Services in Northern Ireland – Final Report – February 2023 (p.100).
57 Review of Childcare Services in Northern Ireland – Final Report – February 2023 (p.97).

months to 2 years with 15 hours of free childcare a week. This will be further expanded by 2025 to provide working parents of children aged 9 months to 3 years with 30 hours of free childcare a week. The eligibility will match the existing 30 hours offer for 3–4-year-olds. If delivered this would represent a significant investment estimated at more than £4bn by 2027/28.

1.76 Should this go ahead as currently designed, Northern Ireland would be due to receive additional funding by way of Barnett Consequentials. While this funding will arrive to Northern Ireland un-hypothecated and it will be for the Executive to allocate it as it agrees, the funding presents a significant opportunity for Northern Ireland to invest in affordable childcare and expanded early years provision.

1.77 The Executive should take this opportunity and agree to allocate this funding to the Department of Education to invest in affordable childcare and expanded early years services that will benefit Northern Ireland as a whole. Part of this resource should be used to provide subsidised access to childcare services for disadvantaged families where this will enable a parent to take up paid employment.

1.78 There is a need to consider a significant initiative to support parents back into work and better understand the potential costs and benefits of such a scheme. The Department of Education should collaborate with other departments, specifically the DfE, to prepare proposals to effectively support parents through affordable and high-quality childcare provision. Within this plan priority should be given to disadvantaged families seeking work. Of course, such plans should be affordable and would need to demonstrate clear benefits for both the Northern Ireland economy and the learner. Funding options need to be considered; this could involve a means-tested sliding scale of charges.

1.79 However, we need to be mindful that there is research evidence that extended hours away from the family in the very early years can have adverse effects on the very young. Evaluation of a generous programme of state-funded childcare in Quebec concluded that extended hours of childcare have resulted in "negative non-cognitive effects" including "worse health, lower life satisfaction, and higher crime rates later in life"[58]. A comprehensive US study concluded that "the risks are (a) that more hours in (any kind of) child care across the first [4.5] years of life are related to more problem behaviour from 54 months through first grade and less social competence and poorer academic work habits in third grade; and, independently, (b) that more time in child-care centers is related to higher levels of problem behaviour from 54 months through third grade. The benefit is that higher quality childcare and more experience in centers predicts better cognitive, linguistic and academic achievement functioning across the same lengthy developmental period."[59]

1.80 Furthermore, making use of extended hours of childcare brings with it a serious logistical challenge for some families. Putting together extended day coverage based on combining, say, a part-time funded pre-school education provision place, some private provision and childminding, potentially in different locations, is logistically difficult for families and liable to break down. We consider that there is a case for limited extended hours provision with the state supporting and subsidising families in cases of proven need.

58 The Long-Run Impacts of a Universal Child Care Program (aeaweb.org)

59 Baker, M., Gruber, J and Milligan, K. (2019). 'The Long-Run Impacts of a Universal Child Care Program', *American Economic Journal: Economic Policy,* 11(3), 1-26. Available at: The Long-Run Impacts of a Universal Child Care Program (aeaweb.org)

Panel conclusion

Affordable childcare is a pressing concern for many of the stakeholder groups we have engaged with including parents and parenting organisations, early years organisations and political parties. The issue is not unique to Northern Ireland.

There are competing concerns – the need to provide affordable childcare options for parents wishing to return to employment and the need to ensure options provide sufficient quality to enhance child development. Furthermore, we acknowledge evidence that emphasises that the best place for a child in these early years is with their parents. Therefore, any subsidies must be carefully targeted and have appropriate limits.

This is also an issue that extends beyond education. Any argument for childcare subsidies must come with a careful analysis of the economic benefits and the positive impact on the economy when parents return to the workplace.

It is clear, however, there are policy developments beyond Northern Ireland that should be considered and that funding available as a result of these should be targeted for early years services locally. Part of this resource should be used to provide subsidised access to childcare services for disadvantaged families where this will enable a parent to take up paid employment.

Recommendations and actions

1.81 Throughout the chapter, we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

The early years offer a unique learning opportunity for all children. Increased investment in early years will improve quality, enabling early diagnosis and intervention in cases of difficulty. Early childhood health and education needs should be met through an increasingly integrated service.

There should be phased expansion of early years education. First steps would be to ensure that all 2-year-olds can receive up to 20 hours per week and all 3-year-olds up to 22.5 hours per week. In any expansion, priority should be given to 2-year-olds and those in disadvantage.

There should be increased access to training and professional development for early years workers. A fully developed programme of in-service training should be implemented, allowing staff to refresh and improve their skills and obtain additional qualifications.

All early years staff, whether professional or para-professional, should have appropriate skills and qualifications at the point of entry. Furthermore, staff should have access to continuing high-quality professional development thereafter. In the long term, all early years education should be graduate-led.

Current arrangements relating to funding, staff ratios and qualifications in the statutory sector should be applied to the non-statutory sector as soon as possible.

In the medium term, early childhood services should become the responsibility of an integrated service-delivery body across health and education (and others), known as the Early Intervention and Learner Support Agency. Its responsibilities would include:

- Parental support and engagement.
- Sure Start management and Pre-School Education Programme.
- Learner support services (i.e., Special Educational Need support).
- Child protection and safeguarding.
- Youth services.
- Emotional health and wellbeing.

In the short term, partnership working across health and education should be prioritised. A Partnership Board led by Ministers should be established with responsibility for managing a ring-fenced early years budget.

Health visiting should be regarded as a chief priority to support cognitive development. The programme of assessing beyond 6–9 months should be reviewed to ensure that cognitive development is properly tracked.

To support disadvantaged families seeking work and boost the economy, the Department should work with other departments to prepare affordable plans for childcare provision, taking account of both parental employment and child development. Funding options could involve a means-tested sliding scale of charges.

CHAPTER 2 – DISADVANTAGE

Introduction and context

2.1   For at least the last 80 years the state education system has set out to offer equal opportunities to all children and young people. However, outcomes have always varied greatly. In recent decades there has been growing concern that some learners are less well placed to take advantage of opportunities and that the consequences have far-reaching implications both for individuals and for society.

2.2   This chapter is concerned with the steps that might be taken to alleviate the educational disadvantage experienced by some learners. This includes the need to learn from the excellent practice that currently exists in Northern Ireland, keeping all learners engaged in education for as long as possible and ensuring that they are thriving and progressing.

2.3   The problem of educational disadvantage was addressed by the DE's Expert Panel led by Dr Noel Purdy, whose remit was to examine the links between educational underachievement and social disadvantage including the long-standing issues facing working-class Protestant boys. Their report, *A Fair Start*[60] (2021), contains numerous worthwhile recommendations, which we endorse. As the remit of this Review is wider, we have sought to build on their work and suggest other ways of tackling inequality and low achievement.

2.4   Firstly, it is clear that Northern Ireland's education system compares favourably with the rest of the UK and with international comparators. Our learners and educators deserve credit for this success. The National Foundation for Education Research (NFER) carried out a Progress in International Reading Literacy Study (PIRLS) for 10-year-olds in 2021. Northern Ireland pupils significantly outperformed pupils in 52 of the 56 participating countries, coming just behind Singapore and the Republic of Ireland[61].

2.5   Northern Ireland took part in the Trends in International Mathematics and Science Study (TIMSS) in 2019. The performance of 9- and 10-year-olds in mathematics was very good, ranking seventh out of 58 participating countries. The average science score, although lower than the mathematics score, was above the TIMSS science average[62].

2.6   Northern Ireland also took part in the Programme for International Student Assessment (PISA) study in 2018 focusing on the reading, scientific and mathematical skills of 15-year-old pupils. The reading score was significantly above the OECD average, for the first time. Mathematics and science scores were similar to the OECD average[63].

2.7   Further evidence of the strong performance of Northern Ireland is found when we compare outcomes with England and Wales for the number of pupils **not** attaining five+ GCSE grades A*–C including English and mathematics. However, due caution should be taken when making such comparisons[64].

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60   A Fair Start – Final Report & Action Plan | Department of Education (education-ni.gov.uk)

61   Key findings from PIRLS 2021 in Northern Ireland - NFER

62   TIMSS 2019 - Results for Northern Ireland | Department of Education (education-ni.gov.uk)

63   Achievement of 15-year-old pupils in Northern Ireland: PISA 2018 National report

64   The Panel is aware that comparison with other jurisdictions is often inappropriate due to differences in qualification systems, headline measures and methodological variations in reporting outcomes. Due caution should be exercised.

Figure 2.a: Pupils not attaining five+ GCSEs A*–C incl. English & mathematics: England, Wales and Northern Ireland, 2008/09–2018/19[65,66,67]
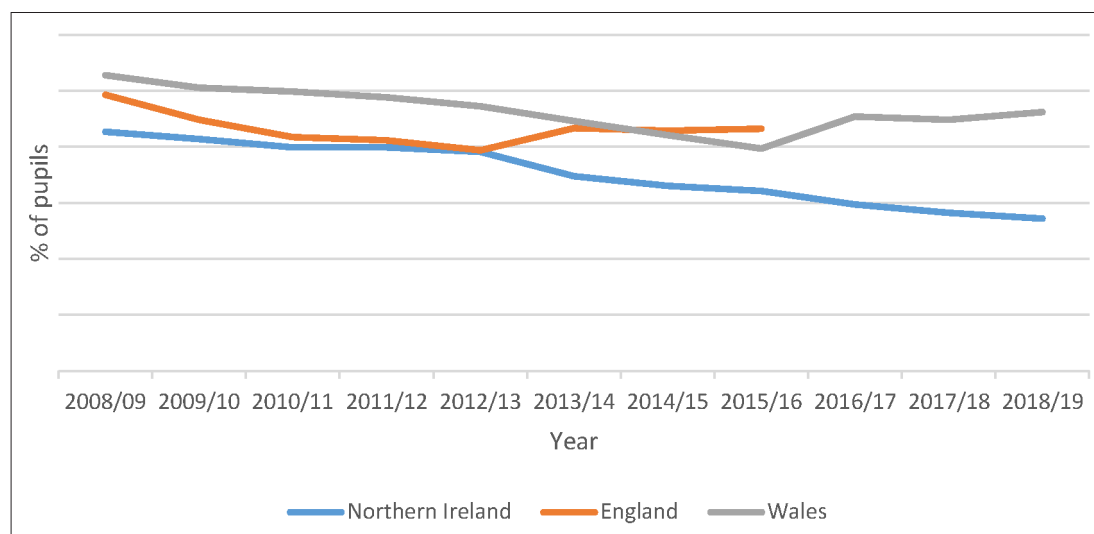
2.8   The percentage of pupils in Northern Ireland **not** attaining the GCSE benchmark of five+ GCSEs grades A*–C including English and mathematics fell 15.5 percentage points over a 10-year period, 6.6 points ahead of Wales over a similar period and 6.1 points ahead of England over a 7-year period.

2.9   The 2016–2018 Chief Inspector's report[68] also acknowledges the high performance of the sector: "The system continues to work very well for tens of thousands of learners", but it goes on to say that "Too many under-achieve, even in schools which provide well for most learners, there is undue variation in the quality of provision and outcomes for particular groups of learners, such as those with special educational needs (SEN), for free school meal entitlement (FSME) pupils, newcomers, looked after children and boys."

2.10   Significant attainment gaps persist for groups of learners; many of these gaps are linked to disadvantage and this presents a challenge for policy makers and educators alike. Indeed, such concerns are a feature of most education systems. Many countries, including Northern Ireland, have policies and programmes designed to combat educational disadvantage.

2.11   In addition to welfare policies such as free school meal entitlement and the Education Maintenance Allowance (for post-16 learners), Northern Ireland offers educational programmes including Getting Ready to Learn (early years), the Extended Schools and Full Service programmes, Targeting Social Need Funding, the Pathway Fund and various initiatives arising out of the implementation of the recommendations in *A Fair Start*[69]. Many of these are not core funded and are susceptible to cuts when budgets are tight. By the end of June 2023, funding was significantly reduced for a number of programmes targeting disadvantage and special educational needs. By late July, media reports, including BBCNI, reported that there was only £2.5m of funding for the implementation of the Fair Start strategy in 2023/24, rather than the recommended £21m. These cuts are devastating for

65   School performance | Department of Education (education-ni.gov.uk)
66   Statistics: GCSEs (key stage 4) - GOV.UK (www.gov.uk)
67   Examination results | GOV.WALES
68   The Chief Inspector's Report - 2016-2018 | Education Training Inspectorate (etini.gov.uk)
69   *A Fair Start – Final Report & Action Plan* | Department of Education (education-ni.gov.uk)

our most vulnerable learners. In particular, the recommendations outlined in "A Fair Start" should be funded and implemented.

Understanding disadvantage

Defining underachievement

2.12   The term "underachievement" can be interpreted in different ways. Dr Purdy's[70] definition describes how the term is used in this Report.

> *"Underachievement" can be defined as relative to what a pupil could be predicted to achieve based on prior attainment, or could be thought of in terms of a comparison with another group.*[71]

2.13   "Achievement" in education is normally seen in terms of examination success in the later stages of schooling. However, it is increasingly recognised that there is a need to move to a broader range of indicators to measure achievement including the concept of "distance travelled". Indicators of success should also go beyond cognitive attainment and consider the whole development of the learner. Fundamentally, we favour broader measures of success that extend beyond attainment at 16 or 18, but rather consider the whole education journey. We describe this further in Chapter 5.

Understanding the scale of the problem

2.14   There is significant synergy between this chapter and Chapter 1 on early years insofar as investment in disadvantage that reduces its impact presents significant opportunities for longer-term savings. The risk of young people engaging in harmful behaviours, such as substance misuse or offending, or being trapped in a cycle of poverty and disadvantage, can be mitigated through a supportive and purposeful education. Early investment in education is a means of avoiding more costly interventions at a later stage in the young person's life.

2.15   We have already referenced the 2018 report by the Early Intervention Foundation[72]. This report highlights the significant impact to the public purse of failing to intervene early and found that Northern Ireland spends a total of £536m per year on late interventions. This equates to £288 per head, or £1,166 per child. The cost to the public sector of young people who are classed as Not in Employment, Education or Training (NEET) was estimated to be £134m. The report notes that the cost of providing early interventions falls across multiple agencies, meaning that an agency investing to improve outcomes will not be the only agency to directly benefit from a reduction in service demand. The report also highlights the importance of collaboration between professionals, services and organisations and the need to focus on the collective benefits that can be achieved from any investment.

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70   From Loyalist-and-Republican-Perspectives-in-Educational-Underachievement-in-Northern-Ireland-CREU-Report-May-2021.pdf

71   There are however conceptual difficulties with this definition in that its use of the predicted level of attainment of groups leads to a circular argument.

72   The cost of late intervention in Northern Ireland | Early Intervention Foundation (eif.org.uk)

2.16   It is estimated that almost three-quarters of the prison population in Northern Ireland left school between the ages of 14 and 16 and at least half have no formal qualifications[73]. Figures for England show that, on entering custody, 47% of prisoners have no formal qualifications[74]. The Ministry of Justice (MoJ) also reports that 42% have previously been expelled or permanently excluded from school[75]. Prisoners have much lower levels of literacy than the general population. The most recent data published by the MoJ shows that 57% of adult prisoners taking initial assessments had literacy levels below that expected of an 11-year-old[76]. In 2021/22, the cost per prisoner place in the Northern Ireland Prison Service, excluding exceptional payments and the cost of the Prisoner Escorting and Court Custody Services, was £44,868 per annum[77]. The annual cost of custody per young person in the Woodlands Juvenile Justice Centre was £189,635, based on the maximum number of places available, or £252,846 based on the number of places the Centre is resourced to accommodate using current staffing levels[78].

2.17   These costs stand in stark contrast with those related to educating a child in an ordinary school setting. Hence, reinforcing the argument that early investment can prevent costly interventions later.

2.18   This chapter is concerned with a range of attainment gaps and the ways in which these gaps can be reduced. The key attainment gaps that we focus on are:

- the **socio-economic** attainment gap, including the attainment gap between **grammar and non-selective** schools;
- the **gender** attainment gap; and
- the attainment gap for **vulnerable learners**.

2.19   It is worth bearing in mind that many learners will be impacted by two or more of these factors.

Panel conclusion
The immense cost to the public purse of custodial sentences, and the dearth of educational qualifications among prisoners, highlight the critical importance of investing in education and tackling disadvantage before the impact becomes so great and so costly. Increased investment in education would lead to savings in the longer term.

Socio-economic disadvantage

2.20   The evidence shows a close link between disadvantage and low educational achievement. It is clear that a gap between poor and more affluent children opens up at an early stage and tends to expand over time. Indeed, evidence from other jurisdictions suggests that it is

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73   Prisons 25 by 25 - agendaNi
74   committees.parliament.uk/writtenevidence/9597/html
75   Prisoners' childhood and family backgrounds - GOV.UK (www.gov.uk)
76   Prison Education Statistics 2019 - 2020 - GOV.UK (www.gov.uk)
77   Annual Report and Accounts 2021/22 (justice-ni.gov.uk)
78   Microsoft Word - Youth Justice Agency - Annual Report and Accounts – 2021/22 Final for Laying (justice-ni.gov.uk)

present even before the child first goes to school[79,80,81,82]. Despite the best efforts of teachers, it is incredibly challenging to close the attainment gap but Northern Ireland already has some schools with very high levels of disadvantage achieving excellent outcomes so there is much to be learned from these and others further afield.

2.21   We must also acknowledge that Northern Ireland learners perform favourably in comparison to other nations. As previously mentioned, achievement of five+ GCSEs at A*–C including English and mathematics was roughly on a par with England up to 2012/13, and after that point Northern Ireland pupils performed better (up to 2015/16, which was the last year this metric was reported on in England). Northern Ireland pupils outperformed Welsh pupils on this metric throughout the period 2008/09 to 2018/19. However, as noted previously, due caution should be taken when making such comparisons[83].

2.22   There is no fully satisfactory measure of socio-economic disadvantage that can be used to make valid comparisons of the relative educational success of different social groups in Northern Ireland. We have chosen to use entitlement to free school meals (FSME) as our main proxy. It has the advantage of relating to the circumstances of the individual rather than trying to draw inferences from statistics about the socio-economic circumstances of an area (as in the case of the index of multiple deprivation).

2.23   It is also difficult to find a simple agreed measure of educational success. Performance information relating to primary schools is now sparse, a point we deal with in Chapter 4. The most widely used measure of overall attainment is the level of attainment at five+ GCSEs (grades A* to C) including English and mathematics. However, given the limited use of GCSE as an entry qualification to later stages of education or employment, this is not very satisfactory. The following graph compares the percentage of school leavers achieving five+ GCSEs at A*–C (including English and mathematics) with and without an entitlement to free school meals over the period since 2005/06. It will be noticed that attainment rates have improved with the poverty-related attainment gap narrowing slightly.

79   Robertson, L. and McHardy, F. (2021). *The Poverty-related Attainment Gap: A review of the evidence.* Glasgow: The Poverty Alliance. Available at: The-Poverty-related-Attainment-Gap-A-Review-of-the-Evidence-2.pdf (povertyalliance.org)

80   Bonetti, S. and Brown, K. (2018). *Structural elements of quality early years provision: A review of the evidence.* London: Education Policy Institute. Available at: Early-years-structural-quality-review_EPI.pdf (ioe.ac.uk)

81   Axford, N. (2019). *Improving the Early Learning of Children Growing up in Poverty: A Rapid Review of the Evidence.* University of Plymouth, Centre for Evidence and Implementation, Dartington Service Design Lab and Save the Children. Available at Improving the Early Learning Outcomes of Children Growing Up in Poverty - A Rapid Review of the Evidence.pdf (plymouth.ac.uk)

82   Scobie, G. and Scott, E. (2017). *Rapid evidence review: Childcare quality and children's outcomes.* Edinburgh: NHS Health Scotland. Available at: Rapid evidence review: Childcare quality and children's outcomes (healthscotland. scot)

83   The Panel is aware that comparison with other jurisdictions is often inappropriate due to differences in qualification systems, headline measures and methodological variations in reporting outcomes. Due caution should be exercised.

Figure 2.b: Percentage of school leavers (with and without FSME) achieving five+ GCSEs A*–C incl. English & mathematics, Northern Ireland, 2005/06–2021/22[84,85]
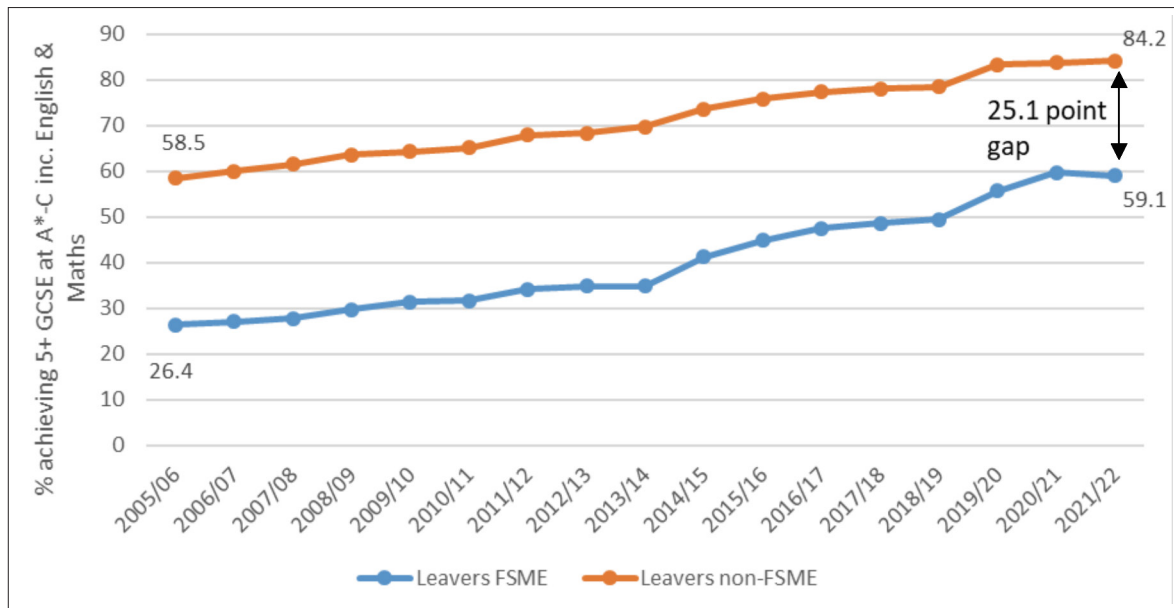
2.24   The attainment gap at A Level, widely regarded as a more valid measure of educational success, has reduced from 15.9 percentage points in 2012/13. In 2018/19, 61.1% of Year 14 pupils with FSME achieved three or more A Levels at grades A*–C (or equivalents). However, 74.1% of pupils without FSME achieved this standard, a gap of 13.0 percentage points.

Figure 2.c: Percentage of Year 14 pupils (with and without FSME) achieving three+ A Levels A*–C, Northern Ireland, 2012/13–2018/19[86,87]

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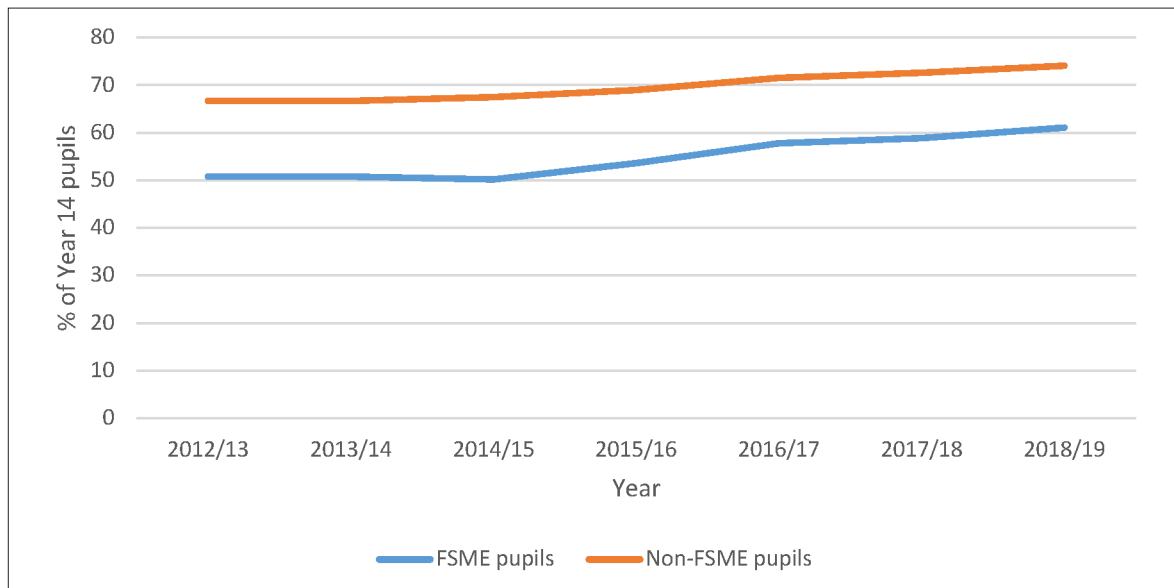
84   School leavers | Department of Education (education-ni.gov.uk)

85   This data is based on pupils who left school during, or at the end of, an academic year and includes pupils who left the school system following Key Stage 4, i.e., following GCSEs or equivalent, as well as pupils who stayed on to undertake a period of Level 3 study, i.e., AS or A Levels or equivalents.

86   School performance | Department of Education (education-ni.gov.uk)

87   The collation of this data has been suspended since 2019/20 due to the Covid-19 pandemic.

2.25   The disadvantage attainment gap is also seen in England and Wales. The figure below shows the disadvantage attainment gap trends for all three countries achieving five+ GCSE grades A*–C including English and mathematics. The graph demonstrates that only in Northern Ireland has there been any meaningful reduction in the disadvantage attainment gap in recent years, down from 32.8% in 2012/13 to 26.1% in 2018/19. Despite this reduction, the gap remains stubbornly high and was similar to England in 2015/16 (when this measure ceased to be reported in England). As noted previously, due caution should be taken when making such comparisons[88].

Figure 2.d: Disadvantage attainment gap, five+ GCSE grades A*–C incl. English & mathematics, Northern Ireland, England and Wales, 2012/13–2018/19[89,90,91,92]
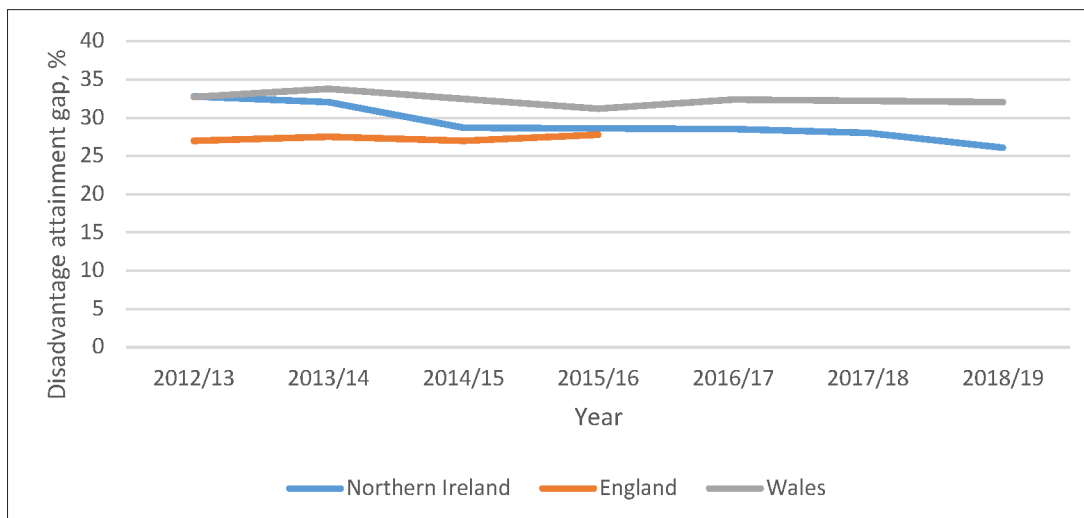
2.26   In common with all other countries, pupils from the most advantaged backgrounds in Northern Ireland had higher reading achievement than those from less socio-economically advantaged homes in a 2018 Programme for International Student Assessment (PISA) study[93]. This gap in achievement was significantly smaller in Northern Ireland than the OECD average disadvantage gap, which was partly because of better performance of the most disadvantaged pupils in Northern Ireland but also partly accounted for by a narrower gap in the socio-economic status of the most and least disadvantaged pupils.

2.27   More advantaged pupils achieved higher mean reading scores than their less advantaged peers. There was a 62-score point difference in average reading performance between the most advantaged (4th quartile, score 539) and least advantaged (1st quartile, score 476) pupils in Northern Ireland. This disadvantage gap is statistically significantly narrower than the average OECD disadvantage gap, which is 89 score points.

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88   The Panel is aware that comparison with other jurisdictions is often inappropriate due to differences in qualification systems, headline measures and methodological variations in reporting outcomes. Due caution should be exercised.

89   School performance | Department of Education (education-ni.gov.uk)

90   SFR_40_2014_Measuring_disadvantaged_pupils'_attainment_gaps_over_time__updated_.pdf (publishing. service.gov.uk)

91   Statistics: GCSEs (key stage 4) - GOV.UK (www.gov.uk)

92   Examination results | GOV.WALES

93   Achievement of 15-year-old pupils in Northern Ireland: PISA 2018 National report

2.28   Socio-economic disadvantage frequently gives rise to digital disadvantage, which is of increasing importance in the modern world.

2.29   As the impact of new technology on education at all levels inevitably increases it becomes ever more important that all pupils should have access to good equipment and broadband, not only in school but also in accessible public centres such as libraries and, crucially, in the home. As the experience of distance learning during the pandemic conclusively demonstrated, this is currently not the case. Children from more affluent families enjoy a substantial advantage.

2.30   Barriers to informed use of technology include financial poverty, lack of skills and access problems. Ofcom report that in the UK children in the "most financially vulnerable" households were more likely than those in the "least financially vulnerable" households to have mobile-only internet access (5% vs 2%), or smartphone-only internet access (3% vs 1%)[94]. Furthermore, the problem of affordability is increasing as a result of the recent rapid increases in the cost of living. This will, of course, have a greater effect on more disadvantaged households. We suggest that a practical means of reducing the impact of digital poverty would be to ensure that the facilities in schools are available for a period of time outside normal hours. Improving the facilities in public libraries would also offer at least a partial solution.

2.31   The Northern Ireland Assembly Research Department[95] has noted that 32% of the working-age population in Northern Ireland has limited or no basic digital skills, as opposed to 26% in the UK as a whole. This reinforces the case for ensuring that digital skills feature regularly in the school curriculum. The relevant parts of the curriculum should be regularly reviewed to ensure that they are up to date and take account of new developments such as the impact of artificial intelligence (AI). The need to keep the curriculum under review is addressed in Chapter 4.

2.32   Of course, digital disadvantage affects not only school-age learners but also those in further and higher education and adult learners. It is important that adults with low skills can access appropriate opportunities. Some will be able to do so through their employers, but affordable short courses should be available through the college sector.

Panel conclusion

Throughout the world, learners from more affluent homes generally enjoy greater success at school than their more disadvantaged peers[96]. There are, of course, many individuals from disadvantaged backgrounds who are highly successful. Furthermore, there are numerous instances of schools with high levels of disadvantage among their pupil population which achieve excellent outcomes. Nevertheless, socio-economic disadvantage has a significant deleterious impact on the education and subsequent life chances of many young people. Reducing its effect must be a priority.

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94   Ofcom, Children and parents: media use and attitudes report 2020/21 (ofcom.org.uk), p.11.

95   An overview of the Digital Divide in Northern Ireland - Research Matters (assemblyresearchmatters.org)

96   OECD (2018). *Equity in Education: Breaking Down Barriers to Social Mobility.* Paris: PISA, OECD Publishing. Available at: https://doi.org/10.1787/9789264073234-en

The socio-economic disadvantage attainment gap by type of school

2.33   Another factor to consider is the socio-economic gap across school types, specifically in the post-primary sector. As discussed in Chapter 5, transfer between primary and post-primary includes the use of academic selection. Currently there are 66 grammar schools and 126 non-selective (or partly selective) schools.

2.34   In 2022/23, 96,300 pupils were entitled to free school meals (FSME) – 27.7% of the school-age population. 12.7% of pupils in grammar schools were entitled to free school meals compared to 34.9% in non-grammar schools[97].

2.35   The impact of socio-economic circumstances is affected by the type of school a young person attends at post-primary level with disadvantaged pupils concentrated in non-selective schools. While the number of young people entitled to free school meals has decreased since a high point in 2016/17 (30%), there has been an overall increase over the past decade both in primary and post-primary schools. The difference between selective and non-selective schools remains stark.

2.36   10 years ago, 1 in 13 pupils in grammar schools was entitled to free school meals compared to 1 in 4 in non-grammar schools. Now, the corresponding figures are about 1 in 8 in grammar schools compared to 1 in 3 in non-grammar schools.

Table 2.e: Number and percentage of pupils with FSME for grammar and non-grammar schools, Northern Ireland, 2013/14–2022/23[98]

	Total enrolment		FSME		% FSME	
	Non-grammar	Grammar	Non-grammar	Grammar	Non-grammar	Grammar
2013/14	81,339	62,634	22,046	4,606	27.1%	7.4%
2014/15	79,840	62,713	29,626	7,610	37.1%	12.1%
2015/16	77,753	63,359	30,990	8,811	39.9%	13.9%
2016/17	77,432	62,981	31,461	8,978	40.6%	14.3%
2017/18	77,727	62,818	30,866	8,951	39.7%	14.2%
2018/19	79,377	62,862	31,080	8,848	39.2%	14.1%
2019/20	81,662	63,423	30,833	8,665	37.8%	13.7%
2020/21	84,520	64,398	31,372	8,793	37.1%	13.7%
2021/22	86,588	65,313	31,292	8,762	36.1%	13.4%
2022/23	88,590	65,722	30,942	8,354	34.9%	12.7%

2.37   The difference in the size of the attainment gap is affected by the unequal distribution of FSME pupils between the sectors. Grammar schools' attainment at five+ GCSE grades A*–C including English and mathematics is consistently high and the attainment gap is much narrower than in non-grammar schools. In 2018/19, the attainment gap for grammar schools (between FSME and non-FSME pupils) was 8.4 percentage points, down slightly from 9.7 percentage points in 2012/13.

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97   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020-21 (education-ni. gov.uk)

98   School enrolments - overview | Department of Education (education-ni.gov.uk)

Figure 2.f: Attainment of five+ GCSEs A*–C incl. English & mathematics, grammar schools, Northern Ireland, 2012/13–2018/19[99]
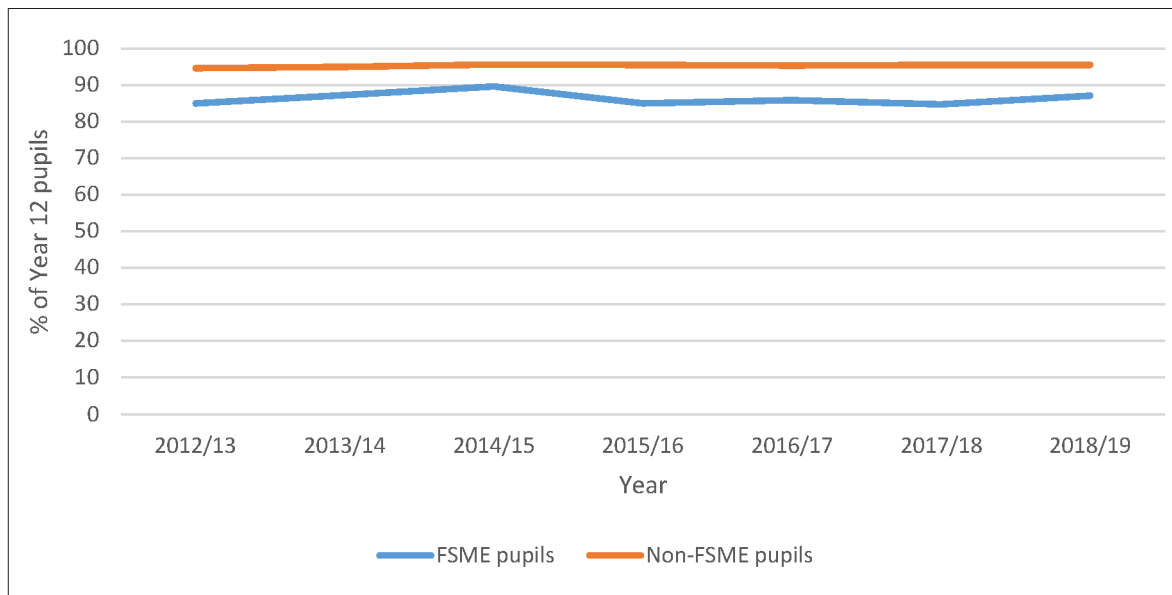
Figure 2.g: Attainment of five+ GCSEs A*–C incl. English & mathematics, non-grammar schools, Northern Ireland, 2012/13–2018/19[100]
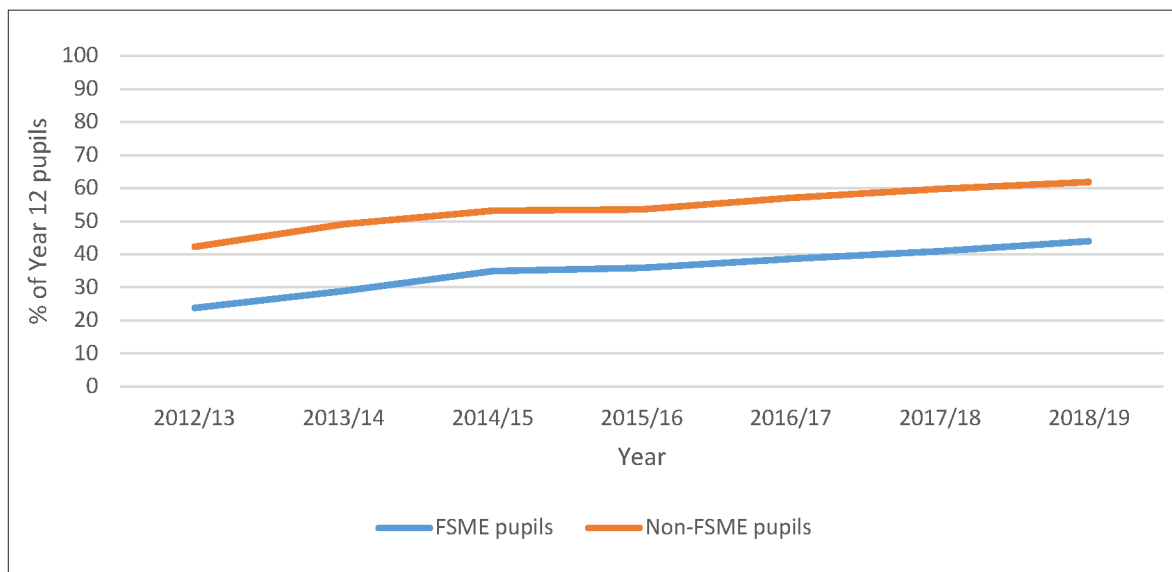
2.38   Another way to consider the data is to control for disadvantage in order to isolate the impact of type of school attended on attainment. The graphs below show that the attainment gap between learners attending grammar schools and those attending non-grammar schools is greater for disadvantaged pupils (43.1 percentage points in 2018/19, down from 61.2 percentage points in 2012/13) than it is for non-disadvantaged pupils (33.6 percentage points, down from 52.4 percentage points in 2012/13).

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99   School performance | Department of Education (education-ni.gov.uk)
100   School performance | Department of Education (education-ni.gov.uk)

Figure 2.h: Attainment of five+ GCSEs A*–C incl. English & mathematics by FSME pupils, Northern Ireland, 2012/13–2018/19[101]
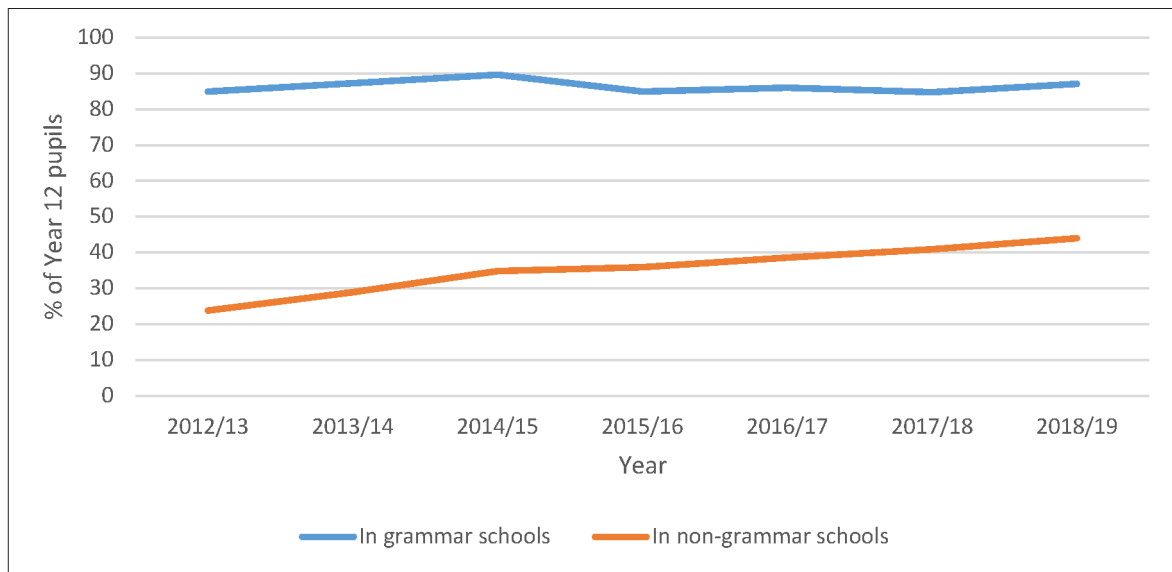
Figure 2.i: Attainment of five+ GCSEs A*–C incl. English & mathematics by non-FSME pupils, Northern Ireland, 2012/13–2018/19[102]
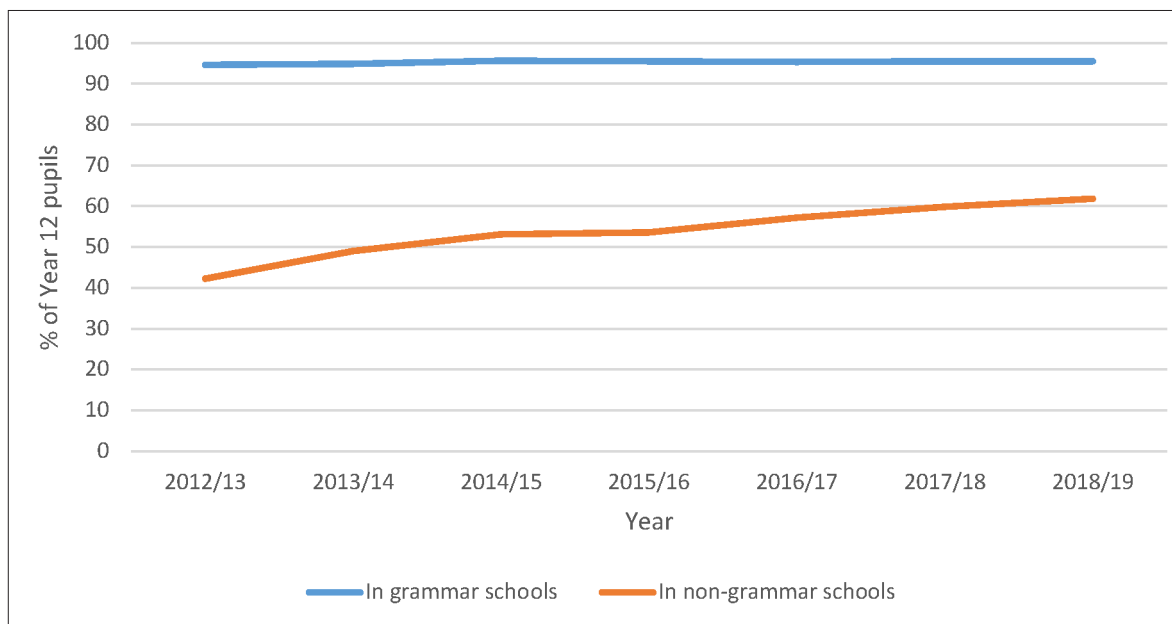
2.39 Around 6% of grammar school learners do **not** achieve five+ GCSEs grades A*–C including English and mathematics. The corresponding figure for non-grammar school learners has fallen from 67.1% in 2008/09 to 45.2% in 2018/19. The attainment gap for school type was 60.9 percentage points in 2008/09; by 2018/19 it had reduced to 39.5 percentage points, due to the improved performance of the non-grammar school sector.

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101 School performance | Department of Education (education-ni.gov.uk)
102 School performance | Department of Education (education-ni.gov.uk)

Figure 2.j: Year 12 pupils NOT achieving five+ GCSEs A*–C incl. English & mathematics, Northern Ireland, 2008/09–2018/19[103]
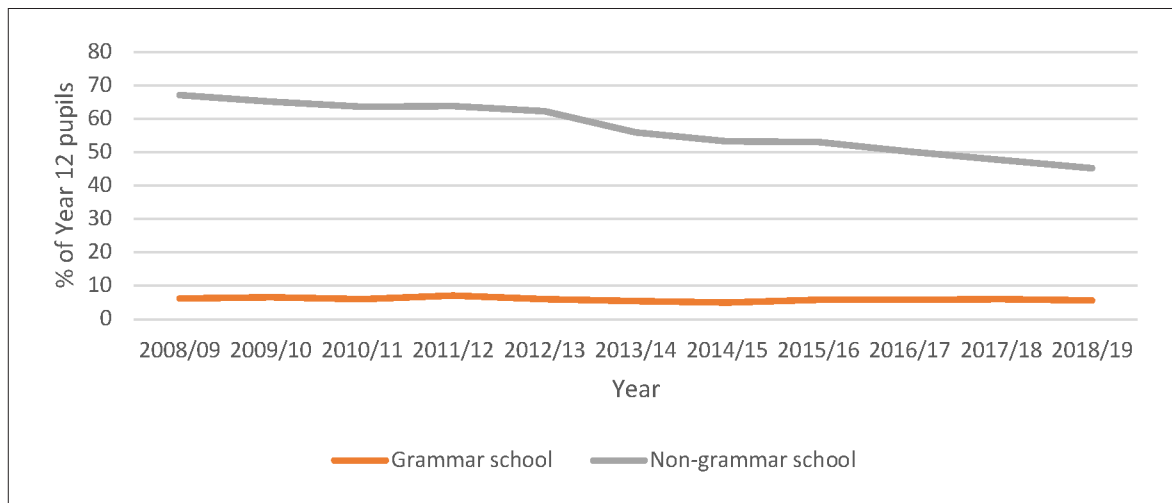
2.40   A similar pattern is found at A Level where the disadvantage gap has been narrowing slowly over time. In 2008/09, 24.9% of grammar school learners did not achieve the benchmark of three+ A Level grades A*–C compared to 58.6% in the non-grammar sector, an attainment gap of 33.7 percentage points. In 2018/19 the figures were 20.3% and 41.2% respectively, a gap of 20.9 percentage points. The reduction is noteworthy, but the gap is still significant.

Figure 2.k: Year 14 pupils NOT achieving three+ A Levels A*–C, Northern Ireland, 2004/05–2018/19[104]
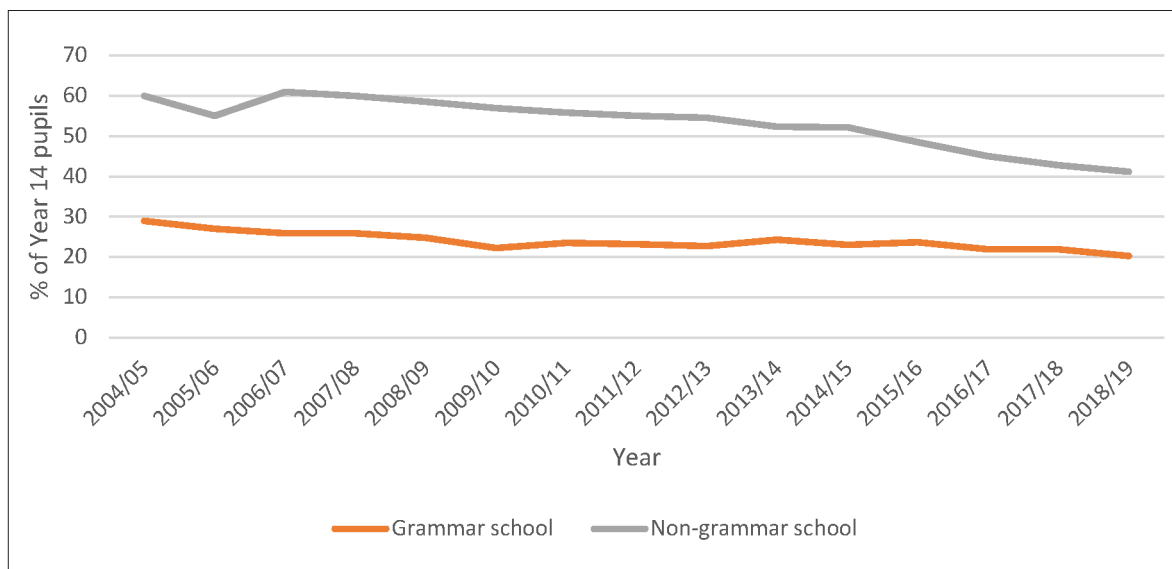
2.41   Given the lower proportion of FSME pupils, it is hardly surprising that grammar schools achieve higher outcomes at both GCSE and A Level and that the disadvantage attainment gap is smaller. The following table summarises the attainment gap trends for FSME and school type.

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103   School performance | Department of Education (education-ni.gov.uk)
104   School performance | Department of Education (education-ni.gov.uk)

Table 2.I: Summary of GCSE attainment gaps for FSME and school type, Northern Ireland, 2012/13–2018/19[105]

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
% of Year 12 pupils achieving five+ GCSEs A*–C incl. English & mathematics							
FSME	33.9	38.7	45.6	47.0	49.6	51.6	54.1
Non-FSME	66.7	70.8	74.3	75.6	78.1	79.6	80.2
Attainment gap	32.8	32.1	28.7	28.6	28.5	28.0	26.1
% of Year 12 FSME pupils achieving five+ GCSEs A*–C incl. English & mathematics							
Grammar	85.0	87.3	89.7	85.0	86.0	84.8	87.1
Non-grammar	23.8	28.9	34.9	35.9	38.6	41.0	44.0
% of Year 12 non-FSME pupils achieving five+ GCSEs A*–C incl. English & mathematics							
Grammar	94.7	95.0	95.7	95.6	95.4	95.6	95.5
Non-grammar	42.3	49.1	53.2	53.6	57.2	59.9	61.9

Panel conclusion

There is a stark difference between the socio-economic make up of grammar schools and that of non-grammar schools. In grammar schools there are fewer disadvantaged pupils who need additional resources and support. This contributes to consistently high levels of attainment in most schools.

Conversely, a much higher proportion of disadvantaged learners end up in non-selective schools. Meeting the needs of high concentrations of disadvantaged learners so they all can progress and succeed is extremely challenging.

This presents a challenge when seeking to tackle disadvantage. Our proposal that grammar schools should admit at least the same percentage of pupils with FSME as among the total number of applicants will reduce the disparity. The effectiveness of the additional financial support provided to help schools support disadvantaged pupils should be carefully monitored and, if necessary, reviewed.

The gender gap

2.42   It is very evident and widely recognised that socio-economic disadvantage has a significant adverse effect on educational attainment. However, other factors are also important.

2.43   Gender is another factor, which should not be overlooked. Of course, these two factors are compounded. Those particularly disadvantaged are working-class boys.

2.44   The Expert Panel on Educational Underachievement was asked to look specifically at educational failure among Protestant boys. While this is unquestionably an extremely pressing issue, there are similar concerns about the performance of Catholic boys. Catholic boys do slightly better at school than Protestant boys, but both are significantly outperformed

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105   School performance | Department of Education (education-ni.gov.uk)

by girls, regardless of religious/community background. The reality is that there is a problem of male educational failure which is not receiving the attention that it should.

Figure 2.m: School leavers' performance at GCSE, five+ A*–C incl. English & mathematics, Northern Ireland, 2011/12–2020/21[106]
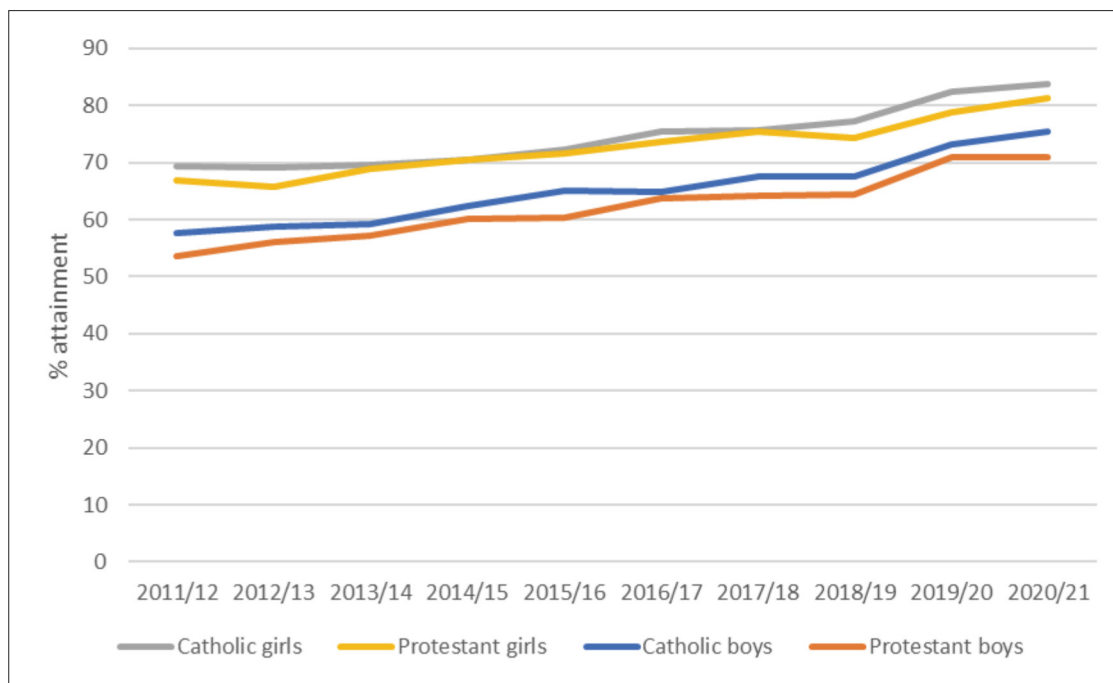
2.45 Discounting religion and focusing solely on gender we can see the significance of the gender gap, which first emerges during Key Stage 1 and then continues, at varying degrees, at different stages of education.

Table 2.n: Key Stage 1 attainment, Northern Ireland, 2018/19[107]

		Percentage achieving Level 2 or above
Communication	Girls	89.1
	Boys	84.8
	All	86.9
Using Mathematics	Girls	89.1
	Boys	88.5
	All	88.8
Using ICT	Girls	89.0
	Boys	87.6
	All	88.3

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106   School leavers | Department of Education (education-ni.gov.uk)
107   KSA 2018/19 Methodology Paper v 1.1.pdf (education-ni.gov.uk)

2.46   By GCSE, the gender gap in favour of girls has widened. Furthermore, the gap is greater in the case of young people entitled to free school meals. In 2018/19[108], the gaps between girls and boys were 6.7 percentage points overall and 9.8 percentage points in the case of pupils with FSME (five+ GCSEs) and 9.8 percentage points overall and 12.3 percentage points for pupils with FSME (five+ GCSEs including English and mathematics)[109]. The gender gaps were thus smaller than the gaps due to socio-economic circumstances, but still substantial.

Table 2.o: School leavers' GCSE attainment, Northern Ireland, 2018/19[110]

	Girls (%)	Boys (%)	All pupils (%)	Gender gap (percentage points)
Achieving 5+ GCSEs A*–C				
All pupils	89.8	83.1	86.4	6.7
FSME pupils	80.7	70.9	75.8	9.8
Non-FSME pupils	93.2	87.4	90.3	5.8
Socioeconomic disadvantage gap (percentage points)	12.5	16.5	14.5	
Achieving 5+ GCSEs A*–C incl. English & mathematics				
All pupils	75.7	65.9	70.8	9.8
FSME pupils	55.6	43.3	49.5	12.3
Non-FSME pupils	83.3	74.0	78.5	9.3
Socioeconomic disadvantage gap (percentage points)	27.7	30.7	29.0	

2.47   The gender gap still exists at A Level[111] but is narrower than at GCSE Level. In 2018/19, at A Level the gap between boys and girls overall was 3.8 percentage points and the gap between pupils with FSME and those without was 13.0 percentage points.

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108   2018/19 data was used as subsequent years' assessments were disrupted by the Covid-19 pandemic. Public examinations were cancelled in summer 2020 and summer 2021 with alternative arrangements being put in place to award grades to students; these were largely centre-determined, with an additional awarding organisation moderation process put in place in the 2021 series. In 2022, CCEA introduced a number of measures to support students such as optional unit omissions; reduction in coursework/controlled assessment requirements; and the provision of formulae and equations for GCSE mathematics. Source: Qualification Insight Report 2022.pdf (ccea. org.uk)

109   School leavers | Department of Education (education-ni.gov.uk)

110   School leavers | Department of Education (education-ni.gov.uk)

111   Revised - Year 12 and Year 14 examination performance at post-primary schools in Northern Ireland 2018_19_ Revised.pdf (education-ni.gov.uk)

Table 2.p: Year 14 pupils achieving three+ A Levels A*–C, Northern Ireland, 2018/19[112]

	Girls (%)	Boys (%)	All pupils (%)	Gender gap (percentage points)
All pupils	73.4	69.6	71.8	3.8
FSME pupils	63.1	57.9	61.1	5.2
Non-FSME pupils	75.9	71.8	74.1	4.1
Socioeconomic disadvantage gap (percentage points)	12.8	13.9	13.0	

2.48   Evidence of significant attainment gaps based on gender emerges from the three international surveys in which Northern Ireland participates.

2.49   The Progress in International Reading Literacy Study (PIRLS) compares attainment levels in reading of pupils from around the world. In this case attainment is measured at age 9/10. In 2021, the most recent completed round of PIRLS, girls in Northern Ireland significantly outperformed boys, by 24 score points. This attainment pattern favouring girls was also found internationally and represents a widening of the gap since 2011 (16 score points) and 2016 (18 score points)[113].

2.50   We deal with special educational needs later in this chapter as well as more fully in Chapter 3. However, it is worth noting here that in 2021/22 66.8% of all pupils with diagnosed special needs were male[114]. This relates to those who have a SEN diagnosis and are therefore on their school's register. 61% of pupils at Stages 1–2 of the SEN Code of Practice were male and 39% were female[115]. The proportion increases when we consider learners with a SEN statement with 73% of pupils being male and 27% female. Furthermore, boys were in the majority in all 23 categories of special needs, in some cases to an overwhelming extent. 80% of pupils with social and behavioural difficulties and 77% of those with developmental language disorders were male[116]. 71% of pupils attending special schools were male and 29% were female[117]. It is thus fair to conclude that SEN constitutes a further manifestation of male disadvantage.

2.51   Furthermore, school refusal affects many more boys than girls. Education Other Than at School (EOTAS) is an educational provision for pupils with complex social, emotional and behavioural needs who cannot sustain their placement within a mainstream school without significant levels of support. Currently, EOTAS caters for very many more boys than girls: of the current total enrolment, 73% are male[118]. This disparity goes well beyond anything

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112   Revised - Year 12 and Year 14 Examination Performance at Post-Primary schools in Northern Ireland 2018/19 - Revised.pdf (education-ni.gov.uk)

113   PIRLS 2021 in Northern Ireland Full Report.pdf (education-ni.gov.uk)

114   This relates to Special Educational Needs only (e.g., Cognition & Learning, Social, Behavioural & Emotional Wellbeing and Dyslexia) and excludes Medical Needs (e.g., Asthma, Autism Spectrum Disorder and Anaphylaxis). Data provided by DE's Analytical Services Unit.

115   Special Educational Needs 202122.pdf (education-ni.gov.uk)

116   Data provided by DE's Analytical Services Unit.

117   School enrolment - school level data 2021/22 | Department of Education (education-ni.gov.uk)

118   Data provided by EA's Post-Primary Behaviour Support Team.

which could be attributed to coincidence. Of course, help needs to be available to girls but there is a specific male issue which must be understood before it can be addressed.

2.52   This problem of a gender divide is not unique to Northern Ireland but is common to all developed nations. To take a single measure – the percentage of 25–34-year-olds with tertiary education qualifications – young women significantly out-perform young men everywhere in the developed world. The gaps in a selection of wealthy countries are as follows: South Korea (12%), Japan (6), Canada (18), UK (8), Australia (15), US (10), Norway (19), Finland (16), Germany (4) and Iceland (16). It is worth noting that the much-vaunted success of Finnish education is entirely due to girls. Finnish boys perform no better than American boys[119].

2.53   There is almost certainly a biological explanation for this. It has been widely acknowledged for a long time that girls mature faster than boys. The development of the prefrontal cortex is about 2 years behind in adolescent boys while the cerebellum is normally fully formed in girls at 11 but in boys not until 15. The pruning of synapses, which seems to be the main brain development in the teenage years, shows a maximum gap between girls and boys around the age of 16. It would be surprising if all this did not influence learning, especially in the teenage years.

2.54   While general recommendations on supporting disadvantaged learners can apply to boys, their unique circumstances require additional investment. One key recommendation is investment in early years education and sustained support throughout their formal educational journey. This support can include high-quality teaching and the development of trusting relationships with staff, including youth and community workers.

2.55   In terms of curriculum, we suggest that broader and more relevant pathways that offer vocational and work-based learning opportunities from age 14 would keep boys more engaged. Broader measures of success that value the holistic development of the learner are also needed.

2.56   To address the challenges of working-class boys, it is important to invest in targeted strategies that address their unique circumstances and help them thrive in their learning journeys.

Panel conclusion

The main preoccupation of any discussion of disadvantage has to be with socio-economic factors. However, gender is another factor, which cannot be overlooked. Of course, these two factors are compounded. Those particularly disadvantaged are working-class boys. Middle-class boys, although slower maturing than girls, enjoy good levels of educational success and possess cultural capital that helps them in employment.

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119   OECD Education at a glance 2022

The attainment gap between high and low achievers

2.57   The spread of performance in a country can be examined by comparing the scores of low achievers to those of high achievers. In the most recent PISA study[120], the attainment gap in reading scores between Northern Ireland's highest- and lowest-achieving pupils was not significantly different from the OECD average.

2.58   The gap between the highest- and lowest-achieving pupils in science in Northern Ireland was smaller than, but not significantly different to, the OECD average gap. Compared with the OECD average, Northern Ireland had slightly better performance at the lower ability range in science.

2.59   The difference in performance in mathematics in Northern Ireland was also not significantly different from the OECD average.

2.60   Using PISA as a measure, it would seem that education in Northern Ireland has outcomes which, in terms of equity, are largely in line with most participating countries. As the overall educational attainment in Northern Ireland is high, the narrower spread in performance between high and low achievers suggests that programmes designed to improve outcomes for disadvantaged learners are working.

Vulnerable learners

Children Looked After

2.61   In 2021, DoH published its strategy for Children Looked After (CLA) – *A Life Deserved; "Caring" for Children & Young People in Northern Ireland*[121] to improve the wellbeing of children and young people. Learners who have experienced time in care (including children and young people in care, those on the edge of care or those who have left care) experience significant challenges in education. These learners are also often impacted by multiple deprivation indicators.

2.62   The number of children in care is increasing; some headline figures[122] include:

- 2,794 children were in care for more than 12 months.
- 43% were from the 20% most deprived areas.
- 2,066 were school age, 49% in primary schools, 37% in non-grammar schools, 8% in special schools, 5% in grammar schools and 3% in EOTAS.
- 25% had a statement of SEN while 55% received some SEN support. 16% had a disability.
- Their absence rate was 6.5% compared to a general absence rate of 5.4%.
- 7% were suspended compared to 1.2% of the general school population.

2.63   The attainment gaps for CLA are shown below.

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120   Achievement of 15-year-old pupils in Northern Ireland PISA 2018 National Report.PDF (education-ni.gov.uk)
121   A Life Deserved: "Caring" for Children and Young People in Northern Ireland
122   Figures from 30 September 2020.

Table 2.q: Outcomes for CLA compared to non-CLA, Northern Ireland, 2020/21[123,124,125]

Outcome	CLA	NON-CLA
Attendance	93.5%	94.6%
Suspensions	7%	1.2%
Leave with no qualifications	6%	1%
Five+ GCSE grades A*–C incl. English & mathematics	34%	78%
Destination: HE FE Employment Training Unemployment Other/unknown	– 61% 8% 25% <5% <5%	48% 27% 11% 11% 2% 2%

Ethnic minority communities

2.64   The recent census[126] (2021) shows a growing and increasingly diverse population. The fastest-growing group proportionally is people with "other national identities", i.e., from outside UK and Republic of Ireland, up from 61,900 in 2011 (3.4%) to 113,400 in 2021 (6.0%). 3.4% (65,600) belong to an ethnic minority group, as defined in the census, roughly double the 1.8% figure in 2011 (32,400 people), and four times the 0.8% figure in 2001 (14,300).

2.65   The census also revealed that 4.6% (85,100) of our population aged 3 and over had a main language other than English, up from 3.1% (54,500) in 2011. Coinciding with this, the school-age population has seen an increase in the proportion of learners from ethnic minorities.

2.66   The most recent DE Annual Enrolment Data[127] indicates that nearly 21,800 (6.1%) learners in Northern Ireland were recorded as being "non-White"[128], an increase of nearly 7,400 pupils (1.9 percentage points) compared to 2017/18.

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123   Children in Care in Northern Ireland 2020/21 (health-ni.gov.uk)

124   School Leavers - 2020/21 | Department of Education (education-ni.gov.uk)

125   Collection of Year 12 results was suspended by DE in 2019/20. Instead, Northern Ireland School-Leaver data has been used as a proxy for comparison. The school-leaving cohort comprises of Year 12, 13 and 14 pupils, and as such is not a direct comparison to the children in care Year 12 information.

126   https://www.nisra.gov.uk/system/files/statistics/census-2021-main-statistics-for-northern-ireland-phase-1-press-release.pdf

127   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020/21 (education-ni.gov.uk)

128   "Non-White" includes the following ethnic categories: Bangladeshi, Black-African, Black-Caribbean, Black-Other, Chinese/Hong Kong, Indian/Sri Lankan, Irish Traveller, Korean, Malaysian, Mixed Ethnic Group, Other non-White, Pakistani, Roma and Vietnamese.

Table 2.r: Ethnicity of pupils in all schools in Northern Ireland, 2022/23[129]

Ethnic Group	Number	% of total
Chinese	1,503	0.4%
Irish Traveller	1,086	0.3%
Indian/Sri Lankan	2,824	0.8%
Pakistani	569	0.2%
Black	3,518	1.0%
Mixed ethnic group	6,540	1.8%
Other ethnic backgrounds	5,722	1.6%
Total of all ethnic minority groups	**21,762**	**6.1%**
White	333,415	93.9%
Total	**355,177**	**100%**

2.67   There is evidence of relative poverty among ethnic minorities, including Irish Travellers. Rates of free school meal entitlement are highest among Irish Traveller learners (65%), followed by Black learners (37%) and "other" ethnic minority learners at 35%. All these learners are under-represented in grammar schools and almost half of Irish Travellers (49%) are recorded as having special educational needs[130].

2.68   At GCSE, learners from minority ethnic backgrounds achieve similar levels to White learners on the measure of five+ A*–C grades, 88.3% and 92.0% respectively in 2021/22. However, a larger gap emerges when this measure includes English and mathematics. An attainment gap of 8.9 percentage points (in favour of White learners) exists between White and minority ethnic learners in relation to achieving five+ GCSE grades A*–C including English and mathematics. At A Level, however, the gap slightly favours learners from ethnic minorities. More school leavers from ethnic minority groups went on to HE than White school leavers in 2021/22 (47.7% compared to 43.6%)[131]. There are undoubtedly variations across different ethnic groups.

Table 2.s: Qualifications of school leavers by ethnic origin, Northern Ireland, 2021/22[132]

	White %	Minority ethnic groups[133] %	Attainment gap (percentage points)
3+ A Levels A*–C	45.2	45.8	-0.6
3+ A Levels A*–E	54.3	55.8	-1.5
2+ A Levels A*–E	57.8	57.1	0.7

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129   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020/21 (education-ni.gov.uk)

130   Loader, R., Jimenez, E., O'Boyle, A. and Hughes, J. (2023). *Experiences of education among minority ethnic groups in Northern Ireland*. Belfast: QUB/Nuffield Foundation. Available at: https://www.qub.ac.uk/public-engagement/Filestore/PubAffFiles/Filetoupload,1862560,en.pdf

131   Qualifications and Destinations of Northern Ireland School Leavers (education-ni.gov.uk)

132   Qualifications and Destinations of Northern Ireland School Leavers (education-ni.gov.uk)

133   Minority ethnic groups includes Irish Travellers.

	White %	Minority ethnic groups[133] %	Attainment gap (percentage points)
At least 5 GCSEs A*–C	92.0	88.3	3.7
At least 5 GCSEs A*–C incl. English and mathematics	78.3	69.4	8.9
At least 5 GCSEs A*–G	96.9	94.7	2.2
No GCSEs	0.9	2.0	-1.1
No Formal Qualifications	0.7	1.8	-1.1

2.69   We would also see learners from the Roma community as disadvantaged. While data relating to these pupils is not published due to small numbers, literature[134] suggests that Roma families experience distinctive challenges in education that can lead to low attainment and poor attendance. According to the Annual School Census the attendance rate for Roma pupils in 2021/22 was 61.8%. The EA identifies Roma as a community for targeted support and employs a dedicated Roma Support Officer.

2.70   Representatives of ethnic minority groups that we met advised that navigating the education system is extremely challenging. They highlighted difficulties in finding information in order to choose a suitable school/college as well as understanding the various education pathways. A number felt that some admissions policies have criteria that can discriminate against them.

2.71   A report by Dr Rebecca Loader et al. (2023) entitled *Experiences of education among minority ethnic groups in Northern Ireland*[135] has similar findings and makes a number of important recommendations for policy and practice to improve the educational experience of minority ethnic groups. These include recommendations about admissions criteria, bullying, curriculum and cultural responsiveness, English heritage and language and home–school relationships.

Newcomer learners

2.72   Currently, there are about 90 first languages spoken in education settings. After English, Polish and Lithuanian are the most common languages. Since 2021/22, there has been an increase of roughly 2,300 pupils whose first language is not English.

2.73   A learner is described as newcomer if they do not have the language skills to participate fully in the curriculum. In 2022/23, there were nearly 19,500 (5.5%) newcomer pupils, an increase of over 4,200 since 2017/18[136].

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134   Loader, R., Jimenez, E., O'Boyle, A. and Hughes, J. (2023). *Experiences of education among minority ethnic groups in Northern Ireland*. Belfast: QUB/Nuffield Foundation. Available at: https://www.qub.ac.uk/public-engagement/Filestore/PubAffFiles/Filetoupload,1862560,en.pdf

135   Loader, R., Jimenez, E., O'Boyle, A. and Hughes, J. (2023). *Experiences of education among minority ethnic groups in Northern Ireland*. Belfast: QUB/Nuffield Foundation. Available at: https://www.qub.ac.uk/public-engagement/Filestore/PubAffFiles/Filetoupload,1862560,en.pdf

136   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020-21 (education-ni.gov.uk)

Table 2.t: Newcomer pupils in all schools in Northern Ireland, 2017/18–2022/23[137]

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Funded pre-schools	337 4.2%	332 4.1%	331 4.1%	264 3.6%	247 3.4%	269 3.8%
Nursery schools	452 7.7%	439 7.5%	407 7.0%	446 7.7%	443 7.6%	468 8.1%
Nursery classes/ reception	699 7.2%	736 7.6%	796 8.1%	808 8.2%	789 8.0%	801 8.1%
Primary school and prep. depts	10,724 6.2%	11,435 6.6%	11,964 6.9%	12,080 7.0%	12,507 7.3%	13,291 7.8%
Non-grammar	2,562 3.5%	2,751 3.5%	3,242 4.0%	3,395 3.9%	3,765 4.3%	3,916 4.4%
Grammar	277 0.4%	368 0.6%	453 0.7%	478 0.7%	408 0.6%	520 0.8%
Special schools	169 2.9%	177 3.0%	#	193 3.0%	197 3.0%	#
EOTAS	*	*	*	*	*	*
Total	**15,220 4.4%**	**16,238 4.7%**	**17,391 5.0%**	**17,664 5.0%**	**18,356 5.2%**	**19,471 5.5%**

* Fewer than five cases. # Number suppressed.

SEN learners

2.74   Outcomes for learners with SEN have traditionally been much lower than learners who do not have SEN but there have been some positive trends more recently. If we are to continue to close the gap, it is important there be robust, system-wide data available over an extended period – starting from the earliest possible opportunity.

2.75   The Education and Training Inspectorate carried out a review of special educational needs in mainstream schools in 2019[138]. They report that:

> There is no comparative data available regarding outcomes from early intervention for pupils in Foundation Stage. This is because most schools do not begin to assess cognitive skills until year (Year) 4, when they accept that formal assessment is more reliable.

2.76   DE collects data regarding outcomes in Communication, Using Maths and Using ICT at Key Stages 1, 2 and 3 from all schools. Industrial action short of strike action by teachers' unions greatly limits our ability to assess the current position given the reduction in the number of schools submitting data to DE. This means that there is no useful data on outcomes for SEN learners (and all other learners) available before Key Stage 4. We find this unacceptable and would wish to see a change in policy and practice to ensure schools submit standardised assessments for all learners at Key Stages.

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137   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020/21 (education-ni.gov.uk)

138   https://www.etini.gov.uk/sites/etini.gov.uk/files/publications/survey-special-educational-needs-in-mainstream-schools.pdf

2.77 Examination of outcomes at Key Stages 4 and 5 shows that there is improvement but that significant gaps remain. In 2010/11, 24% of learners with SEN achieved five+ GCSEs grades A*–C including English and mathematics compared to 67% of learners without SEN. In 2017/18, 41% of learners with SEN achieved this standard compared to 79% of learners without SEN, an attainment gap of 38 percentage points[139]. Therefore, the proportion achieving this benchmark has increased and the SEN attainment gap has narrowed by 5 percentage points[140].

2.78 The PAC report[141] acknowledged this improvement.

> *On a positive note, PAC is pleased to hear that the educational attainment in examinations for children with SEN have improved considerably, over the years, and it would like to see this success story apply to far more children. PAC recognises and commends the dedication of front-line staff involved in the provision of support to children with SEN.*

2.79 There is no doubt that parents, educators and wider society have greater ambition for SEN learners than in the past, and this has helped improve outcomes. In addition, there is more specialist training available for staff (although we would wish to see a substantial further increase), including online training, and all SEN learners have individual learning plans with achievable targets. Both of these factors have contributed to better outcomes for SEN learners. Better outcomes means that, overall, fewer learners with SEN are leaving school with no qualifications and more are progressing to further and higher education.

2.80 For some SEN learners, the Northern Ireland curriculum and associated assessments are not suitable. In such cases, these can be disapplied and more relevant curricula and assessments put in place. There is a range of suitable entry-level qualifications available with an emphasis on personal development, life skills and vocational pathways. Entry-level and Level 1 qualifications may be more appropriate for some learners as are the range of CCEA-accredited courses provided by organisations like The Prince's Trust.

2.81 The progress of SEN learners should not be confined to attainment in examinations and assessments. Outcomes for attendance, communication and interaction, engagement in learning, social skills, and ability to self-regulate and be independent are skills that could be included in formal reports re learner progress.

2.82 In 2006, 27% of SEN leavers went to further education colleges while 10% went to higher education. In 2018, this had risen to 43% and 21% respectively. As the proportion progressing to FE and HE increased over this period, the proportion of SEN leavers entering training and employment decreased. Figures for training dropped from 37% in 2006 to 20% in 2018, while employment figures dropped from 17% to 10%[142,143].

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139   School leavers | Department of Education (education-ni.gov.uk)

140   More up-to-date data is available but it is not comparable to prior years due to changes in the SEN categories in 2018/19.

141   http://www.niassembly.gov.uk/globalassets/documents/committees/2017-2022/pac/reports/special-educational-needs/report-on-impact-review-on-special-educational-needs.pdf

142   NIAO Impact review of special educational needs (niauditoffice.gov.uk). Figure 18, p.56.

143   Data relating to the qualifications and destinations of school leavers with SEN is not available for 2018/19 following the review of SEN categories. The changes to the categories were implemented from January 2019 and impacted on the 2018/19 data relating to school leavers with SEN, as schools transitioned to the new system.

2.83   All learners including those with SEN have access to careers guidance in their own schools and through the Careers Service. The final stage of schooling is a challenging time for all learners and especially so for SEN learners and their families. Information about options may not be easy to access. Progression routes are not always clear. They may feel overwhelmed and unable to assert their own fears and aspirations.

2.84   There is a need for SEN learners to experience the world of work through appropriate work experience placements and the development of work-related skills. This can be challenging so there is a need to identify a directory of suitable placements and to provide appropriate support to the placement organisation in terms of reasonable adjustments and how best to meet the needs of the learner.

2.85   There is a need to continue to raise aspirations for SEN learners at a system level (including government, DE, Department for the Economy, Education Authority, Careers Service), at school level (Boards of Governors, school leaders, teachers and support staff), at home and in wider society. The special educational needs and disability (SEND) Code of Practice correctly indicates the need for Careers Service involvement in the annual review following the learner's 14th birthday and refers to further education and training as possible future options. This, of course, should include aspiration to attend higher education.

2.86   There are well-established routes into work on the basis of GCSE and/or A Level passes as well as with qualifications in FE or HE. It is important that similar pathways exist for those leaving school qualified at National Qualifications Framework (NQF) Level 1.

Addressing low or no qualifications

2.87   We were asked to undertake a review of education, not only schooling. Education extends beyond 18 years old and into adulthood and the impact of disadvantage extends beyond school-age learners. Upskilling under-skilled adult learners is an important education function.

2.88   Data from the 2021 Census shows that Northern Ireland has a higher proportion of residents aged 16 or over with no qualifications than England or Wales (24% in Northern Ireland compared to 15% in England and 16% in Wales). However, compared with other UK nations Northern Ireland has the lowest proportion of residents whose highest qualification is Level 1 and the highest proportion of residents with at least a Level 4 qualification.

2.89   Furthermore, the proportion with no qualifications is falling. In 2013, the figure for 17–24-year-olds was 12.7%[144]. In 2017/18, only 0.1% of pupils in Northern Ireland achieved no GCSE passes, compared to 1.0% of their peers in Wales and 3.5% of pupils in England[145]. However, due caution should be taken when making such comparisons[146].

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144   Machin, S., McNally, S. and Wyness, G. (2013). 'Educational attainment across the UK nations: performance, inequality and evidence', *Educational Research*, 55(2), 139-164. Available at: Educational attainment across the UK nations: performance, inequality and evidence (tandfonline.com)

145   Statistics: education and training - GOV.UK (www.gov.uk)

146   The Panel is aware that comparison with other jurisdictions is often inappropriate due to differences in qualification systems, headline measures and methodological variations in reporting outcomes. Due caution should be exercised.

Figure 2.u: Highest qualification of residents aged 16+, Northern Ireland, England & Wales, 2021 Census[147,148]
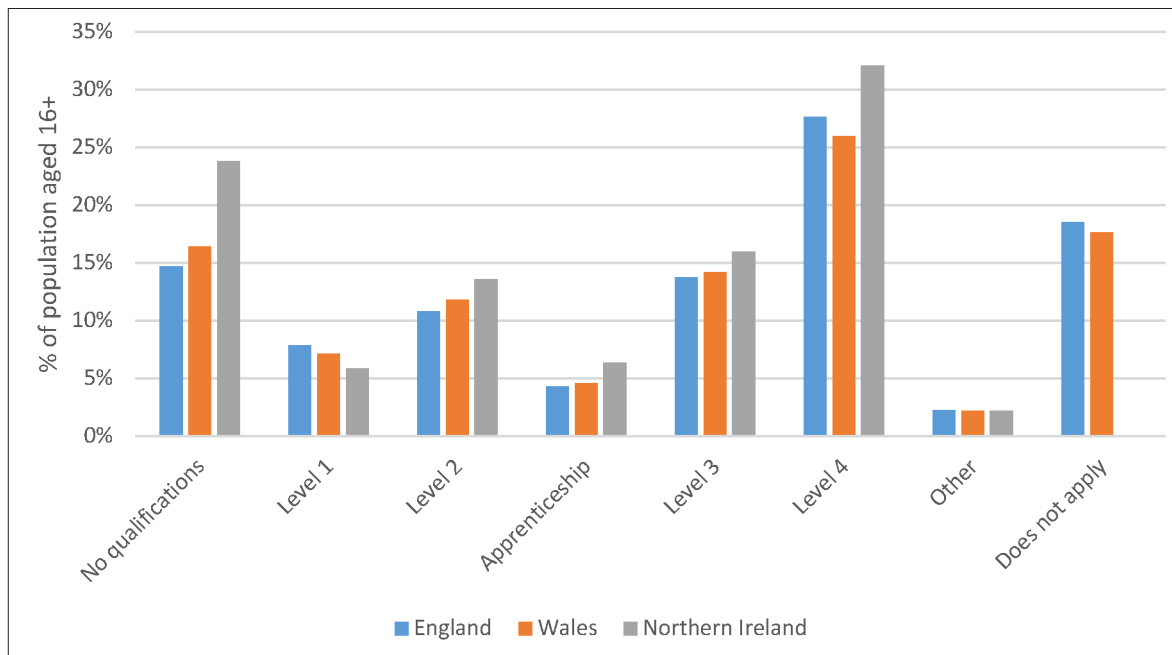
2.90 In 2021/22, 22.0% of school leavers did not achieve the benchmark of five GCSEs at grades A*–C or equivalent including English and mathematics. The proportion of students with FSME failing to achieve this threshold was even higher, at 40.9%. In addition, 116 boys and 94 girls left school with no GCSEs or equivalent qualifications in 2021/22[149]. Many of these will have been affected by one or more disadvantage factors.

2.91 The OECD's Skills Strategy Northern Ireland (2020)[150] states that:

Adults' foundational skills are comparatively weak but are improving. The average skill level of adults in Northern Ireland is below that of many other OECD countries (OECD, 2016[151]). While adults in Northern Ireland have levels of literacy around the OECD average, they are falling behind in problem solving and numerical ability. The share of adults with a well-rounded skill set is therefore relatively low when compared to England and the OECD average. This is caused, in part, by the high level of adults with no qualification at all. In 2017, 16.6% of Northern Ireland residents aged 16 to 64 had no qualifications, compared to just 8.0% of all UK residents. However, in recent years this comparative gap has been closing and by the end of 2019, the figure for Northern Ireland had already fallen to 13.8% (NISRA, 2019[152]). This is an important, positive trend. Adults will need a well-rounded skillset to take advantage of digitalisation and the transformation

147 Highest level of qualification - Office for National Statistics (ons.gov.uk)

148 Census 2021 Main statistics for Northern Ireland - Statistical bulletin - Qualifications (nisra.gov.uk)

149 Qualifications and Destinations of Northern Ireland School Leavers (education-ni.gov.uk)

150 OECD Skills Strategy Northern Ireland (United Kingdom), p.14.

151 OECD (2016), Skills Matter: Further Results from the Survey of Adult Skills, OECD Skills Studies, OECD Publishing, Paris. Skills Matter : Further Results from the Survey of Adult Skills | OECD Skills Studies | OECD iLibrary (oecd-ilibrary.org).

152 NISRA (2019), Education and Skills, NISRA. Statistics | Northern Ireland Statistics and Research Agency (nisra.gov.uk) (accessed on 27 November 2019).

of jobs occurring due to megatrends, as well as to be more resilient and adaptable in the uncertain labour market that will follow on from Covid-19. Nonetheless, more can still be done to improve lifelong learning in Northern Ireland.

2.92   The Northern Ireland Skills Barometer 2021[153] notes that:

> There has been a long-term shift in the stock of skills over the past two decades. The proportion of people in employment with at least an undergraduate degree (NQF Level 6+) has more than doubled from 16% in 2003 to 38% in 2021. Whereas the stock of low-level qualifications (below NQF level 2) has halved from 30% to 15% over the same period.
>
> On a longer-term basis, the trend is driven by two key factors:
>
> **A generational effect** whereby older workers with lower levels of qualification exit employment to retirement to be replaced by younger labour market entrants with higher level qualifications. For example, amongst persons employed just over one in four (27%) of the over 50's has an NQF level 6+ qualification compared to almost one in two (49%) people aged 22–35. The over 50's represent half (49%) of people in employment with a qualification below NQF level 2 and only 23% of people with an NQF level 6+ qualification. This highlights the long-term improvement in education attainment over time that has created a large qualifications gap between generations.
>
> **A changing sector mix**, whereby the economy has shifted away from sectors that require lower levels of qualification towards sectors requiring higher level qualifications. For example, the sectors which have increased their share of employment the most over the past 20 years are health and private services (i.e., administration and support services, professional services and ICT), which have a high graduate content. The sectors that have experienced the largest fall in their share of employment include retail, agriculture and construction which tend to have a relatively low qualifications profile. Manufacturing has reduced its share of total employment more than any other sector. This reflects a shift towards advanced manufacturing which requires fewer, but higher qualified, workers.

2.93   More learners are staying on in education beyond the compulsory school age and achieving higher outcomes so there are fewer entering the workforce at lower levels. However, Northern Ireland also has a "brain drain". Many of our talented, highly skilled young people leave to study in higher education institutions in other parts of the UK. However, there is not a reciprocal influx of learners from other parts of the UK. The overall effect is that Northern Ireland has a skills imbalance with relatively high levels at NQF 6 and above but fewer at NQF levels 3, 4 and 5 where skills are needed now and in the future.

2.94   The prevalence of Northern Ireland residents with no or low qualifications signals the need to provide a number of pathways back into education for adults who leave formal education with either no or low qualifications.

2.95   We highlight this point again in Chapter 5 and Chapter 6 and recommend both increasing the age of educational participation to 18 and introducing a lifetime guarantee to provide opportunities for all learners to secure basic qualifications.

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153   Northern Ireland Skills Barometer 2021 (economy-ni.gov.uk) pp.20-21.

Early leavers

2.96 The proportion of Year 13 pupils staying on at school for Year 14 has been stable at close to 90% but a small rise was noted in 2020/21 and 2021/22, presumably due to the effects of the Covid-19 pandemic.

2.97 However, we have heard from learners who were encouraged to leave their post-16 course after a year or at some stage prior to the final examination as it was believed that they would not achieve at a high level. We strongly recommend that this practice ceases immediately and that all learners in a given cohort are included in the statistical returns. A unique learner number would make it easy to track all learners through their education journey and help provide support to those who are at risk of dropping out.

2.98 At present, a small but significant number of leavers is lost to education – in most cases permanently – at the leaving age of 16. Many of these young people would benefit from continuing contact on a more flexible basis, generally involving an element of vocational training. This is one reason for our recommendation that the age of mandatory participation in education and/or training should be raised to 18. It is important to note that we are not recommending raising the school-leaving age to 18. Indeed, we do not anticipate that many of the young people affected by such a change will remain in school. For many of them, apprenticeship routes are likely to be far more productive.

2.99 A report by the Economic and Social Research Institute (ESRI)[154] comparing education and training systems on the island of Ireland looked at early school leaving using three different definitions of early leavers. Regardless of the definition used, a consistent trend emerges, with the Northern Ireland early school-leaving rate much higher than that of Republic of Ireland.

2.100 There is an opportunity to share and learn across both jurisdictions not just about factors influencing the school-leaving age but also about other factors impacting on the outcomes for disadvantaged learners. This work should be led and supported by the relevant departments North and South but include practitioners/academic expertise from both jurisdictions. Possible areas for collaborative working include.

- Addressing disadvantage including early years provision.
- Inclusion and SEN.
- Professional development (the Middletown Autism training is an excellent example that is currently working well).
- Digital literacy including the impact of AI.
- Educational research on areas of mutual interest.

Panel conclusion

Perhaps the single most important contribution a revitalised education service can make to the future of Northern Ireland – both socially and economically – is to reduce to as near to zero as possible the number of young people emerging from the years of compulsory education unable to live fulfilling lives and compete effectively for well-paid employment. Better qualified, more highly skilled young people will contribute to a brighter future for all, including a brighter economic future. Perhaps even more importantly, society will benefit from the contribution of all its members. The cycle of disadvantage which blights the lives of so many families will have been broken.

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154 Smyth, E., Devlin, A., Bergin, A., and McGuinness, S. (2022). *A North-South comparison of education and training systems: lessons for policy*, ESRI Research Series 138. Dublin: ESRI. Available at: https://doi.org/10.26504/rs138

The Covid-19 legacy

2.101 Our Review commenced in the context of the pandemic. At this stage there is limited data available on the impact of the pandemic however we suggest that it is likely that it will have exacerbated poverty, isolation and social inequalities. The short-term impact on children and young people varied. Some enjoyed being at home and coped well with home schooling but many more struggled with isolation and coped less well or not at all with remote learning.

2.102 The impact on disadvantaged learners was greater mainly due to digital poverty, poor access to good-quality equipment and low levels of digital literacy. Efforts have been made by DE to address learning loss through initiatives such as the Engage Programme, which was viewed favourably by practitioners. However, the programme has ceased due to funding cuts announced in April 2023. The Engage Programme should be evaluated and a business case developed to assess the widest potential benefits to Northern Ireland of mainstreaming such an approach to provide ongoing targeted support for learners at risk of disadvantage and/or disengagement.

2.103 The effect of the pandemic is likely to be long term or even permanent in all too many instances. A significant legacy has been left in the form of increased absenteeism. A comparison between attendance rates in the year before the pandemic and 2021/22 shows an increased absence rate across primary, post-primary and special schools. This is true of both authorised and unauthorised absence.

Table 2.v: Comparison of school absence rates pre and post Covid-19 pandemic, Northern Ireland, 2018/19 and 2021/22

| | % of total half days | | | | | |
| | 2018/19[155] | | | 2021/22[156] | | |
	Primary schools	Post-primary schools	Special schools	Primary schools	Post-primary schools	Special schools
Attended	95.2	92.9	90.0	91.6	89.0	84.4
Overall absence	4.8	7.1	10.0	8.4	11.0	15.6
Authorised absence	3.2	4.5	6.5	5.9	7.0	10.2
Unauthorised absence	1.6	2.6	3.5	2.5	4.0	5.3

2.104 This downturn in attendance rates is not unique to Northern Ireland but is concerning. At first glance, attendance figures around 90% may seem impressive but it implies an absence of one day every fortnight, a degree of interruption of the learning process

155   Attendance at grant aided primary, post-primary and special schools in Northern Ireland 201819.pdf (education-ni.gov.uk)

156   Attendance at grant aided primary, post-primary and special schools 2021/22 | Department of Education (education-ni.gov.uk)

with which many pupils will struggle to cope. It has also been suggested to us that since the pandemic there is greater incidence of anxiety and other forms of mental health problems, and school refusal. These difficulties were invariably mentioned to us in discussion with young people and should be investigated further in order that they feel welcome in school or college, have a sense of belonging, know that their wellbeing will be supported and that they will have access to professional counselling services when necessary.

2.105 It is too early to say whether increased absence will be a long-term consequence of the pandemic. However, it is important that all schools seek to improve attendance rates as soon as possible and the Department give this significant attention.

Panel conclusion

A greater emphasis on promoting wellbeing as a vital characteristic of a good school or college is certainly a legacy of the pandemic but there are wider considerations regarding ensuring education is a welcoming environment where all learners can thrive. More research is needed to understand and address the long-term impact of the pandemic and the need to build resilience for future disruption.

Combatting disadvantage

2.106 There is no "silver bullet" when it comes to reducing the educational effect of disadvantage. Ultimately, it is essential that all learners be provided with the conditions where they can remain engaged and thrive in education. Within our Report, we make numerous recommendations that would positively contribute to combatting disadvantage.

2.107 These include:

- Invest in early childhood education and continue to invest in all learners through formal schooling up to the age of 18.
- Invest in high-quality teaching for disadvantaged learners providing small-group and 1:1 support as required.
- Invest in a broader curriculum offer that allows all learners to progress and achieve, including providing pre-vocational opportunities from age 14 and vocational opportunities including pre-apprenticeship and apprenticeship training. Provide courses in personal development and life skills and remove the requirement for qualifications that prevent progression.
- Invest in a broader range of assessment techniques that better meet the needs of disadvantaged learners and provide a broader range of qualifications and measurements of success that go beyond attainment at ages 16 or 18. Provide courses in literacy, numeracy and digital skills for underqualified adults.

2.108 Further to the above, there are a number of other actions that can be taken, as detailed in this section.

Keeping learners engaged and thriving in education

2.109   There are some children who find school difficult from the outset, but more begin to experience problems in late primary/early post-primary years. Only 0.1% of pupils aged under 11 years were suspended from school in 2021/22. This figure rose to 3.2% of pupils aged 11–12 years, 4.2% of pupils aged 13–14 years and 3.3% of pupils aged 15 and over[157].

2.110   In early adolescence brain changes of a different type from those of the early years are occurring. These seem to involve synapse pruning and give rise to mood swings and difficulties in concentration[158]. For the most part education systems ignore these developments. For most children the onset of puberty roughly coincides with transfer from primary to post-primary schooling. Any difficulties arising from puberty coincide in many cases with the transition from primary to post-primary. Most young people cope well, but this is not universal. A subject-based curriculum can appear fragmented and confusing. Forming a good relationship with many teachers is a different proposition from forming a good relationship with just one.

2.111   Due to these factors this Report argues for greater continuity and progression in the young person's experience of learning. In Chapter 5 on Transitions, we argue for a much more coherent curricular transition from primary to post-primary schooling. Implementation of this recommendation will bring about a significant reduction in the number of young people disengaging from education in the early years of adolescence. However, there will still be a need for alternative approaches for young people who find mainstream education difficult.

2.112   In addition, access to a wide range of extra-curricular programmes will allow learners to pursue their own interests and talents in a more informal setting and will help improve learners sense of self-worth, help them develop wider skills and build their confidence, ensuring they feel fully engaged and committed to their education.

2.113   EOTAS provides a very good service but it is currently the only provision available in Northern Ireland for young people who have disengaged to the extent that mainstream schooling is not a viable option. Elsewhere, the voluntary sector provides less formal educational opportunities either on a full-time basis or in combination with part-time attendance at school. Some of these options are provided in close collaboration with organisations concerned with sports or the creative and performing arts.

2.114   The Organisation for Economic Co-operation and Development (OECD) noted the positive impact of arts education on three subsets of skills, which it defined as "skills for innovation": "technical skills, including in some non-arts subjects; skills in thinking and creativity; and behavioural and social skills (or character)"[159]. A curriculum that focuses on developing these skills will engage learners who are less suited to a more traditional curriculum.

2.115   For instance, museums and local heritage assets can be used to build upon and enrich the existing curriculum, but they could do more to educate local learners about cultural heritage; this would help to build community, a sense of identity and social cohesion.

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157   Pupil suspensions and expulsions | Department of Education (education-ni.gov.uk)

158   Abbott, J. (2009). *Overschooled but Undereducated*. 1st edn. Bloomsbury Publishing. Available at: https://www.perlego.com/book/Overschool but undereducated

159   www.oecd.org/education/ceri/arts.htm

Local heritage should be formally integrated throughout the curriculum (a new policy is required). This may engage more learners including disadvantaged learners and allow them to connect with their local community.

2.116 Experience elsewhere indicates that provision based on a limited academic curriculum, extensive pre-apprenticeship training and an emphasis on personal development can be highly effective[160].

2.117 A crucial factor in bringing disaffected young people back into meaningful contact with the education system is building strong trusting relationships with a small group of staff. This is more easily achieved in a small setting. For such young people, quality of relationships is much more important than factors such as breadth in the curriculum. A second success factor involves keeping in touch with pupils after they have left school. Getting them into a positive destination such as training is not always enough. Keeping them there or helping them move to another worthwhile position is also essential. This "keeping in touch work" could be done by a community worker, a youth worker or an allocated mentor.

> **Panel conclusion**
>
> Keeping learners engaged in education is crucial for their success in the future. To achieve this, it is important for learners to remain in education or training until the age of 18. Providing curriculum pathways that cater to their abilities and different strengths and interests will help students stay engaged in their learning. Additionally, providing access to vocational training, apprenticeships, and work-based learning will help them expand their skills and knowledge, making them more attractive to future employers.
>
> Monitoring growth, setting achievable goals, and measuring progress is an essential aspect of keeping learners engaged in their education. Building confidence in their abilities will encourage them to continue learning and achieving their goals. Access to extra-curricular programmes will help students develop their wider skills and build their confidence, ensuring they feel fully engaged and committed to their education.

Learning from existing excellent practice at home

2.118 During our work, we have been struck by the many examples of excellent practice demonstrating that many young people from disadvantaged backgrounds in Northern Ireland achieve remarkable success in school.

2.119 There is clear evidence that a high number of Northern Ireland schools with relatively high levels of disadvantage (as measured by the proportion of pupils eligible for free school meals) perform above the average for such schools, as illustrated below.

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160   Kemp, K. (2021). *A for Achievement, A for Attitude, A for Attendance: The Life-Changing Endeavour of Newlands Junior College.* Mereworth Publishing.

Figure 2.w: Proportion of pupils achieving five+ GCSEs (or equivalent) A*–C (incl. English & mathematics) relative to proportion of FSME at school, Northern Ireland, 2018/19[161]
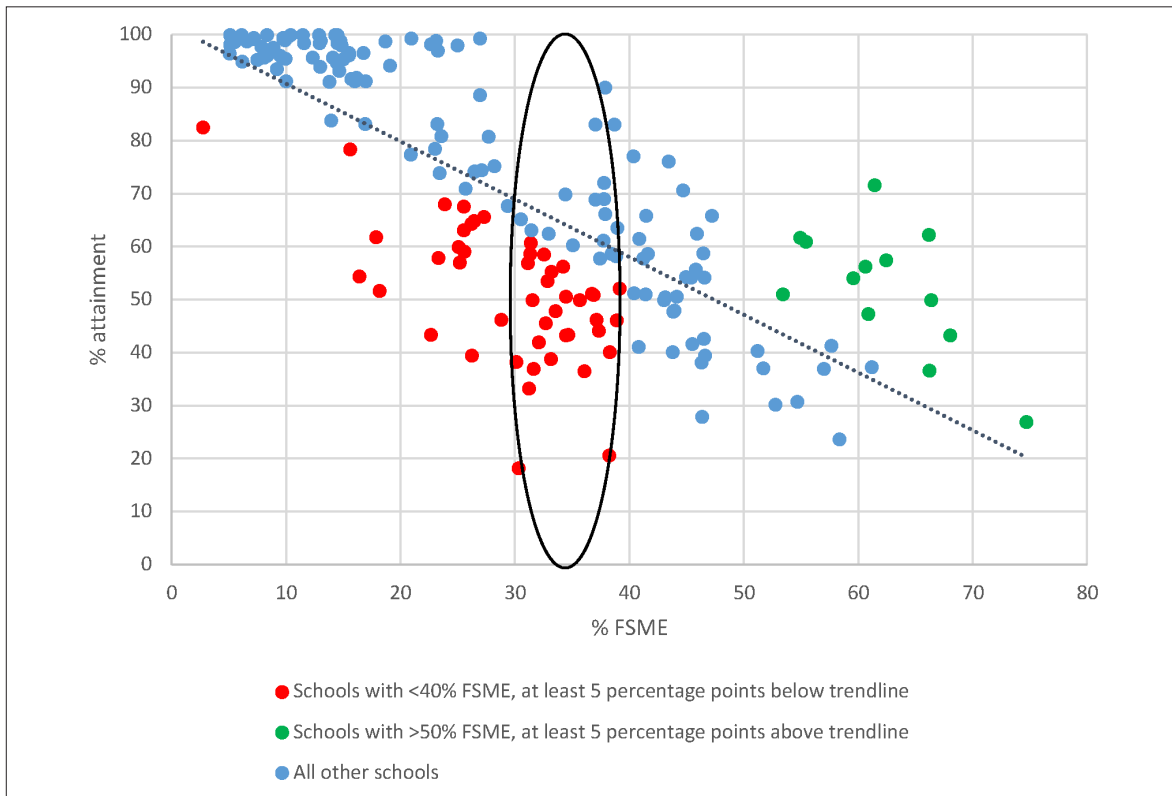
Figure 2.x: Proportion of pupils achieving three+ A Levels (or equivalent) A*–C relative to proportion of FSME at school, Northern Ireland, 2018/19[162]

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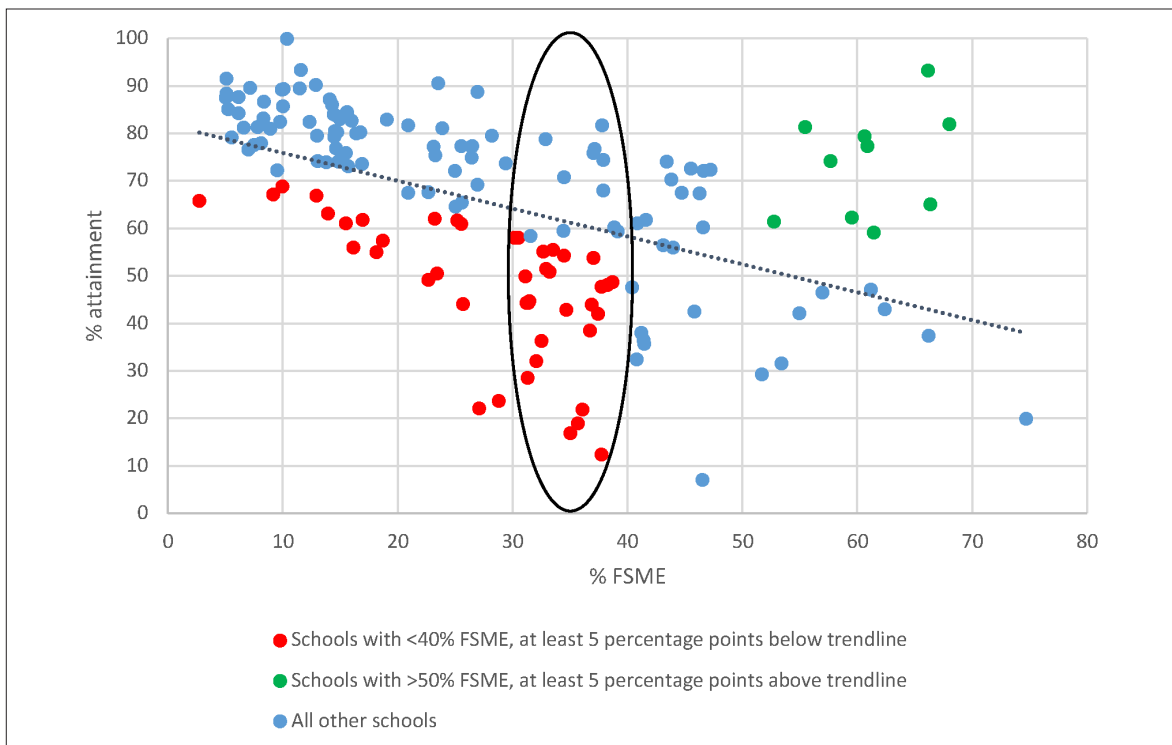
161   Data provided by DE's Analytical Services Unit.

162   Panel analysis based on data provided by DE's Analytical Services Unit.

2.120   These graphs show a general downward trend, that is, the higher the proportion of FSME in a school the lower the attainment. This is something that would be common in most education systems. However, there are a number of interesting aspects of these graphs that are worth exploring further.

2.121   Firstly, there are a number of schools with high levels of FSME (greater than 50%) which sit at least 5 percentage points above the trendline – 13 at GCSE and 10 at A Level. These are coloured green in the top right-hand corner of the graphs. These schools, their teachers and their learners are demonstrating a remarkable ability to overcome the challenges posed by socio-economic disadvantage.

2.122   The black oval (in the centre point of the graphs) highlights the very significant difference in attainment between schools with similar levels of disadvantage (30%–40% FSME). The range of attainment (from the highest- to lowest-performing school) at GCSE is 71.9 percentage points and at A Level is 69.3 percentage points.

2.123   It is also clear from the graph that underperformance is found across the full range of schools including selective schools for both GCSE and A Level performance. We contend that the biggest concentration of underperformance is in the 30% to 40% FSME range, followed by schools in the 20% to 30% range and the 10% to 20% range, illustrated on the graph by "red dots". These are schools with less than 40% FSME and that sit at least 5 percentage points below the line of best fit. Interestingly, the group of schools with the highest level of free school meal entitlement contains some of the lowest numbers of underperforming schools.

2.124   When the grammar schools are removed from the graphs above, we can see that there is a much weaker correlation between attainment and FSME at school level. This is especially true at A Level and demonstrates that the grammar schools skew the data, arguably due to their generally much lower levels of FSME. The graphs below show that many schools achieve high levels of attainment, despite having relatively large numbers of disadvantaged pupils.

Figure 2.y: Proportion of pupils achieving five+ GCSEs (or equivalent) A*–C (incl. English & mathematics) relative to proportion of FSME at school, non-selective post-primaries only, Northern Ireland, 2018/19[163]
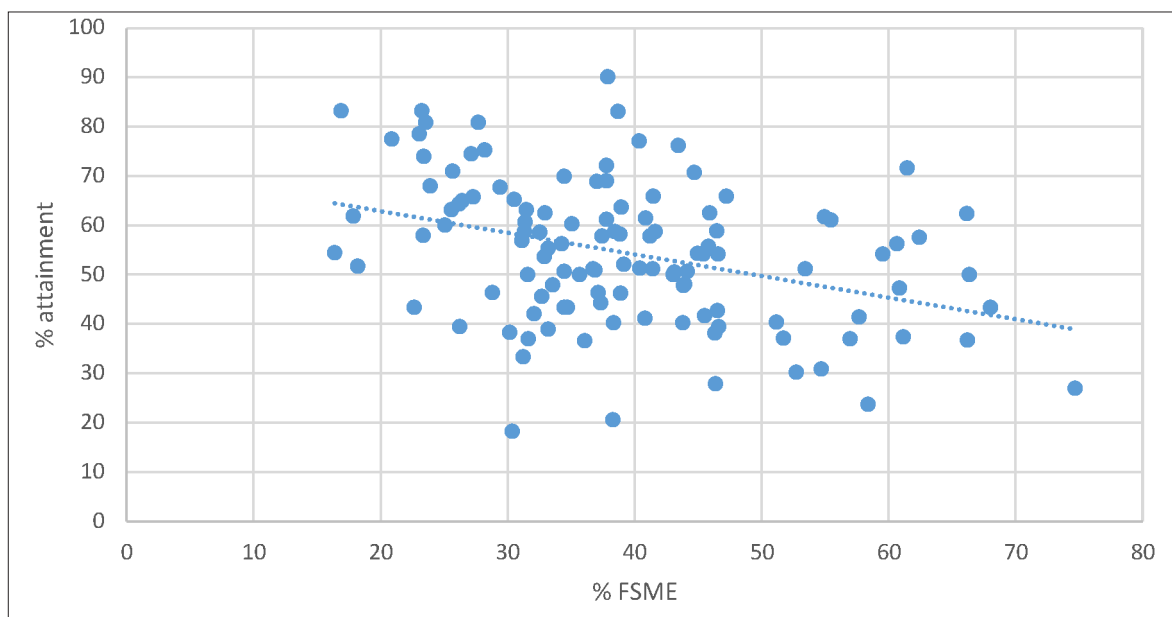
163   Panel analysis based on data provided by DE's Analytical Services Unit.

Figure 2.z: Proportion of pupils achieving three+ A Levels (or equivalent) A*–C relative to proportion of FSME at school, non-selective post-primaries only, Northern Ireland, 2018/19[164]
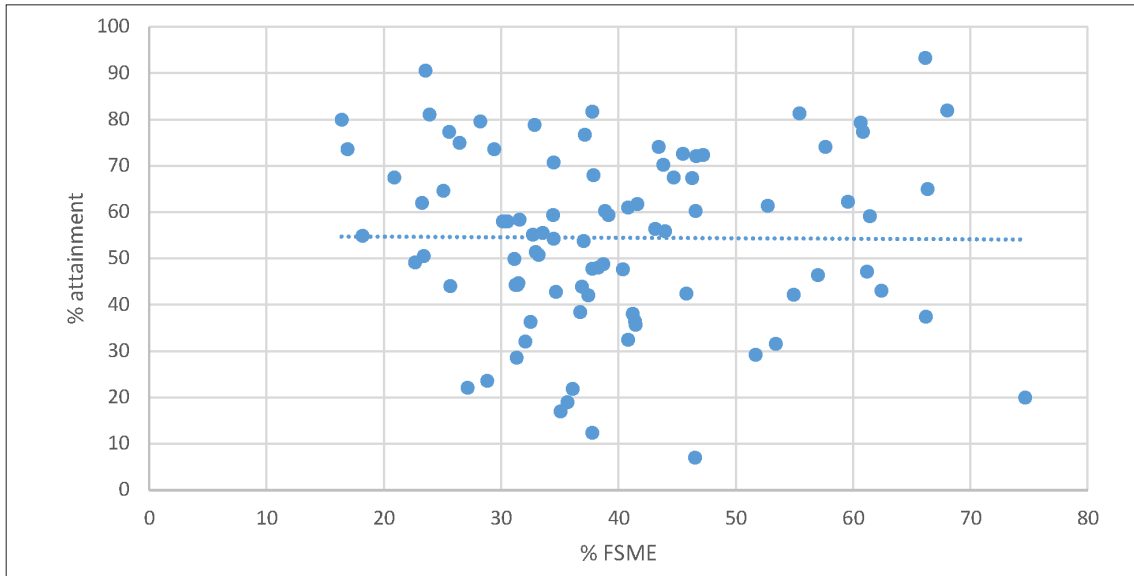
2.125   It is our view, based on our experience from elsewhere, that this phenomenon would not be common in other UK jurisdictions, where there would be a much stronger alignment with the line of best fit. However, this hypothesis would need critical review. For comparison purposes, we were able to source school-level data from Scotland relating to free school meal registrations compared to pupils achieving at least five highers[165,166].

Figure 2.aa: Free school meal registrations compared to the percentage of pupils achieving at least five highers, Scotland, 2021/22[167,168,169]

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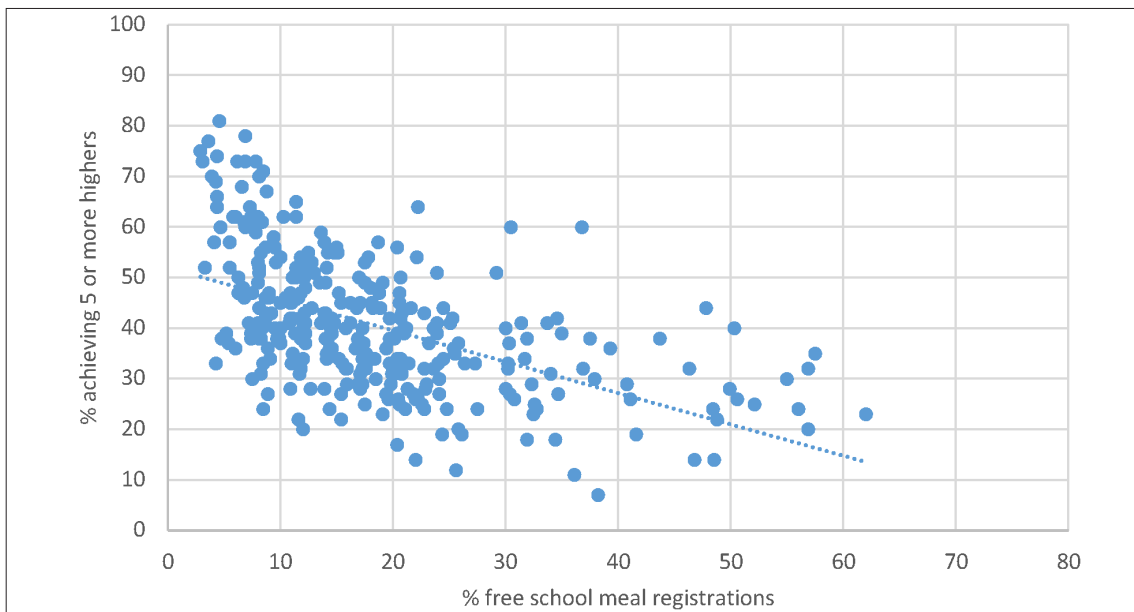
164   Panel analysis based on data provided by DE's Analytical Services Unit.

165   Scottish highers are broadly equivalent to Level 3 qualifications in Northern Ireland including AS and A Level.

166   UK Qualification Comparison Chart (https://eal.org.uk/support/document-library/7-uk-qualifications-comparison-table/file)

167   Pupil census free school meal registration - school level statistics - gov.scot (www.gov.scot)

168   Secondary School Survey Scotland 2022 - Scotland's data on a map (datamap-scotland.co.uk)

169   A small number of schools were removed from the data when plotting the graph as there wasn't attainment or free school meal data available for them, or the attainment data was zero.

2.126   The graph shows a more pronounced line of best fit, greater grouping along the line and far fewer schools breaking the trend.

2.127   In any event, the lessons from the Northern Ireland schools must be learned and the obvious good practice captured and disseminated across the wider system. Conversely, learning what is not effective is also important.

2.128   These findings are supported by the most recent PISA study[170], discussed earlier, which showed that the disadvantage attainment gap in Northern Ireland was smaller than the average for other OECD countries, indicating that pupils here are somewhat more able to overcome their socio-economic disadvantage.

2.129   The ILiAD[171] report (2017) examined seven of the most socially and economically deprived areas in Northern Ireland to consider why the educational outcomes for some of these areas were inconsistent with the widely held belief that disadvantaged learners have poor educational outcomes. The research sought to identify the factors that allowed children and young people in some areas of high deprivation to achieve much better educational outcomes than their peers in similar or less deprived areas.

2.130   The report found that a number of factors can impact negatively on educational outcomes for disadvantaged learners at individual, family, community and structural levels including:

- lack of aspiration;
- poor attendance;
- the negative impact of academic selection;
- lack of investment in early years;
- poor careers guidance;
- lack of understanding and awareness of vocational education pathways;
- poor school leadership; and
- schools that do not engage positively with families and the community.

2.131   Any attempt to mitigate the impact of disadvantage must take account of all of these.

2.132   The ILiAD research also identified a number of features that contributed to better outcomes for disadvantaged learners including:

- high expectations and a belief that all learners can achieve;
- schools having strong links with and engaging with families and the local community;
- schools collaborating with each other, with local further and higher education institutions and with other external agencies; and
- professional development for teachers re supporting disadvantaged learners.

2.133   DE's Tackling Educational Disadvantage Team produced a paper (2017)[172] that identified effective practice in eight schools with high levels of disadvantage. They identified ten key features that contributed to their success:
- Strong, committed and visible leadership;
- Committed teachers and staff;

170   Achievement of 15-year-old pupils in Northern Ireland PISA 2018 National Report.PDF (education-ni.gov.uk)
171   Investigating Links in Achievement and Deprivation (ILiAD) | The Executive Office (executiveoffice-ni.gov.uk)
172   10 Features of Effective Schools.pdf (education-ni.gov.uk)

- High expectations of and aspirations for all pupils;
- Effective pastoral care and positive behavioural management;
- Broad and balanced curriculum with a focus on literacy and numeracy;
- Skilled use of data to track pupil performance;
- Cross-phase links to support transitions and to identify and share best practice;
- Effective use of outside interventions;
- Good links with parents, communities and employers;
- A well-informed, skilled Board of Governors (BoG) committed to supporting the school.

2.134 These local case studies are welcome, and the achievements of our young people are to be celebrated. However, more research, understanding, experimentation, innovation and evaluation are vital to build on the success achieved to date so that all our young people regardless of their circumstances can progress and achieve. This research must be followed with investment, implementation and sustained action.

Panel conclusions/recommendations

Northern Ireland has many examples of schools that are achieving very good outcomes for disadvantaged learners. The factors contributing to their success should be explored, understood and promoted. The number of schools with high levels of disadvantage and high levels of attainment is quite remarkable.

However, there is also underperformance in a range of schools, across all sectors and across all types, with both high and low levels of disadvantage. This also needs to be explored and underperformance tackled across the entire system. In particular, we need to understand why underachievement is occurring in schools with relatively low levels of disadvantage.

The optimum method of sharing best practice is through collaborative networks where school leaders can meet and learn from each other. Such networks must be promoted, supported and seen as an investment. They need investment in the form of structure, expertise and resources, including time.

These networks must be practitioner led with the opportunity to draft in expertise as required.

Learning from other jurisdictions

2.135 The London Challenge, which operated in the secondary sector only, was by far the most successful of the many attempts in the UK to narrow the socio-economic attainment gap[173].

2.136 It sought to develop constructive collaboration between schools. This was done on a basis which did not pretend that all schools are equally successful. Attempts were deliberately made to use the strengths of some schools to address weaknesses in others. There was also strong central support and leadership.

2.137 The extent to which the success of the Challenge can be attributed to the contribution of able and aspiring immigrant children is hotly disputed. It seems clear that, because of the limited number of such children, the mechanisms put in place by the Challenge itself must be regarded as significant.

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173   Case study 5: The London Challenge | The King's Fund (kingsfund.org.uk)

2.138   While much can be learned from successes locally and further afield, there is no doubt that a great deal remains to be done in order to break the link between disadvantage and poor educational outcomes.

2.139   The research and intelligence function recommended in our Report should seek to learn lessons from the Challenge and other programmes aimed at combatting disadvantage.

The need for good data

2.140   An essential element in any programme to combat disadvantage (of whatever kind) is good data. As mentioned earlier in this chapter when discussing disadvantage and learners with SEN, it is a matter of considerable concern that there is no system-wide data for outcomes at Key Stages 1, 2 and 3 apart from "best estimates". This is due to the very limited number of schools which have submitted data in recent years. In Chapter 4 on Curriculum, Assessment and Qualifications, we recommend a system of assessment, kept under review and incorporating best assessment practice, including the use of technology-enabled adaptive assessment. In this way, emerging difficulties and the need for additional support can be identified as early as possible in a child's educational journey.

2.141   While there is a wealth of data available for outcomes at Key Stages 4 and 5, it is also worth remembering that these outcomes (GCSE and A Level results) only represent those who sit the examinations. Some learners are excluded from the examinations data that is submitted annually to DE. In 2018/19, 7.53% of the overall Year 12 cohort (over 1,600 learners) were deemed ineligible for inclusion in the Summary of Annual Examination Results returns. As already mentioned, we recommend that these returns include all pupils, indicating clearly where an individual has not achieved success in any examination.

2.142   A useful way to tackle disadvantage is to learn from institutions that are doing good work in this area. Schools with a high proportion of pupils entitled to free school meals receive Targeting Social Need (TSN) money. In 2023/24, £75.4m of TSN funding was distributed to schools in Northern Ireland[174]. Schools have widespread discretion in how this resource is used. An advantage of this approach is that schools are free to innovate and a wealth of experience of different approaches is accumulating. However, schools do not always report on their activities and an enormously valuable learning opportunity is thus being lost.

2.143   A report by the Northern Ireland Audit Office[175] indicated that £913m had been spent on targeting social need since 2005 but DE does not have any data to demonstrate how this money has been spent or what outcomes have been achieved. The report also criticised the slow pace of progress to close the attainment gap between FSME learners and non-FSME learners. In this context, unsuccessful initiatives can yield as much valuable information as successful ones.

2.144   We recommend that reporting outcomes of spending on addressing disadvantage should be made mandatory and ETI look at a school's efforts to combat disadvantage as a routine part of institutional inspections.

2.145   We recommend elsewhere in our Report that a research and intelligence function be established within DE. It should have the capacity and responsibility to analyse data, access

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174   Microsoft Word - Common funding scheme 2023-2024 (education-ni.gov.uk)
175   249503 NIAO Closing the Gap report Final WEB.pdf (niauditoffice.gov.uk)

research and seek out innovative ideas which can be deployed to advance education in Northern Ireland.

Working with the community including parents and youth workers

2.146   As we explained in Chapter 1, partnership with parents is crucially important. Not all parents feel equally comfortable in dealing with schools. For some parents, their own negative experience of school acts as a barrier to involvement with their children's school. This tends to be less of a problem in primary schools than at later stages. It may at first be necessary to communicate electronically or even through home visits. There should be opportunities for parents/carers to come to school for social, recreational, sporting or celebratory events so that they build relationships and get to know staff.

2.147   Schools and colleges should actively seek to make parents more confident about visiting and engaging with educators.

2.148   Collaboration with youth services is also of great importance, as a means of enriching the experience and adding to the cultural capital of the young person and as a means of developing positive attitudes. We highlight the importance of utilising youth services as a core part of our education system more in the next chapter.

Recommendations and actions

2.149   Throughout the chapter, we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

The Fair Start Programme should be appropriately resourced and fully implemented.

In order to identify and address the impact of disadvantage on educational attainment at the earliest possible opportunity, it is crucial that there be accurate reliable data available for the early Key Stages.

Learners should have the right to complete courses. The practice of encouraging learners to leave their course prior to examination (as it is believed that they would not achieve at a high level) should cease immediately. All learners in a given cohort should be included in the statistical returns, without exception.

There are areas of commonality and difference that are worth pursuing on an all-island basis so that we can learn from each other. This work should be led and supported by the relevant departments North and South but include practitioners/academic expertise from both jurisdictions. Possible areas for collaborative working include:

- Addressing disadvantage including early years provision.
- Inclusion and SEN.
- Professional development (the Middletown Centre for Autism training is an excellent example that is currently working well).
- Digital literacy including the impact of AI.

- Extending educational research (currently focused on HE research and innovation through "A Shared Island Programme") to include the earlier compulsory stages of education. Possible areas of interest are: early years, revised curricula, the advantages and disadvantages of narrow and broader curricula post-16, the benefits of a transition year.

Vocational training structures and non-tertiary pathways are different across the island so exploring the vocational training approaches in Northern Ireland compared with the Education and Training route in Republic of Ireland, including the role of the Education and Training Boards (ETBs) and the recent emergence of Technological Universities would be of interest.

Lessons should be learned from schools with high levels of socio-economic disadvantage that are achieving high levels of attainment. Good practice should be captured and disseminated across the wider system.

The Engage Programme should be evaluated and a business case developed to assess the widest potential benefits to Northern Ireland of mainstreaming such an approach to provide ongoing targeted support for learners at risk of disadvantage and/or disengagement.

There should be a more equitable distribution of pupils with FSME between the grammar and non-grammar sectors.

Well-structured and well-resourced collaborative networks of schools and teachers should share experience and learn from what works for disadvantaged learners.

Curriculum pathways that allow learners to enter the workforce at NQF Level 1 when appropriate should be provided.

High-quality up-to-date careers information and guidance, and meaningful opportunities to experience vocational pathways, the world of work, FE and HE should be provided to all learners from an early age.

Adults with low skills should be able to access appropriate opportunities to upskill with their employer or through the FE sector.

CHAPTER 3 – LEARNER SUPPORT, INCLUSION AND WELLBEING

Introduction and context

3.1   Recent years have seen significant changes in the demographics of society, and these are reflected in classrooms. The needs of learners are changing and becoming more complex. Similarly, classrooms are changing and becoming more diverse. Education and educators need to adapt and be supported to manage these changes and provide the best educational experience for all learners. There is a need to make progress towards a more inclusive education system to ensure that learners vulnerable to exclusion can learn and achieve outcomes more comparable to their peers.

3.2   Schools are becoming more ethnically diverse. Nearly 21,800 pupils in schools in Northern Ireland are recorded as "non-White" and represent 6.1% of the school population. This is an increase of nearly 7,400 pupils or 51.4% compared to 2017/18.[176].

3.3   For instance, the number of newcomer pupils[177] welcomed into Northern Ireland schools has increased from just over 1,000 in 2001/02 to over 19,000 in 2022/23, a rise of 1,306%. Newcomer pupils now represent 5.5% of the pupil population[178].

Figure 3.a: Newcomer pupils as a percentage of school population in Northern Ireland, 2001/02–2022/23[179]

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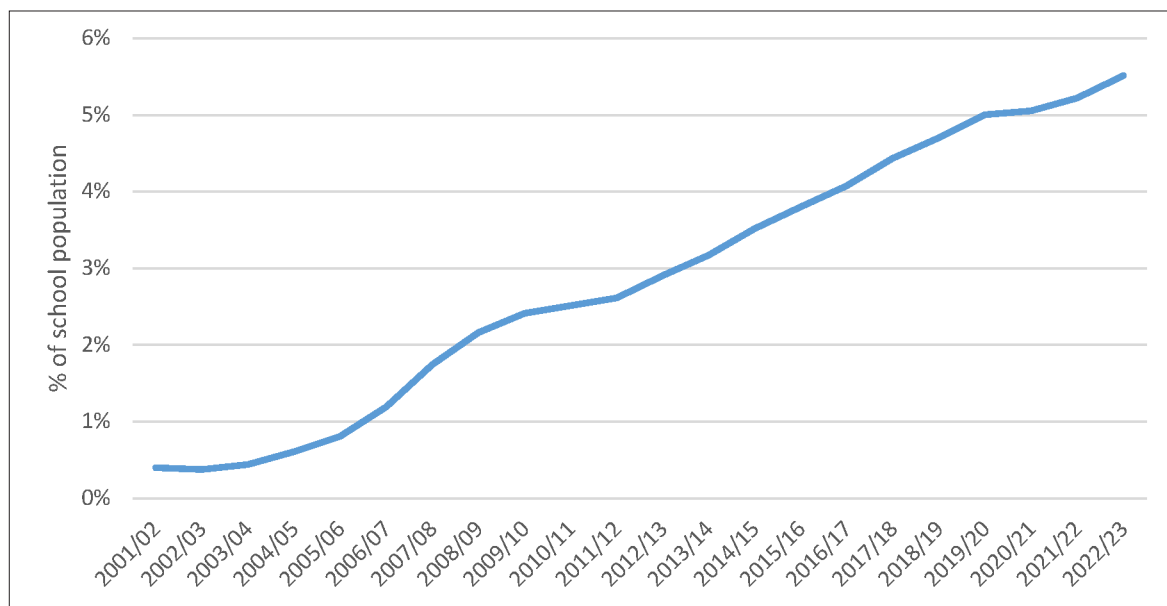
176   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020/21 (education-ni.gov.uk)

177   A newcomer pupil is one who has enrolled in a school but who does not have the satisfactory language skills to participate fully in the school curriculum, and the wider environment, and does not have a language in common with the teacher, whether that is English or Irish. This has previously been referred to as English as an Additional Language. It does not refer to indigenous pupils who choose to attend an Irish-medium school.

178   School enrolments - Northern Ireland summary data | Department of Education (education-ni.gov.uk)

179   Excludes voluntary and private pre-school education centres and independent schools.

3.4 Throughout the UK and beyond, the number of children and young people assessed as having special needs is steadily increasing and the cost of meeting those needs is rising even faster. These tendencies are more pronounced in Northern Ireland than in other jurisdictions.

3.5 The percentage of pupils identified as having SEN in Northern Ireland rose year on year from 17.7% in 2007/08 to 23% in 2017/18. 2019/20 saw a change in the way pupils are recorded on their school's SEN register. Up to that point, children with medical needs were included on the register, even if they didn't have an associated SEN. From 2019/20, these pupils have been included in the school's medical register only. Any pupil with a medical diagnosis who requires SEN provision or has been assessed in other SEN categories is now recorded on both the school's medical register and the SEN register. The effect of this change has been to make the SEN registers more accurate. As a result, there was a reduction in 2019/20 in the number of pupils recorded as having SEN. The proportion of pupils with SEN but without a statement has continued to fall since 2019/20 and is now 11.9% of the school population[180].

3.6 There has been a steady rise in the number of pupils with SEN statements in the school population, from 3.9% of the population in 2007/08 to 6.8% in 2022/23. Between 2005/06 and 2018/19 there was an increase in the proportion of pupils with SEN who did not have a statement, from 12.0% to 17.5% of the population.

Figure 3.b: Overall percentage of pupils identified with SEN in Northern Ireland 2007/08– 2022/23[181]

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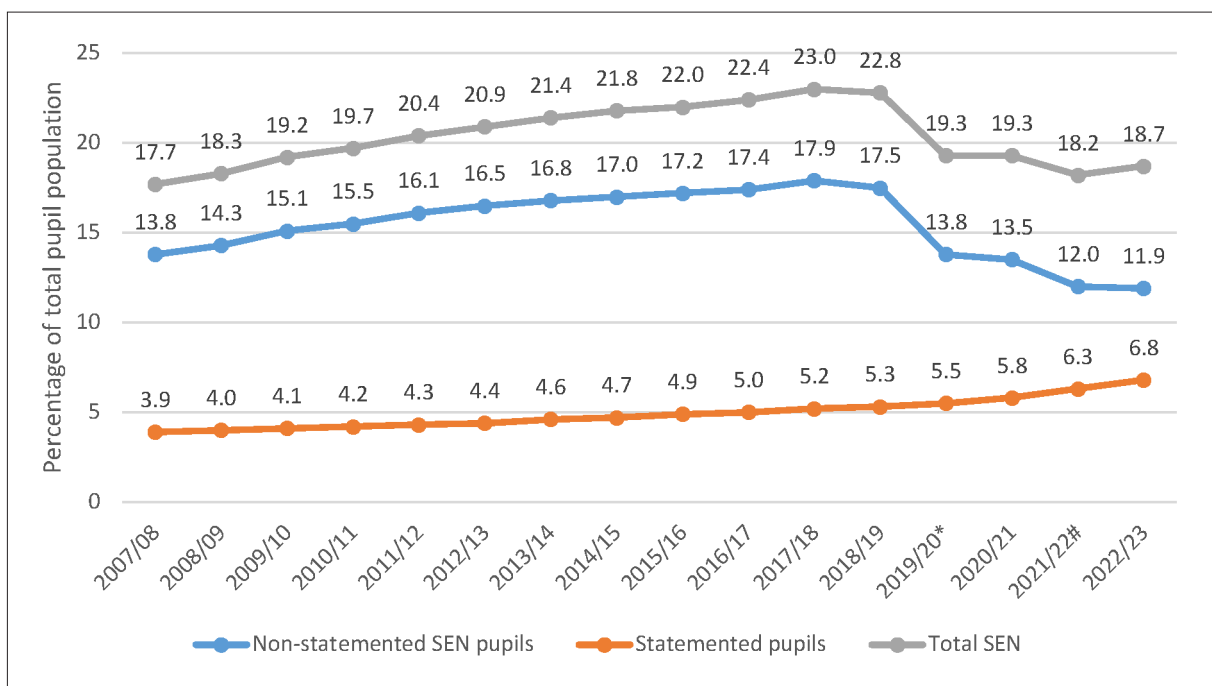
180 School enrolments - overview | Department of Education (education-ni.gov.uk)

181 Data source: DE Northern Ireland School Enrolment Statistical Bulletins. Available at https://www.education-ni. gov.uk/articles/school-enrolments-overview

Data for all schools and pre-school education centres (excluding hospital and independent schools). 2019/20 data is for all funded pre-school, nursery, primary, post-primary, and special schools.

* In 2019/20 there was a change in the categorisation of SEN.

\# From 2021/22 onwards, SEN are classified in three stages rather than the five stages used in previous years.

3.7   Conversely, the number of children attending a special school has risen steadily in recent years, from under 5,000 pupils in 2005/06 to almost 7,000 pupils in 2022/23, a rise of 51% (**Figure 3.c**)[182].

Figure 3.c: Pupils attending special schools in Northern Ireland 2005/06–2022/23
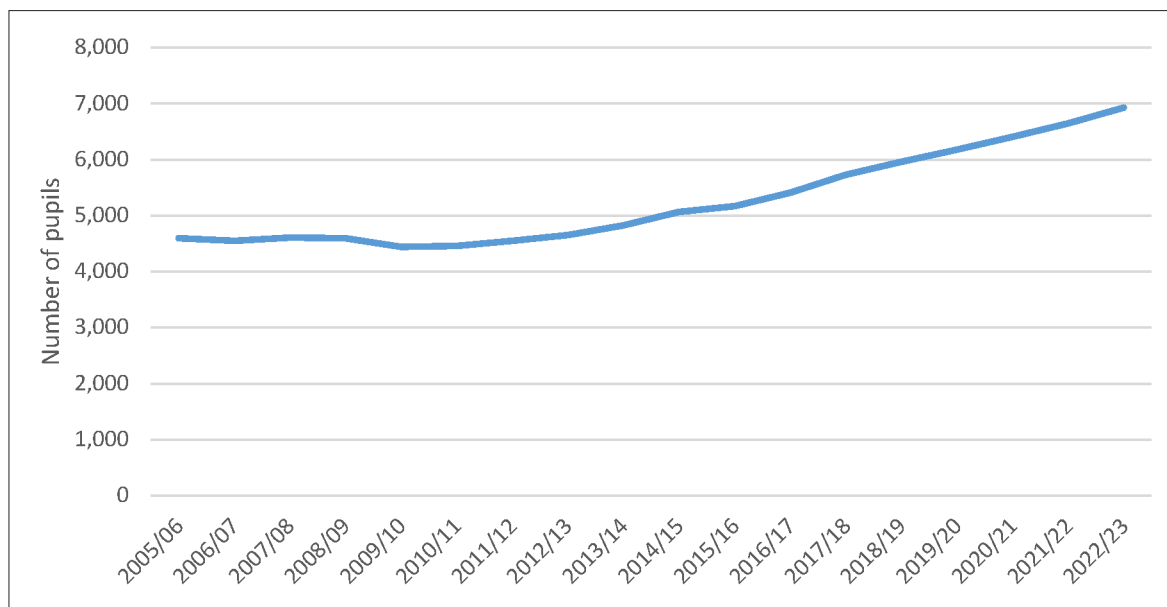
3.8   There is a significant gender disparity with roughly 28% of those with statements of SEN being female compared with 72% of males. The pattern is similar but not as stark for those at Stages 1 and 2 where 40% are female and 60% are male. Reasons for this will likely include cognitive and developmental differences in gender development and potential under diagnosis in females. Further research is required.

3.9   The 2020 Northern Ireland Audit Office (NIAO) report[183] demonstrated an increase of 41% of total SEND spend in the EA within the preceding 5 years with 2020/21 spend at £362m[184]. £283m of this was related to providing support to pupils with a statement of SEN or disability (either in mainstream or special schools). This was an increase of 42% since 2016/17. Since the publication of that report, spend has continued to increase. The resource expenditure on SEN for 2022/23 was in the region of **£479m**.

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182   School enrolments - overview | Department of Education (education-ni.gov.uk)

183   *Impact Review of Special Educational Needs* (2020). NIAO Impact Review of Special Educational Needs | Northern Ireland Audit Office (niauditoffice.gov.uk)

184   Includes Behavioural Support & Provisions Service (BSPS) although not all children and young people registered with BSPS are on the SEN register.

Figure 3.d: EA SEND-related expenditure in Northern Ireland 2016/17–2020/21[185]
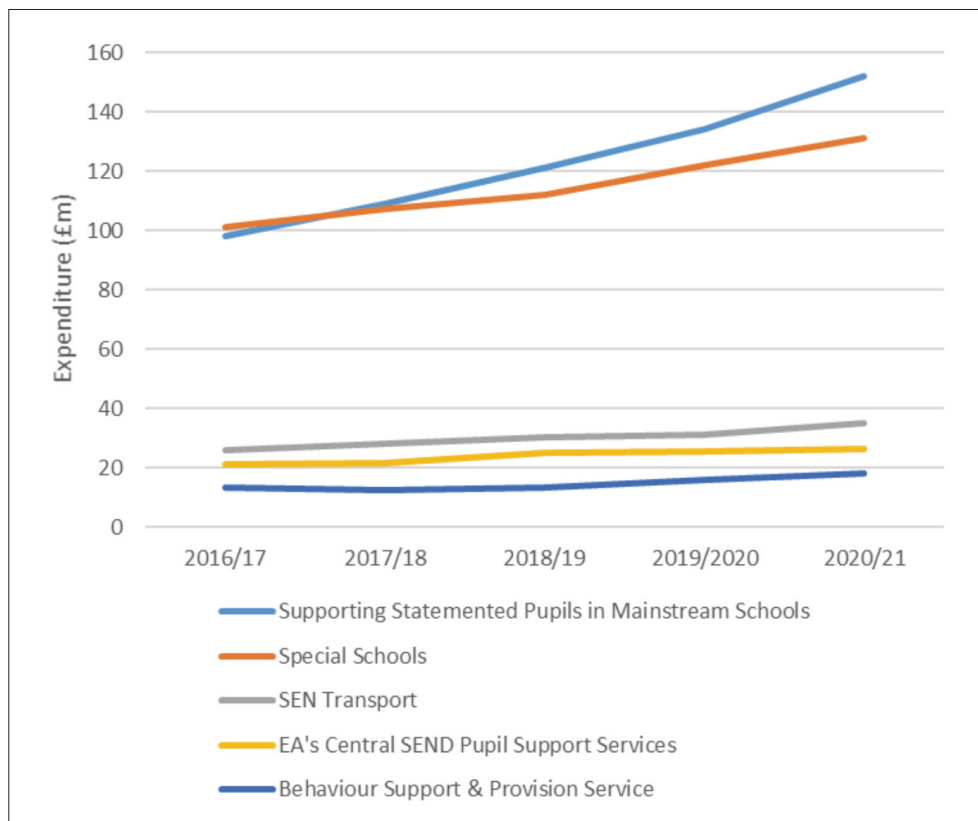
3.10 Many people raised concerns with us about the wellbeing and sound mental health of young people. We were appointed in the immediate aftermath of the Covid-19 pandemic and many people found the experience of lockdown increased stress, anxiety and feelings of isolation. It is, therefore, to be expected that such concerns should have bulked large in the evidence. Nevertheless, we do not believe that the emphasis which was placed on matters of personal wellbeing was simply a reaction to the circumstances of the pandemic. Issues such as depression, isolation, fear of bullying and many others were growing in prominence before the pandemic struck.

3.11 In addition to rising numbers of SEN learners, and spiralling costs, it is important to remember that the effects of the Covid-19 pandemic constituted another layer of disadvantage for that cohort.

3.12 A report led by the National Children's Bureau[186] (NCB) in partnership with Mencap, the Special Educational Needs Advice Centre (SENAC) and Specialisterne found that SEN learners and their families were impacted in ways that were similar to everyone else but some of these were more acutely felt. For example, fear and insecurity were heightened due to the vulnerability of some SEN learners. Parents and carers were seriously impacted by lack of respite since there was no support allowed in the family home. School closure affected SEN learners more profoundly than others. The report states:

> *Parents whose children attend special schools or special units within mainstream*
> *schools highlighted the negative impact of school closures on their children who*

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185 Source: EA Finance & ICT Directorate Reporting 2021.

186 Insights into the impact of Covid-19 on children and young people with Special Educational Needs and Disabilities in Northern Ireland. Geraghty and Lyons for NCB. June 2021

normally receive therapies such as speech and language therapy, occupational therapy, physiotherapy or other specialist assistance, which remained disrupted, even when schools re-opened in autumn 2020. These negative impacts included deterioration or lack of development in terms of ability to speak and communicate, lack of development in terms of motor skills and lack of concentration.

Inclusive education for a changing society

3.13 The emerging global context is of progress towards a more inclusive system of education within an overarching rights-based framework. The United Nations Convention on the Rights of People with Disabilities (UNCRPD) guarantees all disabled children and young people a right to participate in all forms of mainstream education with appropriate support. The [European Agency for Special Needs and Inclusive Education](#) has developed a vision for inclusive education systems which is that "all learners of any age are provided with meaningful, high-quality educational opportunities in their local community, alongside their friends and peers".

3.14 We support this aspiration and believe that a more inclusive classroom strengthens social cohesion. Successful models of inclusion found elsewhere are worthy of further scrutiny and a clearly planned, properly resourced strategy with measurable outcomes is needed to progress a more inclusive approach.

3.15 Inclusive education is commonly associated with special educational needs and disabilities. However, the notion of inclusivity should be broadened to encompass all learners who are susceptible to exclusion or are at risk of achieving sub-standard educational outcomes in comparison to their peers. Education must be accommodating and attainable for everyone, and resources must be used fairly, taking into account the wellbeing of all learners, including those who do not have special needs.

3.16 Within our Report, we outline how we would wish to see learners learning together in the classroom and the breaking down of areas of division. Divisions can occur on grounds of socio-economic status, community background, gender, etc. There is already growing emphasis within DE on this issue and it is important that this be sustained. Work is required to define "inclusive education" in a way suited to the circumstances of Northern Ireland and a road map for delivery developed.

3.17 While DE has no formal definition of "learners vulnerable to exclusion", during the Covid-19 response a cross-departmental definition was agreed for ["vulnerable children and young people contingency planning"](#) which included:

- A child who has an assigned social worker because he or she is a child in need, in need of protection (or on the child protection register) or a child who is looked after.
- A child who is in need, including in need of protection, but whose need is not known to statutory services.
- A child who is "on the edge" of receiving support from children's social services.
- A child who is receiving support from or has been referred to Child and Adolescent Mental Health Services (CAMHS).
- A child who has a statement of special educational needs (SEN), a child who is accessing Education Other Than At School (EOTAS), or a child who normally accesses Nurture Groups.

- A young person who was previously a "child looked after", whether or not they are receiving support from statutory services.
- A child/young person who has been placed for adoption.
- Asylum-seeking and refugee children, and children whose parents have no recourse to public funds.
- A child/young person identified as from the Traveller or Roma community.

3.18   We should have these groups of learners in mind, and other cohorts not reflected in the list above that are at risk of exclusion, when we think of a more inclusive education system. We highlight such groups of vulnerable learners within Chapter 2 on Disadvantage. There is a growing cohort of such vulnerable learners:

- The number of newcomer pupils increased by nearly 2,300 in the single year between 2021/22 and 2022/23.
- The number of Children Looked After[187] has increased by almost 200% since 2007/08, from just over 1,000 pupils to almost 3,000 in 2022/23[188].
- The proportion of children with free school meal entitlement rose between 2008/09 and 2016/17 and has remained relatively stable since. In 2022/23, over 96,300 pupils, or 27.4% of the school population, had an entitlement[189]. A change in entitlement criteria introduced in 2010/11 has affected the number of pupils eligible for free school meals from that year onwards[190].

Figure 3.e: Proportion of pupils in all schools and pre-school education centres with FSME in Northern Ireland, 2001/02–2022/23[191]

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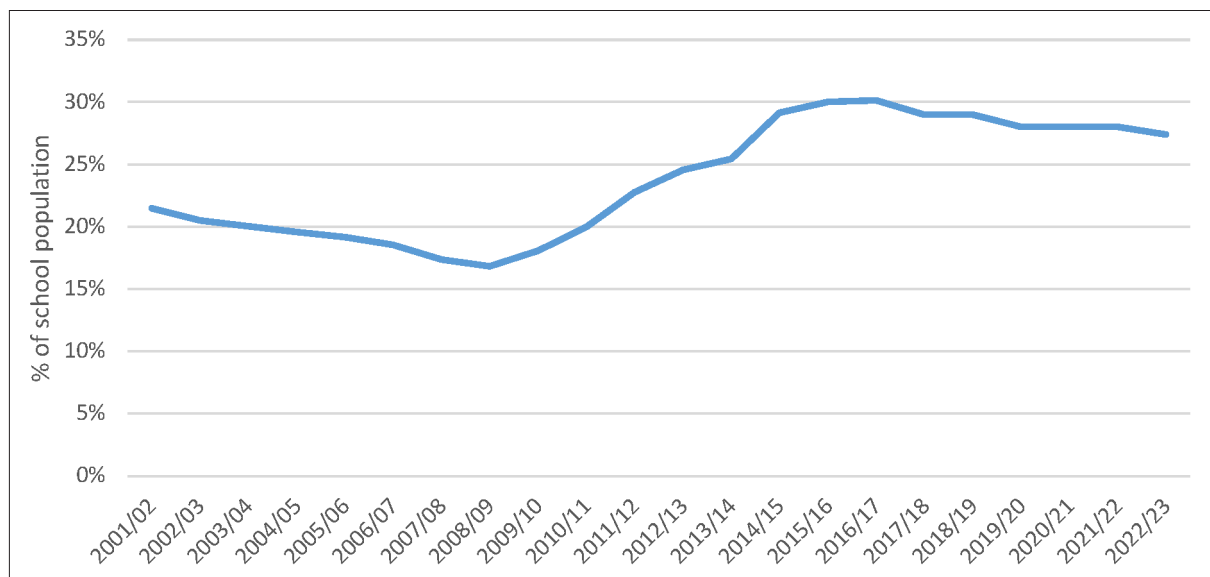
187   "Children Looked After" are those in the care of a Trust or who are provided with accommodation by a Trust. They may be living in residential homes or schools, with foster carers, or with a family relative or friend.

188   Northern Ireland School Census.

189   School enrolments - overview | Department of Education (education-ni.gov.uk)

190   From the start of the 2010/11 school year the eligibility criteria for free school meals were extended to include full-time nursery and primary school children whose parents are in receipt of Working Tax Credit and have an annual taxable income which does not exceed £16,190 (in 2010/11). The new criterion was introduced on a phased basis with nursery, Foundation Stage and Key Stage 1 pupils eligible from September 2010. This was extended in 2011/12 to include Key Stage 2 pupils. It was further extended to post-primary school pupils from September 2014. Source: School meals - 2014/15 statistical bulletin - 7 October 2015 (Revised) | Department of Education (education-ni.gov.uk)

191   School enrolments - overview | Department of Education (education-ni.gov.uk)

3.19   Many of the groups described in the preceding paragraphs tend to have lower levels of attainment compared to their peers and this is discussed in [Chapter 2 on Disadvantage](#). It is also noticeable, and worrying, that many also have lower levels of school attendance.

- The special school sector has the highest overall absence rates. In 2021/22, the attendance rate was 84.4% of total half days. 10.2% were due to authorised absence and 5.3% due to unauthorised absence.
- Learners with a statement of SEN had an attendance rate of 86.0% in 2021/22 compared to 91.3% for learners without SEN.
- Irish Traveller children have a markedly high absence rate, missing 32.2% of total half days. This compares to a rate of 11.1% of learners from a minority ethnic background and 9.4% for White pupils.
- In 2021/22, Children Looked After in post-primary schools had an attendance rate of 84.7% compared with 89% for those not in care.
- In 2021/22, Newcomer pupils had a lower attendance rate (87.4%) than those who were not Newcomer pupils (90.6%) across all school types[192].

3.20   Ensuring higher levels and greater parity of school attendance is an obvious and important first step, but there is a need to understand the reasons for this disparity and remove barriers to attendance.

3.21   It will be a significant challenge to ensure all places of learning are truly inclusive and that all learners have equal access to the curriculum. Delivering a more inclusive education system could potentially require changes to funding models, the school estate, teacher education and training, etc. DE is considering the benefits, challenges and risks of a variety of more inclusive models of education. This is important work which should continue.

3.22   One of the immediate ways in which some vulnerable learners can be better supported in the classroom is through the use of technology. Many educational ICT programmes are interactive, can make learning more enjoyable and enable more creativity and investigation than is possible with traditional approaches. This is especially helpful in the case of learners who require compensatory support, such as those with physical disabilities. Access to and effective use of technology can open up opportunities through use of word processing and text to speech/speech to text programmes and allow work to be modified to suit individual needs, such as use of enlarged fonts and colour.

3.23   Technology can also benefit learners with cognitive difficulties, by providing interactive curricular programmes that have features that cater for different levels of ability, supporting the individual needs of each learner, so that all can progress at their pace and achieve appropriate goals. These programmes provide opportunities for multi-sensory learning and for repetition and practice to support learning.

3.24   Similarly, ICT effectively supports some learners with emotional and behavioural difficulties by providing a supportive, calm environment that helps learners progress at their own pace and take responsibility for their own learning.

3.25   It is important to recognise, however, that vulnerable learners are individuals. Some will be engaged and motivated by the use of new technology, but others will not. Most will also

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192   [Attendance at grant aided primary, post-primary and special schools 2021/22 | Department of Education (education-ni.gov.uk)](#)

benefit from the social aspects of learning. In other words, technology can be a valuable tool but is not a panacea.

Panel conclusion

School communities are changing and are more diverse than ever before. This trend will likely continue. Education must adapt both culturally and structurally to meet the needs of a changing society. This will require improvements to teacher education and professional development, changes to the delivery of the curriculum, and adaptations to the school estate. A more inclusive classroom can strengthen social cohesion.

3.26   Increasingly, there is a view that all children and young people should be educated in mainstream schools. This is seen by some as a way of modelling a more inclusive society. However, we question whether this is the best way to support some learners with very complex needs. Special schools are better able to help children with some kinds of complex needs. Their expertise can also constitute a resource for mainstream schools which otherwise struggle to provide for some categories of need. We believe there will always be a role for such specialist provision, albeit the model of delivery may change over time in a more inclusive system. This would mean greater flexibility, ensuring learners can move between special and mainstream institutions to best meet their needs.

3.27   Special schools should be a key part of shared education and area learning communities, forming strong partnerships with local mainstream schools and FE colleges. This would provide learners in special schools the opportunity to attend another school on a part-time basis to widen their curriculum experience. At the same time, the special school workforce has important expertise which should be used to support teachers within mainstream. Over time, special schools could be developed as regional specialist needs hubs – supporting teachers and learners in mainstream education as well as catering for learners with complex needs.

3.28   Special schools should be just that – specialist and high-quality provision for more complex cases, with partnership working between education and health professionals where necessary. They should be seen as an integral part of the whole education family, working in collaboration with mainstream schools to provide opportunities for learners in both specialist and mainstream provision dependent on their own specific needs.

3.29   Therefore, the special schools network is vital in supporting learners with more complex needs. However, as indicated later in the chapter, it is under significant pressure. Northern Ireland has some excellent modern special school buildings which can offer learners an exceptionally well-equipped and attractive environment. However, these are not the norm. Some special schools contrive to offer an excellent service, with highly committed staff, in premises that can only be described, at best, as suboptimal. There is a pressing need to invest in the special school estate, so that specialist provision is of a high standard and available to those who need it. We are concerned with both the lack of provision and that some highly vulnerable learners are located in sub-standard premises. Such provision should be prioritised for capital investment.

3.30   Middletown Centre for Autism (MCA) is a very good example of the way in which specialist provision can support a more inclusive approach to SEN provision. The centre opened in 2007

and is jointly funded by DE (Northern Ireland) and the Department of Education (Republic of Ireland). It is not a special school, but it provides a range of services to autistic children and young people, their families/carers, educational professionals and others including some health professionals on an all-island basis.

3.31   The centre has developed a multi-disciplinary "whole-school" model of support for autistic learners, supporting them in the classroom, in school and in their home. The services provided include a Learning Support and Assessment Service (LSA), a Training and Advisory Service and a Research and Information Service. The LSA team includes specialist teachers, specialist occupational therapists, specialist speech and language therapists, autism intervention officers and learning support officers. The accredited training, much of which is available online, is very highly regarded. Evaluations indicate that over 90% of both parents and professionals rate the training received as "excellent"[193].

3.32   We commend this approach and would wish to see it extended, with further centres of excellence catering for other areas of specialist SEN provision. Where possible, there should be collaboration on an all-Ireland basis.

3.33   Another key element of inclusion relates to those who are currently being formally and informally excluded from education. In 2021/22, 20 pupils of compulsory school age were expelled and there were 7,428 occasions when pupils were suspended[194]. We have also heard concerns regarding informal exclusions within schools. This is an unacceptable practice. It is the responsibility of BoGs to ensure that it does not occur. The ETI also has a duty to report such occurrences to DE.

3.34   DE has published draft Statutory Guidance on the Reduction and Management of Restrictive Practices in Educational Settings in Northern Ireland[195]. The draft guidance indicates that parents/carers must be informed of any instances of the use of restrictive practice. It should be noted that at the time of writing the guidance remains in draft form. The guidance will not be become statutory until the final version is issued after the consideration of the responses to the public consultation on the draft guidance.

3.35   We welcome this guidance and its child-centred approach. The use of restrictive practices should be monitored by DE.

Transitions

3.36   Starting school, moving school or leaving school to enter further/higher education, training or employment can be a stressful time for all learners. Learners with special educational needs face additional challenges during these transitions.

3.37   The Ipsos *Independent Review of Special Educational Needs, Services and Processes*[196] highlights the delays learners with a statement of SEN face when transitioning to a new learning environment particularly when transferring to P1 and Year 8:

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193   Opening statement for the meeting of the Joint Committee on Autism

194   Pupil Suspensions and Expulsions in Northern Ireland 2021/22 - Experimental Statistics.PDF (education-ni.gov. uk)

195   Statutory Guidance on the Reduction and Management of Restrictive Practices in Educational Settings in Northern Ireland: Understanding and responding to behaviour in crisis situations (September 2023)

196   Independent Review of Special Educational Needs Services and Processes | Department of Education (education-ni.gov.uk)

A review of EA documents and feedback from a wide range of stakeholders highlighted that over the past number of years there have been issues associated with finding suitable school placements for children with SEN, particularly in P1 and Year 8. This has resulted in late notification of school places for the academic year. Both parents and schools noted that the late notification of school places creates uncertainty which causes distress for pupils and their parents.

3.38   There is a serious problem regarding delays in confirming school places for some pupils with statements of SEN at various transition points. For example, in July 2023 – only a few weeks before the commencement of the new school session – almost 200 children with statements of SEN were still waiting for confirmation that they would have a school place in September. This is an entirely unacceptable situation.

3.39   The EA is undoubtedly under increasing pressure, as evidenced in the following statement that was previously available on its website:

For September 2023 there are 8,025 pupils across SEN Stages 2 (children undergoing statutory assessment) and SEN Stage 3 (children with a statement of special educational need) identified as requiring a new or change of placement for September 2023 and into the next academic year as statements are finalised. This is a 35% increase in comparison to the number of children who required placement this time last year and equates to an additional 2,101 pupils.

3.40   The increasing demand for SEN places is not new. Many of these learners are known and the fact that they will need a new placement is also known well in advance. The fact that places are often not confirmed until a very late stage is evidence that the planning and preparation have been inadequate and that there is lack of suitable provision.

3.41   We believe that at the early years stage, learners with a statement of SEN should be assigned a place in appropriate primary provision on assessment of need. For post-primary, identified learners should have a place assigned to them for post-primary by the end of the P6 year in advance of wider transfer procedures, so they can smoothly transition at 11 years old.

3.42   Of course, there will be situations, such as when a learner only receives a statement of need late in a transition year, that do not fit with the framework outlined above. However, the general principle we would wish to promote is that there is greater priority be given to the placement of SEN learners.

3.43   Furthermore, statemented children should not be treated as supernumerary[197] in admissions and enrolments numbers. Learners with a statement of SEN are admitted as supernumerary

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197   Children with a Statement of Special Educational Needs, children admitted on appeal and children admitted by direction of the Exceptional Circumstances Body (ECB) (Years 8-12 only) are treated as supernumerary for school admissions purposes. Children with a Statement of SEN are treated as supernumerary for the duration of their time at school while the other groups are supernumerary for the year of admission only. Supernumerary pupils who obtain admission to mainstream schools do not reduce the number of available places or prevent other pupils from gaining admission if available places remain. In practical terms this means that some schools can have large numbers of Statemented pupils enrolled, often resulting in actual numbers of pupils being significantly above the school's approved enrolment numbers, while also having available places. Some schools are therefore facing challenges in safely educating their pupils within approved accommodation. Children who receive a Statement of SEN during a school year can also become supernumerary, thus creating a vacancy for another child to be added to the class/year group.

to schools over and above approved admission numbers. In recent years there has been an increase in the number of statemented learners attending mainstream schools and settings. From 2015/16 to 2021/22 the number of statemented learners in mainstream pre-school increased by 120%, in mainstream primary schools increased by 37% and in mainstream post-primary increased by 31%.[198] The demand for mainstream placements for learners with a statement of SEN are forecast to increase to at least 2030[199].

3.44 Treating learners with statements of SEN as supernumerary creates a number of issues including a practical concern regarding accommodation with the potential for schools to operate in excess of approved enrolment numbers.

3.45 In our Report we recommend that the practice should cease and a "SEN first" model be considered so learners with a statement of SEN have places identified in advance of transition years. In this way, the institution receiving these learners can plan and have staff and resources in place to meet their needs.

3.46 This policy would be implemented on a phased approach with full implementation occurring only when there is sufficient confidence in the processes. An early action would be treating pupils as supernumerary *only* in the year of their admission to a new school (P1 or Year 8) and including them in the roll thereafter. As soon as possible the system should move to a "SEN first" model.

Panel conclusion

Diversity within a classroom should be seen as a strength not as a challenge. The starting point for education should be that all learners should learn in the classroom together. There will, of course, be circumstances where this is not possible or does not produce the best outcome for the learner, but these should be an exception rather than the norm.

There will always be a need for specialist provision. This can be made available either within mainstream education or in specialist institutions. It should be high quality and accessible. Therefore, there is a need to prioritise capital investment for specialist provision, including special schools.

We do not believe that SEN learners should be treated as supernumerary in school admissions or enrolments. At key transition points the principle should be "special needs first", i.e., SEN learners being placed first to prevent the scenario we have seen in recent years of SEN learners being unplaced shortly before the start of the academic year.

Transition of statemented learners out of formal schooling

3.47 All learners with a statement of special educational needs should be assigned a transition coordinator from Year 10 onwards who helps them draw up a transition plan and make important decisions to prepare them for life after school. The young person and their parents or carer will have a central role in drawing up this plan with input from the relevant health and education professionals including the careers services and other statutory and voluntary services. The plan should be reviewed and updated annually as part of the annual review process until the young person leaves school.

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198   Data provided to the Panel by DE.
199   Paper provided to the Panel by DE.

3.48   Despite this, learners with a statement of special educational needs and their parents/carers find the transition out of formal schooling very challenging.

3.49   This is in part due to concerns about the limited options available to them generally. It is exacerbated by the fact that often there may not be enough places available on suitable courses in FE that develop their independence and employability.

3.50   The Pivotal report *Transforming the 14–19 education and skills system in Northern Ireland – youth voices and solutions*[200] highlights the lack of support in the education and skills system for young people with complex special educational needs. It states that:

> *There is also a clear lack of capacity in the education and skills system to support increasing numbers of young people with complex special educational needs. Lengthy waiting times for referrals and assessments leads to a domino effect of delayed identification of student needs, lack of individualised support in school and diminished academic performance throughout their school life.*

3.51   The report goes on to recommend,

> *a stronger policy focus on supporting overlooked groups of young people and more sustainable funding for voluntary organisations in this area.*

3.52   We support this approach and believe it is crucial to provide ample opportunities in further education and training for learners with SEN to enhance their personal and social skills, as well as their independence, in addition to course-specific skills. This may necessitate an increase in available spaces. The voluntary sector also plays a significant role in offering work or volunteer opportunities for young people with SEN, but we must expand the number of slots.

Panel conclusion

Many learners with special needs face particular difficulties at the point of leaving school and embarking upon adult life. They should receive continuing support in education, training and employment. In the case of people with complex and severe needs more intensive and long-lasting, possibly permanent, support will be required.

Improved emotional health and wellbeing

3.53   Improving emotional health and wellbeing has been highlighted as a priority issue for many, especially learners themselves who have commented on increasing pressures within the education environment. There is already growing emphasis within DE on this issue and it is important that this be sustained.

3.54   We were asked in our Terms of Reference to consider "the role of education in supporting the mental health and wellbeing of our children and young people". However, we agree with Northern Ireland's Mental Health Champion, Professor O'Neill, who told us that there is a failure to recognise within our Terms of Reference that education, and mental health and wellbeing, are intrinsically linked. From a biological perspective it is impossible for children

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200   https://www.pivotalppf.org/cmsfiles/14-19-final.pdf

to learn and retain knowledge when they are in a state of dysregulation as a result of acute stress, anxiety or poor mental health[201,202].

3.55   Professor O'Neill also told us that "there is very strong evidence showing that such school-based interventions are also cost-effective in reducing the economic burden of mental illness"[203,204].

3.56   Education should not be seen as the solution to all of society's problems. However, it can support the building of resilience in learners, provide a safe place for everyone and ensure access to additional services where required. It is clear that the role of education has significantly changed over the recent past and that it is well placed to deliver positive outcomes that extend beyond learning. However, if schools and colleges are expected to solve complex issues, then funding and resources must follow and collaborative working with other departments and bodies is key.

3.57   A 2020 study by the Health & Social Care Board[205] of over 3,000 young people aged 2–19 years and over 2,800 parents has shown that rates of anxiety and depression in Northern Ireland are around 25% higher in the child and youth population in comparison to other UK nations. This reflects a similar trend in the adult population. The study showed that,

- one in eight children and young people in Northern Ireland experience emotional difficulties;
- one in ten children and young people experience problems with their conduct;
- one in seven children and young people experience problems with hyperactivity;
- one in eight children and young people meet the diagnostic criteria for common mood and anxiety disorders;
- one in 20 young people aged 11–19 years display symptoms of post-traumatic stress disorder (PTSD) or complex post-traumatic stress disorder (CPTSD).

3.58   The study also revealed that almost 19% of young people aged 11–19 years met the threshold for psychotic-like experiences, and 16.2% of young people in this age group engaged in a pattern of disordered eating. Almost one in ten young people aged 11–19 years reported having engaged in self-injurious behaviour and roughly one in eight reported having thought about or attempted suicide, with 6.6% having made a plan and 3.5% having made an attempt.

3.59   The proportion of young people with poor mental health increases throughout the post-primary school years, and some studies show that in the year prior to university, a third of students had seriously considered suicide, and one in five had made a plan[206].

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201   Paper submitted to the Independent Review of Education by Professor Siobhan O'Neill (https://www.independentreviewofeducation.org.uk/files/independentreviewofeducation/2022-09/Mental%20Health%20Champion.pdf)

202   Hill, M. (2019). Emotionally regulate before we educate: Focusing on psychological wellbeing in the approach to a new school day. Northern Ireland British Psychological Society. Psychological wellbeing in the approach to a new school day | BPS

203   Paper submitted to the Independent Review of Education by Professor Siobhan O'Neill ()

204   McDaid, D. & Park, A. (2022). The economic case for investing in the prevention of mental health conditions in the UK. https://www.mentalhealth.org.uk/publications/mental-health-problems-costuk-economy-least-118-billion-year

205   Youth Wellbeing Prevalence Survey 2020 - HSCB (hscni.net)

206   O'Neill, S., McLafferty, M., Ennis, E., Lapsley, C., Bjourson, T., Armour, C., Murphy, S., Bunting, B. and Murray, E. (2018).

3.60 In Northern Ireland, a whole generation of parents have higher rates of trauma exposure and a higher risk of mental illness and substance abuse because of the violence of the Troubles. This impacts on their children's risk of mental illness and has contributed to the poverty and inequalities that are associated with poor mental health[207].

3.61 We find these figures very worrying. There is a clear need for a cross-departmental, joined-up approach. This is recognised in the Children and Young People's Emotional Health and Wellbeing Framework[208].

3.62 The Framework uses the World Health Organization's definition of sound mental health:

> *a state of wellbeing that allows children to develop and become aware of their own unique personality, to build their own identity, to fulfil their own potential, to cope with the challenges of growing up; to feel loved, secure and accepted as unique individuals and to be able to be happy, play, learn and to participate and contribute to family and community.*[209]

3.63 The overriding aims of the Framework are**:**

- To ensure children and young people are empowered and assisted to understand and take care of or manage their emotional health and wellbeing;

- To ensure that their needs are identified early and addressed effectively;

- To establish an integrated model that supports early intervention focusing on children's emotional health and wellbeing needs; and

- To help ensure that fewer children and young people will require specialist intervention from CAMHS.

3.64 The Framework has adopted a universal approach, targeting interventions at all pupils, providing support for all, and then, for those who need additional support, using specific projects to provide "early support" and "enhanced support".

3.65 Education has an important role to play as the education workforce has sustained access to children and young people over a very long period of time. Also, relationships formed in school with staff and other learners have a significant influence on the mental health of individual learners. However, the workforce needs support to fulfil this function. Embedding and delivery of the Framework is a vital first step.

'Socio-demographic, mental health and childhood adversity risk factors for self- harm and suicidal behaviour in college students in Northern Ireland'. *J. Affect. Disord.*, 15(239), 58-65. Available at: doi: 10.1016/j.jad.2018.06.006. Socio-demographic, mental health and childhood adversity risk factors for self-harm and suicidal behaviour in College students in Northern Ireland - ScienceDirect

207 O'Neill, S., Armour, C., Bolton, B., Bunting, B., Corry, C., Devine, B., Ennis, E., Ferry, F., McKenna, A., McLafferty, M. and Murphy, S. (2015). *Towards a Better Future: The Transgenerational Impact of the Troubles on Mental Health*. Belfast: CVSNI. (PDF) Towards A Better Future: The Trans-generational impact of the Troubles on Mental Health (researchgate.net)

208 Children & Young People s Emotional Health and Wellbeing in Education Framework (final version).PDF (education-ni.gov.uk) February 2021.

209 European Network of Ombudspersons for Children (ENOC) Position Statement on "Child Mental Health in Europe" Adopted at the 22nd ENOC General Assembly, September 2018

Emotional health and wellbeing in the curriculum

3.66   The Northern Ireland curriculum deals with emotional health and wellbeing in a number of areas. In primary school, these issues are addressed through Personal Development and Mutual Understanding (PDMU) while at post-primary level they are addressed through Learning for Life and Work (LLW). Learners have the opportunity to develop their communication skills as well as their thinking skills and personal capabilities. CCEA's "Living. Learning. Together."[210] for primary schools and the Wellbeing Hub[211] for both primary and post-primary schools provide very useful resources to support the teaching of wellbeing in the curriculum. However, this area of concern is often not prioritised, especially in the later stages of schooling.

3.67   We have heard from practitioners and young people alike a view that there is over-emphasis on end of Key Stages 4 and 5 assessments (GCSEs and A Levels), at the expense of a system that prioritises growth and emotional intelligence. This has a direct correlation with how the system measures achievement and reinforces the need for broader indicators of success at learner level, institution level and system level.

3.68   It has been presented to us that a whole-school, trauma-informed approach (TIA) works and there are excellent programmes available which address metacognition, emotional intelligence and the components of resilience in a trauma-informed manner (e.g., Hopeful Minds, Roots of Empathy, AMH's Healthy Me). These programmes, if part of a whole-school approach, can help develop coping skills and resilience.

3.69   It is important that the use and impact of these resources be monitored system-wide. CCEA Hub resources focus on learners aged 4–15 years in mainstream schools. There are also links to CCEA personal development resources written at an appropriate level for learners with severe/moderate learning difficulties. While many subjects include areas relevant to emotional wellbeing and mental health, it is important that all learners have the opportunity to develop a basic understanding of child development, how the brain works, emotional intelligence and how we learn.

3.70   There is a strong, possibly undeniable case, for greater investment in health and wellbeing interventions and pastoral care. There are already examples of schools employing trained staff (such as social workers) to respond to complex needs and to support the wider school workforce in terms of training and guidance. We see this becoming more commonplace over the near future. All schools should be able to access specialist staff to support learner wellbeing. This may be through direct employment, resources shared between schools, or effective learner support services from a central organisation. New funding will be required, as well as collaboration with health and other services. For example, one new dedicated post in each school would cost approximately £10m per annum. (There may be a case for crisis workers, possibly shared between schools.)

3.71   It should be the aim that every school has direct access to counselling services and crisis workers, through dedicated posts within schools, shared resources or collaboration with health and other services.

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210   Living. Learning. Together. | CCEA
211   Wellbeing Hub | CCEA

Panel conclusion

Emotional health and wellbeing has been highlighted as a key priority by many stakeholders, chiefly by children and young people. Positive relationships are key to building resilience and educational settings are well placed to build positive, trusting relationships due to sustained contact. However, a multi-disciplinary approach is crucial.

Emotional health and wellbeing should be prioritised in the curriculum, from early years right through to post-16. This should include PDMU and Learning for Life and Work, Child Development (with attachment theory), self-awareness, emotional intelligence and metacognition. This is challenging in the later years of schooling and often can be de-prioritised due to pressures around assessment. It is essential that the importance of emotional health and wellbeing in the curriculum is recognised and its profile raised at all stages.

The *Fair Start* report makes important recommendations regarding the use of Nurture Units and counselling services. These services should be protected. DE's Emotional Health and Wellbeing Framework should be central to the School Development planning process, with progress and performance against the framework monitored at school level and inspected by ETI. It is also important for School Leaders and BoGs to have access to expertise in child development and strategies to promote emotional health and wellbeing, e.g., identification of neurodiversity, awareness of common mental health difficulties, understanding of Restorative Practice and Trauma-Informed Approach.

There is a need to invest in resources and training so education can play an important role as part of a cross-departmental, joined-up approach to promote emotional health and wellbeing.

Transforming the special needs policy, legislative, funding and services framework

3.72   Ensuring effective support for learners with SEN is a matter of widespread public concern which has been raised with us by parents, teachers and many others. There is universal agreement that the current approach is not working.

3.73   Parents believe that the system responds to their children's needs grudgingly and belatedly. They portray the process of gaining support as a continuous struggle. Their experience is that obtaining a statement is the necessary passport to resources. The number of assessments which extend beyond the statutory period and the very minimal levels of support given to children with special needs without a resulting statement suggest that they are right.

3.74   At the same time, the number of children with statements is growing rapidly and expenditure on special needs is growing faster still. Failure to provide support for learners without a statement obviously provides a perverse incentive which results in an increase in statementing. The reasons for costs increasing at an even faster rate are unclear.

3.75   In our interim report, we made the point that current timescales for assessment and statementing processes are excessively lengthy with families believing they need to fight to secure support. This results in interventions not occurring at the earliest possible opportunity. There are also concerns about the impact of services or interventions when they are finally secured. There appears to be a perfect storm with frustrated families, late

interventions, ineffective services and an overwhelmed system. The result is learners not getting the help that they need in a timely and efficient way.

3.76 It is important to understand the implications of the rapidly rising costs. The budget for DE is determined at the beginning of the financial year. Apart from some minor adjustments, it remains fixed. As the year progresses, additional statements are drawn up and additional costs incurred. These increase the expenditure of the service due to the fulfilment of statutory obligations, but they have no effect on its budget. In the following year, these additional costs need to be provided for. As SEN investment has risen in all recent years faster than the education budget, the share of the budget taken up by special needs is steadily growing.

3.77 It is difficult to carry out robust extrapolation of data into future years. SEN expenditure has risen quite substantially since 2017/18. At the same time, the proportion of pupils with SEN has actually dropped from 23% in 2017/18 to 18.7% in 2022/23 (due to changes in how pupils are recorded on the SEN register). However, for illustrative purposes only, we have carried out a high-level extrapolation based on recent <u>expenditure trends</u> – applying a 13%[212] year-on-year increase to costs starting from 2022/23. We have also calculated the proportion of the education budget that would be spent on SEN in such a scenario (assuming a flat budget and based on the 2022/23 budget). The results are shown below.

Figure 3.f: Northern Ireland SEN costs (£m) as a percentage of DE budget (2017/18–2022/23 actuals and 2023/24–2027/28 projections)[213]
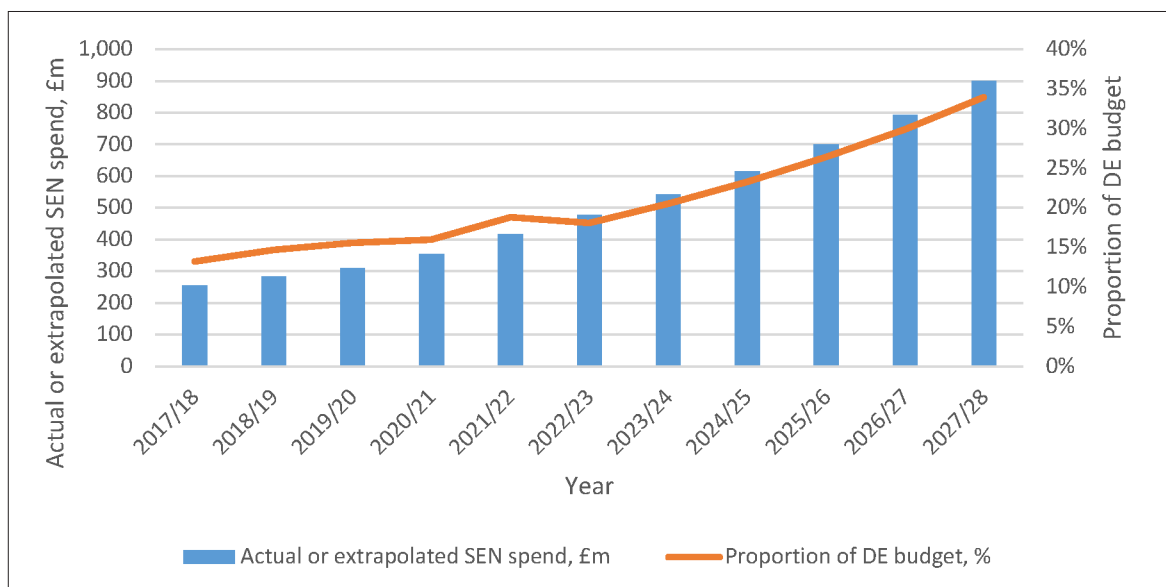
3.78 From 2017/18 to 2022/23, the proportion of the total education budget spent on SEN increased from 13.2% to 18.1%. During this period, there was an 88% increase in total EA SEN spend, rising from £255m in 2017/18 to £479m in 2022/23.

3.79 Of course, the increase in SEN-related expenditure is not unique to Northern Ireland. Other jurisdictions are experiencing similar trends. In England, SEN expenditure increased from

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212   Recent years have seen year-on-year increases of 13% on average.

213   Actual figures (2017/18 to 2022/23) provided by DE Finance. Projected figures (2023/24 to 2027/28) extrapolated by assuming a 13% year-on-year increase. Proportion of budget calculated assuming a flat cash DE budget.

£4.7bn in 2013/14 to £9.0bn in 2022/23, an increase of 91%[214]. While direct comparisons are challenging given differences in how funding is spent and recorded, a crude analysis would suggest that, over the same time period, Northern Ireland expenditure increased by 143%.

3.80   Furthermore, the proportion of pupils with a statement in Northern Ireland[215] is considerably higher (58%) than the proportion of pupils with an EHC plan in England[216] (6.8% compared to 4.3%). This brings additional cost that must be found from the overall budget. We estimate that the cost of Northern Ireland having a greater proportion of learners with statements is in the order of £136m[217].

3.81   The financial position is of significant concern and must be managed. If Northern Ireland experiences a similar increase in expenditure over the next 5-year period to what was experienced in the last 5-year period, SEN costs would reach £900m spend by 2027/28. Assuming a flat DE budget, this would mean that by 2027/28, SEN expenditure could account for **c. 34%** of the total Department of Education budget. If, as has been the case in recent years, the number of statemented learners continued to rise, this could easily be an underestimate.

3.82   These projections indicate an impending financial crisis for both education and the Northern Ireland Executive as a whole.

3.83   The wider effect of this funding position – although not by intention – is that the service available to children with special needs is being funded at the expense of the service provided to others. It is the task of those running the service to try to ensure that the fixed resource available is allocated equitably in the interests of all learners. This manifestly is not taking place. When account is taken also of the shortcomings of the service provided to learners with special needs, it is no exaggeration to say that the system is in chaos.

3.84   The Northern Ireland approach to special educational needs has been subject to significant critical review and analysis in recent years. The Northern Ireland Commissioner for Children and Young People (NICCY) carried out a rights-based review of SEN provision within mainstream schools. The *Too Little, Too Late* report[218] was published in 2020 and made a series of recommendations to improve the educational experience of learners with SEN. DE accepted the recommendations in the report.

3.85   In 2017, the Northern Ireland Audit Office (NIAO) raised concerns regarding a lack of systemic evaluation of SEN interventions and support in the context of increased diagnosis[219]. A further report by the NIAO in 2020 found that the 2017 recommendations had not been implemented and therefore value for money for SEN expenditure could

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214   SN07020.pdf (parliament.uk)

215   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020-21 (education-ni.gov.uk)

216   Special educational needs in England, Academic year 2022/23 – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)

217   Calculated on the basis of approximately 9,000 additional pupils with statements in Northern Ireland at a cost of around £15k per learner over and above mainstream funding.

218   *Too Little Too Late: A Rights-Based Review of Special Educational Needs in Northern Ireland.* (2020). Northern Ireland Commissioner for Children and Young People. Available at: Review of SEN Provision - 'Too Little, Too Late' - NICCY

219   *Special Educational Needs* (2017) NIAO. Available at: Special Educational Needs | Northern Ireland Audit Office (niauditoffice.gov.uk)

not be demonstrated[220]. The report made further recommendations on the approach to SEN policy and services in Northern Ireland. DE is currently seeking to deliver on these recommendations. This has included an Independent Review of SEN Services and Processes in Northern Ireland published in May 2023.

3.86   The report by Ipsos[221] provides a detailed analysis of the current SEN framework and contains numerous useful suggestions which we would endorse. In total it made 43 recommendations across a number of key themes including transformational change, early intervention, school leadership, workforce development, etc. However, from our perspective the report does not fully address the fundamental issues facing SEN policy and provision including the central matter of financial unsustainability.

3.87   The foundations of current approaches to special needs throughout the UK were laid down by the Warnock report, commissioned in 1973 by Margaret Thatcher when Secretary of State for Education, and published in 1978.[222] Prior to the Warnock report, the education of children with special needs was a largely disregarded field. Even the terminology used would be unacceptable to a modern audience. The report was an enlightened document which changed attitudes and practice for the better. It introduced the concept of individual needs, which gave rise to the report's title, *Special Educational Needs*, and the terminology which has been applied subsequently.

3.88   Warnock also laid stress on a number of other crucial concepts:

- Early intervention is vital.
- Children with significant learning difficulties should receive multi-disciplinary assessments.
- The results of assessments should be developmental rather than judgemental.
- Parents should be seen as partners.
- In cases of more pronounced needs, statements should be drawn up to ensure appropriate action.

3.89   These principles generally remain sound to this day. However, much has changed over the 45 years since the report's publication. The report assumed that around 2% of children might require a statement. They would be a subset of a somewhat larger group whose special needs warranted some kind of additional support which might be temporary. Today in Northern Ireland, 18.7% of children are recorded as having special needs and 6.8% have statements[223].

3.90   Given the dramatically changing context, there is a need to revisit the Warnock report[224] and consider a new approach to supporting learners with special educational needs, their families and their educators. From our perspective, there is a compelling case for overhauling the current policy and legislative framework.

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220   *Impact Review of Special Educational Needs* (2020). NIAO. Available at: Impact Review of Special Educational Needs | Northern Ireland Audit Office (niauditoffice.gov.uk)

221   *Independent Review of Special Educational Needs Services and Processes* (2023). Available at: Independent Review of Special Educational Needs Services and Processes | Department of Education (education-ni.gov.uk)

222   The Warnock Committee had 27 members and co-opted 15 others to assist. There were four full members from Scotland and two from Wales.

223   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020/21 (education-ni.gov.uk)

224   Warnock 40 Years on: The Development of Special Educational Needs Since the Warnock Report and Implications for the Future. (Lindsay, Wedell and Dockrell) 2020.

3.91   There are several principles that should guide the process of change:

- Legislation should not be excessively prescriptive, nor should it provide perverse incentives.
- Processes for assessing needs should be manageable and capable of being completed in realistic timescales.
- Support should be provided speedily and, in the great majority of cases, without the need for a statement.
- Where possible, interventions for special needs should be aimed at enabling children and young people to learn effectively without ongoing additional support.
- Practice should be regularly reviewed with the intention of establishing norms for the requirement of different levels of support. These revised norms should subsequently inform refreshed assessment processes.
- Existing methods of supporting children and young people with special needs should be evaluated with a view to disseminating good practice and reducing the current over-reliance on classroom assistants.
- Decisions regarding special needs should be informed by the need for equitable distribution of resources across the entire system.
- Children and young people should be included in decisions about their support and what will help them progress.

Panel conclusion

Current policy, legislation and services relating to special educational needs require radical overhaul because of dissatisfaction with poor quality service, lack of evidence of the effectiveness of many interventions and an unsustainable funding model.

The present position is one of services unavailable, assessments unduly protracted, families frustrated, learners unsupported and costs spiralling. This leads us to believe that there is a need for urgent reform.

Minor changes will not suffice. A complete overhaul of the current legislative and policy framework is needed.

3.92   The need for change is driven by the growth in diagnosis, frustration with the quality and timeliness of the current service provision and a spiralling increase in expenditure that is adversely impacting on resources available to other learners.

3.93   The Northern Ireland school census data shows that there has been a steady increase of total pupil enrolments over the past number of years. Over the same time period, there has been a decrease in the number of pupils on the SEN register. As noted above, this is largely due to the change introduced in 2019/20 in how pupils are recorded on the SEN register. This decrease has had no discernible effect on SEN costs, which have continued to escalate.

3.94   As we have already stated, Northern Ireland is not alone in the phenomenon of increasing numbers of children with SEN statements, but the trends are slightly more pronounced. While direct comparison with other nations is difficult due to differences in how data is recorded, broad trend comparisons are useful to consider. The EA prepared the trend analysis below comparing Northern Ireland, England and Wales, all of which showed upward trends with Northern Ireland's being more pronounced.

Figure 3.g: Percentage of total enrolment with statement or EHCP, 2009/10 – 2020/21, Northern Ireland, England and Wales[225,226,227]
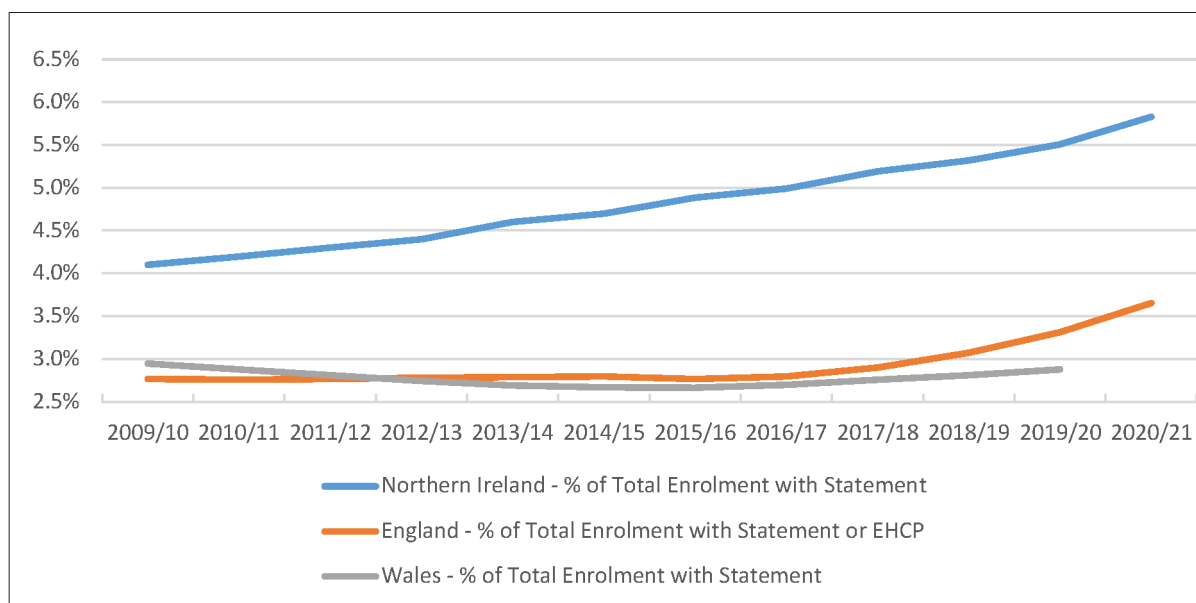
3.95   Even with the growing numbers of learners being identified with a special educational need requiring a statement there is a concern there is a significant unmet need not being recorded. This would mean the picture is perhaps starker than the above figure would suggest, albeit that other jurisdictions would likely also have unmet need. Analysis undertaken by the EA estimates that less than a third of mainstream primary and post-primary pupils across Northern Ireland whose Special Educational Needs Coordinators (SENCOs) felt needed education psychology involvement received it in 2021/22.

3.96   The largest SEN category in 2021/22 was cognition and learning – language, literacy, mathematics, numeracy – which accounted for 30% of all SEN diagnoses. This was followed by social, behavioural, emotional and wellbeing (18%) and speech, language, and communication needs (11%). In 2019/20, the two most common diagnoses had been the same; however, the third most common was dyslexia or specific learning difficulty – language/literacy, which accounted for 11% of all SEN diagnoses. The three largest medical categories in 2021/22 were asthma (33%), autism spectrum disorder (20%) and other medical conditions/syndromes (19%). These three categories also occupied the top three positions, in that order, in 2019/20.

3.97   This data is illustrated **below**. For presentation purposes, only categories representing at least 1% of diagnoses have been included.

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225   https://www.education-ni.gov.uk/articles/school-enrolments-overview
226   Special educational needs in England 2019
227   https://gov.wales/sites/default/files/statistics-and-research/2019-07/school-census-results-2019-764.pdf

Figure 3.h: Proportion of SEN diagnoses in Northern Ireland, 2021/22
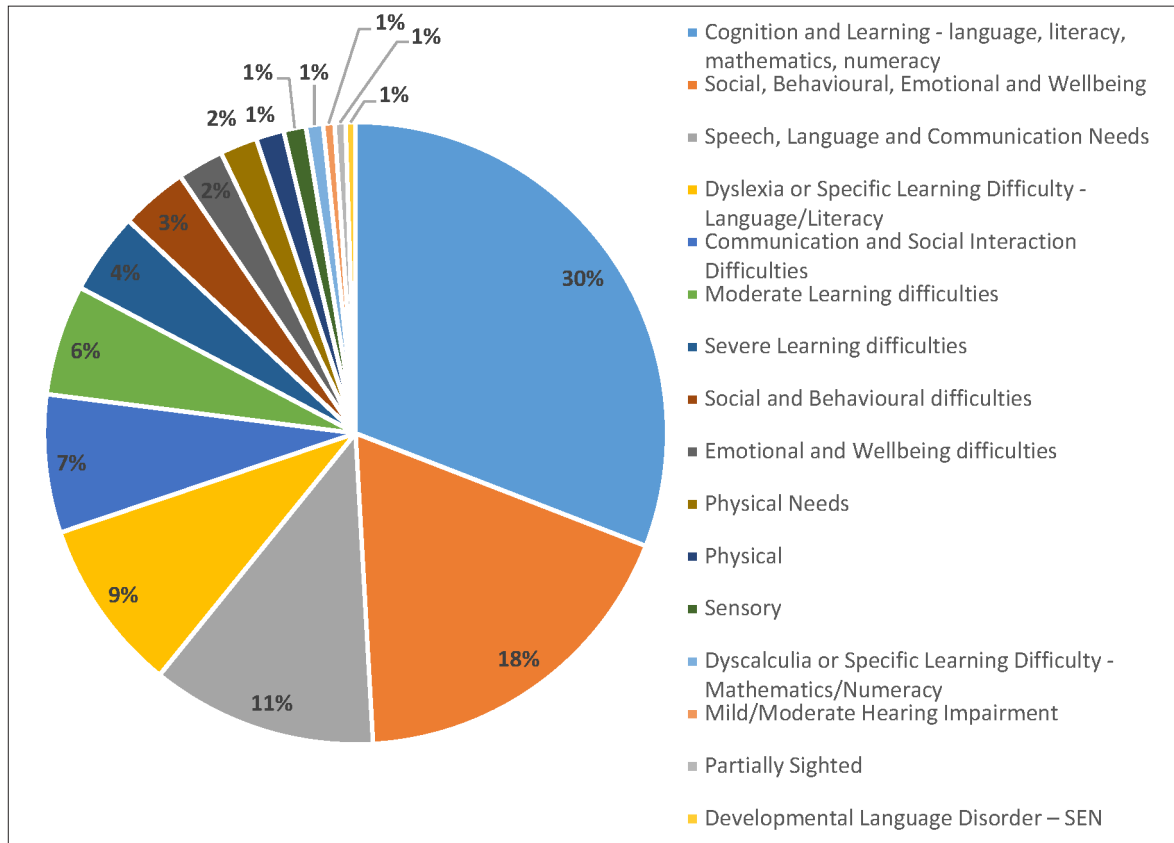
Figure 3.i: Proportion of medical diagnoses in Northern Ireland, 2021/22[228]
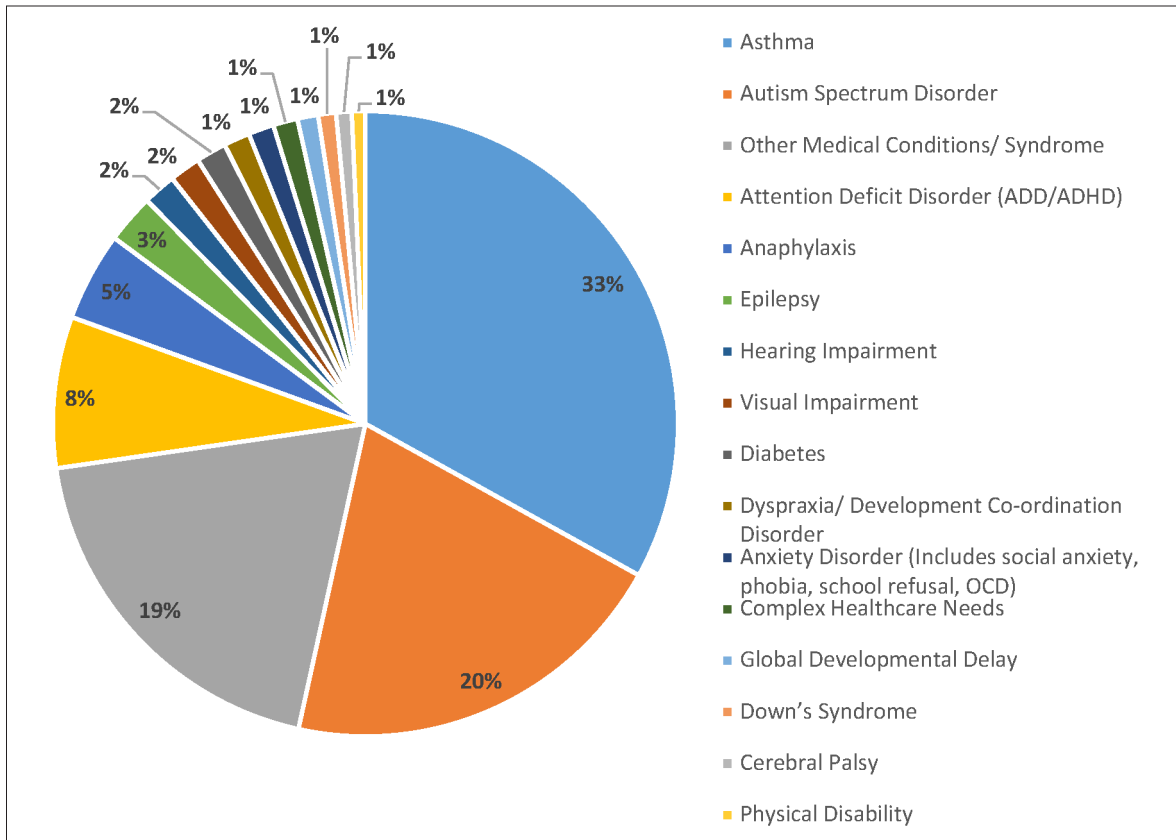
228   Panel analysis based on data provided by DE's Analytical Services Unit.

3.98 Analysis of deprivation statistics has shown a correlation with SEN needs, with the most deprived areas having the highest incidence of SEN (**Figure 3.j**). 73% of pupils resident in the most deprived decile do not have SEN compared with 88% of pupils in the least deprived Multiple Deprivation Measure (MDM) decile.

Figure 3.j: Percentage of pupils with SEN by MDM decile of pupil location in Northern Ireland, 2021/22[229]
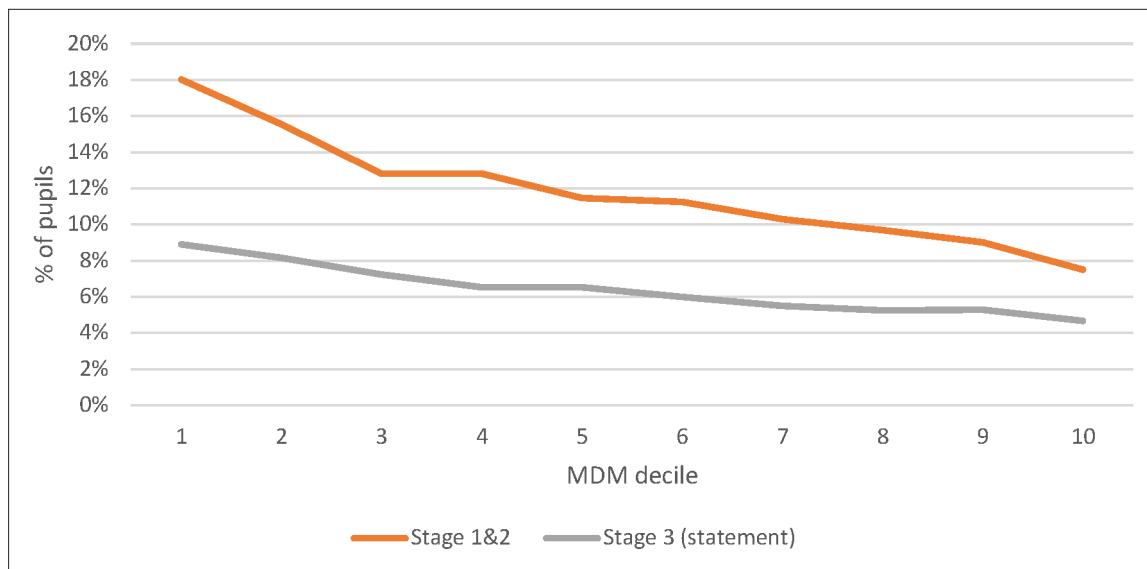
3.99 Analysis of the distribution of SEN among each of the MDM deciles for the five most common SEN needs shows a general reduction in occurrence from most deprived to least deprived area (**Figure 3.k**). "Dyslexia or specific learning difficulty – language/literacy" does not follow this general pattern but hovers around the 10–12% incidence rate for deciles 1–6, and then falls slightly[230].

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229 Panel analysis based on data provided by DE's Analytical Services Unit.
230 Panel analysis based on data provided by DE's Analytical Services Unit.

Figure 3.k: Percentage of SEN needs by MDM decile of pupil location (five most common SEN needs) in Northern Ireland, 2021/22[231]
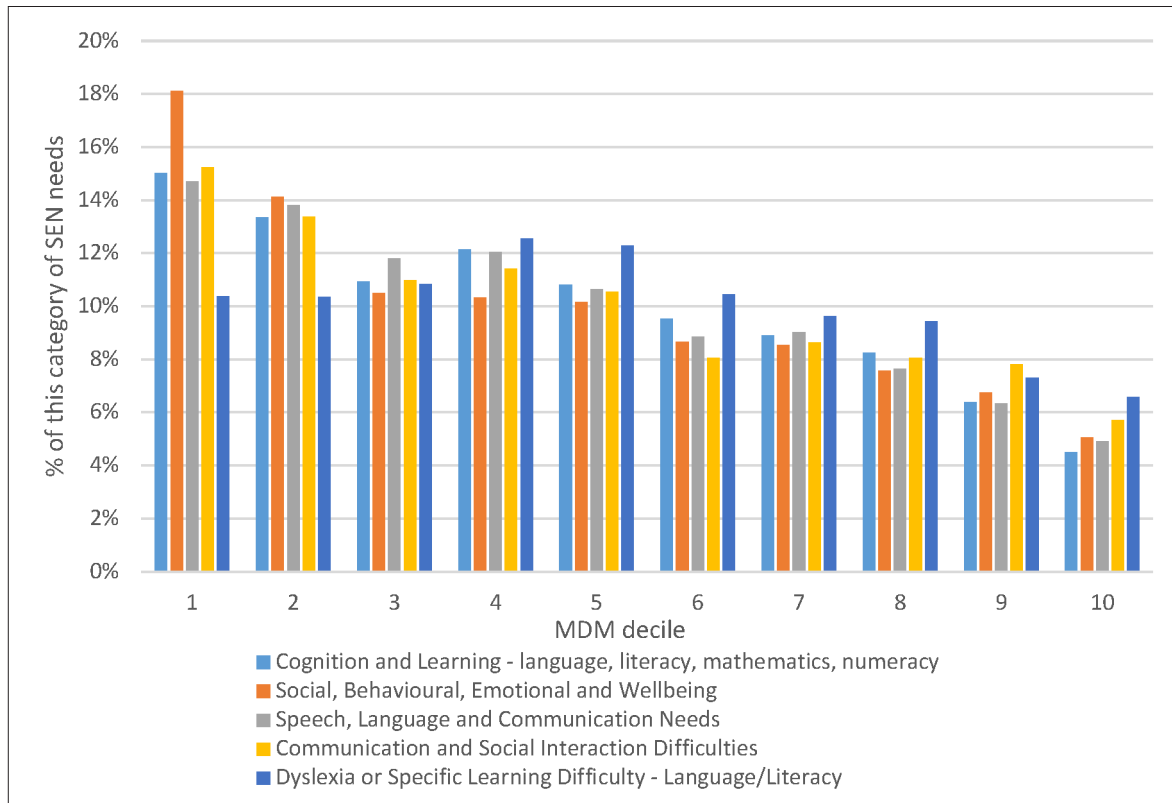
3.100 We have also heard from some stakeholders and seen from relevant data that not only is there increasing prevalence of additional needs but there is also increasing complexity of need. This growing complexity is demonstrated by the growth in demand for places in the special school sector. Between 2017/18 and 2022/23, there has been a 20.8% growth in pupils in special schools. The growth in mainstream schools over the same time period was 3.1%.

3.101 A key question the Panel has been asking is "What is the reason for the current trend of increasing numbers of children and young people with statements of special needs?" Suggestions made to us include better diagnostic tools, greater public awareness, and parental pressure to secure diagnoses culminating in a statement. The trauma that exists in a post-conflict society may also be a factor. The increased survival rate of very premature babies has been put forward on several occasions as an explanation of an increase in very complex needs. Although this is almost certainly true, the numbers involved are small. We have yet to find a definitive answer as to why the number of statemented learners is increasing globally or why Northern Ireland's rates are higher than in most other countries.

3.102 We suggest that the statementing system currently creates a perverse incentive for parents to seek confirmation that their child should be placed in the group of young people with the most acute special needs and given a statement. Additional support should be given to learners who are considered to have special needs, as quickly as possible, whether or not they have a statement. Stage 1 of the special needs process is intended to ensure that the learner will be assisted using the resources and expertise of the school. Stage 2

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231   Panel analysis based on data provided by DE's Analytical Services Unit.

involves intervention using additional resources brought in from outside the school. Stage 3 requires the drawing up of a legally enforceable document stating what support the learner is entitled to receive. In practice, many parents believe that it is only at Stage 3 that meaningful support will be given. The system is not working as intended. Steps must be taken to ensure that meaningful support is provided at Stages 1 and 2.

3.103   We conclude that the large-scale increases in numbers and cost that have occurred in recent years are mainly caused by some combination of improved diagnoses, greater public and parental awareness (particularly of conditions such as autism) and parental perception of how to obtain greater resources for their children.

> **Panel conclusion**
>
> The increased number of learners with statements of SEN is not unique to Northern Ireland. It is part of a wider global trend. However, the trends appear to be more significant in Northern Ireland.
>
> The reasons for this are likely to be multiple and varied – better diagnostic tools, greater public/parental awareness, increased need and a belief (which is largely justified) that support services are only available to those with a statement of need.

3.104   There is a need for an immediate change in the way that statements are written so as to:

- Increase the capacity of the school (or other setting) to cater for special needs rather than attaching a resource to an individual learner.
- Better meet the needs of learners so they can progress.
- Reduce reliance on allocating hours of classroom assistant time.
- Build in a requirement for review rather than allocating a resource in effect in perpetuity.

3.105   We recommend that such an approach be put in place as a matter of extreme urgency.

3.106   It is possible that changes to the approach of statementing may not remedy the problem we have outlined. It could be that decisions of appeal tribunals could frustrate their intended purpose. Were that to take place, there would be no alternative but to legislate in order to make reform possible. It is highly likely that such legislation would need to radically change the content and purpose of statementing in order to allow the system to operate more flexibly.

3.107   Data from the EA shows that in 2022/23, the statementing process was not completed within the 26-week statutory period in 42% of cases. When valid exceptions were excluded, 23% had not been completed within the statutory timeframe[232]. Furthermore, in the period April 2022–January 2023, in those instances where the parent challenged the decision via the Special Educational Needs and Disability Tribunal (SENDIST), the EA conceded two-thirds of cases. The majority of other appeals were withdrawn, which is likely to mean the EA and parents reached agreement prior to a tribunal hearing taking place[233]. These are indications of a system in crisis.

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232   Data provided by DE's Special Education and Inclusion Review Team.
233   Parents of special needs children 'face fight for support' - BBC News

3.108 Given the rising costs, reduced budget and unquestioned need, it is essential that interventions be effective and targeted.

3.109 There is also an immediate need to improve service delivery. We discuss in Chapter 8 reform of the Education Authority and the rationale behind much needed change. One reason for the need to reform is the evidence gathered and stakeholder feedback on poor service delivery, especially in relation to SEN services and pupil support. Of course, this is in the context of spiralling demand, reduced resources and recovery from a pandemic.

3.110 In Chapter 1, we set out the possibility of a single agency tasked with early intervention and learner support, providing a child-centred approach to services including early years, SEN support, youth etc. We suggest that the long-term objective should be the separation of pupil support services from the other functions of the EA. A fundamental flaw with the design of the EA is that it is expected to be too many things to too many different customers. An organisation expected to recruit and pay staff, manage buildings and govern institutions has a fundamentally different culture than one that is expected to support learners and provide needs-based interventions.

Panel conclusion

The system, as it currently operates, is under significant pressure. It is a cause of widespread discontent and division. Families experience extreme frustration in obtaining a service. Even when they do so, the service is often ineffective. Most importantly, current approaches are totally unsustainable. The existence of a demand-led source of expenditure reinforced by statutory provisions imperils not merely arrangements for supporting learners with special needs but the entire education system. On present trends, the growth in SEN expenditure will be inflicting significant damage on the education of all children and young people in the immediate future.

Central to this is the statementing process – both how statements are written and how they are interpreted. A new approach needs to be developed on the principle that earlier access to specialist support is available at Stages 1 and 2, reducing the need for so many referrals at Stage 3. Many neuro diverse learners should not require a statement, providing they are able to access professional and expert support at an early stage. Statements should be for those with the most complex needs.

Effective interventions and needs-based services

3.111 Without a dramatic overhaul of SEN practice and the legislative and policy framework the current approach is unsustainable. Furthermore, it presents a problematic issue of equity which is seldom voiced but is of fundamental importance. It is the responsibility of those involved in managing the system to ensure that whatever resource is available is used in a manner which is fair to all children and young people. The current arrangements, however, mean that a steadily increasing proportion of the budget is allocated to a minority of pupils without any policy decisions being made in relation to the equitable use of the overall resource.

3.112 The current arrangements do not work for SEN learners or non-SEN learners. A better way to use both financial and human resource to provide effective interventions and needs-based services to learners is urgently required.

3.113   Firstly, in terms of the financial resource there is a fundamental issue as to whether an essentially supply-led approach to funding the education system as a whole, can co-exist with a partly demand-led approach to funding SEN. This is particularly true when the demand is rising while the overall budget is reducing (in real-terms). Any spend associated with providing the necessary Stage 1 support for pupils with SEN in mainstream schools must be met through a school's Common Funding Formula (CFF) allocation. The Education Authority is responsible for providing additional support for pupils with a statement as deemed necessary, usually in the form of a classroom assistant or specific equipment, while in some cases providing Stage 2 support for non-statemented SEN pupils via a range of pupil support services such as literacy or language/communication. The EA and schools must together ensure that they fully meet their statutory obligations in the provision of education for children with SEN[234].

3.114   There are three stages of special educational provision[235], as set out in the Code of Practice[236]. These stages focus on the level of intensity of the special educational provision required for a child to make adequate progress commensurate with their abilities and improve their outcomes. Responsibility for pupils with SEN at each stage lies with the school, given the day-to-day role of the school in a pupil's teaching and learning, with increasing EA involvement where required.

3.115   A pupil who is identified by their teacher as having or appearing to have SEN enters **Stage 1** of the process and is placed on the school's SEN register. The school identifies the appropriate provision to be implemented to support that child's needs. The pupil's needs are met out of the school's budget. A child's progress in response to school delivered special educational provision at Stage 1 should mean that a relatively large proportion of children will not require the involvement of the EA.

3.116   A small proportion of children may require school delivered special educational provision to be further supplemented by the EA at **Stage 2** of the Code. This support may be accessed from the EA or from Health and Social Care (HSC) Trust professionals.

3.117   A still smaller number of children will not make suitable progress despite the resources, advice and support delivered through Stage 2. In these circumstances, the school may wish to consider a referral to the EA with a view to statutory assessment. A parent also has the right to request a statutory assessment. This may result in the making of a statement detailing the provision necessary to meet the child's needs. If a statement is made, the child enters **Stage 3**. The school retains responsibility for the day-to-day learning of the child, but collaborates with the EA and, where appropriate, the HSC Trust. The statement sets out what the learner needs to access the curriculum. This is normally translated into the number of adult assistant hours that the child will receive. The cost of this assistance is met by the EA, and DoH if there are health-related costs. Schools may also offer reasonable adjustments to pupils with certain needs, e.g., assistive technologies.

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234   Information provided by DE's Special Education and Inclusion Review Team.

235   The three stages are part of the new SEN Framework and cannot be fully implemented until a new SEN Code is introduced which is contingent on new SEN Regulations being made by the Northern Ireland Assembly. Until such time as a new SEN Code is operational, schools must have regard to the 1998 SEN Code and its 2005 supplement in all respects with the exception of recording children with SEN under the new three stages. Further information can be found in DE's Circular 2021/06 available at: DE Circular 2021/06 - Three Stages of Special Educational Provision | Department of Education (education-ni.gov.uk)

236   The draft Code - Section 3 - Identification, Assessment and Provision by Schools.PDF (education-ni.gov.uk)

3.118   A vitally important role in relation to this process is played by the Educational Psychology Service (**EPS**). In 2015/16 the service employed 140 full-time equivalent (FTE) psychologists but by 2022/23 this had fallen to 84.5 FTE. (It is worth noting that work done by the Educational Psychology Services suggests that, despite an increase in the training programme, the age profile of the existing workforce and other factors will bring about a further reduction in numbers of around ten FTE by 2026/27.) The EPS also now employs Psychology Assistants (PAs) and Assistant Educational Psychologists (AEPs) who are able to relieve fully qualified staff of routine tasks, but the EPS believes that the staffing balance within the service should not be further altered.

3.119   Given the statutory requirements in relation to assessment at Stage 3, the consequence of this decline at a time of rapidly rising demand for the service is that EA educational psychologists are spending an increasing amount of their time on assessment. Educational psychologists are also involved in annual review of statements where updated assessment/ advice is required. The amount of time they can spend directly assisting children is now very small.

3.120   More than 80% of a psychologist's time is spent on assessment which is of two main categories. By far the more time-consuming is the full statutory assessment of individual children or young people to determine whether a statement of SEN is merited and, if so, what should be the content of the statement. This is the process required at Stage 3. The other kind of assessment relates to Stage 2. Less intensive psychometric assessment of individual children or young people is used to determine whether external support is merited above and beyond what their school can provide directly. This will generally involve giving access to one of EA's SEND Pupil Support Services (**PSS**).

3.121   It is important to note that there is a statutory requirement that the EPS must complete all Stage 3 assessments within 6 weeks of request from the EA's Statutory Assessment and Review Service (SARS). However, there is no statutory timeframe for the completion of Stage 2 assessment. As a result, psychologists are effectively required to prioritise Stage 3 over Stage 2 assessments.

3.122   However, it could be argued that – objectively – it is the Stage 2 process which is the more important. If appropriate support is provided at that point and children and young people can then engage more fully with the educational process, then fewer will need to progress on to Stage 3. In the absence of a Stage 2 assessment, children and young people are unable to access external support at an early stage. As a result, more cases proceed to Stage 3, thus limiting further the resources that the EPS can devote to Stage 2. A perverse vicious circle is thus put into operation.

3.123   As a result, fewer children are provided with a service at the stage when it might be most effective. As mentioned earlier, a recent study by the EPS estimated that less than a third of mainstream primary and post-primary pupils across Northern Ireland whose SENCOs felt needed EP involvement actually received it in 2021/22. This discredits the operation of the whole system. It fuels the belief among parents that the only way of obtaining a service for their children is to obtain a statement. Furthermore, schools may advise parents to request a Stage 3 assessment as soon as possible because they share the belief that little benefit will result from assessment at Stage 2 even if such an assessment can be obtained.

3.124   In short, there has been a complete breakdown in trust in the system. Rebuilding that trust will be a protracted undertaking. It is unlikely to be assisted by the actions which will require to be taken urgently to prevent the financial crisis that the acceleration in SEN spending is rapidly bringing about.

3.125   Part of the problem at Stage 2 is caused by the fact that the EPS is required to fulfil a gatekeeper function which is not undertaken by psychologists elsewhere. This function is not valued by other stakeholders. If, however, their role was to be abolished, it is likely that referrals direct from schools could have the effect of doubling the demand for services from the PSS. This is a level of demand that could not be met.

3.126   The PSS consists of the following specialist services:

  • Autism Advisory & Intervention Service
  • Language & Communication Service
  • EA Literacy Service
  • EA Sensory Service
  • SEN Early Years Inclusion Service
  • SEN Moderate Learning Difficulty Service
  • SEN Inclusion Service (Severe Learning Difficulties)
  • SEN Inclusion Service (Down Syndrome)
  • Medical Needs Service

3.127   These services employ c. 250 FTE at a cost of some £17m[237]. If intervention at Stage 2 is to become an effective part of the system, this resource will need to be increased. Apart from employment costs, there will be a substantial training implication.

3.128   Furthermore, if schools have greater success in dealing with difficulties at Stage 1, i.e., internally using the school's own resources, there will be the need to develop, or access, more SEN expertise within the school staff. This too has training and resource implications.

3.129   From all these considerations, it is evident that the system is in need of fundamental reform if it is to deliver effective support to those with SEN and command public confidence.

3.130   The following changes are needed to ensure an effective system:

  • Effective screening of the development of the child from before birth up to the point of entry into primary school.
  • Increased support for the parents of very young children, including building on the "Getting Ready …" and Play Matters programmes.
  • Early years provision from age 2 for all families who wish it, starting with disadvantaged families and others at risk.
  • Early diagnosis of difficulties followed by early and effective intervention.
  • Multi-disciplinary SEN capacity in early years settings.
  • Access for early years settings and primary schools to the PSS.
  • A strengthening of the in-house SEN expertise of all schools in order to make support at Stage 1 and Stage 2 more effective, including provision of in-house SEN expertise through Irish in Irish-medium settings.

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237   Figures provided by DE's Inclusion Directorate.

- Increased understanding within schools regarding the use of "reasonable adjustments".
- An extended provision of SEN continuing professional development (CPD) opportunities for serving staff.
- More emphasis on SEN in all initial teacher education courses and a 1-year course for university graduates leading to the award of a Post-Graduate Certificate in Education (PGCE) in Special Educational Needs.
- An expansion of the Pupil Support Services to make intervention at Stage 2 more effective (including ensuring the availability of expertise to meet the needs of, *inter alia*, newcomers or the IM sector).
- Removal of the gatekeeper function of the Educational Psychology Services (EPS) at Stage 2.
- An expansion of the EPS, including the use of Psychology Assistants and Assistant Educational Psychologists.
- Revision of the Code of Practice[238] to reflect these changes.

3.131   We believe that the approach summarised above will make it possible to create a system which functions effectively and is seen as credible by schools, affected families and the public at large. Given the distrust and conflict that currently characterises the system, this will take time. In the meantime, given the impending financial disaster, other steps will need to be taken. These are likely to be highly controversial.

3.132   As we have outlined, Northern Ireland spends a significant amount of money on SEN support and there are serious questions about the effectiveness of that spend.

3.133   The majority of this spend relates to the employment of classroom assistants (CAs) to help SEN learners in both mainstream and special schools. The number of CAs employed to support SEN pupils in mainstream schools has increased by 1,589 FTEs (44%) since 2017/18. The increase in special schools is 366 FTEs (31%).

Table 3.l: Total number of FTE classroom assistants in Northern Ireland 2017/18–2021/22[239]

Academic Year	Classroom Assistants FTE		Total
	Mainstream	Special	
2017/18	3,571	1,169	4,740
2018/19	3,801	1,263	5,064
2019/20	4,009	1,323	5,332
2020/21	4,490	1,407	5,897
2021/22	5,160	1,535	6,695

3.134   Classroom assistants can play a vital role in supporting learners and teachers. They are valued by schools, learners and parents. However, it is apparent that CAs are becoming viewed as the only available support mechanism for learners with complex needs. This should not be the case. Learners' needs vary greatly, and a blanket use of CAs is inappropriate. Interventions and support should be needs-based and focused on the individual learner. Tailored interventions and support provided through, for example, speech and language

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238   Code of practice on the identification and assessment of special educational needs (https://www.education-ni.gov.uk/publications/code-practice-identification-and-assessment-special-educational-needs)

239   Source: EANI (2022).

therapy, occupational therapy or dyslexia support, will in many cases be more effective. There is also growing evidence that the method of deploying CAs can have a negative impact on the educational outcomes of learners with SEN and serve to cause social isolation.

3.135   There are practical implications of the growth of CAs. We have seen examples of schools where CAs outnumber the teaching workforce 2:1 or more and individual classrooms have high numbers of adults present. We know there are concerns regarding recruitment and retention. There is also a lack of training and professional development. Finally, there are increasing costs. This leads us to question the value for money and the effectiveness of the current model.

3.136   The recent Ipsos report drew similar conclusions, stating that:

> *Assigning classroom assistants on a one-to-one basis is not perceived to be an efficient way of supporting children, unless they have a physical or medical need, as this does not help children develop independence and is not the most effective way to help pupils meet their learning goals … It is clear from these findings that the role of a classroom assistant should be professionalised, meaning that they should have a higher level of qualification, should have greater training and skills, have opportunities for career progression and be better paid.*[240]

3.137   The available resources could be used for greater benefit of the learner if there was a mixed service model rather than an ever-increasing use of CAs. This has significant implications for the workforce and would require a programme of transformation.

3.138   Multi-disciplinary working within schools to support learners' needs would be greatly preferable. This could be via the deployment of specialist SEN teachers, speech and language therapists, educational psychologists, occupational therapists, dyslexia support, etc., working in schools and providing direct support for learners. This would also be accompanied by upskilled CAs. We suggest that this model would be preferable and more effective than the almost automatic allocation of CA hours.

3.139   Such an approach will require schools to be provided with greater discretion in the use of the funding allocated for learners with SEN, and a phased programme to increase the use of specialist support with a transition away from allocating CAs for every child that has a statement.

3.140   This changed approach will link with policy and legislative changes relating to the statementing process, a new employment model (whereby a number of different schools could employ a shared resource) and a new service-delivery model involving reform of the learner support services within the EA.

3.141   The statement of need should explain the core services the learner needs and the school, in conjunction with the service provider, should determine the best way to meet those requirements. Options would include use of a CA (either full-time or part-time), use of resource to buy in specialist therapy (from speech and language therapists (SLT), OT, Ed Psych, etc.) or the use of specialist teachers. The model would vary from school to school and

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240   Ipsos (2023). *Independent Review of Special Educational Needs, Services and Processes in NI* p.42. Available at: Independent Review of Special Educational Needs Services and Processes | Department of Education (education-ni.gov.uk)

case to case and would be determined by the Principal, SENCO and relevant professional, based on the statement of need.

3.142 A **Learner Support Workforce Programme** is required to upskill the workforce and maximise access to specialist support for learners who need it most.

3.143 The design of such a programme would be for DE to determine. Implementation would take time because of the constraints of workforce development and the need for access to specialist teachers, currently in limited supply.

3.144 We carried out some high-level analysis on such a programme to aid our thinking. This is illustrated below.

Figure 3.m: Illustrative example of Workforce Transformation Programme regarding SEN support in schools[241]
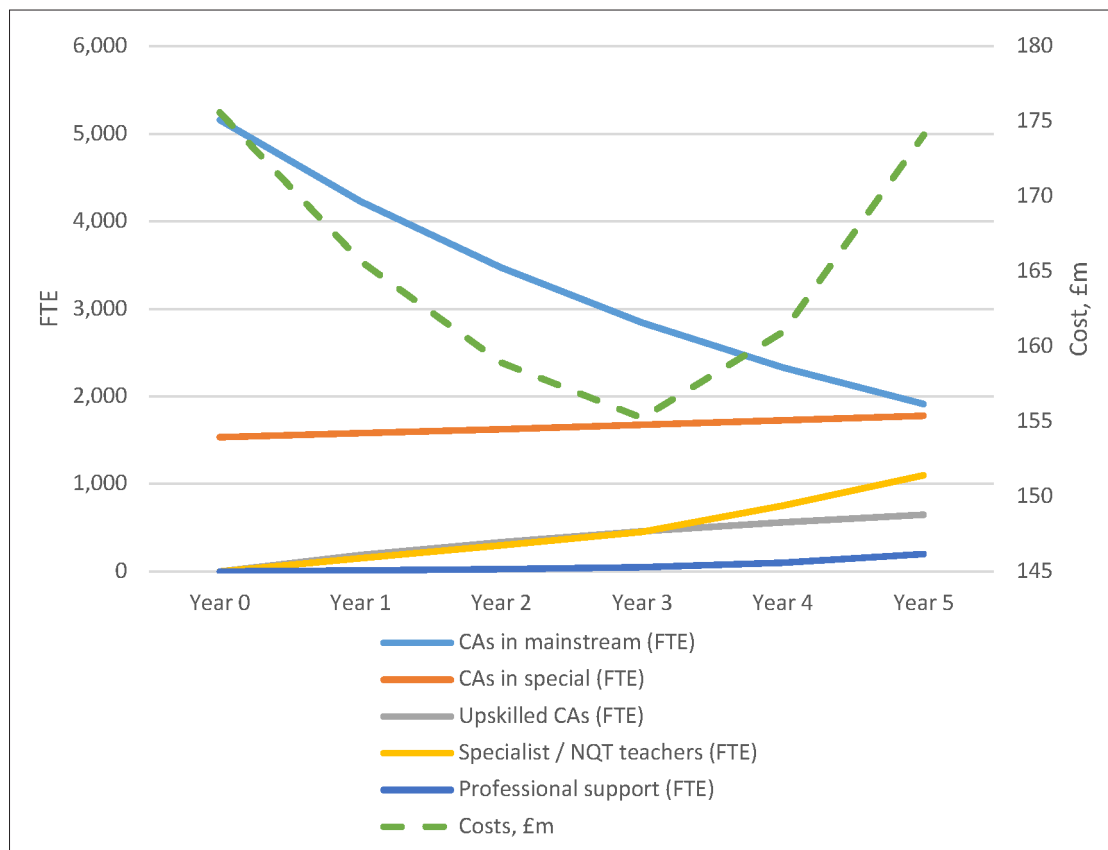
3.145 While the numbers above are purely illustrative, it demonstrates that over a 5-year period the number of CAs in mainstream education would reduce with the number of specialist teachers and other professional support staff increasing, to provide greater access to specialist intervention in schools for learners.

3.146 In our illustrative example, there would be approximately 1,100 additional specialist teachers and 200 additional professional support staff. There would also be an increase in the number of upskilled CAs. The programme could largely be cost neutral with savings made in initial years used for training needs and the overall wage costs returning to the starting position by year 5.

241 Based on analysis by the Independent Review Panel.

> ### Panel conclusion
>
> It is essential that learners with additional needs receive support at the earliest possible opportunity and receive services tailored for their needs that improve outcomes.
>
> Schools should have greater discretion in the use of the funding allocated for learners with SEN. Over time, we would expect to see the number of CAs reduce with increased specialist support in the form of specialist SEN teachers, speech and language therapists, educational psychologists, occupational therapists, dyslexia support etc. This would also be accompanied by upskilled CAs.
>
> This model would be preferable and more effective than the almost automatic allocation of CA hours.
>
> This requires significant transformation of and investment in the learner support workforce but would ensure that schools have the resources in place to support learners sooner (well in advance of Stage 3), by providing greater access to specialist support and targeted interventions much earlier.

3.147 There is a need to increase specialist support for learners with SEN. Budgetary provision is required for this in the immediate future.

3.148 A key element in the current SEN support network is the team of educational psychologists employed by the EA. While there has been a year-on-year increase in demand on the Educational Psychology Service (except in 2019/20 due to Covid-19 lockdowns) there has been a decrease in the staffing resource.

Table 3.n: Specialist EPS staff numbers and expenditure in Northern Ireland, 2016/17 – 2020/21[242]

	2016/17	2017/18	2018/19	2019/20	2020/21	% Change
Educational Psychologist FTE *(including management)*	136	118	129	106	101	-26%
Psychology Assistant FTEs	9.5	16	13.5	23.5	21.5	126%
Total Specialist Staff FTEs	145.5	134	142.5	129.5	122.5	-16%
EPS Expenditure (£m)	10.1	9.9	9.4	9.9	9.7	-4%

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242 EA Special Educational Needs and Disability Strategic Development Programme draft outline business case.

3.149 As well as this being a decreasing resource, concerns have been raised with the Panel about how this expert resource is utilised. This is reflected in the NICCY *Too Little, Too Late* report as part of their engagement with educational psychologists.

> *Much concern was expressed by EPs about whether their time is being used to best effect. During in-depth interviews, EPs reflected on the challenge in attempting to balance the number of referrals for assessment while also fulfilling other aspects of their post, such as intervention work and the provision of training/ guidance to schools. Comments suggest that the scale of demand far exceeds the resource available to conduct assessment. As a consequence, EPs perceive their time to be monopolised by assessment. Survey findings corroborate this point, as 19 of 23 respondents disagreed that there is a sufficient balance in their current duties to best meet the needs of children and schools. Closer examination of typical duties highlights that **assessment of children accounts for most of the educational psychologists' time**. Responses reveal that a smaller proportion of time is dedicated to other duties including administration and correspondence, consultation with staff and parents/carers, the provision of training and guidance, observations, home visits, professional development and attending review meetings. It is also concerning to note that EPs reported that an average of **just 4% of their time is used for direct intervention work with children**. In contrast, when asked to consider how their time should be used, the majority indicated that the time allocated to assessment and administration should be reduced, enabling more time for direct work with children.*

3.150 Undoubtedly, educational psychologist time is largely focused on the statutory assessment process and annual reviews, leaving fewer opportunities for direct engagement with learners or support for teachers. A review of the Educational Psychology Service Model undertaken by the EA found that:

> *The majority of Educational Psychologist (EP) time is currently focused on the psychometric assessment of children and young people. Demand outstrips supply and as a result the support and the number of Stage 3 assessments that can be completed in mainstream schools has been restricted. This in turn has restricted the number of children and young people who can then access EA support services at Stage 3.*

> *Typically, **around three-quarters of an Educational Psychologist's (EP's) time across a year is spent on casework, the vast majority of which relates to the psychometric assessment/review of individual children and young people**. Although individual cases and requirements vary, a typical full psychometric assessment of a child is estimated to take 10 hours of an EP's time which equates to c. 95 assessments per EP per annum.*

3.151 It is essential that the staffing of the Educational Psychology Service should return to the level of 5 or so years ago with around 130 fully qualified psychologists. The focus of their work should be on directly assisting learners. This will be dependent on controlling the demands of assessment. It is also important that there be the necessary spread of expertise in the service to allow it to meet requirements such as supporting children with SEN among newcomers and in the Irish-medium sector, ensuring that any barriers regarding language are overcome.

3.152   Given the pressures on the Psychology Service, consideration should also be given to adopting a model similar to that used in the Republic of Ireland regarding the use of "approved suppliers". This could mean the EA buying in services from the private sector and/or accepting private assessments providing these are completed by an approved psychologist.

3.153   Furthermore, we have seen from the data that speech, language and communication needs are among the most frequently reported types of SEN (11%). However, it has been suggested to us that the commissioning of speech and language therapy SEN services has not kept pace with need and that not all children with speech, language and communication needs (SLCN) are receiving the service they require. There is an urgent need to invest in and commission more speech and language therapy services[243]. In Northern Ireland, there are no specific educational speech and language therapists (SLT)[244]. We would suggest that there is a widening gap between capacity and demand, with the same number of SLTs supporting growing numbers of learners that require support. SLT interventions for children with SEN are most in demand in the nursery and Key Stage 1 years.

3.154   The increase in nursery and P1 intake in special schools across Northern Ireland has driven up demand for SLT services exponentially as the youngest children require the most intensive support. This is a vitally important service, with early intervention through SLT potentially helping to prevent or resolve problems that could emerge later in life. This requires a funded commissioning plan for SLT service provision[245].

3.155   The need to increase numbers of EPs and SLTs reinforces our belief that a Learner Support Workforce Programme is needed.

Panel conclusion

Northern Ireland benefits from a significant human resource directed towards supporting learners with special educational needs. This is seen primarily with the increased numbers of Classroom Assistants but also in highly qualified professionals working within the Education Authority.

There are, however, areas of serious shortage and fundamental questions regarding how the resource is utilised.

Immediate action is needed to:

- Break the link between statementing and CAs.
- Delegate funding to schools to buy in services/employ staff to support learners with SEN.
- Use resources differently to ensure greater access to specialist support much earlier.
- Increase the number of specialist teachers and other professional support available in or to schools (SLTs, OTs, Ed Psychs, etc.).
- Improve training and professional development for CAs within schools.
- Provide schools with flexibility to employ such professional staff on a shared basis, i.e., two or three schools employing a single SLT to work across each setting.

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243   Information provided by The Royal College of Speech and Language Therapists in a briefing to the Panel.
244   Information provided by DE's Inclusion Directorate.
245   Information provided by The Royal College of Speech and Language Therapists in a briefing to the Panel.

Utilising youth services

3.156 Collaboration with youth services is also of great importance, both as a means of enriching the experience and adding to the cultural capital of the young person, and as a means of developing positive attitudes. This non-formal education which facilitates personal and social skill development complements the more formal learning processes of the school or college and encourages engagement/re-engagement in positive learning in a non-formal setting. As it is put in UK Youth's report on the economic value of youth work[246], it:

- allows young people to explore their values, beliefs, ideas and issues;
- enables them to develop their voice, influence, and place in society; and/or
- facilitates the learning of a set of practical or technical skills/competencies that enable them to realise their full potential.

3.157 Youth work embraces a very wide range of activities including open-access youth clubs, targeted provision for young people at risk, outdoor learning, the creative arts, physical activities and many more. Often these activities engage young people in a way that formal learning does not, allowing the building of trusting relationships with young people.

3.158 The Expert Panel on Educational Underachievement took a positive view of youth work. The *Fair Start* report[247] indicated that:

- young people who are at the periphery of education generally respond positively to youth work pedagogy;
- the involvement of the voluntary and statutory youth sector in schools can be valuable and should be encouraged;
- the benefits of youth sector provision are not widely recognised by schools or the wider education system; and
- the Youth Service Engagement and Outcomes Framework provides an effective measure of the personal and social development of young people.

3.159 We endorse these observations and believe that the full contribution of the service has yet to be fully realised.

3.160 A vital feature of youth work which distinguishes it from other types of educational provision is its ability to involve large numbers of volunteers. This is true of Northern Ireland, which has an active youth sector and wide network of volunteers. The EA provides funding to local organisations while also providing a youth programme of its own (through employed youth workers).

3.161 There are good examples of organisations working directly with schools which help:

- raise confidence, resilience, self-esteem and motivation;
- make connections with other curricular areas;
- promote children's mental health and wellbeing.

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246 *The economic value of youth work: A report for UK Youth* (November 2022). p.9. Available at: Economic value of youth work - Summary (ukyouth.org)

247 *A Fair Start, Final Report and Action Plan* (May 2021). Key Area 4, points 4.6-4.9.

3.162   Youth programmes, including those delivered in schools, support a growth in confidence, resilience, self-belief, the ability to try again and a wider understanding of wellbeing and the importance of a positive lifestyle. These important outcomes demonstrate the value of this kind of collaboration between voluntary organisations and schools.

3.163   The Youth Council Northern Ireland (YCNI) remains a statutory body, as established under the Youth Service (Northern Ireland) Order 1989[248], but has been non-operational since the term of the previous Council members expired in March 2019. New members could not be appointed in the absence of a Minister and Executive. The future of the organisation remains unclear.

3.164   There is merit in having a body with oversight of youth service delivery as a whole. It would require representation from the voluntary sector as well as from the EA's own service. We suggest that, once the new department has been set up, it conduct a consultation aimed at determining the form that such a body should take.

3.165   It is difficult to draw direct comparisons with other jurisdictions given the different delivery and funding models. However, there is some evidence to suggest that statutory youth work in Northern Ireland is underfunded, especially in comparison with England. For instance, it is estimated that expenditure in the youth sector in England is around £2bn. Pro rata-spending in Northern Ireland would exceed £70m whereas the revenue budget in the EA is currently £34m. However, this would need further analysis as a direct comparison is difficult.

3.166   Notwithstanding, we believe that youth work represents good value for money. Its costs can be seen as preventative spend which can obviate later spending in other areas. Youth work contributes economic and social value by helping to reduce crime, improve health, promote community relations, and increase employment, as well as increase participation in education. However, more could be done to both quantify and communicate the economic value and benefits of youth service delivery.

3.167   From discussion with voluntary groups and our own analysis, there appears to be some tension between statutory and non-statutory services i.e., between voluntary groups and the EA. The contribution of the voluntary sector should not be undervalued and opportunities for them to work directly with schools or colleges should be encouraged. There is scope for improving working relationships and delivering a more joined-up approach that would be to the benefit of young people. The attachment of youth workers to schools should be promoted.

3.168   We consider that better mechanisms need to be developed for communication and collaboration. This would be a function of the body referred to above.

3.169   In addition, there would be value in creating more effective partnerships at a local level. We suggest that the most effective vehicle for doing this would be the area learning communities (ALCs). We would wish to see both the EA Youth Service and the voluntary sector participating in appropriate meetings and the ALCs taking on a responsibility for promoting youth services in their areas and for helping to ensure broad and cost-effective provision across their areas.

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248   The Youth Service (Northern Ireland) Order 1989 (legislation.gov.uk)

Panel conclusion

The full contribution of youth services has yet to be fully realised. DE-funded youth work is educationally focused but its delivery impacts on many different policy areas. Youth work contributes economic and social value by helping to reduce crime, improve health, promote community relations, and increase employment, as well as increase participation in education. It is a cross-cutting service and any structures to support its delivery need to recognise that.

Youth services should be seen as a key partner with schools and colleges, working alongside education settings to provide opportunities and experiences that formal education cannot. It is essential that youth services be seen both as a vital component of an excellent education system but also as a service that extends well beyond support for learning.

This, of course, requires resources and it is important that the case be made strongly that youth services is an investment in the lives of young people, has significant economic value and is preventative spend. Youth services could play a role in ALCs and the statutory and non-statutory services should work in collaboration.

It also requires a greater strategic focus beyond "education". The role of youth services in developing skills, increasing resilience, enhancing community cohesion, tackling anti-social behaviour and preventing disengagement requires a cross-departmental focus.

Recommendations and actions

3.170   Throughout the chapter, we make numerous recommendations and highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

DE should define what it sees as "inclusive education" taking account both of the local context and international best practice.

DE's Emotional Health and Wellbeing Framework should be central to the School Development planning process, with progress and performance against the Framework monitored at school level and inspected by ETI.

There is a need for greater investment in health and wellbeing interventions and pastoral care. To address complex needs, schools should be enabled to employ specialist staff, such as social workers, or to access such expertise from beyond the school's staff. This will require new funding and joint working with colleagues in health. Every school should have direct access to counselling services and crisis workers through dedicated posts within schools, resources shared between schools or access to specialist services.

Emotional health and wellbeing should be prioritised in the curriculum, from early years right through to post-16. All learners should have the opportunity to acquire crucial life skills.

The special school sector should be prioritised for capital investment. There is also a need for capital investment to support SEN provision within mainstream education.

Special schools should be a key part of shared education and area learning communities, forming strong partnerships with local mainstream schools and FE colleges. Over time, special schools could be developed as regional special needs hubs – supporting teachers and learners in mainstream education as well as catering for learners with complex needs.

Statemented children should not be treated as supernumerary in admissions and enrolments numbers. In this way, the institution receiving these learners can plan and have staff and resources in place to meet their needs. At key transition points the principle should be "Special Needs first", i.e., SEN learners being placed first to prevent the scenario we have seen in recent years of SEN learners being unplaced shortly before the start of the academic year.

SEN Policy and Services should be overhauled based on the following principles:

- Legislation should not be excessively prescriptive, nor should it provide perverse incentives.
- Processes for assessing needs should be manageable and capable of being completed in realistic timescales.
- Support should be provided speedily and, in the great majority of cases, without the need for a statement.
- Where possible, interventions for special needs should be aimed at enabling children and young people to learn effectively without ongoing additional support.
- Practice should be regularly reviewed with the intention of establishing norms for the requirement of different levels of support. These revised norms should subsequently inform refreshed assessment processes.
- Existing methods of supporting children and young people with special needs should be evaluated with a view to disseminating good practice and reducing the current over-reliance on classroom assistants.
- Decisions regarding special needs should be informed by the need for equitable distribution of resources across the entire system.
- Children and young people should be included in decisions about their support and what will help them progress.

There should be an immediate change in the way that statements are written to:

- Increase the capacity of the school (or other setting) to cater for special needs rather than attaching a resource to an individual learner.
- Better meet the need of the learner so they can progress.
- Reduce reliance on allocating hours of classroom assistant time.
- Build in a requirement for review rather than allocating a resource in effect in perpetuity.

There may be a need to legislate in order to make reform possible. It is highly likely that such legislation would need to radically change the content and purpose of statementing to allow the system to operate more flexibility.

The following are indispensable elements of an effective SEN support system and must be delivered:

- Effective screening of the development of the child from before birth up to the point of entry into primary school.
- Increased support for the parents of very young children, including building on the "Getting Ready …" and Play Matters programmes.
- Early years provision from age two for all families who wish it, starting with disadvantaged families and others at risk.
- Early diagnosis of difficulties followed by early and effective intervention.
- Multi-disciplinary SEN capacity in early years settings.
- Access for early years settings and primary schools to the Pupil Support Services (PSS).
- Strengthening of the in-house SEN expertise of all schools in order to make support at Stages 1 and 2 more effective. Including provision of in-house SEN expertise through Irish in Irish-medium settings.
- Increased understanding within schools regarding the use of "reasonable adjustments".
- Extended provision of SEN continuing professional development opportunities for serving staff.
- More emphasis on SEN in all initial teacher education courses and a 1-year course for university graduates leading to the award of a Post-Graduate Certificate in Education (PGCE) in Special Educational Needs.
- Expansion of the Pupil Support Services to make intervention at Stage 2 more effective (including ensuring the availability of expertise to meet the needs of, *inter alia*, newcomers or the IM sector).
- Removal of the gatekeeper function of the Educational Psychology Services (EPS) at Stage 2.
- Expansion of the EPS, including the use of Psychology Assistants and Assistant Educational Psychologists.
- Revision of the Code of Practice to reflect these changes.

The current policies, practices and legislation are failing to deliver support for learners with special educational needs. At the same time, expenditure is out of control in a way that threatens the quality of service to all learners. Thorough reform is urgently required. The use of resources should be based on equitable treatment of all learners.

A comprehensive Learner Support Workforce Programme should be developed and implemented. This programme must prioritise greater access to specialist support, with particular focus on enhancing support at Stages 1 and 2. At Stage 3, the educational institution should have flexibility in the use of allocated resources. The practice of automatically allocating classroom assistant hours should cease.

The staffing of the Educational Psychology Service should return to the level of five or so years ago with around 130 fully qualified psychologists. In the interim, consideration should be given to adopting a model similar to that used in the Republic of Ireland regarding the use of "approved suppliers". This would mean the EA buying in services from the private sector and/or accepting private assessments providing they have been completed by an approved psychologist.

Support services delivered by the EA are not functioning as would be expected. To provide responsive developmental and educational services to learners, educators, and parents, a new early intervention and learner support body should be created. This could be accomplished by separating the management and educational functions of the EA.

The new body will be responsible for all essential services a learner may require during their education journey. These services include parental support and engagement, Sure Start Management and Pre-School Education Programme, learner support services (i.e., those for learners with special educational needs), pupil wellbeing and protection, youth services, emotional health and wellbeing, education improvement and professional development, and careers education.

As an interim measure, the EA should restructure internally to create a management services group and an early intervention and learner support group, each with a single senior responsible officer. Over time, this organisation would divide into a single authority (responsible for employment and other transactional support services) and a separate early intervention and learner support agency, responsible for all essential services a learner may require during their education journey.

CHAPTER 4 – CURRICULUM, ASSESSMENT AND QUALIFICATIONS

Introduction and context

4.1   School students in Northern Ireland have a well-justified reputation for academic achievement, as demonstrated in international tests and in annual examination results.

4.2   In the most recent Programme for International Student Assessment (PISA) study[249], the mean reading score in Northern Ireland was significantly above the OECD average.

4.3   In the 2021 Progress in International Reading Literacy Study[250] (PIRLS), pupils in Northern Ireland scored significantly higher than those in 52 of the 56 other PIRLS participating countries and were outperformed to a statistically significant extent by pupils in only two countries: Singapore and the Republic of Ireland.

4.4   Pupils in Northern Ireland also performed well in the Trends in International Mathematics and Science Study[251] (TIMSS) in 2019. The results showed that mathematics and science attainment for 9- and 10-year-olds in Northern Ireland remained high. Pupils in Northern Ireland in these age-groups scored significantly higher than 51 of the 58 participating countries and were significantly outperformed by only five countries. Reflecting the high performance in mathematics overall in Northern Ireland, just over a quarter of pupils reached the Advanced International Benchmark, the sixth-highest percentage internationally. The average score for science was lower than that for mathematics, although still above the TIMSS science International Average. Pupils in England and the Republic of Ireland achieved science scores that were, on average, significantly higher than Northern Ireland. Eighteen countries outperformed Northern Ireland in the science assessment.

4.5   Elsewhere in our Report, we cite evidence that the gap between the numbers awarded lower grades (or none) at GCSE and A Level and the numbers achieving higher grades is narrower than in other parts of the UK which use these qualifications, and we refer to notable examples where schools and their pupils have made outstanding achievements in a

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249   PISA is a study of educational achievement organised by the Organisation for Economic Co-operation and Development (OECD). Every 3 years PISA tests 15-year-old pupils from many parts of the world in reading, mathematics and science. PISA enables governments to benchmark education policy and performance and to learn from policies and practices from other countries. Over half a million 15-year-olds from 79 countries and economies took the PISA test in 2018, including all members of the OECD and all four countries of the United Kingdom. PISA 2018 Northern Ireland Executive Summary.PDF (education-ni.gov.uk)

250   PIRLS is an independent research study organised by the International Association for the Evaluation of Educational Achievement (IEA), which provides data about reading literacy. It takes place every 5 years and assesses the knowledge and skills of pupils aged 9-10 years old (P6 in Northern Ireland). In total, 57 countries along with eight benchmarking participants took part in PIRLS 2021. PIRLS 2021 in Northern Ireland Full Report. pdf (education-ni.gov.uk)

251   TIMSS is a research project taking place every 4 years and providing data about trends in mathematics and science achievement over time. It assesses the knowledge and skills of pupils aged 9-10 (and aged 13-14, although Northern Ireland participated only at the younger age range) around the world and enables researchers to collect extensive background information about pupils' home and learning environments and the quantity, quality and content of teaching. Trends in International Mathematics and Science Study (TIMSS) | Department of Education (education-ni.gov.uk). As a result of industrial action by teachers, Northern Ireland was unable to gather enough data to participate in TIMSS 2023.

context of socio-economic disadvantage. However, we have noted problems which remain – including adults with few or no qualifications and learners who exit early from formal education. In that context this chapter considers curriculum, assessment and qualifications, as experienced by learners of all ages and in all sectors.

4.6   In is important to recognise that the curriculum as taught will often differ from the curriculum as designed by policy makers and educational experts. Even more importantly, the curriculum as experienced by learners will differ from both the designed and taught curricula. Experience will vary from one learner to another. The current (designed) curriculum in Northern Ireland was praised by many who gave evidence to us. It is, however, possible to make improvements which will enhance the curriculum as experienced.

4.7   The curriculum must reflect a well-informed understanding of how learning takes place. The experienced curriculum should instil a love of learning that extends into later life. The curriculum must remain relevant in rapidly changing circumstances. This calls for regular review led by educationists and informed by an understanding of the needs of society and of the economy.

4.8   The curriculum should:

- be informed by an understanding of how people learn;
- support the process of translating knowledge into understanding;
- encourage the absorption of educationally useful knowledge into long-term memory;
- set ambitious goals for the development of the individual;
- understand the merits and limitations of constructivist approaches;
- build interdisciplinary learning on sound disciplinary foundations;
- offer learners a wide range of educational pathways – academic, creative, technical and vocational.

4.9   Assessment is extremely important in education – to students, their parents, teachers and the wider public. It is vital to support the teaching and learning of students, to monitor progress of learners against agreed benchmarks and to evaluate performance at school and system level.

4.10 We have heard from educators that "what is assessed will be what is taught" and some learners whom we met tended to be dismissive about lessons on subjects which were not included in assessments that they thought mattered. Although many regretted that assessment was such a driving force, we have resisted the temptation to make assessment a scapegoat for wider shortcomings in education. Good education must include good assessment.

How we learn[252]

4.11 Unfortunately, the knowledge base underpinning education is limited. There is little incontrovertible understanding of the learning process and therefore of the teaching process. A comparison with the knowledge base of, for example, medicine is seriously humbling. The rapid development of neuroscience may bring about significant change but, in the meantime, educational practice rests on relatively limited scientific foundations. The following short account of what learning is and how it should be organised underpins our views on the curriculum but relies on an evidence base which is much less secure than it should be.

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252   *How we learn* by Dr Keir Bloomer, prepared for the Review Panel in 2022.

Importance of building knowledge

4.12   Knowledge is a crucial component of educational capital. It acts as a kind of cognitive Velcro. The more children know, the easier they find it to see how a new piece of information fits into the emerging mental map of the world. Information which is meaningful is liable to be remembered. Information which lacks meaning is almost certain to be forgotten.

4.13   Knowledge is thus the starting point, but it is the way in which pieces of knowledge fit together that is crucial. This can be thought of as understanding. Understanding is always provisional; it is modified by experience and the acquisition of more knowledge. An emerging pattern of understanding can be helpfully described as a schema. Isolated facts do not constitute a schema. Connected knowledge and associated understanding and skills do. Education should, therefore, be a process of steadily increasing the number and complexity of these schemata.

4.14   As an example, a child quickly recognises that, if they let go of an object, it will fall to the ground. Falling can be prevented by placing the object on a table or by suspending it as in the case of a mobile over a cot. This is an emerging schema for understanding gravity. There is some distance to go before appreciating that the motions of the solar system are just more ambitious examples of the same phenomenon – but the child has made a start.

4.15   To build up a schema it is first necessary to commit the experience and resulting knowledge into long-term memory. Indeed, the very notion of "acquiring knowledge" is simply another way of describing the process of absorbing it into long-term memory.

4.16   George Miller's 1956 paper "The magical number seven, plus or minus two"[253] remains critically important here. Miller argued that the human brain is incapable of handling large numbers of inputs simultaneously because the capacity of short-term memory is very limited. Typically, people can handle around seven items at a time, hence the title of the paper. Long-term memory on the other hand has no obvious limit. The brain has no difficulty in bringing in material from long-term memory as required. As Miller explained, the brain is capable of "chunking" (Miller's word) material so that what is retrieved may be a complex concept rather than a single fact.

4.17   In other words, learning is the process of adding to long-term memory. If nothing is altered in long-term memory, then nothing has been learned.

4.18   This has profound implications for the curriculum. The essential task of the curriculum is the development of schemata of understanding, which, in turn, is dependent on the expansion of long-term memory.

False dichotomies – 1

4.19   A distinction is sometimes made between curricula based on "What Children Should Know" and curricula concerned with "What Children Should Become". The argument set out above in relation to the importance of knowledge and long-term memory is not intended to reach a conclusion that favours the former. Emphasising the centrality of knowledge to learning is not the same as stipulating that every child must know about Boyle's Law, Shakespeare's

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253   Miller, G. A. (1956). «The magical number seven, plus or minus two: Some limits on our capacity for processing information». *Psychological Review*.

sonnets and Florence Nightingale. It is entirely appropriate to set aspirational goals in terms of human development; for example, to indicate that the intention behind the curriculum is that children should become confident and well-rounded contributors to society and the economy (as the Northern Ireland curriculum does). The key issue is how to translate what we know about the learning process into a series of learning experiences, extended over many years, which will have the desired outcomes. Without sufficient and relevant knowledge, children will not become the kind of contributors society needs. At the same time, possession of knowledge in itself will not guarantee the desired outcomes.

False dichotomies – 2

4.20   Another false dichotomy is between content-based and skills-based curricula. In reality, skills only exist on the basis of knowledge. This may, of course, be practical ("knowing how") rather than factual or theoretical knowledge ("knowing that" or "knowing why"). Knowing and understanding are as much the foundation of vocational courses as of academic ones. In workplaces that undergo rapid change, underpinning knowledge confers the adaptability that the employee will need in a way that the practical skills in themselves cannot. Indeed, the higher the level of generality of any understanding, the easier it is to translate it into a new context. For this reason, it is desirable for young people to pursue a theoretical (or, as it is frequently described, an academic) curriculum for as long as this yields productive outcomes, which include the continuing motivation and understanding of the learner.

4.21   Skills derive from the application of knowledge and understanding. A skills-based curriculum is thus one that places emphasis on the application of the knowledge that it also develops.

4.22   There is a widespread demand from both employers and young people themselves for a curriculum that develops a range of what are sometimes described as "21st century skills" such as problem-solving, communication, creativity, thinking and interpersonal skills. This is a worthy aim but translating it into practice calls for care. Some skills are much more context-specific than the general description would imply. Thus, problem-solving in engineering is not the same as problem-solving in HR management. Communication in a small workplace calls for different techniques from communication through the media. It is important that education should equip young people with skills that are in demand (even if they are sometimes rather loosely described) but it has to do so in an effective manner, which will necessarily involve building up the knowledge and understanding on which these skills are based.

4.23   Underpinning the demand for relevant skills is quite a widespread belief that much of what is taught, especially in the school sector, does not serve a useful purpose. In part, that is a consequence of inadequate understanding of the learning process. In some cases however, the concern is legitimate. It is important to look critically at each curriculum component. What knowledge is to be acquired? In what circumstances is it likely to be applied? Is its usefulness such as to justify its inclusion in a programme of learning in which time will inevitably be limited? Addressing these questions is part of the continuing review which we consider that the experienced curriculum requires.

Constructivism

4.24   Various modern curricula are often described as constructivist. This term goes back to the work on United States education that President Kennedy engaged Jerome Bruner to

undertake as a response to the realisation that the launch of Sputnik might indicate that Soviet education had overtaken American education. Bruner's key notion was that learning is an active process conducted in the brain of the learner. (This, of course, is closely related to ideas about the importance of long-term memory.) The teacher may provide information, but nothing is learned unless the pupil creates understanding for him/herself.

4.25   Fundamentalist adherents of constructivist philosophy conclude from this that true education consists in leading children to discover all knowledge for themselves. This is not a view to which Bruner would have subscribed.

4.26   The underlying idea, nevertheless, has merits. There is value in taking pupils through the process of discovery on an occasional basis. However, as a way of covering a curriculum, it is hopelessly impractical because it is hugely time-consuming. If it was readily apparent to every learner that the square of the hypotenuse is equal to the sum of the squares of the other two sides, the name Pythagoras would have been forgotten long ago.

4.27   There is an obvious place in curriculum design for a more diluted form of constructivism which does not insist on an artificial process of pretending to discover knowledge which already exists but emphasises the importance of an approach to learning which relies on encouraging mental activity as opposed to the passive absorption of factual information or the uncritical memorisation of prescribed material.

Disciplinary and interdisciplinary learning

4.28   Any curriculum requires a sound epistemological basis. In other words, the structure of knowledge is important. The practical knowledge underpinning a vocational course has a structure but the issue of structure is particularly important in relation to earlier stages of education. This introduces the concept of *disciplines* or distinct ways of knowing about the world. Thus, historical explanation is not the same as empirical inquiry but both have a place in the curriculum.

4.29   Most of the pressing and difficult problems facing the world – climate change, sustainability, the impact of artificial intelligence and the like – are interdisciplinary issues. The curriculum, many now argue, must therefore equip young people to engage in interdisciplinary thinking. This is probably not unique to the modern world although the need for informed citizens capable of thinking in an interdisciplinary way has possibly never been greater.

4.30   The point, which is not always acknowledged however, is that sound interdisciplinary thinking must rest on secure disciplinary foundations. This is not intended to imply that disciplinary learning should invariably precede application in an interdisciplinary context. Applying knowledge and understanding derived from more than one disciplinary area should be a feature of education from an early stage. Indeed, it can reasonably be argued that the play-based learning of young children is inherently interdisciplinary.

Panel conclusion

The curriculum must rest on a proper understanding of how people learn. Progressively building up educational capital is fundamental. That has to involve the acquisition of knowledge (including practical knowledge) and its commitment to long-term memory. The learner has to be assisted to translate knowledge into understanding and to be able to apply that understanding.

A quality curriculum that supports learning

4.31   The success of any education system depends ultimately on two factors: the quality of its curriculum and the quality of its teachers. We made this point in our interim report and we said that curriculum would be central to our final Report. We also acknowledged the significance of the link between curriculum and assessment. Our conclusions on these two aspects of education are set out below and form the basis on which much of the rest of this Report is built.

4.32   Any planned learning experience, at any level, at any stage and for any purpose has a curriculum, whether or not it is made explicit. This is as true of early years provision, further education, the training of apprentices or the activities of the youth service as it is of schools. However, we draw a distinction between the early years and the period of compulsory education on the one hand, and tertiary and adult education on the other. The first is concerned with the all-round development of future adults and citizens; the latter has to meet the needs of more mature learners. The early parts of this section are mainly concerned with schools and pre-school settings. Our views on later stages of education follow.

4.33   Traditionally a curriculum has been seen as a statement of subjects to be studied. Each subject is described in a syllabus which generally focuses on the content to be covered. The curriculum is thus the aggregate of a number of subject syllabuses. It may provide for learners to exercise some choice of subjects, particularly in the later school years but that choice is liable to be constrained by factors such as timetabling and the qualifications of staff. Such a view of curriculum tends to give excessive emphasis to content and to encourage forms of assessment which overvalue factual recall.

4.34   It also tends to assume that learners will experience the curriculum entirely as described in the official documentation setting out the requirements. The designed curriculum is important and is the form most open to the influence of policy makers. However, it is the experience of learners which will ultimately determine the effectiveness or otherwise of their education. This is true of education at all ages and stages, not just of schooling.

4.35   Thus the nature of the learning process plays a vital role in determining the success or otherwise of the educational experience. A chemistry course which does not provide for hands-on experimentation will be a poor course. In the same way, primary children learning about the environment without ever setting a foot outdoors are missing out seriously. However, pressures of time created by the need to cover a large quantity of content can lead teachers to minimise time spent on activities which are essential to genuine understanding. Time taken to relate the subject being studied to other areas of learning, hands-on practical experience, reflection and further self-directed study are essential parts of the curriculum as it should be experienced but are sometimes seen as dispensable if there is a risk that the full content of the syllabus will not be covered.

4.36   It has been put to us repeatedly that there are parts of the curriculum as experienced by learners that are unduly content heavy. The extent of the subject matter to be covered should not be so extensive that teachers are faced with the dilemma of either failing to deal with important topics in sufficient depth or sacrificing vital aspects of learning. There is an immediate and pressing need to reduce unnecessary content wherever possible.

4.37   Until comparatively recent decades, it tended to be assumed that the purpose(s) of learning were self-evident, and that the curriculum did not require to set out explicit aims and

objectives. But now, as in many other jurisdictions, Northern Ireland's designed curriculum for the period of compulsory education makes clear what it is intended to achieve for learners[254]. Its aim is "to empower young people to achieve their potential and to make informed and responsible decisions throughout their lives".

4.38   The objectives of the curriculum are described as being to provide learning opportunities for each young person to develop as:

- **an individual**; who can achieve personal fulfilment and individual wellbeing through living a successful life;
- **a contributor to society**; who is concerned for the wellbeing of others as well as themselves, in their own society and beyond it;
- **a contributor to the economy and the environment**; who is able to appreciate how employment will impact on the economic choices they make and how they, in turn, impact individually and collectively on the environment.

4.39   We recommend that the existing objectives be retained but propose adding a further objective:

- **to develop young people as lifelong learners**; able to participate successfully throughout their lives in a society undergoing rapid and accelerating change.

Panel conclusion
The curriculum is the means by which the purposes of education are realised. It should be coherent and continuous from early years to primary and post-primary, and then into tertiary education, training and retraining. There is a need to focus on a continuous experience of education, rather than on the distinctiveness of individual stages. The current objectives of the Northern Ireland curriculum should be retained. A further objective – to develop young people as lifelong learners – should be added.

4.40   Children come into the school system in widely varying states of learning-readiness. In large measure this reflects the amount of cultural or educational capital that they have managed to accumulate in early childhood. Unfortunately, this is strongly correlated with socio-economic status. There is much research demonstrating that affluent families tend to be able to give young children more of the experiences that develop this capital. They speak to them more frequently and in ways that are more helpful to their children's cognitive development.

4.41   This is particularly important in the first 2–3 years of life while the brain is highly plastic and synapse connections are being formed. It is for this reason that extending early years provision into this period is particularly important, not merely as a means of detecting problems and as a contribution to combatting underachievement at later stages but also as a way of enriching the experience, knowledge and understanding of all learners. We discuss the implications of the correlation between socio-economic circumstances and educational attainment in Chapter 2.

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254   Curriculum Aim and Objectives | CCEA

A coherent curriculum

4.42   The curriculum must reflect as well-informed an understanding of how learning takes place as the current state of knowledge allows. The experience to which it gives rise should instil a love of learning that extends into later life. The curriculum must remain relevant in rapidly changing circumstances. This calls for regular review led by educationalists and informed by an understanding of the needs of society and of the economy.

4.43   No learning should be futile. Every part of the curriculum should add value, enriching the experience of every learner. In the years of universal education, the curriculum should provide breadth, some choice and variety of experience for all learners. It should have sufficient flexibility to introduce learners to different pathways and different subjects.

4.44   The curriculum maps the experience of the learner. As far as possible, that should be continuous and progressive, avoiding disruptive transitions and meeting the needs of learners in a manner that is appropriate to age and capability. It is also essential that educational institutions facilitate continuity and ensure that, other than in exceptional circumstances, learners are helped to complete courses on which they have embarked. This is a core theme of Chapter 5.

4.45   At all stages, it is essential that the interests of the learner come first. All education systems have found it convenient to organise provision into separate phases such as "primary" or "further", but it is important to recognise that these are reflections of organisational convenience.

4.46   The curriculum should open up possibilities and, as it progresses, should avoid closing down future pathways. The school curriculum seeks to do this by operating at quite a high level of generality and abstraction. The advantages of this approach in terms of keeping open future possibilities has to be weighed against issues of understanding and motivation. Once learners cease to understand readily the curriculum at the level it is presented to them, they will fail to gain the full educational value from what is on offer and are likely to become less motivated. More practical and/or vocational options will probably have greater appeal. As a general principle, learners should follow a mainstream curriculum for as long as possible but, at the point where this ceases to be the optimal approach, other options should be made available. This is liable to happen with increasing frequency from the early post-primary stages onward.

4.47   The years between the ages of 4 and 11 see extraordinary intellectual development. Primary teachers require to employ a play-based pedagogy in the Foundation Stage and assist the transition to more formal learning, which takes place at a different time and pace for every child. A play-based approach is appropriate from the earliest years into, at least, the first 2 years of primary education. This is particularly important to Northern Ireland where children are starting school at the age of four.

4.48   Primary school educators are the principal developers of the basic skills of literacy and numeracy which underpin almost all later learning. It should be noted this involves mastery of some quite abstract ideas on the part of the children. Methodologies for teaching reading, including a range of phonics methods, are continually developing and require to be kept under review. The use of phonics is one key element in teaching reading and in the overall development of literacy. It is embedded in practice in Northern Ireland. However, it is important that schools use a balanced approach bearing in mind the relative strengths

of different methods and their appropriateness for the individual learner. The Education and Training Inspectorate (ETI) observed to us that this requires continuing professional development by teachers, including training in the use of phonics. It is important that developing expertise for the effective teaching of reading be prioritised.

4.49   By the later stages of primary schooling a wider and more varied curriculum involving *inter alia* science, history, geography, physical activity and the creative arts should be on offer, although we have seen evidence that preparation for the transfer test in P6 and P7 can distort the delivery of the curriculum. The flexibility of the primary school day facilitates project work and, therefore, interdisciplinary learning. Teachers have the task of taking advantage of these opportunities while laying firm disciplinary foundations.

4.50   For the most part, the primary curriculum works well. However, the range of subject knowledge and expertise required of primary teachers in the later stages is highly demanding and can result in some parts of the curriculum being dealt with more effectively than others. In our chapter on Transitions (Chapter 5) we recommend a drawing together of the upper primary and early post-primary stages so as to ease the transition between the two. This may require greater use of specialist teachers in the later primary years as well as more options for primary teachers to update their subject skills and develop new ones. The learner's first years in post-primary education would benefit from a reduction in the number of separate subjects and teachers encountered in Years 8 and 9. We see the working out of suitable transition pathways as an essential early task for curriculum review.

4.51   In the post-primary years, young people normally start with a very wide curriculum covering many subjects and allowing for limited, if any, choice. As they progress, increased opportunities for choice are presented. In many cases this takes the form of a decision to continue with some subjects while ceasing to study others. The point where learners decide to drop a subject, they will already have invested a significant amount of time in it. The question is far too seldom asked, "What lasting benefit will the young person derive from this investment?" However, that question is of fundamental importance. Good curriculum planning should ensure that, at whatever stage a learner ceases to study a subject, he/she will have accumulated knowledge, understanding and skills of lasting value.

4.52   Subject courses are planned primarily in the interests of those who decide to progress further. Courses in the first 3 years of post-primary education are largely devised with GCSE requirements in mind. GCSE prepares for A Level and subsequent study in higher education. While it is important that education should offer long-term pathways, it is also vital that each stage should be valuable in itself. The lasting impact on the cognitive development of the young person whose last experience of any specific subject is at age 14 needs to be as carefully planned as the impact on those who proceed to GCSE and beyond.

4.53   By the age of 14 learners will expect to be able to exercise some choice in their learning. At the same time, some pupils will be experiencing difficulty with the mainstream curriculum and/or will wish to pursue interests which are more directly vocational and involve more practical approaches to learning. It is essential that all schools take steps to accommodate these needs and preferences.

4.54   We propose that all schools should offer a range of pre-vocational learning opportunities. Those should introduce young people to work-related content and to the application of learning to practice. Opportunities to study work-related subjects should not be seen as a

permanent move away from academic study but should be made available to all students to widen their experience of learning and keep options open. They need not be provided by the school itself but could involve collaboration with other schools or a local college. These courses should not be narrowly linked to specific occupations but should involve a significant element of practical learning and are thus likely to relate to particular groups of occupations or areas of the economy.

4.55   It is important that all learners – not only those who opt at age 14 for a pre-vocational course – learn about the world of work. This is obviously one of the functions of the Employability section within the Learning for Life and Work (LLW) course which is a compulsory part of the curriculum at Key Stage 3. The aims of this course are admirable but, in many schools, it is not accorded high status. The course also deals with personal development, wellbeing and relationship and sexuality education. These are all matters which were repeatedly mentioned to us by young people as issues of pressing concern to them that were, in their view, rarely well dealt with in schools. There is clearly a need to raise the status of LLW, strengthen its contents and, through CPD, improve its implementation to ensure the objectives of the curriculum are fully met.

4.56   In Chapter 5 we note that, for most young people, their later years at post-primary school are focused on a limited number of A Level courses. Although we consider this an undesirably narrow educational experience, we believe that the best interests of these learners dictate that they should obtain qualifications which are universally recognised throughout the UK and have widespread international respect. We suggest that Northern Ireland use its influence to seek modifications to the A Level framework and participate fully in any ongoing debate about frameworks enabling wider study. We say more about this in the section on "qualifications" later in this chapter.

4.57   From the age of 16, learners have a wide range of options. This extends far beyond course content. They can remain in school, enrol in a college or, under our proposals for raising the participation age to 18 years old, opt for various combinations of education, training and employment. From that point on the curriculum will be largely determined by the needs and preferences of the learner as he/she perceives them.

4.58   Until that point the curriculum experienced by every learner should:

- be knowledge rich;
- support the process of translating knowledge into understanding;
- encourage the absorption of educationally useful knowledge into long-term memory;
- set ambitious goals for the development of the individual;
- recognise the interdependence of knowledge and skills;
- understand the merits and limitations of constructivist approaches;
- build interdisciplinary learning on sound disciplinary foundations.

4.59   At the same time it should:

- enable a smooth transition from play-based to more formal learning;
- ensure the acquisition of secure basic skills;
- gradually introduce a wider range of specialisms;
- progressively offer more choice;
- embrace practical and vocational options;
- lead to widely recognised qualifications;
- prepare the young person for entry into adult life.

Panel conclusion

Education has traditionally been divided into stages. However, labels such as primary or post-primary are merely a convenience. The learner should experience education as a continuous and seamless process. At all times, the interests of the learner should take priority over those of the institution.

The curriculum should open up opportunities. So far as possible, choices should not have the effect of closing future pathways. Learners who embark on a course should be able to complete it.

A curriculum which operates at a high level of generality is most effective at keeping open future possibilities. The advantage of generality has to be weighed against issues of understanding and motivation. For some learners there comes a point where a more practical and/or vocational approach may become preferable. Choice in the post-primary sector thus plays an important role.

A "living" curriculum

4.60   The current Northern Ireland curriculum was introduced in 2007[255] and covers each phase of compulsory education. It sets out the minimum requirements that should be taught at each Key Stage with schools having a responsibility to provide a broad and balanced curriculum for all learners.

4.61   From our engagement with school leaders and stakeholders it is our impression that the existing curriculum is generally well-regarded. The fact that schools have considerable flexibility in its delivery means that teaching and learning can adapt, to an extent, to the changing world. There is a need to see the curriculum as "living", i.e., being kept under continuous review to take on board concerns of practitioners and learners. In a rapidly changing society, the curriculum requires to be flexible and the level of prescription limited.

4.62   We are of the view that primary legislation should normally not be concerned with the detail of the curriculum, other than giving DE powers to make regulations. Such regulations should require schools to advance the objectives of the curriculum and take account of guidance. The curriculum thus constitutes a framework offering considerable flexibility in pursuit of agreed purposes.

4.63   Northern Ireland does not currently have a single central body with responsibility for developing the curriculum and supporting educational institutions and professionals with its delivery. CCEA has important responsibilities in this area and developed the current curriculum for schools. CCEA also works in partnership with a range of other professional stakeholders who may be better placed to work with schools, teachers and learners in their own locale. This includes, but is not limited to, the EA (with regard to school improvement), the ETI and local universities and teaching colleges.

4.64   The Education (Northern Ireland) Order 1998 sets out its functions. In relation to the curriculum, examinations and assessment, the Council shall[256]

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255   The Education (Curriculum Minimum Content) Order (Northern Ireland) 2007
256   Education (Northern Ireland) Order 1998 (Part VIII)

- keep under review all aspects of the curriculum for grant-aided schools and all aspects of examinations and assessment;
- advise the Department on such matters concerned with the curriculum for grant-aided schools or with examinations and assessment as the Department may refer to it or as it may see fit;
- publish and disseminate, or secure or assist the publication and dissemination of, information relating to the curriculum for grant-aided schools or to examinations and assessment;
- produce, or secure or assist the production of, teaching materials for use in connection with the curriculum for grant-aided schools.

4.65 In our view the resources devoted to this essential function with CCEA are inadequate. We would suggest that this restricts CCEA's capacity to support teachers, lecturers and other professionals and results in the body largely acting as Northern Ireland's examinations and qualifications board, with a limited focus on the curriculum. This position should be rectified.

4.66 We recommend that Northern Ireland have a distinct Curriculum Council suitably resourced to have specific responsibility for reviewing, refreshing and advising on the curriculum. This would require the removal of curriculum functions from the existing CCEA. It would have the effect of creating two separate organisations:

- the Assessment and Qualifications Council for Northern Ireland;
- the Curriculum Council for Northern Ireland

4.67 This may take some time to deliver and would require legislative change, organisational review and an increase in resources. There is a need for immediate impetus for curriculum review. A start, therefore, requires to be made in advance of the creation of the new body.

4.68 In the short term there should be an adequately resourced Curriculum Taskforce that would work speedily to deal with critical issues regarding the curriculum that we have identified in this chapter and throughout our Report. This Taskforce could include departmental and CCEA staff, practitioners and curriculum experts and could act as a "shadow" body in advance of wider institutional reform.

4.69 The undertaking of this Curriculum Taskforce, and the statutory Council in the longer term, should not be underestimated – it is significant and it is challenging. It is vital that the value of the curriculum be recognised through the creation of a properly resourced review and support body. This requires significant investment. We envision a 5-year programme of work to consider curriculum priorities, after which time a more regular and continuous programme of review and refresh may be undertaken. Funding requirements may therefore be greater in the short term. We estimate that initial funding of £5m–£7.5m per annum[257] would be required for the Taskforce, the majority of which would be staffing costs.

4.70 In the longer term, the new Curriculum Council would be accountable to the new unified department responsible for learning and skills and have the following responsibilities:

- Keeping the curriculum framework under continuous review. This should include ensuring that the content prescribed is not excessive.
- Recommending curricular changes.

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257   Subject to further analysis.

- Advising on the inclusion of work-related content to the curriculum.
- Advising the body overseeing assessment and qualifications of implications for what is assessed when and how.
- Advising educational institutions regarding curriculum content, pedagogy and associated matters.
- Providing support to institutions and professionals.

4.71   The Curriculum Council should be governed by a board and managed by a chief executive with a senior management team. Members of the Board should be appointed by DE but should include:

- Senior staff of schools, colleges and other institutions;
- Practitioners;
- Academics;
- Members with up-to-date business experience.

4.72   The Board should be of a manageable size and should be clearly focused on ensuring that learners' educational interests are best served at all stages and in all settings. Representation of the range of interests generally found on educational bodies in Northern Ireland is not necessary. It will be important to make sure that the voices of learners are sought and listened to by those responsible for curriculum review and reform.

4.73   In keeping the curriculum under review, the new body should have regard to *inter alia* the findings of research, developments in other countries, emerging technological possibilities and fresh understandings of how learning takes place. It will, therefore, require a research and intelligence function, though this will necessarily be small in scale. It should seek opportunities to collaborate with other Northern Ireland organisations (including the new Assessment and Qualifications Council), academia, relevant international bodies such as OECD and similar bodies in other jurisdictions. As a small jurisdiction, it will be very much in the interests of Northern Ireland to promote a sharing of intelligence and research activities.

4.74   The Curriculum Council should have the capacity to respond to requests from institutions and professionals. It will, therefore, require a number of advisory staff but these will necessarily be limited in number. The advisory staff should see their responsibilities as involving keeping in close touch with practice in schools and promoting collaboration among groups of professionals with similar concerns and institutions with complementary capabilities.

Panel conclusion

The curriculum must remain fit for purpose and educators need support and advice to aid delivery. It is essential that there be a continual programme of proactive review and refreshment. This should be the responsibility of a dedicated Curriculum Council for Northern Ireland. Those who are best placed to lead on this work are educators and practitioners themselves but there is also a need for input from academia, the business community and those with experience of the management of educational change.

However, work on the curriculum cannot be delayed pending the creation of this new dedicated Council. In the interim, an appropriately resourced Taskforce should be established to take forward the work we have identified as being a priority for curriculum reform.

4.75   In some curricular areas, the need for regular updating stems from the development of new knowledge and understandings in the relevant disciplines. Scientific and technological subjects are obvious examples. In other areas, changes in pedagogy or interpretation will bring about a need for revision.

4.76   Changes in society and the economy can also necessitate curriculum change. It is important that young people become enthusiastic and successful learners throughout life. Already it is very common for people to change career, perhaps several times, during a working life. Even within the same job, new skills often have to be acquired. These trends will accelerate markedly over the next 20 years.

4.77   The pace of change is speeding up in other areas of life also. To be an effective participator in a modern democracy, the citizen needs to understand shifting circumstances. Making sound decisions requires increasing adaptability and responsiveness to new thinking and changing knowledge. Even in the realm of everyday life, an ability to understand and make best use of shifting opportunities will be essential.

4.78   The Curriculum Council should keep the curriculum under continuous review. We do not see the system as best served by programmes of dramatic change at relatively long intervals. Incremental but timely change on a continuous basis is more appropriate, always remembering that curriculum changes require time for preparation.

4.79   As stated, a shadow body should be established in the short term (described as a Curriculum Taskforce) to make immediate progress on issues we have identified as being core priorities, as set out in the following paragraphs.

Manageability and content

4.80   The overall intention of our proposals for the curriculum is to improve the quality of learning in schools and other establishments. This will involve a focus on greater depth of learning and the promotion of thorough understanding. It will be essential to create space for activities such as personal and collaborative research, experiment, interdisciplinary learning, appropriate use of constructivist discovery methods and self-directed learning.

4.81   This requires time which currently is not always available because excessive factual content crowds out such tasks. It has been put to us repeatedly that there are parts of the curriculum as experienced by school pupils that are unduly content heavy. There is an urgent need to manage the level of content within the curriculum.

4.82   On an ongoing basis, and in consultation with teachers, the Council should review the curriculum and remove content which is not essential to developing understanding.

4.83   This also relates to the number of qualifications learners are taking. In particular, we are concerned with the number of GCSEs taken by learners and recommend later in this chapter that a limit be introduced.

New curricular pathways at 14 years old

4.84   During the early stages of post-primary education, it becomes evident that some learners would particularly benefit from access to more vocationally based courses. In many cases,

these courses should have a strong practical element. There should also be opportunities for all learners to have access to curricular content related to the world of work.

4.85   An early task for the Curriculum Taskforce should be the development of the first examples of such learning opportunities. This should be done in close collaboration with business and industry and also with the college sector.

Life skills

4.86   Many of the young people we spoke with felt strongly that the curriculum should offer more explicit preparation for adult life. This would necessitate a revised curriculum for relationship and sexuality education and also increased emphasis on personal and interpersonal skills, practical and technological skills and communication and numerical skills (including financial literacy). Young people should also be helped to be physically active and equipped to lead healthy lives.

4.87   It is essential that what is offered be soundly based and constitute more than a succession of individual topics deemed important. We are also aware of the danger of trying to cram too many (important) discrete topics into the curriculum. The development of this aspect of the curriculum requires both extensive consultation and educational expertise.

Wellbeing

4.88   Young people also made clear their desire for improved education in relation to aspects of their personal lives. Mental health is a matter of concern, bringing a demand for greater emphasis on wellbeing.

4.89   It is important that schools promote resilience and emotional intelligence in all pupils and give access to support for those facing mental health problems.

Sustainability

4.90   Another area of concern to many young people and to society as a whole is environmental sustainability. Climate change is an important focus, but the concern is more general. It already features in the curriculum but updating the current provision would now be appropriate. It is essential that what is offered be soundly scientifically based and give rise to critical thinking on the part of learners.

4.91   It should not promote a predetermined set of beliefs but should tackle honestly some of the difficult questions of our time. It may offer opportunities for pupil activity in the community. Research suggests that such activities outside the formal curriculum can be particularly influential in conveying the importance of environmental sustainability to young people.

Primary/post-primary transfer

4.92   There should be a much smoother transition between primary and post-primary schooling with a greater diversification of the primary curriculum and a more consolidated curriculum experience in Years 8 and 9. This point is further developed in Chapter 5

4.93   This should involve a reduction in the number of separate subjects with which the learner has to deal in the early years in the post-primary school. That will be a significant change which will require to take place gradually over a period of years.

4.94   An essential early task for the Curriculum Council (preceded by the Taskforce) will be, in consultation with school Principals from both phases (primary and post-primary), to develop coherent curriculum pathways covering the years of transition.

Modern languages

4.95   Modern languages have traditionally occupied an important and prestigious position in the curriculum. As well as allowing the learner to communicate with speakers of the language and giving access to another culture, learning a foreign language brings more general cognitive benefits. However, in recent years the uptake has been in serious decline.

4.96   The growing dominance of English as a global second language reduces the incentive to take up a modern language. Improvements in electronic communication will exacerbate this problem although they will also offer more and different opportunities for exposure to other languages and new ways of learning them. Furthermore, languages are often seen as "difficult" subjects at GCSE and A Level. Efforts elsewhere in the UK to boost language uptake have not enjoyed great success.

4.97   The Primary Curriculum Framework for Primary and Special Schools in the Republic of Ireland, launched in March 2023[258], includes modern language provision of 1 hour per week for primary school learners from third class (age 8–9/9–10). Early exposure to modern languages, such as this, should be considered for introduction in Northern Ireland on a trial basis. However, this would not combat the issues highlighted in the previous paragraph and a similar initiative in Scotland appears to have been unsuccessful. Chief considerations in the delivery of modern languages in primary school are what modern language is selected and how this can be continued in post-primary.

4.98   Unless new policies are developed, based on a realistic assessment of the problems facing modern languages, there is a risk of near terminal decline. Modern languages should remain an important part of education. This will call for new approaches, which will require careful consideration, bearing in mind learner perceptions of the global strength of English, the potential of technology and opportunities for schools to share teaching and learning.

4.99   There is also growing interest in Irish-medium education and an expansion in provision in that sector in recent years. We make suggestions elsewhere in this Report about how this development can be supported.

Religious education

4.100   It may be that the outcome of litigation ongoing at the time of the publication of our Report may make the drawing up of a new religious education syllabus an immediate necessity. However, we consider that the increasing diversity of Northern Irish society makes it highly desirable that a review be undertaken in the near future, regardless of the legal processes. It is a strength of the current arrangements that all four main churches were able to agree the existing syllabus. It would now be desirable if they, together with representatives of other faiths and of those with no religious affiliation, were to collaborate with the new curriculum body in devising a replacement course.

4.101   The new syllabus should help young people to understand the society in which they are

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258   Primary Curriculum Framework for Primary and Special Schools (March 2023)

growing up, including both its increasing diversity and its Christian traditions and heritage. At the same time, it should give insight into an important part of human experience. It should be knowledge-based and separate from religious observance.

Careers education

4.102   Learning about the world of work and their possible places within it should be a part of young people's educational experience from an early stage. This is not about encouraging premature choice of career but rather about making children aware that work is an important and, all being well, a fulfilling aspect of life. Learners should also understand that they have choices, and that these have implications for their educational pathway. These choices are changing as the world of work itself changes and it is important for learners to have professional and expert guidance available to them at the earliest opportunity.

4.103   The purpose of careers education and guidance is to help people of whatever age to make good choices regarding their occupation and to understand the educational and training requirements that their choices will entail. It should help people reflect on their interests, ambitions, skills and talents.

4.104   In Chapter 6 we refer to the recent Independent Review of Careers Guidance[259], which makes many worthwhile recommendations that we would endorse. In particular, the development of an online careers portal should proceed as quickly as possible. We also propose that careers officers be attached to all area learning communities to provide advice, up-to-date information and practical support, including a role in organising work experience for learners in all member schools.

Creativity

4.105   Education at all stages should enrich the experience of all learners and enhance the quality of their lives. The enjoyment of learning is an essential part of the process. This should be true of any subject. However, the creative arts have a vital part to play. The importance of art, drama, music and other art forms both to the curriculum and to the broader life of the school should not be underestimated.

4.106   The creative arts also have significant economic impact. The kind of changes likely to affect the world of work raise difficult questions about the distinctive contribution of human beings. Over the coming decades it seems clear that technology will have an impact on high-skill areas of the economy and knowledge work, comparable to the impact of technology on unskilled manual work for many decades. It is therefore important to consider what kinds of human capability need to be nurtured by education in order to sustain employment.

4.107   Among the service industries which have expanded in recent decades, and are likely to continue to expand, are those concerned with leisure and entertainment. These sectors depend on the creative arts for skilled personnel. However, the importance of creative subjects as a pathway to lucrative and fulfilling employment is not confined to such areas of business. Subjects such as music and art can give access to well-rewarded and expanding areas of employment in fields as diverse as film, computer gaming and advertising.

259   Transforming careers support for young people and adults in Northern Ireland | Department for the Economy (economy-ni.gov.uk)

> **Panel conclusion**
>
> A core objective of the curriculum should be to develop enthusiastic and successful learners. Learning should not end when formal education ends but continue into adulthood and last a lifetime.
>
> There are also a number of areas, highlighted to us during the Review, which need particular consideration at pace by the Curriculum Taskforce in the short term and the Curriculum Council in the longer term. These include:
>
> - addressing the issue of excessive curriculum content;
> - planning a more seamless curricular transition from primary to post-primary;
> - developing vocational courses from age 14;
> - developing new approaches to teaching life skills (including digital skills and financial literacy), promoting creativity and supporting wellbeing; and
> - reviewing a number of specific topics including:
>   - education for sustainability
>   - modern languages
>   - careers education
>   - religious education.

Curricular links with vocational pathways

4.108 We say more about vocational education elsewhere in this Report. However, in the context of the statutory curriculum, we see scope to bring together thinking about curriculum options at Key Stage 4 in schools and the further development of the Level 2 Traineeship Programme recently launched by DfE[260]. We understand that currently the Traineeship Programme is intended for FE colleges, but this could involve some duplication for students entering FE after gaining some Level 2 qualifications at school. The Curriculum Council (and interim Taskforce) should give early consideration to how to bring together thinking about the curricular offer at school and in FE colleges at Level 2.

Looking to the future

4.109 The coming 20 years will inevitably see many developments with substantial implications for the curriculum at all stages of education. The knowledge content of most subjects will need to change in order to reflect *inter alia* technological change, social trends and economic development. Few, if any, areas of the curriculum will be unaffected.

4.110 Furthermore, it seems inevitable that the ways in which learning is delivered will undergo far-reaching change. The Covid-19 pandemic saw the widespread adoption of remote learning. Although schools and other institutions have since largely reverted to more traditional teaching methods, blended approaches to learning are increasingly popular in higher education and will undoubtedly be developed in schools. In Northern Ireland, the Education Information Solutions (EdIS) programme will play an important role. In other words, schools will to some extent be liberated from the organisational constraints – limited fixed hours, near-total reliance on class organisation, etc. – which have shaped their

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260 Management Information - Level 2 Traineeship Programme 2021/22 | Department for the Economy (economy-ni.gov.uk)

working from the earliest days of compulsory education in the nineteenth century.

4.111 However, the extent of the change is likely to be limited by the need for children to be protected and supervised. We anticipate that a combination of the likely broadening of the mission of the education service and better use of the possibilities being made available by new technology will offer increased flexibility. However, the challenge will remain of overcoming inequalities of opportunity for learners to benefit from technology in their learning.

4.112 Northern Ireland society is becoming more diverse as mentioned earlier in our Report. The number of people coming to make Northern Ireland their home is increasing. Meeting the needs of "newcomer" children will be a growing priority for the service. At the same time the presence of families with different traditions, beliefs, languages and culture offers an opportunity to give learners in Northern Ireland a better understanding of the global society in which they are living. The implications for the curriculum (as well as the organisation of the system) are far-reaching.

Panel conclusion
The curriculum should be kept under review to ensure that it keeps pace with social, economic and technological change. Far-reaching change in content and organisation seem inevitable.

Assessment

4.113 Assessment is a central part of all good education systems. It is vital to support the teaching and learning of students, to monitor progress of learners against agreed benchmarks and to evaluate performance at school level and system level. Assessment will place legitimate demands on teachers and learners but should not create avoidable burdens for either.

4.114 There can be many different purposes for assessment. These include:

- **To support the teaching and learning of students**, by checking what they have learned, identifying strengths and gaps and guiding them on what to do next. These kinds of purpose are normally labelled "formative", and formative assessment – often quite informal – is a regular part of life in the classroom.

- **To check what individual students know or can do against benchmarks.** The outcomes of such assessments, when understood and explained, give useful information to teachers, parents and students themselves.

- **To evaluate the levels of learning or performance attained in a school, region or country.** This may be done by testing a sample of students, and in such cases there may be little or no feedback to individual students on how they fared in the test. International tests such as PISA, PIRLS and TIMSS test samples of students from different countries, and countries or regions may hold national/regional sample tests to give them information.

4.115 These purposes are not mutually exclusive. For example, tests against benchmarks can give useful information for formative purposes, and national and international surveys can inform curriculum and pedagogy. However, assessment can be a burden – on teachers as well as students – and we agree with the opinion put to us that the assessment burden on

many 16–18-year-olds in the current system is too great. The purpose of any assessment needs to be identified before assessments are imposed on students.

4.116   Sample tests at national or international level can be useful sources of information. Northern Ireland should continue to participate in international tests such as PISA, PIRLS and TIMSS (or their successors) and academic work should be commissioned to draw educational lessons from the outcomes and the source data. Where information is required about levels of attainment across Northern Ireland at an age or stage of particular interest, the first option considered should be to develop and use a sample test.

4.117   Requirements and material for assessment of pupils in Northern Ireland at Key Stages 1 and 2 (primary school) are set out by CCEA at the "Assessment and Reporting at Key Stages 1 & 2" page of their website[261]. They include some statutory requirements for assessing cross-curricular skills in literacy and numeracy at the end of the P4 and P7 years. We are aware that these assessments have not been administered for several years.

4.118   At the same time, schools have made extensive use of commercially provided tests. Teachers told us that they found the feedback from those tests very useful, and we have no criticism to make of the commercial tests themselves.

4.119   However, we consider that the situation is unsatisfactory, with a Northern Ireland scheme not implemented, considerable expenditure on unregulated commercial tests and the loss of an opportunity to use information from assessments to obtain a collective picture of how well children are learning. We recommend that a system involving the assessments already developed by CCEA be re-enacted as soon as possible across publicly funded schools. There is a need for a more systematic approach to assessments in the primary stages.

4.120   The new Assessments and Qualifications Council should have responsibility for assessments at Key Stages and for keeping the system under review.

4.121   This is an area that will be affected by technological change. There are both challenges and opportunities for assessment with regard to the growth of technology or the use of artificial intelligence.

4.122   CCEA is doing interesting and important work to develop computer-assisted adaptive tests in literacy and numeracy linked to the curriculum in Northern Ireland[262]. Adaptive tests are tests which can be tailored to the individual student by setting tasks for them which build on what they have previously achieved. Technology makes such adaptation more practicable, and adaptive tests can generate rich information on the progress of each learner. In our view there is considerable scope for greater use of adaptive tests in Northern Ireland. The work that CCEA is doing should support and extend the use which many schools are already making of adaptive tests.

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261   Assessment and Reporting at Key Stages 1 & 2 | CCEA
262   CCEA Adaptive Assessments | CCEA

> **Panel conclusion**
>
> Assessment is crucial for supporting students' learning, monitoring progress, and evaluating performance at the school and system levels. However, there is a concern about excessive assessment between the ages of 16 and 18 and its impact on learners.
>
> There is also an urgent need for a systematic approach to assessments in the primary stages.
>
> Technological change presents both challenges and opportunities for assessment.

Qualifications

4.123   Qualifications for learners of all ages in Northern Ireland[263] should provide meaningful evidence of learning. Qualifications are essential to:

- **Provide learners with certification of what they know and can do.** For this the certification needs to be valid and reliable, understood and respected.

- **Support progression to continuing education or into/within work.** Qualifications do this by:
    - providing valid and reliable evidence to inform selection by education establishments or employers;
    - assuring learners, educators at the next stage, or employers, that learners have the necessary knowledge or skills to progress;
    - being a requirement (in some instances) for progression in education or for entry into a trade or profession.

4.124   These functions are all legitimate and should continue in the longer term, although the use of stated academic qualifications as requirements for educational progression should occur only where absolutely necessary.

4.125   In addition to their functions for learners, qualification outcomes may be taken into account as indicators of the performance of a school/college or of Northern Ireland as a whole. The same is true for outcomes of national or international tests, which may be taken by all of a cohort (e.g. age group) or by a sample. However, in our view qualification outcomes should be part of a wider range of indicators used to evaluate the quality of schools or colleges. As well as recognising excellent results in academic or vocational qualifications, there should be recognition of the achievement of some learners and their schools in circumstances when obtaining a "low" grade in a national qualification is a considerable achievement.

4.126   Students should not be required or encouraged to take assessments for qualifications which are not needed. We feel strongly that neither pressures on the reputations of schools nor funding requirements should result in students taking unnecessary qualifications. We were told that the current arrangements for funding FE colleges in Northern Ireland encourage students to take more qualifications than are of educational value to them. In our view, this should stop – FE students should be enrolled for qualifications if, and only if, the qualifications add value to their learning and preparation for the world of work.

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263   The term "qualifications" tends to be applied to assessments which have a name recognised at national or state level and are normally taken by teenagers and adults of all ages. The term is not normally used for tests taken by younger children, even if they are part of a national system.

4.127   A principle guiding our vision of the use of qualifications is that qualifications offered in Northern Ireland should be part of routes that equip learners to fulfil their potential and continue their education or progress to (or in) a worthwhile job. Routes involving academic and/or "vocational" qualifications should be available to all learners and, as far as possible, qualification choices made by or for teenagers at school or college should not rule out options for them in the future. Qualifications supporting routes to higher education, further education, employment, reskilling or underpinning knowledge and skills while employed should all be respected and valued by society and by learners themselves.

4.128   Many learners will benefit from attending a university, either on leaving school or later in life, but alternative routes are also of high value and should be equally respected.

General qualifications

4.129   The majority of general qualifications taken by young people at school or college in Northern Ireland are branded as GCSEs (Levels 1–2) or AS/A Levels (Level 3). These brands are shared with England and Wales; is understood by the public, employers and learners and their parents; and is recognised by universities. CCEA develops GCSEs, AS Levels and A Levels for learners in Northern Ireland. These qualifications follow a modular examination methodology, while a linear, or terminal examination approach is used by English Awarding Organisations.

4.130   In October 2012, the then Minister (John O'Dowd) announced a fundamental review of GCSE and A Level qualifications in Northern Ireland to be undertaken by CCEA. An expert group of key stakeholders, chaired by Professor Norman Apsley OBE, was established to inform this work, and the final report was presented to the Minister in June 2013.

4.131   The review reported that, while there was support for the current GCSE and A Level qualifications in the short-to-medium term, there was a need to develop a longer term vision for qualifications for 14–19 year olds in Northern Ireland.

4.132   Following a period of consultation on the report's findings, the Minister made a statement in the Assembly in March 2013 indicating that he was content to accept the recommendations.

4.133   While CCEA progressed the implementation of the short-term recommendations, the Expert Group, under the chairmanship of Professor Apsley, was re-engaged to focus on the longer-term aspects of the recommendations. However, a combination of an extended period without Ministers, quickly followed by the Covid pandemic meant that the longer-term work has never been presented to a Minister for consideration and decision. As the qualifications system is emerging from the effects of the pandemic, the Department is revisiting and updating this work.

4.134   In the context of that report, and of representations made to this Review, we have considered three possible strategic directions for academic qualifications in Northern Ireland:

a) that Northern Ireland develop a new suite of academic qualifications exclusively for use in Northern Ireland, distinct from qualifications offered elsewhere in the UK;

b) that Northern Ireland link up with one other UK nation and use academic qualifications developed there;

c) that Northern Ireland continue to use brands shared with other UK nations, as long as

these meet Northern Ireland needs, but also have freedom to develop a small number of Northern Ireland-specific qualifications, within the requirements for use of the shared brands.

4.135   Our preferred direction of travel is (c) (the mixed approach). We feel that (a) is not viable for a jurisdiction as small as Northern Ireland, or fair to learners who may need their qualifications to be accepted and respected outside Northern Ireland and that (b) would tie Northern Ireland too closely to decisions taken elsewhere, without provision for consideration of the particular needs of Northern Ireland.

4.136   The mixed approach would require Northern Ireland to be fully included in discussions with government and qualifications regulators in other parts of the UK using the same qualifications. For as long as GCSEs and AS/A Levels continue to be widely used in England, Wales and Northern Ireland, it will be important for regulators in the other jurisdictions to take the interests of Northern Ireland into account when considering future developments in these qualifications. If new approaches to academic qualifications are proposed in other parts of the UK, it should be open to Northern Ireland to consider use of them.

4.137   Legislation[264] requires that CCEA seeks,

> … to ensure that the standards of examinations and assessments conducted by bodies or authorities in Northern Ireland are recognised as equivalent to the standards of examinations and assessments conducted by bodies or authorities exercising similar functions elsewhere in the United Kingdom.

4.138   A key function of the Regulators in each jurisdiction is the maintenance of standards across the jurisdiction to ensure comparability and portability of qualifications.

4.139   Due to a series of reforms in England (and to a lesser extent, Wales) in recent years, there are some differences between the general qualifications offered by the three jurisdictions, in relation to content optionality, assessment structure and, at GCSE, grading scale structure. The recent and proposed further reform of qualifications in Wales and England potentially present significant challenges to the Northern Ireland qualifications landscape. The 14–19 Framework, signed off by the Ministers for the Economy and Education in 2022, indicates a commitment to reviewing the qualifications landscape in Northern Ireland, with specific recommendations to review vocational qualifications and general qualifications.

4.140   We recommend that Northern Ireland continue to make use of GCSEs and AS/A Levels – brands that are understood and respected. But we also recommend that maximum use be made of the room to tailor these qualifications to meet the needs of Northern Ireland students.

4.141   Currently students in schools and colleges in Northern Ireland have access to "applied general" qualifications, which approach academic subjects, such as science, through paths based on the application of those subjects. Some of these are not branded as GCSEs or A Levels and have a more modular structure of assessment. They have been found very useful for many students who are less engaged by the approach and content of GCSEs and A Levels. We recommend that these options continue to be available to students at schools and colleges in Northern Ireland. Regulators in the other UK jurisdictions should have the

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264   Education (Northern Ireland) Order 1998 (Part VIII)

needs of Northern Ireland students in mind when making decisions regarding use of these qualifications elsewhere.

4.142   The new Assessment and Qualifications Council for Northern Ireland will need to keep closely informed of such developments and their effect on qualifications offered in Northern Ireland. They will need to keep under review their advice to the Executive on the qualifications mix that will best meet the needs of Northern Ireland. This should include considering how to make it more possible for post-16 learners in Northern Ireland to study for a cross-disciplinary project-based qualification as well as qualifications confined to particular subjects. Although evidence of this kind of project work is highly valued by universities, school teachers in Northern Ireland told us that there was "no time" for their A Level students to study for such a qualification.

General qualifications normally taken by 16–19-year-olds

4.143   We have recommended that all young people remain in education and/or training until the age of 18. This has important implications for assessment and certification at 16, which is the age at which most young people currently sit GCSEs. Indeed, many sit large numbers of GCSEs. As a result, for them, the experienced curriculum from the latter part of KS3 through KS4 is dominated by the requirement of the GCSE specifications. The school experience from ages 16–18 can become one of successive annual batteries of examinations.

4.144   We have considered the international arguments in support of, or opposing, national assessments at age 16 years. It is our view that many students take an excessive number of GCSEs, which can potentially impede their learning instead of bolstering it. As a result, we favour setting a reasonable limit on the number of these qualifications taken by 16-year-olds, including those who are most able. We urge the Department and the new Assessment and Qualifications Council to prioritise the establishment of such a limit. Experience in other parts of the UK suggests that central direction on this will be required, as the *status quo* regarding students being entered for multiple GCSEs is firmly embedded in custom and practice.

4.145   In a context where almost all students already continue their education beyond the age of 16, it seems illogical that GCSEs have such a dominant place in the thinking of schools, students and their parents in Northern Ireland. This is partly because of the use of GCSE attainment benchmarks to measure the quality of schools and, by extension, "success" in pupil progress. This has given GCSEs more prominence than they deserve in the educational landscape.

4.146   Qualifications at Entry Level and Level 1 have an important role to support learners into further learning at Level 2 and beyond and can provide milestones for young learners who are struggling or who have rejected education, as well as for older learners who have left school with no qualifications. The development of qualifications at these levels is very demanding and not discussed as often as it should be. The Assessment and Qualifications Council should be tasked with reviewing the offer in Northern Ireland at these levels, working closely with schools and with colleges of further education. Once new qualifications in literacy and numeracy at Level 1 are ready, they should be made available free of charge to all unqualified adults through the college system.

4.147   English and mathematics at GCSE act as gatekeeper qualifications. This results in a significant

number of pupils making repeated unsuccessful attempts to gain passes with very adverse consequences in terms of self-confidence and the use of educational time. Furthermore, we would question how far these GCSE courses and assessments function as satisfactory proxies for the attainment of adequate basic levels of numeracy and literacy.

4.148 We recommend that the proposed curriculum and assessment bodies, as a matter of urgency, develop new courses and qualifications at Levels 1 and 2, more suited to the needs both of the pupil client group and of potential employers. Subsequently, we suggest that consideration be given to development of a parallel qualification in digital skills. As soon as these qualifications are available the practice of using GCSE English and mathematics as a "hurdle" for progression to other studies should cease.

4.149 A Levels are among the most specialised academic qualifications for school leavers on offer anywhere in the world. In Northern Ireland students progressing to A Levels normally take slightly more AS qualifications in Year 13. That places a high demand on the students in terms of sitting examinations, but we welcome the slightly wider scope of the AS Level stage, and in our view it should remain. Over the next 20 years there should be a move to include other forms of assessment that alleviate the pressures on young people caused by the annual concerted periods of terminal examinations and allow for more varied forms of evidence to be included in the assessment, but it is essential that assessments do not reduce the already limited teaching and learning time available to teachers and students.

4.150 We recommend that Northern Ireland continue to use A Levels while making maximum use of the limited scope to adapt the content and structure of A Levels for use in Northern Ireland. We have noted the developments elsewhere in the UK involving project-based qualifications at Level 3 (the level of A Levels) encouraging students to apply different areas of academic knowledge and skills to real-world issues. Northern Ireland would benefit from use of such qualifications, but we have been told that it is not practicable at present for students to add work for these qualifications to the workload required to cover the content for their current diet of A Levels. Something has to give. In the future, we would hope to see A Level content less highly specialised, a more flexible assessment structure, and scope and time for students to work for a more synoptic qualification.

4.151 We recommend mandatory limitations to the use of academic qualifications as *barriers* to educational progression in schools. In particular:

- As many (young) people as possible should be supported to develop skills in numeracy and language to a level necessary for life and work and to have a qualification to show that. However, the qualifications offer should be flexible and not require young people to struggle repeatedly (and often unsuccessfully) for a Grade C in mathematics and English, as at present. In our vision, qualifications at Levels 1–2 in numeracy and literacy should be available in forms which make them accessible to learners and able to be obtained in stages "when ready". These qualifications could be developed specifically for Northern Ireland or Northern Ireland could make use of good-quality qualifications developed elsewhere.

- Post-primary schools should retain responsibility for the educational progress of their pupils throughout the period that most pupils study at the school. This should include making arrangements for them to study elsewhere for part of the week if it is agreed that this is in the learner's best interests. The principle should be that learners can enter courses

of their choice without pre-conditions. Schools should not be able to prevent their entry or exclude some pupils early because of disappointing grades in national qualifications.

4.152   During the time of our Review, there were proposals or developments in other parts of the UK aiming to ensure a wider base for qualifications taken by learners currently studying for GCSEs and A Levels. Decisions have been taken on a new curriculum in Wales and work is in train there to design new-style GCSEs with wider scope and less content, with the expectation that 16-year-olds will take fewer such GCSEs than at present[265]. In England, new-style vocational qualifications are being rolled out and as our Review was coming to a close, English Ministers announced their intention to develop an "Advanced British Standard" award, drawing together technical and academic studies and covering a wider range of study than A Levels[266]. The Scottish Government is also considering the recommendations of a major review of qualifications and assessment[267].

4.153   The new qualifications and assessment organisation for Northern Ireland will need to keep closely informed of such developments and its effect on qualifications offered in Northern Ireland. It will need to keep under review their advice to the Executive on the qualifications mix that will best meet the needs of Northern Ireland.

Applied or vocational qualifications

4.154   "Applied" or "vocational" qualifications are traditionally qualifications with content relating to the world of work and/or to the requirements of specific occupations. Literally thousands[268] of vocational qualifications are theoretically available in Northern Ireland, with a number awarded by organisations based in Northern Ireland but many awarded by organisations based in England. While some of the most popular and highly used qualifications are known and understood, we would be concerned that some people – including teachers, parents and students themselves – find the language and terminology of vocational qualifications confusing. That adds to the problem of the lack of esteem for these qualifications – and the routes involving them – compared to the "academic" routes involving A Levels.

4.155   We recommend that the Assessment and Qualifications Council for Northern Ireland have core functions to oversee vocational qualifications in Northern Ireland. This should be included in its core remit and funding, which would come from the government department which we propose should combine the educational functions currently carried out by DfE and DE. That remit should include work to explain and promote vocational qualifications to the public. We recognise that that is not an easy task.

4.156   Led by the Assessment and Qualifications Council, Northern Ireland should take a strategic view of the qualifications required to meet the needs of the Northern Ireland economy in the future and of the occupations (such as health and social care, construction and agriculture) which will continue to require large numbers, as well as those requiring a continued supply of small numbers. It is also important that learners obtain qualifications which are respected outside Northern Ireland and hence "portable" for learners who may work elsewhere (a requirement which has repeatedly been put to us). We have noted the sector-based reviews of vocational qualifications carried out in Wales in sectors particularly

265   Qualified for the Future | Qualifications Wales

266   New qualifications to deliver world class education for all - GOV.UK (www.gov.uk)

267   It's Our Future - Independent Review of Qualifications and Assessment (It's Our Future - Independent Review of Qualifications and Assessment: report - gov.scot (www.gov.scot)

268   Technical and Professional Qualification Bulletins | CCEA

important for the Welsh economy, which resulted in a more selective strategy for the use of qualifications in some areas, and in others the commissioning of new, Wales-specific qualifications. Sector-based reviews of this kind, led by the Assessment and Qualifications Council, could be of value to Northern Ireland.

4.157 We recommend a "mixed" approach to the vocational qualifications used in Northern Ireland in the future. In a small number of areas, it may be appropriate for Northern Ireland-specific qualifications to be developed at Levels 2 or 3 (the level of GCSEs and A Levels). If they meet the regulatory requirements, these qualifications should be able to be branded as GCSEs or A Levels, as is done currently with the widely used A Level in Health & Social Care awarded by CCEA[269].

4.158 In other areas, the proposed qualifications body may designate qualifications awarded by non-government awarding organisations to be funded for use in Northern Ireland. Regulatory powers to do this may require primary legislation. And it should continue to be possible for small numbers of students in Northern Ireland to use recognised qualifications in specialised trades which require a continual flow of workers, but where it is not practicable or sensible to have a Northern Ireland-specific qualification.

4.159 We have considered the question of whether the new Assessment and Qualifications Council – or any other organisation – should have powers to regulate qualifications and/or bodies offering qualifications, and if so, whether these powers should be statutory. Currently CCEA has a regulatory function, which is exercised by a small team in the organisation. As an independent function within CCEA, CCEA Regulation accredits and regulates all qualifications delivered in Northen Ireland as specified in the Education (Northern Ireland) Order (1998).

4.160 Statutory regulation of qualifications is not common outside the UK, but the experience of England and Wales is that it does provide a clear framework, at arm's-length from government, for ensuring the quality, fairness and standards of qualifications and overseeing the awarding bodies that provide those qualifications. A downside is that statutory regulation can be felt to impose an administrative burden on regulated organisations. We recommend that the Executive consider this option for Northern Ireland. Elsewhere in this Report we recommend legislation to bring together the statutory bases for several education functions in Northern Ireland. That could provide a legislative opportunity to establish a statutory qualifications regulatory function in Northern Ireland, to ensure that qualifications meet the needs of Northern Ireland and command public confidence. Meanwhile, it should be possible for strengthened accreditation and evaluation to be in place on a non-statutory basis, covering all qualifications – vocational and academic – publicly funded for use in Northern Ireland.

4.161 In our view Northern Ireland is too small for a separate qualifications regulatory body to be established. We feel that it is beneficial for this role to be at arm's-length from government, and possible organisational hosts are our proposed new qualifications body and curriculum body. Each option could raise potential conflicts of interest, but we have noted that the Scottish Government has decided to place this role in their proposed new qualifications body, with governance safeguards to ensure the independence of the regulation/accreditation function. On balance we think it would be advisable to keep qualifications expertise in the one organisation – with safeguards, as proposed in Scotland. There

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269   Health and Social Care | CCEA

should be a clear regulatory and accreditation function covering academic and vocational qualifications publicly funded for use in Northern Ireland.

Panel conclusion
Qualifications provide a currency for learners of all ages, demonstrating what they have achieved and enabling them to progress in education and the world of work. To fulfil those roles, qualifications need to be respected and understood by the wider public and by employers, as well as by the learners themselves and their educators.

The impact of artificial intelligence

4.162   During the period of our Review, artificial intelligence (AI) rapidly rose to a prominent place in the awareness of the public – including young people – and of educationists. The UK Government's AI Strategy[270] provides a working definition of AI as "machines that perform tasks normally performed by human intelligence, especially when the machines learn from data how to do those tasks".

4.163   AI clearly presents both opportunities and challenges for education in Northern Ireland, as in other countries across the world. In the longer term there will be implications for the kinds of knowledge and skill which young people will need to develop, including critical and evaluative skills to apply to artificially generated material. More immediately, we are aware of risks to the integrity of students' work presented for assessments leading to qualifications or degrees. If a student presented as his or her own work a text which was generated by a chatbox, that would clearly be plagiarism and covered by malpractice rules.

4.164   We are aware of the guidance on that matter recently produced by the Joint Council of Qualifications[271]. However, work presented for assessment in which the student explicitly applies critical thought to AI-generated material is a different matter, and in the future more assessment tasks may involve this. At present, the risk of malpractice may be greater for work that the student can produce at home, rather than under supervision at school, but we recognise that that distinction may become less pertinent if and when school-based activities involve more engagement with AI. The bodies which we are recommending to advise on curriculum and qualifications in Northern Ireland will need to give priority to considering the impact of AI on teaching, learning and assessment, including assessment for qualifications.

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270   HM Government (2022) *National AI Strategy*. Presented to Parliament by the Secretary of State for Digital, Culture, Media and Sport by Command of Her Majesty. Command Paper 525. Updated 18 December 2022. https://www.gov.uk/government/publications/national-ai-strategy/national-ai-strategy-html-version#fn:1

271   JCQ (2023) *AI Use in Assessments: Protecting the Integrity of Qualifications.* Available at AI Use in Assessments: Protecting the Integrity of Qualifications - JCQ Joint Council for Qualifications

Panel conclusion

Although it is impossible to predict what the impact of artificial intelligence might be, we are confident that the implications for education will include the following:

- Reconsideration of the kinds of knowledge and skills that learners will need for a world where AI has a central role.
- A need for an intelligence and horizon-scanning capability, which the system currently does not possess.
- Regular updating of the curriculum so that learners understand the nature of the new technology and its impact on society and the economy.
- Regular reviewing of pedagogical approaches to determine whether there are new ways in which AI can assist learning.

Recommendations and actions

4.165 Throughout the chapter, we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

The curriculum needs to be based on a clear understanding of how learning occurs. It should inspire lifelong learners capable of successfully participating in an ever-changing society. Both the content and the process of learning are crucial. Learners should advance smoothly from early childhood to lifelong learning without abrupt changes, such as that which currently exists between the primary and post-primary stages. This will require major changes and significant investment.

The existing curriculum objectives should be retained but augmented by a further purpose to develop young people as lifelong learners, able to participate successfully through life in a society undergoing rapid and accelerating change.

Considerable resources and attention need to be invested in curriculum development, review and advice. CCEA's responsibilities should be divided between two separate organisations – one for curriculum and the other for assessment and qualifications.

The curriculum should be kept under continual review. In the short term there should be an adequately resourced Curriculum Taskforce, which should work with pace and intensity to deal with critical issues regarding the curriculum.

These critical issues include:

- addressing the issue of excessive curriculum content;
- planning a more seamless curricular transition from primary to post-primary;
- developing vocational courses from age 14;
- developing new approaches to teaching life skills (including digital skills and financial literacy), promoting creativity and supporting wellbeing; and

- reviewing a number of specific topics including:
  - education for sustainability
  - modern languages
  - careers education
  - religious education.

Processes should be put in place to ensure statutory assessment takes place throughout a learner's time in primary and post-primary school. A unique learner profile should give teachers and parents the necessary information to collaborate with learners and make informed decisions regarding their future pathways.

Northern Ireland should continue to use qualifications shared with other UK nations, as long as these meet Northern Ireland needs, but also have freedom to develop a small number of Northern Ireland-specific qualifications.

There should be a limit to the number of GCSEs taken by learners at 16 years old.

There should be mandatory limitations to the use of academic qualifications as barriers to further educational progression in schools. In particular:

- GCSE passes in mathematics and English should cease to be used as "gatekeeper" qualifications in most circumstances.
- Post-primary schools should not be able to prevent pupils' entry to or continuation in courses at senior levels.

New Levels 1 and 2 qualifications in the areas of literacy and numeracy should be developed. Subsequently, we suggest that consideration be given to a parallel qualification in digital skills. These qualifications should be developed in conjunction with business to ensure that the qualifications become accepted and recognised as useful levels of numeracy, literacy and digital skills.

The Assessment and Qualifications Council for Northern Ireland should have core functions to oversee vocational qualifications in Northern Ireland. This should be included in its core remit and funding. That remit should include work to explain and promote vocational qualifications to the public.

Northern Ireland should take a strategic view of the qualifications which are needed to meet the needs of its economy in the future. Sector-based reviews could be of value to Northern Ireland.

The new assessment and qualifications body should review current vocational qualifications at an early date with the aim of simplifying the system. Some qualifications can be re-branded using the nomenclature of GCSE and A Level.

In a small number of areas, it may be appropriate for Northern Ireland-specific qualifications to be developed at Levels 2 or 3 (the level of GCSEs and A Levels).

CHAPTER 5 – TRANSITIONS AND PROGRESSION

Introduction and context

5.1 Education should be viewed as a journey of value in itself and not just a route to a qualification. It should be about instilling a love of learning, providing formative experiences and equipping learners for their life. At the heart of the education journey is the experience of the learner. Every learner must have the appropriate high-quality opportunities and every learner must be supported to succeed.

5.2 Throughout the education journey, our guiding principle is that the interests of learners come first. The institution that the learner attends is of secondary importance. What matters is that the ethos, curriculum and pedagogy should be appropriate. Education should be a continuous and progressive process, closely matched to the development of the individual learner.

5.3 The education journey is characterised by a series of transitions and pathways. It is essential that transitions be seamless and pathways remain open. The journey should have no dead ends. Opportunities for learning and relearning need to be available throughout adult life as well as in childhood. Arguably, education is currently too front-loaded. In future, reskilling and acquiring new knowledge and skills will be a priority for most people. The state will have to take on new obligations for adult learners but employers and others also have a contribution to make.

5.4 To be able to track the learner's progress there is the need to gather information that can inform a unique pupil profile. This will detail the strengths of a learner across a range of academic and non-academic activities. This profile is primarily to inform the learner, the educator and the parent on progress and to aid in decision-making at key transition points.

5.5 The very young child takes a first step into education by attending an early years centre. At age four, there is a transition into primary school. While the age of this transition is an outlier in comparison to other nations, we take the view that providing the experience is appropriate for the age and stage then it should not be seen as a negative or area of concern. This early phase of education provides the building blocks for future success and should be an enriching experience that builds essential educational capital.

5.6 The next major transition occurs 7 years later as learners move from primary to post-primary. The very different organisational norms of the primary and post-primary school combine to create an abrupt and sometimes difficult transition for young people. There are two principal concerns – the experience of the learner during this period and the method of transition. The aim should be a smooth transition that meets the needs of the learner, and leads to a valuable experience in post-primary, regardless of the kind of school attended.

5.7 We see the age of 14 as being critically important within the education journey and are concerned that this is a point in time where pathways tend to narrow. This should not be the case. At Key Stage 4, there should be an enhanced and improved pre-vocational offering in every school that could sit alongside more traditional academic pathways. This will require collaboration among schools and colleges with learners being offered exposure to different pathways and potential careers options in the college sector.

5.8   Throughout the world, more people are spending longer in education. This trend is evident also in Northern Ireland. Over 85% of young people remain in education beyond the age of 16 and over 70% beyond 17 years old[272]. The great majority of them remain at school. However, university education is also expanding. The number of first degrees awarded each year by universities in the UK almost doubled over the past 25 years and reached almost 450,000 in 2020/21[273]. At the same time, there has been a rapid growth in those studying for second degrees. The number of people embarked on apprenticeships in Northern Ireland grew by 75% in the decade to 2021/22[274]. The position in formal FE is rather different, with declining enrolments in recent times. However, the overall trend has been for education and training to expand and for the great majority of young people to be involved in some way.

Everyone progressing

5.9   Education is a journey where everyone progresses at different rates and there are many different end points. It begins at birth, if not before, with every stage adding further educational capital to allow learners to progress successfully. A recurring theme in our Report is the need for education to continue into adulthood, for options to be available for adult learners to return to education, and for the needs of the economy to be met by helping people to upskill and reskill throughout adulthood. In these circumstances tracking educational progress is essential.

5.10   A key feature of any well-organised journey is understanding where you have been and where you are going. The same is true of education. Our vision for education includes learners being on pathways that meet their needs, seamlessly transitioning through each stage and avoiding dead ends. A key element is the use of consistent information about learners to provide a holistic picture and to ensure they can make informed decisions on their educational journey.

5.11   We have concluded that to track educational progression there is a need for a consistent approach to recording and ethically sharing learner information, akin to the use of unique health numbers. A learner profile would record the progress of learners and would also be a key source of information when they transition between different stages of education or across institutions. Its usefulness would continue into adult learning.

5.12   In the early stages, the profile would be held and updated by the school. It would record a range of academic and non-academic information and provide an overview of the strengths of the learner and potential areas of improvement. It could be used to give parents information not only about academic performance but also about issues such as attendance, attitude, conduct, motivation, wider interests, communication skills, leadership potential and many others. On transfer to the post-primary sector, the family would become the main custodian of the profile. While information about courses studied and levels of attainment would be retained in the profile, it would be open to the family to remove other information. From age 14, the learner would become – and remain – the chief custodian. The profile could be used either to build a more extensive CV or simply to retain a record of qualifications, achievements, etc.

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272   Northern Ireland School Census.

273   Statistical bulletins and first releases | HESA

274   ApprenticeshipsNI statistics from August 2013 to July 2022 | Department for the Economy (economy-ni.gov.uk)

> **Panel conclusion**
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> In order to support continual progression throughout education there needs to be a greater understanding of where learners are in their education journey and where they are going. This implies the need for a unique learner profile that can record key information and assist later educational choices. Ultimately, the learner would become the custodian of the record.

Measuring what we value

5.13 Our education system tends to assess schools and learners based on narrow measures of achievement at specific age points. This approach creates an exaggerated focus on these assessments, making them appear more valuable than they should be. In other words, we end up valuing what we measure.

5.14 The emphasis on measuring examination performance overlooks factors such as the individual's personal development, their artistic and sporting achievements, the value added by the institution and much more. There is a need for a broader approach.

5.15 It is worth noting, however, that Northern Ireland performs very well on these measures. We have highlighted elsewhere in our Report that the proportion of pupils not attaining the benchmark of five+ GCSEs including English and mathematics has fallen steadily in Northern Ireland and in 2018/19 stood at 27.2% compared to 46.2% in Wales. This metric stopped being reported on in England in 2015/16, but at that time, the proportion of pupils not achieving this benchmark was 43.2% in England and 32.1% in Northern Ireland[275,276,277]. However, due caution should be taken when making such comparisons[278].

5.16 In the most recent PISA study[279], the mean reading score in Northern Ireland was significantly above the OECD average. Among all countries that participated in PISA 2018, the majority (46) had science scores significantly below Northern Ireland and 16 countries' mean scores were significantly above Northern Ireland's. In mathematics, Northern Ireland significantly outperformed most participants (45 countries) and was significantly outperformed by 17. Pupils in Northern Ireland significantly outperformed those in 52 of the 56 other PIRLS[280] participating countries and were outperformed to a statistically significant extent by pupils in only two countries: Singapore and the Republic of Ireland. Pupils in Northern Ireland

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275 School performance | Department of Education (education-ni.gov.uk)

276 Statistics: GCSEs (key stage 4) - GOV.UK (www.gov.uk)

277 Examination results | GOV.WALES

278 The Panel is aware that comparison with other jurisdictions is often inappropriate due to differences in qualification systems, headline measures and methodological variations in reporting outcomes. Due caution should be exercised.

279 PISA is a study of educational achievement organised by the Organisation for Economic Co-operation and Development (OECD). Every 3 years PISA tests 15-year-old pupils from all over the world in reading, mathematics and science. PISA enables governments to benchmark education policy and performance, to make evidence-based decisions and to learn from policies and practices from other countries. Over half a million 15-year-olds from 79 countries and economies took the PISA test in 2018, including all members of the OECD and all four countries of the United Kingdom. PISA 2018_Northern Ireland_Executive Summary.PDF (education-ni.gov.uk)

280 PIRLS is a research study organised by the International Association for the Evaluation of Educational Achievement (IEA) which provides data about reading literacy. It takes place every 5 years and assesses the knowledge and skills of pupils aged 9 to 10 years old (P6 in Northern Ireland). In total, 57 countries along with eight benchmarking participants took part in PIRLS 2021. PIRLS 2021 in Northern Ireland Full Report.pdf (education-ni.gov.uk)

also performed well in the most recent Trends in International Mathematics and Science Study[281] (TIMSS) in 2019. The results show that mathematics and science attainment for 9- and 10-year-olds in Northern Ireland remains high. Pupils in Northern Ireland significantly outperformed 51 of the 58 participating countries and were significantly outperformed by only five countries. Reflecting the high performance in mathematics overall in Northern Ireland, just over a quarter of pupils reached the Advanced International Benchmark, the sixth-highest percentage internationally. The average score for science was lower than for mathematics, although still above the TIMSS science International Average.

5.17   This demonstrates that while there is always room for improvement and we should strive to support our learners to achieve the best possible outcomes, the performance of Northern Ireland's pupils at all ability levels compares favourably to that of other nations.

5.18   We believe in the need for a broad dashboard of measures to consider different aspects of success at all levels. DE is undertaking work on such a dashboard. We suggest that decisions be taken on its suitability as soon as possible. Such measurements should not unfairly penalise institutions for poor performance but should promote accountability and strive for high standards. Additionally, institutions must have effective improvement programmes in place. They should engage in self-evaluation and be able to learn from best practices in other institutions. They should also have access to external support when needed.

Panel conclusion

The education system's narrow focus on measuring examination performance often overlooks the value added by institutions and individual progress over time, leading to a misrepresentation of educational achievement.

We need to adopt a system with broader measures of success that acknowledges the value of a variety of achievements by learners. This system should promote not only accountability but also high standards.

Building blocks for future success

5.19   Elsewhere in the Report, we recommend the establishment of an Early Intervention and Learner Support Agency (to be created by splitting responsibilities currently held by the Education Authority). A key function of this body would be to ensure the smooth progression for both young children and their families from the health-focused provision in the period before and immediately after birth to a greater focus on learning, initially in the early years but also throughout schooling and beyond.

5.20   Recent decades have seen an expansion in educational services for very young children in most developed countries. This has generally taken the form of a play-based approach, sometimes in units attached to primary schools but more commonly in standalone

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281   TIMSS is a research project taking place every 4 years and providing data about trends in mathematics and science achievement over time. It assesses the knowledge and skills of pupils aged 9-10 (and aged 13-14, although Northern Ireland participated only at the younger age range) around the world and enables researchers to collect extensive background information about pupils' home and learning environments and the quantity, quality and content of teaching. Trends in International Mathematics and Science Study (TIMSS) | Department of Education (education-ni.gov.uk). As a result of industrial action by teachers, Northern Ireland was unable to gather enough data to participate in TIMSS 2023.

nurseries and children's centres. We endorse this play-based approach as best suited to the developmental needs of the very young child and would wish to see it continue until the conclusion of the Foundation Stage in primary school. A continuity of approach between ages 2 and 6 also serves to smooth the pathway from nursery into primary. It does, however, require a transition to a more formal style of learning from age 6 onwards. This transition can be gradual and does not involve a change of school. Class teachers are able to ensure smooth progress in all but a very small number of cases.

5.21   The UK has a lower school starting age compared to many other countries, where compulsory education often begins at age 6 or 7. In the UK, children typically start school at around 5 years old, with the exception of Northern Ireland which has a unique starting age of 4. Although the compulsory school starting age varies across countries it is relatively commonplace for early years provision to start at age 4, or earlier. For example, England has a childcare offer for 3- and 4-year-olds. This is regulated and focused on child development, with a participation rate in excess of 90%. Furthermore, Northern Ireland has recently introduced more flexibility in relation to the starting date of the individual child[282]. Nevertheless, most children enter the formal education system earlier than would be the case in almost any other part of the world.

5.22   There have been suggestions that we should recommend the school starting age be raised but we have concluded that this would be to focus unduly on the organisation of the education system rather than the needs of the child. Excellent and age-appropriate provision is perfectly possible within the existing institutional framework. Engaging all children in learning and development from age 4 ensures that no one is excluded because of family circumstances or parental indifference. This is important given that the take-up of optional services tends to be lowest among disadvantaged groups. For that reason, Northern Ireland's early starting age should be seen as offering an important safeguard to children in need.

5.23   High-quality early years education relies on promoting all-round child development through structured play. It also places an emphasis on nurture, particularly in the case of young children who may be experiencing difficulties in their home lives. Such an approach requires a distinctive set of skills within the workforce. This has implications for the workforce.

5.24   The pedagogy of early years continues to evolve rapidly and it will be important that relevant expertise exist not only within the classroom but also in the Inspectorate and agencies involved in supporting and developing teachers and other staff. This will help to ensure that practice develops in tandem with pedagogical theory.

5.25   Primary schools in Northern Ireland are already expected to use play-based learning in the early stages and the evidence presented to us indicates that the great majority have enthusiastically embraced this child-centred approach. Key elements of this approach include ensuring education is fun and that there is a welcoming environment, with colourful surroundings. These early stages are an opportune time to introduce pre-literacy skills and develop the motivation to read. There should be plenty of opportunity for directed and self-directed play inside and, perhaps more importantly, outside of the classroom with regular opportunity for outdoor learning and physical activity.

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282   School Age Act (Northern Ireland) 2022 (legislation.gov.uk)

> **Panel conclusion**
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> The formal school starting age is of secondary importance to the experience of the learner. In the early years, whether it be in pre-school or Key Stage 1, in a nursery or a playgroup, the ethos, curriculum and pedagogy should be consistent, age-appropriate and focused on child development and nurture. The natural curiosity of very young children will help to instil a love of learning.

A smooth transition between primary and post-primary

Smoothing the curriculum

5.26 Moving from primary to post-primary school involves profound changes in curriculum, pedagogy, school organisation and relationships between learner and teacher. Although there are variations from school to school, class teaching in primary schools is normally in the hands of a single teacher, sometimes with inputs from a small number of specialists or other colleagues. As a result, the relationship between learner and teacher is very close. Usually, although not invariably, this is a strength, particularly in the earlier years. While times are often set for specific activities such as numeracy or physical education, there is nothing similar to the timetabling arrangements of post-primary schools. This makes it relatively easy for primary teachers to undertake project work, often of an interdisciplinary nature.

5.27 By contrast, post-primary schools offer a subject-based curriculum. The number of separate subjects is often greatest in the first 2 years with it being possible that learners might encounter as many as 15 teachers in the course of a week. Many learners find the transition and the ethos of their new school exciting. They appreciate having numerous teachers and access to a great deal of specialist expertise. The times for each subject are rigidly set which entails much pupil movement. At the same time, this means that interdisciplinary work is more difficult to organise and to timetable.

5.28 The transition from primary to post-primary requires learners to move from a familiar situation to one that is profoundly different across the space of a summer holiday. Although schools make efforts to ease the transition, for example by arranging pupil visits to their new schools, a number of children find the move unsettling. While most will adjust to their new school quickly, there are some for whom the transition marks the point at which they begin to lose meaningful contact with the educational process.

5.29 It is important to stress that the abruptness of the change is not inevitable. The notion that there are such things as primary and post-primary education and that the two are different is an artificial construct. In reality, there is an initial phase of education carried out in school and it should be smoothly continuous from beginning to end. Most countries first set up a national system of elementary education extending to around 11 or 12 years of age. Universal secondary (post-primary) education came much later and was conducted in separate premises organised along different lines. The assumptions which ensure that the learner's experience of school in June is so different from his/her experience in September are the legacy of the way in which the system was set up many decades ago, not a reflection of some underlying reality.

5.30 We strongly recommend that steps be taken to bring the pupil's experiences of the later

primary years and the early post-primary years much closer together. This recommendation addresses the single most disruptive transition in the current educational journey and will make an important contribution to reducing the incidence of pupils disengaging shortly after the point of transfer.

5.31   We would expect that the Curriculum Taskforce would take the lead in introducing a smoother curricular experience between primary and post-primary. This will involve consolidation of the Years 8 and 9 curriculum into a smaller number of discrete courses, and increased interdisciplinary working and greater specialisation in primary 6 and 7, including an increase in STEM and language teaching. This would be a key priority for the new body. There will be a need for professional development for serving teachers expected to deliver this revised curriculum.

5.32   Elsewhere in the Report we discuss greater flexibility in the employment model and sharing among different institutions. This includes scenarios whereby staff are employed by a group of schools to work across different sites. This model could support the attachment of relevant specialist teachers to primary schools (i.e., consortia of small schools employing a shared resource). There should also be increased collaboration between primary schools and post-primary schools.

Panel conclusion
A learner-centred system should seek to reduce, or mitigate against, cliff-edge transitions. We believe that the transition from primary to post-primary is such a transition and requires action both by broadening the curricular offering at the upper end of primary and consolidation in the early years of post-primary. The goal should be a seamless educational transition between primary and post-primary.

Transfer at age 11

5.33   Transition at age 11 involves leaving primary school and transferring to post-primary school. This transfer requires change in school, location, peer friendships, curriculum and methods of teaching. These are challenging, exciting and potentially stressful experiences. Many learners, some half of the age cohort[283,284], also undergo formal assessment to determine scores that are used as admissions criteria by some post-primary schools. This process is commonly referred to as academic selection or the transfer test[285]. The test is not compulsory but is a common requirement for entrance into the vast majority of grammar schools (as well as a small number of other schools that utilise the process for an element of their intake).

5.34   It goes without saying that this is a politically contentious[286] and polarising issue. This has the effect of exaggerating its importance within the whole educational debate.

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283   Purdy et al. give these figures for 2022/23 – 8,400 sat AQE and 7,300 sat GL = 61% of cohort.

284   In November 2021, 8,280 children sat the AQE tests and 5,450 sat the PPTC tests (Meredith, 2021), out of a total Year 7 cohort of around 25,000. As a rough indication, we would estimate that around 50% of Year 7 children sit one or both of the tests. A more accurate estimate is not possible as there is no information available about how many children sit both tests. (Academic Selection Literature Review - Pivotal | Independent Review of Education)

285   A different process of transfer operates in the Craigavon area, known as the "Dickson Model", which does not include a test at age 11; rather, learners move to junior highs.

286   Pivotal (2022) *Impacts of academic selection in Northern Ireland – literature review for Independent Review of Education*. Available at: Academic Selection Literature Review - Pivotal | Independent Review of Education

5.35   We have approached the issue with the desire to find common ground and consensus. It is important to note that individuals and organisations that hold different opinions on this matter do so in good faith and with the learner in mind. At the two ends of the debate there are those who wish to abolish academic selection completely and those who want it retained in its current form unaltered. We respect and have considered both viewpoints. A deliverable solution will require concessions on all sides.

5.36   Our views are informed by evidence, what we think is best for the learner and for education in Northern Ireland, and what we view as being deliverable in the current context.

5.37   In our considerations we have been guided by the following:

- As a general principle, the **needs of the learner should be paramount** over the needs of any particular institution, school, body or political interest.

- **Parental choice is one of our principles and** increased **school autonomy** is part of our vision. Indeed, a key principle of grammar schools (voluntary grammars in particular) is their autonomy. However, there are examples of both choice and autonomy being limited by legislation (anti-discrimination legislation) and in guidance (see departmental guidance on admissions).

- **High academic standards are important** and a strength of the current system. Highly academic schools should be part of an educational framework that offers pathways for all. However, this should not be to the detriment of other learners. There should be **parity of esteem** where vocational and academic pathways are equally valued. This needs to be promoted in schools, among parents and learners and within wider society.

- **Streaming and setting of pupils within schools is a matter for schools to determine**. Schools should be free to group learners as they wish for the benefit of the pupils and to aid teaching.

- The **current position regarding lack of information on how a learner progresses during primary school and early post-primary school is not acceptable**. A key issue for the education journey is being able to track progress throughout and making informed decisions on what is best for the learner at all stages.

- **There are wider societal issues at play that the government cannot control**. These include the esteem in which different kinds of school are held.

5.38   Our Review is significantly different to Burns and Costello, and other non-government reports that have considered academic selection, due to our broader remit. We are not focused on a single issue but have been asked to review the whole education landscape and recommend what it should look like in the future. We therefore need to consider how learners should transfer from primary to post-primary in the context of a clear vision of the education system as it should evolve over a 20-year period. This provides us with the opportunity to set out a long-term direction of travel and possible destination. This is particularly important, as the context in which transfer operates will change. The recommendations set out throughout this Report should have an impact on this context. Changes in society may result in the issue becoming less contentious. However, there is a need for short-term actions that can create an impetus for further change.

5.39   Our end goal in dealing with this issue is to improve the experience for the learner. The

first step is to smooth the curricular experience between primary and post-primary (as described in the previous section). In terms of the process of transfer at age 11 and the learning experience in post-primary we want to:

- reduce the role of academic selection at age 11;
- improve the process of selection; and
- ensure there is more synergy between "grammar" and "non-grammar" schools in terms of learner cohort and learning experience.

The context of academic selection

5.40   Broadly speaking academic selection in its current form has been a feature of education in Northern Ireland since the early post-war period when selective secondary education was introduced across the UK. Pupils were allocated on the basis of a test sat at age 11 (age 12 in Scotland) either to academic grammar schools or schools variously known as secondary moderns, junior secondaries or non-selectives, which offered a less academic and more practical curriculum. It was intended that every child would receive an education suited to their abilities in schools of equal status. In practice, however, the two types of school did not attract equal esteem and it became apparent that non-grammar schools were viewed less favourably.

5.41   From the late 1950s onwards, the system began to be reformed with comprehensive (all-ability) schools taking the place of selective schools in most parts of the UK. By the late 1970s selection had been completely removed in Scotland and Wales. All but a small minority of local education authorities in England changed to comprehensives at the same time. However, the system remained largely intact in Northern Ireland, which now contains around a quarter of the UK's grammar schools. As we have stated elsewhere, attainment in Northern Ireland compares favourably to other UK jurisdictions, for both high and low achievers, and while it is not possible to establish a causal connection between selection and outcomes some might regard it as imprudent to do away with an important component of a successful system.

5.42   While Northern Ireland and some parts of England are outliers on academic selection at age 11, all education systems, to some extent, are selective. An example of this is selection for higher education by way of assessment at 18. In addition, even in schools that are non-selective or "partially selective" there may be streaming or setting by ability. This is held by some to help teaching although it is criticised by others. Of course, transferring learners across "streams" or between "sets" within the same school is far more easily achieved than transferring from one school to another.

5.43   The issue has been considered by previous education reviews. The 2001 Burns report recommended that the state tests taken by all children should end as soon as possible. A subsequent public consultation demonstrated that "most respondents were unhappy with the existing system of selection at 11, but supportive of some differentiation in education provision. There was no consensus on the way forward, in either political or public discourse."[287] The Burns report[288] was followed by the Costello report (2003), which considered implementation of the Burns recommendations. The conclusion of these reports was a system of parent and pupil-based choice that would be informed by a "pupil profile":

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287   Academic Selection Literature Review - Pivotal | Independent Review of Education
288   The Burns Report | Department of Education (education-ni.gov.uk)

The present Transfer Tests should end. Transfer from primary to post-primary school should continue to be at age 11 but should be on the basis of choice by parents and pupils, supported by appropriate information including the Pupil Profile.[289]

5.44   We discuss earlier in this chapter the need for a learner profile. We do not see the need for such a "profile" as being directly linked to the matter of transfer. Rather it would be an important tool in its own right, helping to ensure that learners, parents and educators have a clear and shared understanding of the learner's progress.

5.45   Neither the Burns report nor the Costello report secured political agreement. However, the government ended the state test in 2008. Thereafter, between 2009 and 2023, selective schools in Northern Ireland used one or both of two privately commissioned tests provided by the Post-Primary Test Consortium (PPTC) and the Association of Quality Education (AQE Ltd) to select on the basis of academic ability. DE did not have a role in either test or their operation.

5.46   The arrangements for transfer tests have changed for 2023/24 with a common entrance examination via the Schools' Entrance Assessment Group (SEAG)[290]. Within its membership, SEAG includes Controlled and voluntary grammar schools and Integrated schools.

5.47   In 2020/21 the tests were not used due to public health restrictions and concerns relating to the Covid-19 pandemic. Instead, selective schools set their own admissions criteria having regard to departmental guidance.

5.48   Research[291] carried out by the Centre for Research in Educational Underachievement (CREU) at Stranmillis University College[292] found that the demography of the affected intake showed only minimal differences from the 2020/21 cohort. The CREU report provides details[293]:

Table 5.a: Demography of Year 8 intake, Northern Ireland, 2020/21 and 2021/22

	2020/21 cohort *Selection*	2021/22 cohort *No selection*
Free School Meals	15.1%	15.8%
SEN (all stages)	6%	5.6%
Statement of SEN	1.3%	1.3%
Newcomer	1.3%	1.1%

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289   The Costello report in full | Department of Education (education-ni.gov.uk) Chapter 10 (p.74)

290   SEAG | Home (seagni.co.uk)

291   Testing Times: Northern Ireland School Transfer without Tests in 2021 (March 2023) by Prof. Noel Purdy, Dr Glenda Walsh, Dr Karen Orr, Dr Annemarie Millar and Dr Mark Ballentine. TestingTimes-Report-March-2023.pdf (stran.ac.uk)

292   The research was funded by the Nuffield Foundation.

293   Further to the data in the table there was a small increase in the percentage of girls in the 2021/22 cohort (up from 48.7% in 2020/21 to 49.7%). Figures for Children in Care and Ethnicity were too low in every grammar school to draw reliable comparisons.

5.49   The CREU research found that the top ten criteria used by selecting schools was as follows.[294]

> a) Older sibling currently attending school;
> b) AQE/GL Registration[295];
> c) Eldest/First/Only child in family;
> d) Sibling who was previously enrolled/completed education at school;
> e) Tie-breaker criteria;
> f) Attend primary school in listed Feeder schools;
> g) School named as first preference;
> h) Free School Meal Entitlement (FSME);
> i) Parent/guardian member of teaching/admin/ancillary staff;
> j) Mother/father previously attended school.

5.50   The list above includes a number of criteria specifically described as "non-recommended admissions criteria" within the departmental guidance. Furthermore, the inclusion of AQE/GL registration was used as the first admissions criterion in 47 of the 63 schools (75%). The use of this criterion presents an element of "self-selection".

Changing the context

5.51   Elsewhere in our Report, we make recommendations which would alter the context in which the transition takes place. These are described in the following paragraphs.

5.52   Ongoing **standardised statutory assessment during primary school** ([in Chapter 4](#)*)* is intended to provide consistent and reliable data on learners as they progress in the education journey and to enable effective monitoring of standards in primary schooling. The data should be used to inform pupil profiles that support decisions on appropriate pathways for the learner at different points of their journey. It is important to note our reservations about their use as a means of selection (see later).

5.53   **Smoothing the curricular experience of the learner between primary and post-primary** will ease the transition between primary and post-primary. This requires a broader curricular experience in the upper years of primary involving increased use of specialist teaching. At the same time pupils will experience a less fragmented curriculum and a reduced number of teachers in the early post-primary years. The effect of such an approach will be to make the difference between primary and post-primary less extreme and the transition less daunting for the learner.

5.54   **Introduction of pre-vocational pathways and options from KS4** (described later in this chapter) would create new pathways for learners from an earlier age and provide greater parity of esteem across academic and vocational routes.

5.55   **Rationalisation of sixth form provision** will also change the post-primary landscape. Our recommendation on "right-sizing" the network of schools, including the delivery of more [sustainable sixth forms,](#) would lead to the closure of up to 84 unsustainable sixth forms. This would lead to a concentration of sixth form provision in the remaining post-primary schools

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294   Testing Times: Northern Ireland School Transfer without Tests in 2021 (March 2023) by Prof. Noel Purdy, Dr Glenda Walsh, Dr Karen Orr, Dr Annemarie Millar and Dr Mark Ballentine. [TestingTimes-Report-March-2023.pdf (stran.ac.uk)](#) (p.22)

295   Meaning learners had to have been registered to take part in the AQE or GL process prior to its cancellation.

to serve the local community. Learners in schools without a sixth form would have the right to use the nearby sixth form provision should they wish. We also suggest that there would be an opportunity to pilot innovative approaches such as community sixth forms or tertiary colleges where circumstances allow.

5.56 Radical reform of **shared education, including strengthening of area learning communities and new models of school governance** (including jointly managed community schools) will provide a framework for schools to work in cooperation with each other for the benefit of all learners. Breaking down barriers between individual institutions could make decisions taken at age 11 less important than at present. The developing use of new technology to facilitate innovative forms of learning could have a similar effect.

5.57 An unrelenting focus on **school improvement** will bring about changes in pedagogy, curriculum and class organisation. It will lead to a greater emphasis on ensuring the success of all learners. The active collaboration of ETI in the process of school improvement should lead to the more effective dissemination of good ideas and innovative practice.

5.58 The **removal of "gatekeeper" qualifications**, such as English and mathematics at GCSE, which prevent learners from progressing in education will also assist a smoother learner journey. School-aged learners should have a right to study courses that they wish to without being barred because of internal admissions criteria (i.e., school requirements for learners to take subjects at A Level or GCSE). Learners should be guided by educators but should have freedom to pursue pathways as they wish.

5.59 Such changes will make a profound difference to the experience of learners transferring between primary and post-primary and the pathways open to them. They have important implications for the process of transfer itself. Furthermore, there are other changes already taking place which have an impact on attitudes towards the transfer process.

5.60 Because of **demographic decline**, parental choice and changes in the network of schools, the proportion of learners being educated in grammar schools has risen from 38.9% in 1991/92 to 42.6% in 2022/23[296]. This is forecast to rise to 46.6% in 2031/32[297]. This projected increase will have an impact on the viability of many non-selective schools as well as changing the character of selective schools – a system originally designed to educate around 25% of learners in a highly academic ethos will deal with nearly half of learners in a much less selective context.

5.61 **Pupil wellbeing** is an issue of increasing public concern with virtually every group of young people we have met raising this issue with us. Although Covid-19 has unquestionably increased concerns, it is by no means solely responsible for them. The transfer test is one of a range of other factors causing anxiety long before the advent of Covid. Sitting this test or any test is undoubtedly a stressful experience, especially at this young age.

5.62 This changing landscape, both through our recommendations and wider societal changes, will fundamentally alter the context in which transfer operates and how decisions are taken at age 11.

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296   School enrolments - Northern Ireland summary data | Department of Education (education-ni.gov.uk)
297   School enrolments - Northern Ireland summary data | Department of Education (education-ni.gov.uk)

The need for change

5.63   The overall context will change only slowly. There is a need for action in the short term.

5.64   The **socio-economic status** of grammar school pupils differs significantly from that of pupils in non-selective schools. There is also a **wide difference in the incidence of pupils with special needs**. This creates a stark contrast between the pupil profile in the grammar and non-grammar sectors as follows[298].

Table 5.b: Demography of post-primary schools, Northern Ireland, 2022/23

	Post-Primary Population	Grammar	Non-Grammar
Free School Meals entitlement	25.5%	12.7%	34.9%
Statement of special education needs	5.5%	2.1%	8.1%
SEN Stages 1 and 2	10.4%	4.6%	14.7%
Newcomers	2.9%	0.8%	4.4%

5.65   The current selection process is a factor in perpetuating these differences. While there are examples of a minority of schools that defy these trends, the overall picture is clear. Assessment drives behaviour. This is true at GCSE and A Level but is also true at transfer at 11. It is therefore essential that we have quality assessment in place that drives the behaviours we wish to see in the classroom.

5.66   There is evidence that the current testing process influences **the curriculum at Key Stage 2, affecting the education of learners, both those who sit and those who do not sit the test**. Participants in the CCEA Curriculum Monitoring Programme[299] were concerned that preparation for the non-statutory transfer test limited opportunities to implement the curriculum fully. Their report notes that non-statutory transfer tests at Key Stage 2 were considered a hindrance to progression, with teachers' focus, particularly in Year 6, moving away from developing essential elements of the curriculum such as cross-curricular skills, thinking skills and personal capabilities in order to concentrate on content that will help pupils pass the tests. Stakeholders also reported that preparing for non-statutory transfer tests in Year 7 could narrow pupils' range of educational experiences, with areas such as PE, careers provision and enrichment activities being squeezed. The OECD Review of Evaluation and Assessment in Education[300] in Northern Ireland highlighted tensions in relation to the implementation of the curriculum at Key Stage 2 as a result of the use of unregulated transfer tests by a number of post-primary schools. There is no guarantee that these tests are aligned to the Northern Ireland curriculum, but they influence what is taught in a significant number of primary schools.

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298   Annual enrolments at schools and in funded pre-school education in Northern Ireland 2022/23 | Department of Education (education-ni.gov.uk)

299   Curriculum Monitoring Programme Report 2018-19.pdf (ccea.org.uk)

300   261913-reviews of evaluation and assessment in education northern ireland.pdf (oecd.org)

5.67   The transfer test is unusual in that it cannot be repeated, unlike GCSE, A Level and many other assessments. It can therefore be argued that the transfer test at age 11 has greater significance than those taken at the ages of 16 or 18, given the fact that it leads to a destination that cannot be easily altered.

5.68   This concern is increased by the early age at which the test is taken. The purpose of the test is to identify those pupils with the best prospects of later academic success. In other words, it seeks to predict the child's educational potential. However, learners develop at different rates. At the time when academic selection in England was the subject of active debate in the 1960s, a common argument by those advocating comprehensive education was the fallibility of the 11+ as a predictor, with some suggestions that a quarter of children were wrongly placed by the state test then used. Research published in 2005 into the previous state-run system in Northern Ireland showed that the candidate ranking system had the potential to misclassify up to two-thirds of the test-taking cohort by as many as three grades[301]. We are aware of evidence that highlights that the accuracy of tests used for selection improves with the passage of time. The conclusion is that testing at age 11 is much more fallible that testing at, say, age 14 or 16. Additionally, international evidence from OECD's PISA indicates that school systems selecting students at an early age have larger socio-economic inequalities in learning opportunities, yet do not have better overall performance[302].

5.69   Taking account of all these points we consider that there should be a transition away from the present system of using testing at age 11 as a mechanism for academic selection.

5.70   The purpose of the Review is to suggest ways in which education in Northern Ireland can be improved. The recommendations within our Report will improve the experience of learners as they transfer between primary and post-primary and widen the opportunities and pathways available to them in post-primary and beyond. This does not negate the need for immediate action to reform specific elements of the selection process. However, short-term recommendations need to be widely acceptable and deliverable and to create impetus for more ambitious change in the longer term.

5.71   Academic selection, as understood in Northern Ireland, comprises three distinct elements, each of which could be altered independently of the other two:

   • The **age** at which assessment takes place (ages 10/11).
   • The assessment **process** and **methodology** through use of an unregulated test focused solely on academic ability in literacy and numeracy, which cannot be repeated in the event of an unsuccessful outcome.
   • The **destination** of a specific school type – selective or non-selective/grammar or non-grammar.

5.72   In principle, each of the above elements could be altered in ways which would significantly change the transfer process although, in practice, some of the options might be ruled out on grounds of cost or disruptive impact on the system as a whole. Thus, testing or selection could take place at a later age or be replaced by other forms of assessment or methods of admission. Alternatively, selection could be used to determine not entry to a particular

301   Gardner, J. and Cowan, P. (2005) *The fallibility of high stakes "11-plus" testing in Northern Ireland*, July 2005 https://www.researchgate.net/publication/233197735_The_fallibility_of_high_stakes_'11-plus'_testing_in_Northern_Ireland

302   261913-reviews of evaluation and assessment in education northern ireland.pdf (oecd.org)

school but to different pathways in the *same school*. The range of possible changes is large. Furthermore, options might be combined. In addition to such possibilities, for limited change consideration needs to be given also to two more fundamental options – either maintain the status quo or prohibit the use of academic selection in its entirety.

5.73   We seek to summarise the options we have considered as part of our Review below.

Option 1 – Maintain the status quo

5.74   There are many proponents of the view that the status quo should remain. Overall standards of attainment tend to be higher in Northern Ireland than in other UK jurisdictions and this could be seen as supporting the current processes and existing system. It is not, however, possible to establish a causal connection between the overall level of attainment and the use of selection at age 11. Furthermore, there are examples of high-performing and underperforming schools in both the selective and non-selective sectors.

5.75   It is argued by some that selection on the grounds of academic ability is the "fairest" methodology when dealing with admission to over-subscribed schools. This is seen by some as being preferable to selection by catchment area or feeder school or other potential admissions criteria. Another argument put forward by supporters of the existing arrangements is that removal of the test may have the unintended consequences of giving rise to the emergence of an independent or fee-paying sector, which is currently very limited.

5.76   The status quo is, of course, eminently deliverable. Primary schools would continue to prepare learners for an external entrance examination in Year 7 and post-primary schools could use the results to admit pupils based on academic ability, supplemented with appropriate non-academic criteria as needed.

5.77   Such an option would not do anything to alleviate Panel concerns regarding the current arrangements, that is:

- The impact of the test on curriculum delivery.
- The impact of the test on the wellbeing of the learner.
- The impact on the non-selective sector and its viability (in the light of declining demographics and consequent falling enrolments).
- The marked socio-economic disparity between the selective and non-selective sectors.

5.78   We conclude that these concerns require the current arrangements to be reformed, even if the use of academic selection is to continue.

Option 2 – Abolish selection

5.79   The Panel has considered simply recommending prohibition of using academic ability or testing as a means of selection. This would require legislation giving powers to DE to make regulations limiting the kind of criteria which could be used by schools in the admissions process.

5.80   There have been attempts in the past to abolish the use of selection and these attempts have failed. We have concluded that lack of anything approaching a consensus either public or political means that such an approach is not deliverable in the short term. That is not to

say that this will always be the case. Indeed, as we have outlined earlier in the chapter, we expect the wider changes we are recommending to the educational landscape will diminish the prominence of the issue of transfer, reduce its importance and impact and ultimately de-toxify the debate, potentially to the point that its use is significantly reduced.

Option 3 – Change the age at which selection takes place

5.81   As previously stated, most (if not all) education systems are selective at some point with the most obvious example being academic selection for the purposes of entrance into higher education courses. What is unique about Northern Ireland is the age at which selection occurs. Therefore, an option open to the Panel would be recommending a change to the age at which selection takes place. Already in Northern Ireland, there is an example of such an approach, referred to as the "Dickson Plan". Learners within that area move to a junior high school at age 11 (without a test) and then transfer to other schools in time for Key Stage 4 at age 14. Decisions regarding transfer at 14 years old are based on continuous assessment and school examinations.

5.82   Raising the age of selection is an attractive option insofar as evidence demonstrates that the later such a test is taken the greater the reliability as a predicator for future attainment. Conversely, the earlier the test is taken the less reliable it is.

5.83   However, any move to such a model would have significant consequences for the design of the current estate. There would be substantial risks to the learners during any transitionary period and the costs of substantially changing the educational infrastructure would be prohibitive. We conclude that such an approach is undeliverable.

5.84   We describe elsewhere in the Report how we would wish to see greater sharing among institutions, including at post-primary, for the benefit of learners. We also describe the importance of decisions taken at age 14, before Key Stage 4, to allow informed choice of new pathways in education including pre-vocational routes. Selection or wholesale transfer at age 14 is almost certainly undeliverable but greater flexibility at age 14 could be introduced to allow more learners to take courses at more than one institution or even transfer to a different school. This would involve a more formalised method for learners to apply to other schools at age 14. Of course, transfer would depend on the availability of places but increased movement at this age could be encouraged and facilitated if possible.

Option 4 – Reform selection

Improving the assessment process

5.85   There is evidence that the current testing regime is having an impact on the delivery of the curriculum at P6 and P7. In particular, it leads to an emphasis on numeracy and literacy to the detriment of other parts of the curriculum. Valuable teaching time is spent on practising and revising for a non-regulated test. This affects pupils sitting the test and those who are not.

5.86   This is of particular concern if we wish to see a broadened curricular experience in these years to prepare learners for transition to post-primary. Furthermore, there is limited evidence regarding the suitability of the current non-statutory transfer tests for their intended purpose. This is not to question the quality of the present tests but rather to highlight the challenge

of non-regulated tests being used within the state system. If the tests are to continue the public must have confidence in their suitability and be assured that they are not distorting the delivery of the statutory curriculum. This implies a regulatory role for the state. However, bringing the tests back within DE would be a retrograde step and unlikely to secure political support. It is impossible to see any way of resolving this dilemma; a point which strengthens the case for ensuring the early demise of the tests.

Changing the basis of selection

5.87   Earlier in this chapter, we discuss the introduction of learner profiles. These are important to track the progression of learners and to inform decisions at key transition points. The need for such profiles is of intrinsic value outside of any discussion on selection at age 11.

5.88   The use of these profiles as a possible replacement for the current testing regime has been recommended by previous reviews and suggested by other stakeholders. The use of profiles would have the attraction of reducing stress and potentially taking account of a wider range of qualities than those assessed by testing learning over a limited part of the curriculum.

5.89   However, problems would emerge should the proposed learner profile be used to inform selection at 11. In particular, if completion of the profile required primary schools to record subjective judgements on pupil effort, attitudes or other qualities, they would almost certainly find themselves open to extensive parental complaint, challenge and potential litigation. Teachers might feel that they were being obliged to make potentially prejudicial comparisons between pupils and refuse to cooperate with the process.

5.90   To mitigate these problems, profiles would, therefore, almost certainly need to be limited to objective information. The main component would be information on academic performance obtained by test or other means. In other words, pupil profiles used for selection would be largely based on the results of assessments undertaken throughout the learner's time at primary school, largely via computer adaptive testing. The emphasis would obviously be on more recent assessments. The timing and method for such assessment would need to be determined but the expectation would be they would be aligned with other recommendations on statutory assessment.

5.91   Of course, the use of such profiles could be supplemented with interviews undertaken by the post-primary schools. University entrance procedures often include interviews without being susceptible to challenge. The post-primary school could look for the qualities it believes to be demonstrated by those passing the current test. Interviews could also be used in conjunction with academic pupil profiles if needed.

Altering admissions guidance

5.92   Currently DE sets out recommended admissions criteria that BoGs of post-primary schools are required in law to "have regard" to when setting their own admissions criteria for Year 8[303]. The guidance does not refer to academic testing. It lists the following recommended criteria:

- applicants who are entitled to free school meals: "priority to be given so that the proportion of such children admitted is not less than the proportion of first-preference FSME applications received within the total number of first-preference applications received". Any school using this criterion must list it as the first criterion;

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303   DE Circular 2022 15 - Procedure for Transfer from Primary to Post-Primary Education.PDF (education-ni.gov.uk)

- applicants from a feeder/named primary school;
- applicants residing in a named parish (with nearest suitable school);
- applicants residing in a geographically defined/catchment area (with nearest suitable school);
- applicants for whom the school is the nearest suitable school;
- applicants who have a sibling currently attending the school;
- applicants who are a Child Looked After; and,
- tie-breaker criteria.

5.93   The guidance relating to FSME includes a stipulation that, where a school uses this criterion, it must be placed ahead of all other criteria. It would be possible to use such an approach in other cases.

5.94   DE should adopt such a strategy to ensure that the transition process aligns with wider policy objectives. There is significant disparity in the socio-economic mix in post-primary schools of different types. There are also significant differences in proportions of pupils with SEN in grammar and non-grammar schools and in rates of newcomer pupils.

5.95   Guidance could thus be altered to promote a more equal balance across grammar and non-grammar, for instance by giving priority to certain minority groups. The intention of such a recommendation would be to have a more inclusive system. This would also help guard against the possibility that the quality of teaching and learning in a school could be adversely affected by an imbalanced demography with disproportionately high numbers of pupils facing difficulties.

5.96   Guidance is currently advisory. However, were it to become clear that it was being flouted on a large scale; legislation could be used to give it mandatory force.

Option 5 – Destination

Limit selection

5.97   The results from the current test are used to determine the destination of learners at post-primary. We value academic pathways and respect parental choice. Therefore, we are disinclined to remove the option of families choosing grammar or selective schools (even if this were practically or politically deliverable). However, this leaves an option of limiting the level of selection allowed. This would be in line with our recommendations on "right-sizing" the network of schools and efficient enrolments. It would involve moving all grammar schools to an efficient enrolment number, which might be below the current figure.

5.98   A grammar school system initially designed for around 25% of the population has grown significantly in recent years. In stark contrast, many schools in the non-selective sector have experienced declining rolls. The demography of the grammar and non-grammar sectors also differs greatly in terms of FSM, SEN and newcomer enrolments.

5.99   In 2022/23, the grammar school sector accounted for 43% of the total post-primary enrolment. However, the percentage share at Year 8 is lower, accounting for 38% of the total Year 8 post-primary enrolment. The difference can be largely explained by the fact that all grammar schools have a sixth form compared to only 75% of non-grammars[304].

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304   School enrolment - school level data 2022/23 | Department of Education (education-ni.gov.uk)

5.100 The proportion admitted through academic selection is lower still. In 2022/23, 28% of the total Year 8 enrolment was admitted through academic selection[305]. This is due to the fact that there are a number of grammar schools that do not use (or only partially use) academic selection. The figure of 28% includes one non-grammar school which used partial academic selection in 2022/23.

5.101 The proportion selected on academic grounds has varied in recent years with schools changing some admission criteria post Covid-19 (i.e., moving from academic selection to other criteria and then back again). It is estimated that c. 35% of the entire Year 8 cohort was selected on academic grounds in 2023/24.

5.102 It would be possible to place a cap on the percentage of the transferring cohort who could be admitted by academic selection. The Department would need an appropriate methodology for operating such a cap.

- A system-level cap would limit the number of places that could be filled by academic criteria. In essence, this would mean that only a proportion of learners could be admitted by way of academic selection in any given year. Selective schools that do not fill to their admissions number by way of academic selection would either have a reduced intake or "top up" their admissions by selecting a proportion of pupils via non-academic routes. This would give rise to "bilateral"[306] schools, although it is possible that some schools could remain fully selective but with a smaller enrolment. While this option could help strengthen the non-selective sector and re-focus grammar schools as academic pathways, it could also have the unintended consequence of creating a smaller cohort of fully selective grammar schools that become more sought after and place increased pressure on learners transferring at age 11. However, this would be in the context of increased "bilateralism".

- A school-level cap would mean that individual schools could only use academic selection for a certain proportion of their admissions. This would reduce the "selectiveness" of grammar schools. There are already examples of schools that operate a "bilateral" admissions process by selecting a proportion of their intake on the basis of academic ability while admitting the remainder using other admissions criteria. Such an approach would allow the post-primary school to establish an academic ethos at the same time as better reflecting the character of the local community or admitting a more socially mixed intake by deploying other admissions criteria.

5.103 There would obviously be important questions about the proportion of the intake to be admitted through academic selection and whether that proportion should be fixed or be reduced over time. In addition, it would be important to establish whether there should be a separate academic stream – in effect a school within a school – or whether, once admitted, all pupils would be on an equal footing. Given that pupils' ability varies from subject to subject, the preferable options would appear to be setting or mixed-ability organisation. Ultimately, this is a decision for the school.

5.104 Our analysis suggests that if a cap of 27.5% of the total transferring cohort had been enacted in 2022/23 this would have resulted in c. 1,850 learners no longer transferring on the basis

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305   Panel analysis based on figures provided by DE's School Admissions Team.

306   Meaning post-primary schools that admit a proportion of learners based on academic grounds and the remainder on other criteria.

of academic selection, a reduction of 22%. In this scenario these places in selective schools might have remained unfilled or would have been filled via non-academic criteria.

5.105   It would clearly be possible to combine this approach with a shift from testing to pupil profiles and/or interviewing or some other basis of selection.

Selection in non-grammars

5.106   Standing in contrast to some of the above would be the option to expand selection. Currently, academic selection is primarily used by grammar schools (although, there are exceptions with examples of grammar schools not using selection and non-grammars partially using it).

5.107   To change admissions arrangements to the school either in part or in full to introduce or eliminate selection on the basis of perceived academic ability, the Department's view is that a development proposal (DP) should be published in the interests of clarity and openness.

5.108   It might be considered equitable that, if selection on academic grounds is permissible, then it should be permissible in all sectors and all school types equally. This would imply that any school should be free to choose to use academic criteria should they wish for either all or some of their intake. Schools already have discretion to create internal pathways or streams, which they might see as helpful in instances of partial selection.

5.109   However, any proposal in a school would be subject to the total extent of selection nationally remaining within the cap.

5.110   Such an approach would require a change to the DP process, in essence, removing the need for formal DP approval for changes related to pupils transferred via academic selection.

Panel conclusions

The Panel wants to radically transform the education landscape to alter the context in which selection operates so its perceived (or real) impact, influence and importance is significantly reduced. These changes include:

- Implementing quality standardised statutory assessment throughout the education journey, including in primary school.
- Smoothing the curricular experience of the learner between primary and post-primary.
- Introducing pre-vocational pathways and options from KS4.
- Rationalising sixth form provision.
- Raising the age of education and training to 18.
- Establishing a single department to manage a single education journey.
- Removing "gatekeeper" qualifications that prevent learners from progressing.

We recommend that the process for the current testing regime move away from being a one-off test at age 11 to a pupil profile informed by statutory assessment and enabled by computer adaptive testing, as it develops. The information provided for progression purposes should go beyond numeracy and literacy and be consistent with the aims of the curriculum.

The Panel recognises the value of an academic pathway but does not believe this should be to the detriment of other pathway options. Therefore, we recommend a "cap" on the total number of learners in any transferring cohort that can be admitted to post-primary by way of academic selection. The Department should develop the specific methodology to be applied to implement the cap for a given Year 8 cohort. **The cap would be within the range 25–30% of any given Year 8 cohort.**

Any school selecting pupils via academic means must first give priority to FSM pupils to ensure that the proportion of such children admitted is not less than the proportion of first-preference applications received. This will require legislative change. The Department should issue guidance to achieve a more equitable distribution of newcomer[307] pupils across the grammar and non-grammar sectors.

Greater flexibility should be encouraged at age 14 to allow learners to choose to move to different institutions to follow specialist pathways or take courses that may not be available in their current school. Of course, transfer at 14 years old will depend on the availability of places in other schools but increased movement at this age should be encouraged and facilitated where possible.

As per recommendations in Chapter 3, learners with a statement of SEN should not be classified as supernumerary (as is currently the case). Instead, their Year 8 school place should be identified by the end of their P6 year, in advance of the wider post-primary transfer arrangements. (The Panel recognises that there will be a need for a phased implementation process and for some flexibility for learners who receive a statement during their P7 year or whose status changes during Year 7 or following an appeal related to the transfer. However, the number of learners involved will be small.)[308]

Any post-primary school should have the option to admit pupils through academic criteria but within the overall cap set by DE. **Schools could operate a fully selective model, a bilateral model or a non-selective model, within the overall cap on the number of pupils selected based on academic criteria that would be set by DE.** The requirement to operate the formal DP process to obtain approval for changes related to pupils transferring via academic selection should be removed to enable DE to operate this revised process.

After 7 years of implementing these changes (i.e., at the point where all learners in all post-primaries have transferred on the basis of the revised process) DE should review the recommendations in light of their impact on the overall system.

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307   A newcomer pupil is one who has enrolled in a school but who does not have the satisfactory language skills to participate fully in the school curriculum, and the wider environment, and does not have a language in common with the teacher, whether that is English or Irish. This has previously been referred to as English as an Additional Language. It does not refer to indigenous pupils who choose to attend an Irish-medium school.

308   Removal of supernumerary pupils will not address additional pupils admitted following consideration by the Exceptional Circumstances Body (ECB). Parents/guardians of non-statemented children who have failed through the normal applications process to gain a place in a specific post-primary school, but who consider that their child's exceptional circumstances require admission to that specific post-primary school, can apply to the ECB. There will always need to be some flexibility in admissions numbers.

New pathways for learners

New pathways

5.111   We see the age of 14 as critically important within the education journey and are concerned that this is a point in time where pathways tend to narrow. This should not be the case. At Key Stage 4, there should be an enhanced and improved pre-vocational offering in every school for all learners that could sit alongside more traditional academic pathways. This will require collaboration among schools and colleges with learners being offered exposure to different pathways and potential careers options in the college sector.

5.112   It has been a scarcely questioned assumption behind curriculum planning for many decades that choice is motivating and should, so far as is feasible, be maximised. While there is merit in this argument, it can lead to an over-specialised or incoherent curriculum, particularly in the later stages of school education. It can also mean that young people have no experience of important areas of learning at the stage in their development when they are capable of understanding them.

5.113   Post-primary education should offer young people a wide range of educational pathways – academic, creative, technical and vocational – all of which should lead to satisfying options for education and training beyond school and good prospects of economically useful and well-rewarded employment thereafter. It is important that progression from these pathways be straightforward. There should be few instances of learners having to backtrack in the event of wishing to change direction.

5.114   Learners should have access to high-quality information and advice before choosing their pathways. Every post-primary school should offer a broad range of academic and pre-vocational options and should collaborate with other schools and with colleges in order to further extend the choices available. Choice should normally begin at age 14. The introduction of new options should allow learners to follow academic, vocational or technical pathways or a mixed approach. All schools should be able to offer such pathways and all learners should participate, with support from the FE sector where needed. The intention would be:

  - to ensure that all learners have a greater breadth of experience earlier;
  - to provide parity of esteem for these different pathways; and
  - to ensure the learner is better informed to make decisions on their future education post-16.

5.115   The Entitlement Framework offers a mechanism for enabling this collaboration, but we have concluded that it currently does not function as originally intended. This will require reform.

5.116   Learners entering the final stages of schooling should be aware of the options open to them well in advance of age 16. A consequence of the fact that teaching is a graduate profession is that all pupils have easy access to a wealth of experience of academic routes into higher education and related areas. At the same time, few teachers have experience of other forms of education beyond school or, indeed, of other kinds of workplace. In our chapter on supporting the education workforce (Chapter 7), we suggest that short secondments and exchange arrangements be increasingly used to broaden teachers' experience.

5.117 It is essential that young people have first-hand opportunities at a much earlier stage to learn about apprenticeships, college provision and other options from those with expertise in these sectors. This means effective collaboration between schools and colleges from age 14, improved careers education and the possibility of short-term experience of these options.

5.118 Accordingly, we propose that all post-primary schools should offer pre-vocational options from age 14 onwards. These should not be courses geared closely to particular careers but should acquaint pupils with the world of work and develop appropriate skills and attitudes. All learners should be expected to participate in such courses.

Informing choice

5.119 Learning about the world of work and their possible places within it should be a part of young people's educational experience from an early stage. Such learning should begin no later than P6. This is not about encouraging premature choice of career but rather about making children aware that work is an important and potentially fulfilling aspect of life. Learners should also understand that they have choices and these have implications for their educational pathway. These choices are changing as the world of work itself changes and it is important for learners to have professional and expert guidance available to them.

5.120 The purpose of careers education and guidance is to help people of whatever age to make good choices regarding their occupation and to understand the educational and training requirements that their choices will entail. It should help people reflect on their interests, ambitions, skills and talents.

5.121 At the same time as helping individuals, careers guidance should serve the needs of the economy. The Careers Service needs to be knowledgeable about local labour markets and the practical implications of the "10X Economy". There is an urgent requirement to stem the flow of talent leaving Northern Ireland and harness all the abilities and skills available.

5.122 Careers education and advice is currently provided partly by schools themselves, usually by careers teachers – who may hold no specific qualification but have acquired some relevant knowledge and expertise – and partly by the Careers Service, managed by DfE. The Careers Service's responsibilities are not limited to schools. It seeks to meet the needs of people of any age requiring information and advice. The Careers Service has a budget of £6m and employs around 100 Careers Advisers. This can be contrasted with the position in Wales and Scotland where the budgets are £29m and £50m, respectively.

5.123 The recent Independent Review of Careers Guidance[309] found that "when adjusted for population size and budget structure, significantly less public money is invested in career guidance in Northern Ireland than in Scotland or Wales." It has recommended:

- The development of a careers portal to which employer and professional bodies as well as colleges and universities can contribute.
- An extended role for ALCs in relation to careers education and work experience.
- An earlier start to careers education in the primary school, allied to encouragement of parent/child discussion.

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309   Transforming careers support for young people and adults in Northern Ireland. Executive Summary (economy-ni.gov.uk)

- A move away from interviewing all post-primary pupils to a more targeted approach involving group work, access to skills assessments and self-help careers resources, and one-to-one guidance where appropriate.
- Embedding careers education across the curriculum.

5.124   We agree with these recommendations. In particular, the development of the portal should proceed as quickly as possible. We also wish to see careers provision in schools strengthened by:

- Giving ALCs a specific role in relation to careers advice including collaboration among groups of post-primary careers teachers to improve provision in their schools and organise work experience for pupils.
- Deploying full-time careers officers at the level of ALCs to provide expertise and support.
- Improving professional development of careers teachers including short-term secondments to the world of work.

Broadening experience

5.125   For a high proportion of post-16 learners in schools the main educational experience will be studying for A Level qualifications.

5.126   In many cases, therefore, the school week will be very largely given over to study in three or four subjects only. We consider that this constitutes an undesirably narrow educational experience. Furthermore, courses are content heavy, thus squeezing out important parts of the overall learning experience. However, the need to ensure that young people from Northern Ireland acquire qualifications which are widely recognised, especially in other parts of the UK, means that change can only take place in collaboration with other jurisdictions.

5.127   Looking to the longer term, we suggest that every opportunity be taken to persuade other jurisdictions that A Levels should evolve in ways which would permit a larger number of subjects to be studied, include an option for an interdisciplinary project and allow time in the school week for a broadening of the overall educational experience. In the interim, any flexibility in the A Level framework should be used in order to permit movement in these directions.

5.128   A Level courses last 2 years. Pupils embark on them in the expectation that they will complete the course and have the opportunity to sit the qualifying examination. The proportion of Year 13 pupils staying on at school to Year 14 has remained stable over the past 10+ years and is currently 88.3%. A small rise was noted in 2020/21 and 2021/22, presumably due to the effects of the Covid-19 pandemic. There is a difference between grammar and non-grammar school staying-on rates, but this is smaller than the Year 12 staying-on rate (93.8% for grammar school pupils compared to 81.2% for their non-grammar school peers).

Figure 5.c: Percentage of Year 13 pupils staying on for Year 14, Northern Ireland, 2010/11–2022/23[310]
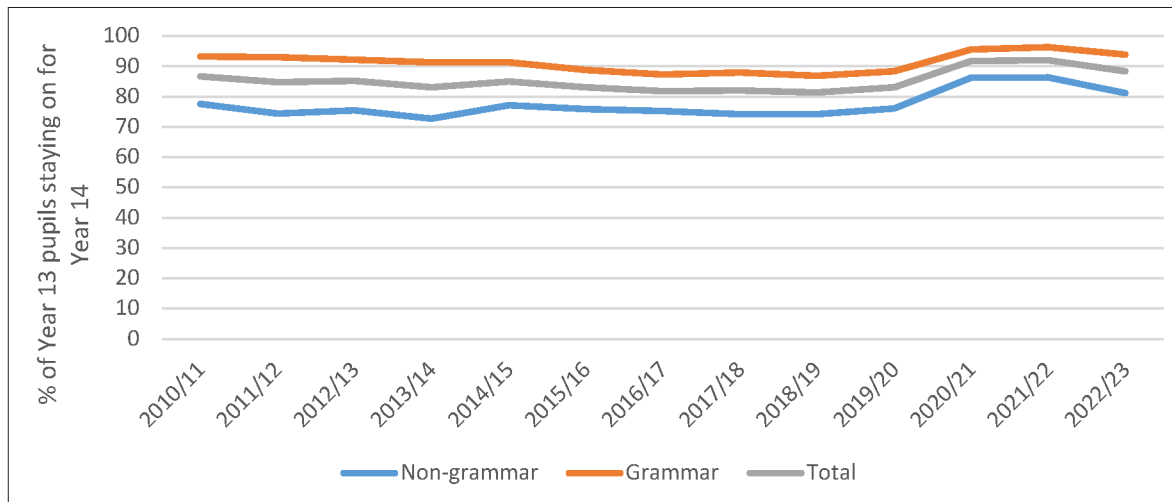
5.129   A relatively small number of learners leave their A Level courses before completion. There will be different reasons for this. However, we were concerned to hear reports of schools directing learners to transfer to other courses or pathways after 1 year. While there will be instances where a pupil is not progressing and the school can reasonably suggest other options, decisions about changing course should ultimately lie with learners and their families. We recommend that schools immediately cease the practice of preventing pupils from completing their A Level courses and encourage pupils to withdraw from courses only on a voluntary basis where there is clear evidence that the pupil is very unlikely to benefit from continuing. We would expect ETI to comment unfavourably where undue pressure is being exerted.

5.130   This practice will, of course, be affected by our recommendation that the compulsory age of educational participation for learners be raised to 18 years. Learners would have the right to remain within their school until the age of 18 and could not be removed against their will.

5.131   At the same time, there needs to be greater understanding, appreciation and valuing of different routes. This will be assisted by greater exposure to different pathways at an earlier age, informed careers education and joint working between schools and colleges under a single department.

Panel conclusion
All learners should have the opportunity to experience a range of pathways post-14 years old. This means access to academic and pre-vocational pathways in school at an earlier age and opportunity to learn about apprenticeships, college provision and other options at an earlier stage. Learners should benefit from high-quality professional careers advice. This will call for changes within the Careers Service, with ALCs taking on an important role in relation to learners still at school. While A Levels will continue as a critically important pathway, particularly for 16–18-year-olds, Northern Ireland should seek to obtain greater flexibility in its operation.

Sustainable sixth forms, set up to succeed

310   Data provided by DE Analytical Services Unit, based on Northern Ireland School Census.

5.132   For the great majority of young people, sixth forms constitute an important stage in the transition from school to other forms of learning, training and employment. It is, therefore, necessary to consider whether they are fulfilling that function effectively.

5.133   In 2022/23, 160 out of 192 post-primary schools operated a sixth form (83%). Of these, 40 were below the existing viability threshold of 100 pupils recommended in the Sustainable Schools Policy (SSP). This means that a quarter of sixth forms were unsustainable. Unsurprisingly, the majority of unsustainable sixth forms are in unsustainable post-primary schools (based on existing thresholds). However, there are also examples of sustainable schools with unsustainable sixth forms and, conversely, unsustainable schools having a sustainable sixth form.

5.134   It is understandable for post-primary schools to wish to have a sixth form and it is logical for learners to wish to continue in a familiar setting for their whole schooling education. We must also be aware that they can add to the perceived prestige of a school or, at least, its attractiveness to learners transferring at age 11. Furthermore, sixth form students attract a premium within the Common Funding Formula, which can drive behaviours to retain learners.

5.135   It is not educationally desirable for learners to attend sixth forms that can offer only a restricted curriculum. We have also considered evidence that unit costs are much higher in small sixth forms. Inefficiency of this kind means that the overall resource of the service is less well used than might otherwise be the case. We therefore approach this issue with the objective of establishing appropriate sixth form provision that meets the educational needs of learners and provides value for money for the wider system.

5.136   The graph below demonstrates that there is a close correlation between the total enrolment of a sixth form and the number of courses delivered. For enrolments up to 250 pupils, there is a steep increase in the number of courses delivered as the enrolment increases (blue section of graph). Beyond this point, the number of courses remains fairly constant even with increasing enrolments (orange section). The two lines of best fit intersect at around 220 pupils, indicating that an enrolment of at least this size is required to ensure the broadest curriculum on offer. Therefore, there are important curricular benefits of increased enrolments.

Figure 5.d: Impact of sixth form enrolment on total number of courses delivered in Year 14[311]
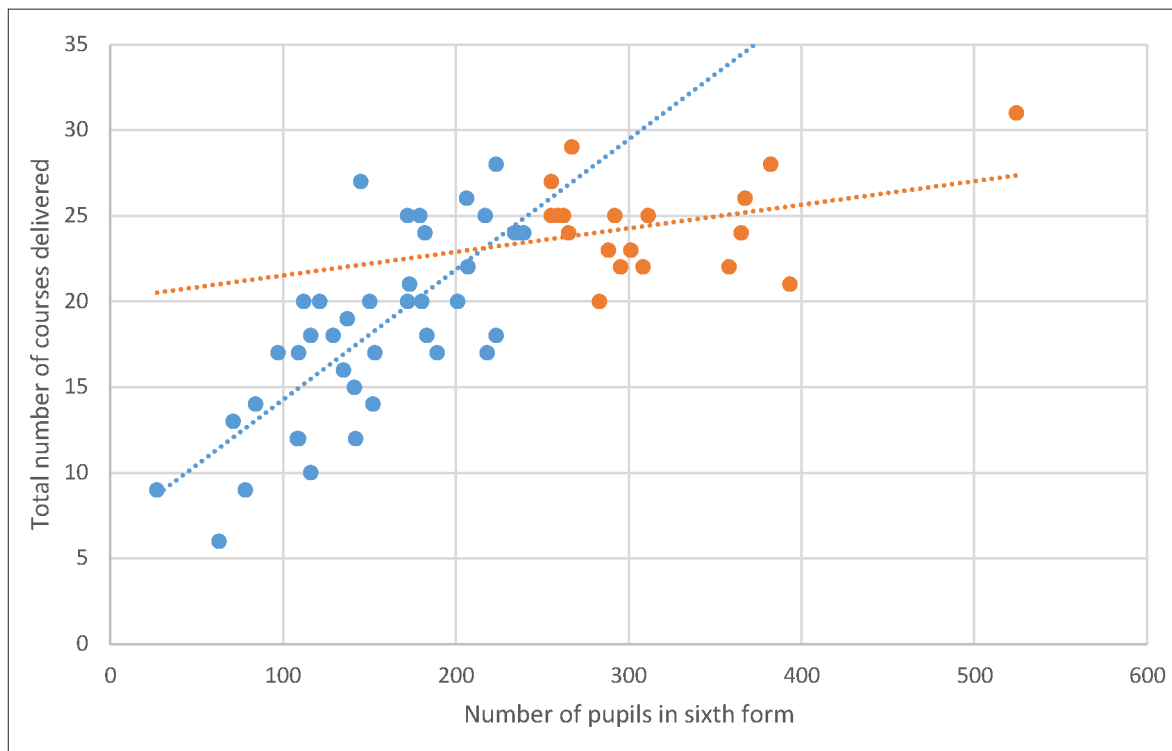
5.137 In addition to the restricted curricular offering in smaller sixth forms there is a strong cost-efficiency argument supporting larger sixth forms. We undertook a desk-based analysis that showed how the average teaching cost per pupil reduces as the enrolment per year group increases. This work, which is detailed in Chapter 10, concluded that a sixth form year group size of 120 pupils (i.e., a minimum sixth form enrolment of 240 pupils) was the preferred minimum enrolment from an efficiency perspective.

5.138 Given the benefits in terms of both a richer curriculum offer and more efficient delivery, we therefore recommend that the sustainability threshold for sixth forms be raised to a minimum of 120 per year group (or 240 in total). If this recommendation were adopted and the criterion applied stringently, we estimate that c. 84 non-viable sixth forms would be closed (a reduction of 53%) with better provision being made for learners in larger units. Changes to sustainability thresholds for sixth form would ideally necessitate a review of the Common Funding Scheme/Common Funding Formula to re-assess the appropriate degree of differentiated weighting, if any, between a sixth form learner versus a Year 8–12 learner in post-primary schools.

5.139 In many cases, the end result will be establishment of a smaller number of larger sixth forms in existing schools. There are, however, other options which could be considered. These include:

- Establishing **sixth form colleges** by combining sixth forms from a number of post-primary schools within reasonable geographical proximity. Sixth form colleges can combine a very extensive range of choice in the curriculum with a more adult ethos and more independent approaches to learning. In England, sixth form colleges tend to be

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311   Data based on a representative sample of sixth forms.

very large, commonly with an enrolment of over 2000[312]. However, such large rolls are unnecessary. Our analysis shows that school-based sixth forms can operate effectively with a total enrolment of 240. A larger number would be desirable in a standalone sixth form college.

- Establishing **community sixth forms** within an existing school. In practice, this would involve housing the larger sixth form within an existing institution but with parallel governance arrangements to ensure the sixth form reflected the interests and needs of the entire local community. This would be a suitable approach where one community is in a small minority and concentrating all sixth form provision in the majority school, without any governance changes, could be seen as favouring the larger community. The community sixth form would receive learners from schools in the local area without sixth forms as well as from the host school.

- Form a **tertiary college** by combining all of the school sixth form provision in an area with a local college campus. The potential delivery of such an option maybe be dependent on locality but could be considered by DE and potentially piloted. It would broaden choice and could do much to create parity of esteem between academic and vocational courses.

5.140   A wholesale structural reorganisation of provision is not the best way forward. Indeed, it would be certain to cause short-term disruption and incur capital costs which are currently unaffordable. However, there are places where the options described in the preceding paragraphs would offer a realistic prospect of significant improvement in provision for 16–18-year-olds and a possible model for more widespread adoption over time.

5.141   Accordingly, we recommend that while the reform of sixth form provision will most often take the form of larger sixth forms within existing schools, there should be consideration of potential opportunities to pilot more innovative solutions to sixth forms.

5.142   The implementation of this recommendation and our recommendation regarding raising the age of educational participation will impact on transition at 16. The outworking will be fewer, but larger, sixth forms. As explained, these may vary in terms of governance and structure. It is likely that the majority will be attached to existing schools but there are options for different models. An important principle is that learners would have a right to remain in school to take their A Levels (or other post-16 qualifications offered by the school) should they wish, either by remaining in their "home" school (should there be sixth form provision) or having a right of entry to another local sixth form provision.

5.143   We discuss in Chapter 6 the need for a thriving college sector. Our proposals on sixth form should not be a barrier to that and should not be seen as more learners remaining in school. That is not the intention of the sixth form reform we have outlined.

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312   There are 47 sixth form colleges in England. In 2021, there were 104,757 students aged 16-18 in these sixth form colleges, giving an average enrolment of 2,229 per sixth form. Data sourced from www.aoc.co.uk/about/sixth-form-colleges and Browse our open data, Data catalogue – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)

> **Panel conclusion**
>
> Sixth forms need to be of a sufficient size to provide a broad and balanced curriculum for all learners. A proliferation of small sixth forms is neither beneficial for learners nor sustainable for the system.
>
> A new minimum enrolment threshold for sixth forms of 240 pupils (120 pupils per year group) should be introduced and enforced. The change should be accompanied by piloting innovative models for delivery. Larger sixth forms within existing schools will likely be the most common option but there will be instances where sixth form or tertiary colleges could be trialled. All models should meet the needs of the learner (rather than any institution) and be tailored to the circumstances of individual localities.
>
> Learners should have a right to remain in school to take their A Levels (or other post-16 qualifications offered by the school) should they wish, either by remaining in their "home" school (should there be sixth form provision) or having a right of entry to another local sixth form provision.

Leaving education equipped for the future

5.144   Over recent decades, the proportion of young people remaining in education beyond the age of 16 or becoming involved with formal training such as apprenticeship at that age has steadily increased, both in Northern Ireland and throughout the developed world. In 2020/21, 85.4% of Northern Ireland school leavers entered higher or further education or a period of training. A further 10.6% commenced employment[313].

5.145   Early disengagement from education is of significant concern. Young people who leave education early are at serious risk of failure leading to a strong possibility of unemployment or low-paid work, poverty and the many associated disadvantages.

5.146   The school-leaving age in the UK varies from country to country. In England, young people can leave school on the last Friday in June if they will be 16 by the end of the summer holidays. After this they must do one of the following until they are 18:

- stay in full-time education, for example at a college;
- start an apprenticeship or traineeship;
- spend 20 hours or more a week working or volunteering while in part-time education or training.

5.147   In Scotland if a young person turns 16 between 1 March and 30 September, they can leave school after 31 May of that year. If they turn 16 between 1 October and the end of February, they can leave at the start of the Christmas holidays in that school year. Young people in Wales can leave school on the last Friday in June, as long as they will be 16 by the end of that school year's summer holidays.

5.148   For the most part, in Northern Ireland, young people turning 16 during the school year (between 1 September and 1 July) can leave school after 30 June. If they turn 16 between

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313   School leavers | Department of Education (education-ni.gov.uk)

2 July and 31 August, they cannot leave school until 30 June the following year[314]. In some deferred cases the leaving age is 17[315].

5.149 Data on young people in the UK who are not in education, employment or training (NEET) has been collated in the table below as a proxy for early school leaving. The time periods differ from country to country, but all figures come from the latest data sets.

Table 5.e: Young people aged 16–24 who are NEET, UK, at various time periods between January 2020 and March 2023

NEET rate	England[316]	Scotland[317]	Wales[318]	Northern Ireland[319]	UK[320]
Overall	12.3%	12.4%		9.0%	10.6%
Female	11.8%	10.4%		9.9%	
Male	12.8%	14.4%		8.1%	
Ages 16–18			13.6%		
Ages 19–24			16.3%		
Time period	Calendar year 2022	April 2020– March 2021	End of 2021	January– March 2023	January– March 2023

5.150 The North-South Comparison of Education and Training Systems by the Economic and Social Research Institute found that, in 2014, "there are marked differences in the extent of early school leaving between the two jurisdictions, with Northern Ireland experiencing over twice the level of early school leaving than Republic of Ireland. Furthermore, students from more disadvantaged backgrounds are more likely to be early school leavers in Northern Ireland than in Republic of Ireland."[321]

5.151 In Q2 2022, only 4% of those aged 18–24 in Republic of Ireland were defined as early school leavers[322]. Females aged 18–24 were less likely than males to be classified as early school leavers (3% versus 5% respectively)[323].

314 School leaving age - GOV.UK (www.gov.uk)

315 The School Age Act (Northern Ireland) 2022 amended Article 16 of the Education and Libraries (Northern Ireland) Order 1986 to make the leaving age 17 years in some deferred cases. Meaning a case in which a person who attains the age of 4 years on any date occurring in the period beginning on (and including) 1st April in any year and ending on (and including) 1st July in the same year does not begin to receive full-time education until the following year, having attained the age of 5 years.

316 NEET age 16 to 24, Calendar year 2022 – Explore education statistics – GOV.UK (explore-education-statistics. service.gov.uk)

317 Scotland's Labour Market: People, Places and Regions - Statistics from the Annual Population Survey 2020/21 - gov.scot (www.gov.scot)

318 Young people not in education, employment or training (NEET): Year to 31 December 2022 | GOV.WALES

319 Northern Ireland Labour Force Survey – Young People Not in Education, Employment or Training (NEET) Statistics | Northern Ireland Executive

320 Northern Ireland Labour Force Survey – Young People Not in Education, Employment or Training (NEET) Statistics | Northern Ireland Executive

321 Smyth, E., Devlin, A., Bergin, A. and McGuinness, S. (2022). *A North-South comparison of education and training systems: lessons for policy*, ESRI Research Series 138, Dublin: ESRI, https://doi.org/10.26504/rs138

322 "Early school leavers" is defined as persons aged 18 to 24 whose highest level of educational attainment is lower secondary or below and who are not currently in education.

323 Education Level and Labour Force - CSO - Central Statistics Office

5.152 However, Northern Ireland and Republic of Ireland use different metrics and therefore a like-for-like comparison is difficult. The data for 2014 cited above is based on a Programme for the International Assessment of Adult Competencies (PIAAC) study which was conducted in 2011/12. This is currently being repeated but the results are not expected to be published until 2024. To provide an up-to-date figure we have used NEET data as a proxy, though it should be noted that in the case of Northern Ireland, this is for 16–24-year-olds, whereas for Republic of Ireland it is 15–24-year-olds. The results are set out below.

Table 5.f: NEET data, Northern Ireland and Republic of Ireland, 2021

	Northern Ireland[324,325,326,327]	**Republic of Ireland**[328]
Definition	16–24-year-olds not in education, employment or training	15–24-year-olds not in education, employment or training
% of this age group who were NEET	11.1%	7.7%

5.153 The latest available EU figures showed that in 2021, 10% of all 18–24-year-olds in EU-27 member states were classified as early school leavers. The Irish equivalent rate was 3% in the same period. This ranked the country joint second-lowest with Greece and Slovenia among EU member states[329].

Figure 5.g: Early school leavers as a percentage of persons aged 18–24 in EU member states, 2021

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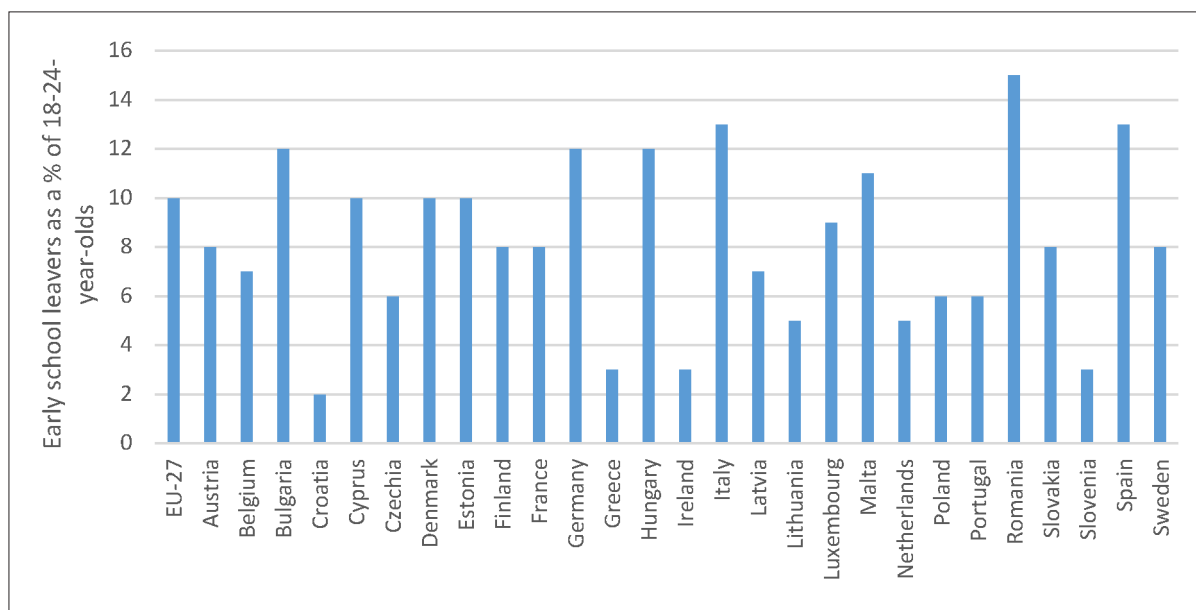
324   Northern Ireland Labour Force Survey – Young People Not in Education, Employment or Training (NEET) | Department for the Economy (economy-ni.gov.uk)

325   Northern Ireland Labour Force Survey – Young People Not in Education, Employment or Training (NEET) | Department for the Economy (economy-ni.gov.uk)

326   Northern Ireland Labour Force Survey – Young People Not in Education, Employment or Training (NEET) | Department for the Economy (economy-ni.gov.uk)

327   Northern Ireland Labour Force Survey – Young People Not in Education, Employment or Training (NEET) | Department for the Economy (economy-ni.gov.uk)

328   Statistics | Eurostat (europa.eu)

329   Ireland, the EU and Educational Attainment - CSO - Central Statistics Office

5.154   A recent research paper considered the risks of early school leaving[330]: "addressing the failure to make a successful transition into the labour market has been a key issue on the policy agenda in England over the last decade, following concerns about the high numbers of young people who are NEET. The key policy mechanism through which national levels of NEET young people have been tackled in recent years is the statutory legislation, *Raising of the Participation Age of young people in England from 16–18*"[331].

5.155   The paper continued:

> *The obligation to meet this statutory duty has been devolved to local government by allocating them a number of duties including ensuring that there is sufficient education and training provision to meet demand[332]; providing support for all young people aged 13–19 and those aged 20–25 with special educational needs and disabilities (SEND) to participate in education and training[333]; and to provide the tracking mechanisms to report on participation and NEET status so that they can be identified for support. To date, such measures have not led to any meaningful reduction in ESL (Early School Leaving) with recent data showing the number of 16- and 17-year-olds identified as NEET has risen to 4.5% (despite some fluctuations) since the introduction of this legislation, compared with only 4.2% in 2013[334].*

5.156   It must be recognised that these figures are affected, at any rate in the short term, as much by economic circumstances as by actions relating to education.

5.157   A study in Wales[335] concluded that raising the legal participation age, as in England, would have a limited impact. It was calculated that the size of the cohort that would be affected (in Wales) would be around 900 per year and the authors estimated the net lifetime economic gain as about £36m per cohort. They did not attempt to calculate the cost of additional provision. The study "[did] not consider the potential wider societal value of increased participation in terms of health, wellbeing, social inclusion or reduced crime"[336]. These are, of course, potentially difficult to estimate but they are relevant.

5.158   We have considered the issue of the education-leaving age and concluded that neither the

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330   [A multi-stakeholder analysis of the risks to early school leaving: comparing young peoples' and educators' perspectives on five categories of risk. (Brown, Douthwaite, Batlle & Savvides, 2022)](#)

331   DfE (Department for Education, England). 2012. *Raising the Participation Age.* https://www.gov.uk/government/collections/raising-the-participation-age

332   DfE (Department for Education, England). 2016. *Participation of Young People in Education, Employment or Training*: *Statutory Guidance for Local Authorities. Available at:* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/561546/Participation-of-young-people-in-education-employment-or-training.pdf

333   DfE (Department for Education, England). 2016. *Participation of Young People in Education, Employment or Training*: *Statutory Guidance for Local Authorities.* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/561546/Participation-of-young-people-in-education-employment-or-training.pdf

334   Figures are taken from ONS Young people not in education, employment or training (NEET) Excel file https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/datasets/youngpeoplenotineducationemploymentortrainingneettable1

335   https://www.wcpp.org.uk/commentary/should-the-age-of-participation-in-education-or-training-be-raised-to-18-in-wales/

336   https://www.wcpp.org.uk/commentary/should-the-age-of-participation-in-education-or-training-be-raised-to-18-in-wales/

interests of individuals or society are well served by allowing young people to opt out of education and/or training at this stage. The key issue is to build a culture of lifelong learning. Short-term fluctuations in the number of young people who are NEET are of much lesser consequence. Accordingly, we recommend that the education participation age be raised to 18 years.

5.159   We hope that raising the age of education provides a clear and unambiguous message regarding the importance of education and that the education journey goes beyond formal schooling and should continue into adulthood. It is important to emphasise that this is not the same as raising the school-leaving age. Young people will have the option of continuing their education in either the school or college sectors (or a combination of the two) and will also be able to begin an apprenticeship or some other form of vocational training.

5.160   It is worth noting that the numbers involved are small. The School Leavers' Survey[337] covers all those who leave school in any particular year and therefore includes 18-year-olds (as well as 16- and 17-year-olds). However, the data is subdivided between those who leave with only GCSE qualifications or below, and those who leave with A Levels. The GCSE or below cohort can be used as a rough proxy of how many young people leave school before the age of 18 (because anyone achieving A Levels is likely to be 18 years old). According to the School Leavers' Survey for 2021/22, 9,340 young people left school with only GCSEs (or below) and 2,078 of them entered employment, were unemployed or their destination was unknown. If we assumed that around 2k learners remained in schooling who previously did not remain, the costs could be in the order of £15m[338].

Panel conclusion

The number of learners remaining in education, training, employment or apprenticeships to the age of 18 continues to increase and that should be welcomed. However, concerns remain about the number of learners who leave schooling early and the difficulties they face in re-integrating into education and making the transition into employment.

The age of education and training should be increased to 18 years to protect learners vulnerable to early disengagement and to provide a clear and unambiguous message regarding the importance of education. The education journey goes beyond formal schooling and should continue into adulthood.

Recommendations and actions

5.161 Throughout the chapter we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

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337   Qualifications and Destinations of Northern Ireland School Leavers (education-ni.gov.uk)
338   Based on a crude assumption that half stay in school and half go to an FE college.

To track educational progression there is a need for a consistent approach to recording and ethically sharing learner information. A learner profile should therefore be developed. It would track the progress of learners and also be a key source of information when they transition between different stages of education or across institutions. Its usefulness would continue into adult learning.

Broader measures of success should be adopted that consider learners' improvement over time (or distance travelled), the value added by the institution, and achievement beyond academic qualifications.

In addition, system-level evaluation should go beyond counting GCSE or A Level passes. A dashboard of measures should be used to account for different aspects of success.

Steps should be taken to bring the pupil's experience of the later primary years and the early post-primary years much closer together.

In order to create a seamless transition and minimise the disparities between selective and non-selective schools, the transfer process at age 11 should be reformed to:

- Limit the number of students transferring to post-primary schools based on academic criteria, with an initial cap of 25–30%.

- Ensure that the percentage of students admitted through this method who are eligible for FSM (free school meals) reflects the proportion of applications received from FSM-eligible students.

- DE should consider approaches to better equalise the distribution of newcomer[339] pupils across the grammar and non-grammar sectors.

- Offer increased flexibility at age 14 to allow students to transfer to different institutions if they wish.

- The use of a single transfer test should cease as soon as practicable. Academically selective schools should make use of the information contained in the new pupil profile rather than test results.

- The requirement to follow the formal Development Proposal process to obtain approval for changes related to pupils transferred via academic selection should be eliminated.

All learners, starting from age 14, should be expected to and able to participate in a wider range of educational pathways including pre-vocational and technical education and work-based learning. To achieve this, schools need to collaborate more effectively while also working closely with the FE sector to provide increased choice and flexibility.

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339   A newcomer pupil is one who has enrolled in a school but who does not have the satisfactory language skills to participate fully in the school curriculum, and the wider environment, and does not have a language in common with the teacher, whether that is English or Irish. This has previously been referred to as English as An Additional Language. It does not refer to indigenous pupils who choose to attend an Irish-medium school.

The existing Careers Service should be reconfigured, re-invigorated and reskilled. Suitably trained, full-time careers officers should be embedded in area learning communities to offer careers guidance and advice to young learners and to act as links to local employers. ALCs should have a specific role in relation to careers advice including collaboration among groups of post-primary careers teachers to improve provision in their schools and organise work experience for pupils. Improved professional development of careers teachers should include short-term secondments to the world of work.

A careers portal should be developed that is open to contributions from employers, professional bodies and educational institutions.

Learners should have the right to remain in schooling to take their A Levels (or other post-16 qualifications) should they wish, either by remaining in their "home" school (should there be sixth form provision) or having a right of entry to local sixth form provision.

Schools should immediately cease the practice of preventing pupils from completing their A Level courses and should encourage pupils to withdraw from courses only on a voluntary basis where there is clear evidence that the pupil is very unlikely to benefit from continuing. We would expect ETI to comment unfavourably where undue pressure is being exerted.

Sixth forms need to be of a sufficient size to provide a broad and balanced curriculum for all learners. A proliferation of small sixth forms is neither beneficial for learners nor sustainable for the system. A new minimum enrolment threshold for sixth forms of 240 pupils (120 pupils per year group) should be introduced and enforced.

The change should be accompanied by piloting innovative models for delivery. Larger sixth forms within existing schools will likely be the most common option but there will be instances where sixth form or tertiary colleges could be trialled.

All models should meet the needs of the learner (rather than any institution) and be tailored to the circumstances of individual localities.

The education participation age should be raised to 18 years. It is important to emphasise that this is not the same as raising the school-leaving age. Young people will have the option of continuing their education in either the school or college sector (or a combination of the two) and will also be able to begin an apprenticeship or some other form of vocational training.

CHAPTER 6 – FURTHER EDUCATION, HIGHER EDUCATION AND LIFELONG LEARNING

Introduction and context

6.1   Colleges play an enormously important role in the education system. Further education is the sector most immediately linked to the needs of the employer and the economy. Colleges have vital responsibilities in ensuring that Northern Ireland has the mix of skills that it needs to prosper.

6.2   They make an important contribution to the provision of applied and vocational higher education. Colleges also provide a route back into education for people who have not enjoyed success at school. Access to learning throughout life, especially for adults with few or no qualifications, is an essential feature of an equitable society. Colleges also achieve a high rate of success with over 80% of learners attaining passes on their courses. They are not divided by community background and make a contribution to social cohesion.

Statutory framework

6.3   Further education (FE) colleges are established under the Further Education (Northern Ireland) Order 1997 ("the 1997 Order"). DfE has approved overall aims for the colleges as follows:

  • providing education in the area in which the institution is situated; and
  • meeting the educational needs of industry and commerce, and the community, in that area in a cost-effective manner.

6.4   Further education has a broad mission. Its strategic objectives are described as being:

  • to support **regional economic development** and, in particular, to provide the skills necessary for the knowledge-based economy;
  • to **increase participation and widen access** to those previously under-represented in the sector;
  • to improve **the quality of provision and enhance standards** of performance.

6.5   DE's Education and Training Inspectorate provides for inspections of FE colleges in relation to the quality of teaching and learning[340].

Structures and governance

6.6   The six FE colleges are classed as Non-Departmental Public Bodies (NDPBs) of DfE. Therefore, each college is a legal entity in its own right. They are responsible for employing their own staff, have their own governance arrangements and operate at arm's-length from DfE.

6.7   Each college is managed by a board with membership established as in the 1997 Order. The appointment process for the Chairperson of each college and any publicly appointed members complies with the Code of Practice for Public Appointments in Northern Ireland. The Board is expected to provide effective leadership and strategic direction to the organisation

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340   DfE's role in further education | Department for the Economy (economy-ni.gov.uk)

and to ensure that the policies and priorities set by the Economy Minister are implemented. The Economy Minister is however ultimately responsible to the Assembly for performance.

6.8   The DfE Permanent Secretary is accountable for the funds allocated and designates the Principal/Chief Executive of each college as the Accounting Officer. In this way, there is a line of authority from each college to the Assembly. The Management Statement/Financial Memorandum (MS/FM) sets outs the terms and conditions under which funding is made available to colleges and provides a clear framework of strategic control for the college. Work is under way to replace the MS/FM approach with a new arrangement called a Partnership Agreement. These Partnership Agreements will be the new foundation of the governance framework and working relationship between DfE and the colleges[341].

6.9   The current system of college governance came into existence slightly under two decades ago when 16 local colleges were amalgamated into six regional colleges[342]. This approach has reduced duplication in course provision and achieved some economies of scale in management costs (despite the absence of shared services such as legal, finance and HR). It has also created a capacity for more strategic management.

6.10   We understand that DfE is reviewing the current governance model and there are different options that could be considered. This is discussed later in this chapter. There is a need to balance a strong strategic direction with local responsiveness. Furthermore, in a time of funding pressures and a need for greater collaboration, it could be expected that a future governance model would include the creation of shared services structures.

Curriculum including tertiary provision

6.11   FE colleges have the autonomy to set their own curriculum. DfE monitors the planning and delivery of the curriculum through College Development Plans to ensure that these align with DfE's objectives. Students can choose from an extensive range of further and higher education courses from entry level to Level 6 (university level), which include Diplomas, Extended Diplomas, Traineeships and Apprenticeships, Higher National Diplomas (HNDs), Foundation Degrees, Honours Degrees and Higher-Level Apprenticeships.

6.12   Since 2018, seven Curriculum Hubs have been established in the FE sector in key occupational areas, focused on priority skills and growth sectors of employment and supporting DfE's economic objectives.

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341   Similar to the MS/FM, the Partnership Agreement sets the overall governance framework within which an individual Arm's-Length Body (ALB) operates, including the framework through which the necessary assurances are provided to stakeholders. Roles/responsibilities within the overall governance framework are also outlined although in a somewhat less prescriptive form than the MS/FM. Some years ago it was more clearly recognised that given the large number of ALBs delivering public services in Northern Ireland, the partnerships between these Arm's-Length Bodies and departments are critical to the delivery of high-quality public services. For the system to work well and achieve good outcomes, those relationships must be based on trust, shared outcomes, transparency and clear lines of accountability and responsibility. To this end, the NICS Board produced Partnerships between Departments and Arm's Length Bodies: NI Code of Good Practice, which aims to set out principles of good practice which can be applied to relationships between departments and Arm's-Length Bodies. These principles are articulated through and underpin the arrangements set out in the Partnership Agreements, which are in essence a "relationship document" setting out the partnership arrangements between an ALB and DE to derive greater value from, and bring consistency to, relationships between departments and Arm's-Length Bodies. They place a renewed focus on working in partnership in an atmosphere of mutual respect and the principle of "no surprises" rather than what some perceived as a "parent/child" relationship that was perpetuated by the MS/FM.

342   Further Education Colleges in Northern Ireland (inputyouth.co.uk)

6.13 Each Hub is led by a designated college and the concept ensures that all six FE colleges work collaboratively through the Hubs to ensure the curriculum delivered across the FE sector is of high-quality, consistent, current and responsive to the needs and demands of each area, thereby increasing opportunities for economic development and performance in each field. The Hub areas and designated lead colleges are:

- Engineering and Advanced Manufacturing – South-West College
- Digital IT – Belfast Metropolitan College
- Construction – South-Eastern Regional College
- Life Sciences – Southern Regional College
- Hospitality and Tourism – Belfast Metropolitan College
- Health and Social Care – North-West Regional College
- Entrepreneurship – Northern Regional College.

6.14 The Hub concept has been recognised by the OECD and ETI as a good practice model. ETI carried out an evaluation of the Hubs and published its report on 25 March 2022, *Evaluation: The Curriculum Hubs in the six colleges of Further Education in Northern Ireland*[343]. This report is currently being considered by FE Division to ensure that future actions are aligned in order to guarantee the effective delivery of DfE's "10X Economy" vision and the Skills Strategy.

6.15 The Hubs work closely with DfE's Careers Service to ensure that accurate and up-to-date information, including employment pathways, is available[344].

6.16 FE colleges have been delivering higher education (HE) courses in Northern Ireland since the 1980s. This is known as "HE in FE". Most of the HE delivered in the colleges is at Levels 4 and 5 on the relevant frameworks[345,346] though there is also a small amount of provision at Level 6 and above. HE in FE makes a distinctive contribution to the overall provision of HE in Northern Ireland and aligns with the economic and inclusive growth vision outlined in *A 10X Economy*[347]. From an economic and skills perspective, HE in FE offers local and niche provision for employers with a particular focus on levels 4 and 5. From a social perspective, HE in FE increases opportunities for learners, especially for those facing barriers in accessing education, to engage in HE and those who are more focused on building skills through practical application.

6.17 HE in FE is not just to provide opportunities for young people to progress into and through HE. A key consideration is that HE in FE and Level 4 and 5 qualifications have long been important for those looking to retrain and reskill – something that will be increasingly important given changes in the economy. This is recognised by the Skills Strategy's focus on lifelong learning. Level 4 and 5 qualifications may also become more important in a qualifications landscape that could become increasingly focused on modularisation and delivering greater flexibility in the way people train and learn[348].

6.18 The colleges are tasked with implementing the DfE policy aim of an interlocking framework of traineeship and apprenticeship courses, which should be available both to those in employment and currently unemployed. The framework is set out in the following diagram.

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343 etini.gov.uk/sites/etini.gov.uk/files/publications/evaluation-the-curriculum-hubs-in-the six colleges-of-further-education-in-northern-ireland_0.pdf
344 Information provided by DfE.
345 https://ccea.org.uk/regulation/guidance/qualifications-frameworks
346 Qualifications Frameworks (qaa.ac.uk)
347 A 10X Economy (economy-ni.gov.uk)
348 Information provided by DfE.

Figure 6.a: Progression pathways in FE colleges, Northern Ireland[349]
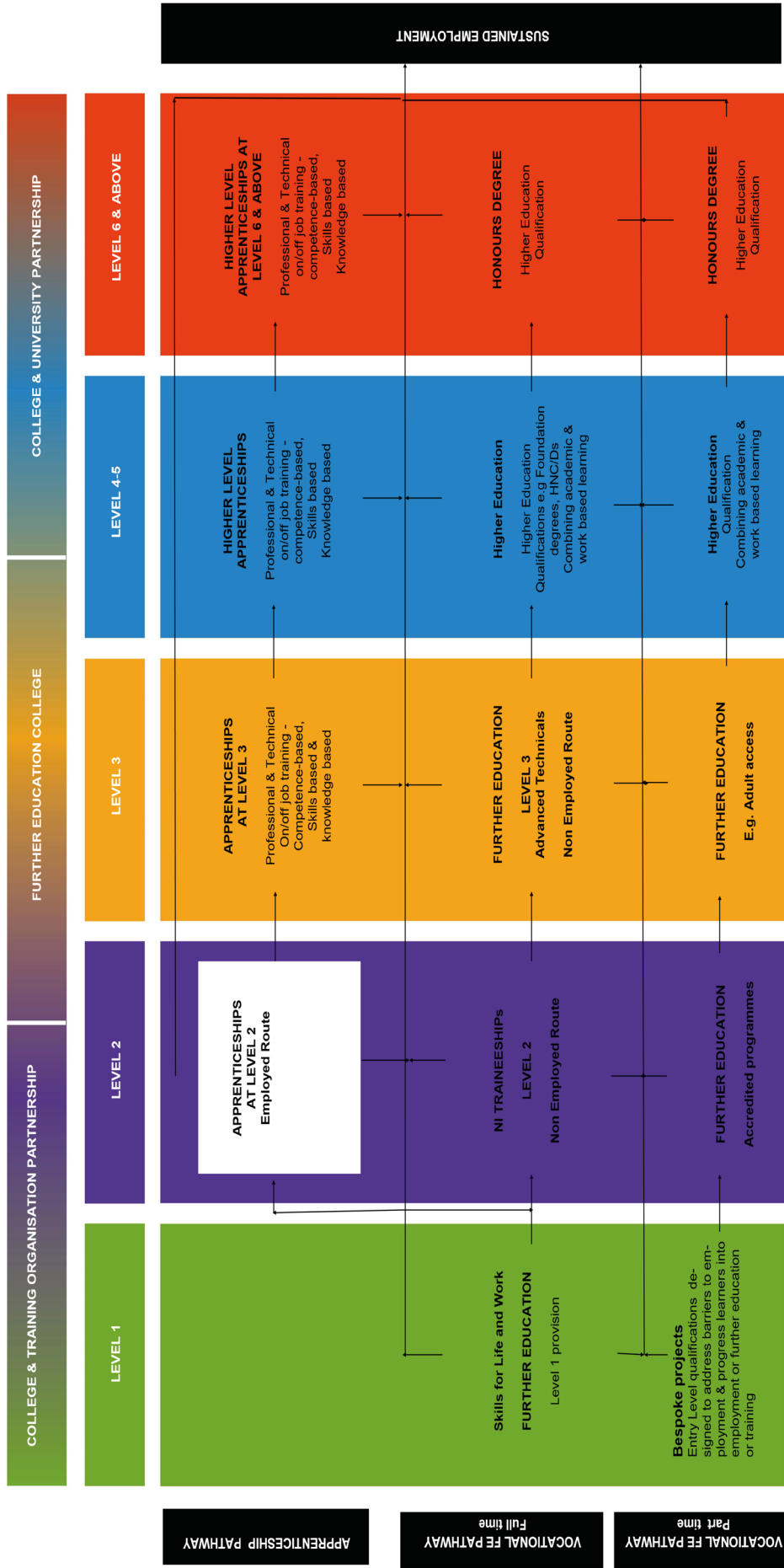
349   Reproduced from briefing material provided by DfE.

6.19 We endorse this approach but would also wish to see appropriate provision being put on offer at Level 1 to those in employment. This is important in that employment at very low levels of skill is inherently insecure and generally poorly paid. This is a group who will have a strong need of upskilling during working life.

Current resources and numbers

6.20 DfE provides in excess of £200m per annum in funding to FE colleges (see table below). Its further education division bids for, manages and allocates the funding, in addition to ensuring that policy and guidance, estate strategies and governance are in place to deliver FE across Northern Ireland. DfE uses a NDPB Budget (resource consumption) and cash grant in aid model to fund the colleges based on a college's operational running costs. Cash drawdowns based on resource consumption are within parameters set out in the MS/FM. The colleges employ 4,068 full time equivalent staff, and with £91m of capital investment in its estate to replace buildings in poor condition with "industry standard, state-of-the-art, accessible to all" learning environments in the last 5 years, and further projects valued at £144m currently in delivery, the FE sector is a significant player in how DfE policies are delivered[350].

Table 6.b: Funding provided to FE colleges (net of income), Northern Ireland, 2016/17 – 2022/23[351]

	2016/17 £000	2017/18 £000	2018/19 £000	2019/20 £000	2020/21 £000	2021/22 £000	2022/23 £000
DEL Other Resource excluding VES, Covid-19 & ERAP Funding	170,792	168,493	176,159	185,680	198,359	201,561	225,825
FEC Voluntary Exit Scheme	3,795	2,296	4,107	2	-	-	-
Change Fund	-	-	-	-	-	-	-
Covid-19	-	-	-	-	14,458	7,461	575
ERAP	-	-	-	-	-	4,147	-
Total DEL Other Res	174,587	170,789	180,266	185,682	212,817	213,169	226,400
Private Finance Initiative Repayment of Imputed Loan	4,279	5,084	5,130	4,878	5,197	5,584	6,513
Total Resource Outturn including PFI	178,866	175,873	185,396	190,560	218,014	218,753	232,913
Capital Expenditure	14,894	12,493	43,684	46,857	29,504	21,149	21,663
Total	193,760	188,366	229,080	237,417	247,518	239,902	254,576

6.21 The colleges are not fully funded from DfE for all their education programmes and training activities. The shortfall to fund their recurrent expenditure and capital investment programmes is recovered by levying appropriate fees and charges payable by students, customers (including other Northern Ireland departments) and users of their business services.

6.22 In addition to funding the FE colleges through the block grant, DfE spends approximately £20m per annum on its Apprenticeships programmes, of which c. £12.5m is part funded

350 Information provided by DfE.
351 Information provided by DfE.

by the European Social Fund (ESF)[352]. A further £35m is spent on Skills for Life and Work, while spending on Traineeships is in the region of £180m per annum. DfE also funds a wide range of programmes aimed at developing skills, encouraging lifelong learning and building a "10X Economy", with annual budgets in the region of £27m. A range of supports are also available to enable participants to take part in programmes. These include FE Support (annual spend approximately £22m), Disability Support Services (approx. £1.5m) and Education Maintenance Allowance (EMA) (approx. £18m)[353].

6.23 In 2021/22 there were a total of 110,833 students enrolled at FE colleges, of whom 22,507 were full-time and 88,326 were part-time[354].

Policy context, FE mission, 10X, 14–19 Framework

6.24 The further education sector is tasked with a two-fold mission. Firstly, it plays a critical role in fostering a robust and dynamic economy by cultivating advanced professional and technical skills at increasingly higher levels and through facilitating innovation among employers. Secondly, it is dedicated to promoting social inclusion by providing individuals who have limited or no educational qualifications, or those who face other learning obstacles, with the requisite abilities and certifications required to secure employment and participate actively in the economy.

6.25 The "10X Economy"[355] sets out an economic vision centred on what can be achieved with the right levels of ambition. The vision embraces innovation to deliver a much improved economy with widespread benefit to society and the environment.

6.26 The "10X Economy" vision identifies five priority clusters which relate to areas which have seen the emergence of significant capability and have the potential to drive the economy forward. Alongside the new/emerging technologies identified, the FE sector will focus on delivery to support DfE's economic vision to "recover, rebuild and rebound back stronger than ever", meaning "better jobs with better wages, in a more flexible working environment and a better overall quality of life"[356].

6.27 Young people entering the 14–19-year-old phase of education and training face a series of fundamental milestones in this brief period of their lives. This begins with having to make subject choices at the age of 14 which may steer them towards a specific pathway or career. At age 16, further and more definite decisions about what to study and also where and how are made. A small number of young people may choose to leave education and training at this point. For those who remain in the education and training system decisions are made from age 18 onwards on continuation of a programme of study or entering employment. The 14–19-year-old phase of education and training is central to the delivery of the "10X Economy", in delivering the policy objectives set out in the draft Skills Strategy, and in fulfilling the New Decade, New Approach and Fair Start commitments[357].

Panel conclusion

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352   ESF funding ended in March 2023.

353   Information provided by DfE.

354   Information provided by DfE.

355   10X Economy - an economic vision for a decade of innovation | Department for the Economy (economy-ni.gov.uk)

356   Information provided by DfE.

357   A framework to transform 14-19 education and training provision | Department of Education (education-ni.gov.uk)

FE aims to boost Northern Ireland's economy by improving the skills of its workforce and bridging the gap between individuals and employment opportunities. It helps people find and keep jobs while also supporting businesses in their growth and innovation to increase competitiveness. FE works to include those who are far from the labour market and mirrors economic priorities at the regional and local level. Recent investments in a modern infrastructure have made the sector even more appealing.

FE is a key part of the education family. It is essential that there are thriving, valued and fully utilised colleges in Northern Ireland.

Challenges for FE

6.28 Despite the FE sector's curricular strengths and economic relevance across many aspects of its provision, the sector is experiencing significant challenges. The extensive remit of the colleges is a source of strength. However, it also serves to spread confusion about the mission of the sector. The public is in no doubt about the purpose of schools. The role of universities is also generally understood although many people may underestimate the importance of research. The same is much less true of colleges.

6.29 Furthermore, their role in relation to "second-chance" education probably contributes to an erroneous impression of being somewhat second-best. This perception of inferior status is the greatest disadvantage that colleges have to overcome. This, of course, should not be the case. There is an increasing need to retrain and upskill so it is absolutely essential that such provision be available.

6.30 There is a need to raise the profile of the sector and increase the esteem in which it is held. Expanding and extending the role of FE in relation to higher-level apprenticeships would be an important first step. Furthermore, our recommendation regarding vocational options in schools from the age of 14 onwards is intended *inter alia* to help create parity of esteem for vocational and academic learning and thus enhance the public standing of the college sector. Fundamentally, greater collaboration between schools and colleges is absolutely essential. This can best be promoted by a single department and a revised funding model for post-16 education.

6.31 Colleges need to be assisted to project a clear sense of mission centred on being the main provider of vocational and technical education. This would be made easier by the simplification of vocational qualifications, which we recommend in Chapter 4. It is also important that all young people from Year 10 at post-primary school onwards should be given the opportunity to learn about what colleges have to offer, including traineeships and the various levels of apprenticeship, of which public understanding is limited. They should also have access to authoritative online information and to specialist advice.

6.32 Further education colleges also have a direct link to business and industry. They are the chief vehicle for filling the main skills gaps, currently identified as being at Levels 4 and 5. It is important that priority be given to maintaining and enhancing connections between the colleges and major economic players.

6.33 Addressing the economic strategy as a whole, however, involves much more than offering courses related to identified areas of skill shortage. Society has a need for training in health,

social care and other areas of the public service which are not identified as priorities in the 10X strategy but which will continue to make an essential contribution to society. Colleges should continue to offer courses at all levels. Also, their role in relation to second-chance education requires that courses be available at Levels 1 and 2 in order to strengthen the basic skills of those seeking to re-enter education, perhaps having experienced failure at school. Clear routes for progression between levels are needed, and articulation of paths from further into higher education.

6.34   Data shows that "Northern Ireland has the worst productivity performance of any region in the UK. The most recent data shows productivity in Northern Ireland is 17% below the UK average. It also lags behind the Republic of Ireland, where productivity is around 29% higher than the UK average"[358]. The primary challenge for the FE colleges is to work more collaboratively with key stakeholders to address the main barriers contributing to skills and training imbalances, which in turn are contributing to lower productivity.

6.35   Northern Ireland has a much higher proportion of the working-age population with no qualifications – at 11.8% compared with the UK average at 6.8%[359]. The percentage of the Northern Ireland population with below NQF Level 2 qualifications is steadily decreasing[360]. However, there is still an oversupply of employees with qualifications at or below that Level and an under-supply of employees with qualifications at NQF Levels 3 to 6+, particularly at Level 3. Inspection evidence shows that the FE curriculum offer, in the main, is well positioned to address these skills imbalances and drive economic growth[361].

6.36   Declining student numbers at FE colleges and increasing costs have resulted in increased costs per student. Student hours reduced between 2016/17 and 2021/22 by around a quarter while expenditure increased by around a quarter. The increase in costs has mainly been driven by increasing numbers of staff and increased costs per member of staff. Such a trend is obviously unsustainable.

6.37   As sponsor department, DfE is responsible for ensuring the FE colleges provide value for money for public funding. Failure to take action quickly to reverse current trends will seriously undermine the cost-effectiveness of the FE sector. As the main deliverer of vocational qualifications and skills, this would bring into question DfE's ability to deliver its objectives. Against a background of falling FE enrolments and increasing costs, in October 2021 the then Minister for the Economy agreed to DfE initiating the first stage of a review of the FE Delivery Model in Northern Ireland[362].

6.38   The FE sector is experiencing significant barriers in meeting the demand for skills at NQF Levels 3 – 5. FE activity data[363] shows that recruitment levels to FE have been steadily declining and colleges have been unable to attract enough learners to meet the skills demand. There was a 28.2% decline in the number of students enrolled over the period 2017/18 to 2020/21 (**Figure 6.c**), albeit with signs of recovery in 2021/22 with an increase of 10.2%. Over this period, the number of students aged 19 and under enrolled on regulated courses declined by 22.2%.

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358   NI-Productivity-Dashboard-2022-041122.pdf
359   ONS Annual Population Survey, 2021.
360   Northern Ireland Skills Barometer 2021: Overview Report (ulster.ac.uk)
361   Publications | Education Training Inspectorate (etini.gov.uk)
362   Information provided by DfE.
363   Further Education Sector Activity in Northern Ireland: 2017/18 to 2021/22 (economy-ni.gov.uk)

Figure 6.c: Number of students in FE colleges, Northern Ireland, 2016/17–2020/21[364]
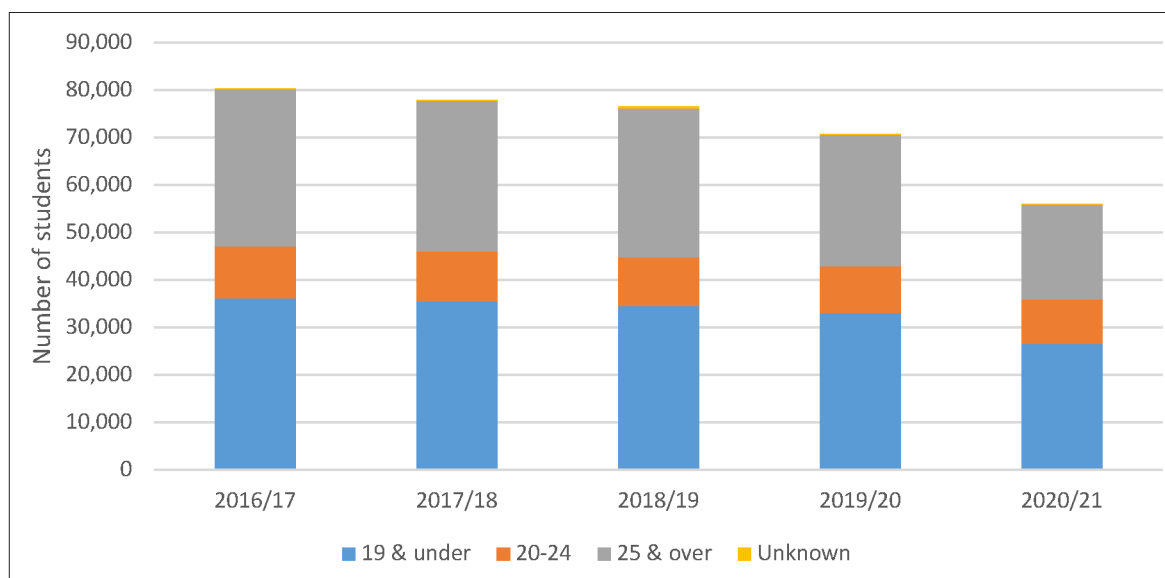
6.39 Many of the major challenges faced by colleges, including an increasing cost base combined with reducing enrolments, stem largely from:

- competition from sixth form provision in schools and, to a lesser extent, universities;
- a confusing array of qualifications;
- a weak culture of lifelong learning among adults (seen by a reduction in the number of adults attending evening classes); and
- a reduced number of hobby/non-regulated courses in colleges.

6.40 A negative public perception of FE by school leavers, parents/guardians and teachers can foster a negative view of the sector within the working-age population. This could be contributing to Northern Ireland's weak lifelong learning culture, compared to that of the UK. NISRA data[365] shows that 17% of 25–64-year-olds in Northern Ireland participate in education and training compared to 25% across the UK. The NISRA data also shows that the qualification profile of working-age adults remains largely unaltered since 2016, except at NQF Levels 6+; the majority of 16–24-year-olds hold either a Level 2 or Level 3 qualification[366].

6.41 The challenges faced by FE have been exacerbated by the Covid-19 pandemic, which saw:

- alternative awarding arrangements allowing more young people to access sixth form provision in schools or progress to higher education;
- lockdown restrictions delaying the achievement of professional and technical qualifications; and
- community access programmes being negatively affected.

6.42 The combined effect of more vocational provision in schools and limited Careers Education Information Advice and Guidance (CEIAG) available to young people is contributing to the

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364 Data provided by DfE.
365 Qualifications in Northern Ireland 2020 | Northern Ireland Statistics and Research Agency (nisra.gov.uk)
366 Information provided by ETI.

decline in the number of enrolments in FE[367]. In particular, many young people have little understanding of progression routes within FE and, therefore, of the opportunities that attendance at a college can bring.

6.43   Delivering the Framework to Transform 14–19-Year-Old Education and Training[368] across two departments is structurally challenging and, while useful processes have been developed to enable cross-departmental working, it should be possible to ensure that the delivery of this Framework can be streamlined within a unified departmental policy context. The competing priorities within and across departments, particularly with current budgetary pressures, are likely to impede progress to realise the benefits of the Framework[369].

6.44   It is becoming increasingly apparent that the existing curriculum and qualification structure for KS4 and the Entitlement Framework[370], which aims to broaden and balance the curriculum offer at 14–19 years old, is not operating satisfactorily in the current context. The Entitlement Framework is intended to fulfil the following objectives but these are not being realised fully:

> … (to) best meet the needs of young people and the economy by offering them access to a broad and balanced range of courses that are relevant to their needs, aptitudes, interests and their future career aspirations, regardless of where they live or which school they attend

and

> (to encourage schools) to make use of up-to-date labour market information and take note of DfE's priority skills areas in offering access to a coherent and economically relevant choice of courses for pupils.

6.45   In practice, differing funding regimes operated by DE and DfE discourage schools from making use of FE courses for which they have to pay. Instead, schools have often developed their own vocational provision. In some cases, this has involved the establishment of sub-standard workshops when greatly superior facilities exist in a nearby college. The principle underpinning the Entitlement Framework remains valid but it needs to be redesigned to make it operate in the way that was originally intended. This will be more easily accomplished with a single department responsible for all aspects of education.

6.46   In all sectors the curriculum needs to keep pace with changing circumstances. Nowhere is this more true than in FE, which has to meet the needs of an economy going through constant change, partly in response to changes in technology which require a new knowledge base.

6.47   In its Education 2030 project[371], the OECD explored the need for curriculum re-design to respond to an ever-changing world. Its publication[372] sets out a vision for 2030 that should be reflected in future curriculum development work, both for schools and FE colleges.

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367   Evidence provided by ETI.

368   A framework to transform 14-19 education and training provision | Department of Education (education-ni.gov. uk)

369   Information provided by ETI.

370   Entitlement Framework | Department of Education (education-ni.gov.uk)

371   oecd.org/education/2030-project/

372   Curriculum (re) design – A series of thematic reports from the OECD Education 2030 Project

6.48 It indicates that students' needs, voice and agency, learning experiences and outcomes, and their wellbeing, should be at the centre of design principles for a curriculum change. Secondly, all stakeholders should understand that a curriculum is a living and evolving tool. A curriculum document itself may be static, but the curriculum as taught and as experienced should be both dynamic and interactive. The curriculum thus creates interactions between the content to be covered and students, teachers, leaders, parents and others. It is important to ensure that these are productive. Thirdly, as curriculum change can be one of the most politically costly types of reform, policy makers should benefit from drawing on research evidence from a wide range of disciplines (i.e., not only subject disciplines but also neuroscience, behavioural economics and complexity science). We see merit in seeking to apply these principles in relation to making changes in the curriculum, both in FE and other sectors.

Panel conclusion

Despite its strengths, the FE sector faces challenges, including confusion about its mission and a perception of inferiority, which harm its public standing. Measures to raise its profile and esteem are needed, such as expanding its role in higher-level apprenticeships, creating parity of esteem for vocational and academic learning, and simplifying vocational qualifications.

Greater collaboration between schools and colleges, as well as a clear mission for FE as the main provider of vocational and technical education, are also needed.

It is important that learners have information and advice about FE options at an early age to inform decisions.

Efficiency and effectiveness

6.49 Falling enrolments are deeply concerning, indeed unstainable, given the fact that they have been accompanied by escalating costs.

6.50 FE sector costs have risen by over £50m over a 6-year period, with a recurrent funding requirement of £226m in 2022/23 (over a quarter of the overall DfE Resource DEL budget). Staff costs are projected to increase by a minimum of £5m per year. Colleges also face significant cost of living inflationary pressures, primarily energy and private finance initiative (PFI) costs, which resulted in an additional £6m resource requirement in 2022/23.

6.51 A combination of declining enrolments, duplication and rising lecturer salaries has seen a significant increase in unit costs in recent years. While comparisons with other regions are challenging, it appears that costs are now higher than in other UK jurisdictions. It is important to emphasise that declining enrolments are not simply a consequence of the expansion of school sixth forms and shortcomings in the working of the Entitlement Framework – although these are certainly relevant factors – but also of dropping numbers of enrolments of adult students.

Figure 6.d: Enrolments in FE colleges and resource spend per enrolment, Northern Ireland, 2012/13–2021/22[373]

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373 Sources: Further Education Statistical Return (FESR), Consolidated Data Return (CDR) and data provided by DfE.
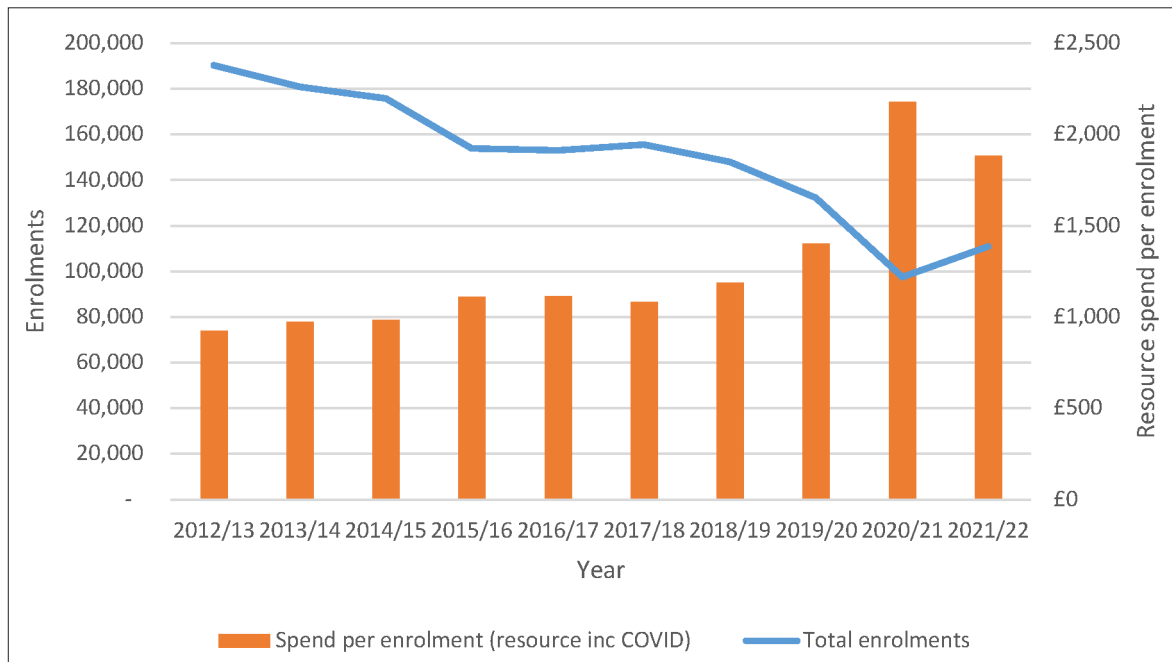
6.52 The graph above shows the problem: as enrolments fall and costs rise the spend per enrolment soars. From the graph, we estimate that there has been a 69% increase in cost per enrolment between 2016/17 and 2021/22. We suggest that this indicates an inability on the part of the college sector as a whole to respond to shifts in student demand.

6.53 The Panel has concluded that:

- Falling enrolments and rising costs have led to an increased spend per enrolment.
- There is a need to better understand how Northern Ireland costs compare with colleges in UK and ROI benchmark costs.
- Staff FTE numbers should be reviewed to ensure they are in line with the number of equivalent full-time students (EFTS).
- Estates costs should be benchmarked with other regions, with consideration given to the impact of PFI costs in Northern Ireland compared to GB.
- Key cost pressures (including fixed costs) should be identified.

6.54 The solution to improving the FE sector does not lie in simply reducing costs or services. The FE sector is a critical component of a high-quality education system. The 10X strategy depends on Northern Ireland colleges to provide the skills necessary for economic growth. Because of the uncertain economic outlook in the short term and the need to drive growth in the long term, the role of FE in meeting the need for retraining is essential for the economy's rebalancing and future growth.

6.55 Nevertheless, there is a need to ensure that unit costs in the FE sector in Northern Ireland come more into line with costs elsewhere in the UK and with benchmark costs. It is also necessary to consider the effectiveness of the sector in terms of outcomes and benchmark against other regions.

6.56 Another measure of effectiveness is the student survey. The results were largely positive, with 76% of respondents in the sector satisfied or very satisfied with their overall college

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Resource spend includes DEL other resource, voluntary exit scheme, Change Fund, Covid-19 funding and ERAP. Spend is per enrolment, not per student – some students will be enrolled on more than one course.

experience.

6.57   To ensure an appropriate level of teaching and training capacity, there must be increased focus on corporate planning for the sector that takes into account projected student numbers for the next 3 to 5 years and the projected needs of the economy. Close collaboration with businesses and employers is essential.

6.58   Alternative delivery models may offer potential cost savings. The availability of common HR, finance, and MIS systems between Northern Ireland colleges could make it easier to realise significant benefits from moving to a shared services model in these areas.

6.59   While NDPB status brings increased accountability and governance for the colleges and DfE, it also means all colleges are operating on a consistent basis, which should make it easier to align practices as part of any new delivery model. This is often not the case in more commercial environments, where changes in delivery models can result in significant additional expenditure.

Value for money

6.60   Falling enrolments and increased costs lead us to be concerned with the current, and long-term, value for money of colleges.

6.61   Teaching spend per EFTS in Northern Ireland is higher than the benchmarked cost. Despite these additional costs, the average success rate for Northern Ireland colleges was below the Great Britain average. On this basis, it would appear that Northern Ireland colleges are delivering poorer value for money than the benchmarked colleges in other jurisdictions.

6.62   Just as we recommend that steps be taken to "right-size" the network of schools to release funding back into education, steps should also be taken to ensure the college sector reduces costs to align with appropriate benchmarked costs in Great Britain and the Republic of Ireland.

6.63   We appreciate that direct comparisons between Northern Ireland and other jurisdictions can be challenging given different approaches to funding and delivery. However, it is estimated that the cost per EFTS in Northern Ireland colleges was c. £9k in 2021/22. This compares to c. £6k for the Great Britain college benchmark, a difference of c. £3k. If we multiply by the number of EFTS in 2021/22 (27,501) it gives a potential saving of £83m. Such a saving is incredibly unlikely and undeliverable – at any rate in the short term – but the potential scale reinforces the need to look critically at value for money in education. We recommend that a target date be set for achieving unit costs more in line with the UK average.

Other issues

6.64   ETI has expressed concern at the low uptake and poor achievement rates across the essential skills provision, which is leading to unaddressed, critical gaps in young people's literacy, numeracy and digital (ICT) skills and qualifications. These gaps have an adverse impact on their opportunities to progress. Students have access to additional provision to address any gaps in their Level 2 numeracy, literacy and ICT skills but the uptake of this provision is much too variable. It is particularly concerning that in one-half of the colleges only a relatively small proportion of those who require literacy and numeracy qualifications are enrolled on

either an essential skills or GCSE programme.

6.65 Only small numbers engage in the GCSE English or mathematics provision. This critical gap in students' qualification profile inhibits their ability to move on to some higher education courses or future career progression opportunities. It suggests a need for more effective student guidance in the sector.

6.66 In addition to the low essential skills uptake, the achievement rates in literacy and numeracy at Level 2 are also much too low. As a consequence, too many Level 3 students are completing or leaving their vocational programme without attaining a Level 2 qualification in literacy, numeracy or ICT. It is notable, however, that where higher-level mathematics is required for students wishing to progress to higher education, a well-supported provision is an integral part of their learning programme.

6.67 Although the quality of the learning and teaching in nearly all of the essential skills lessons is good or better, the student attendance is much too variable and is often unacceptably low. For many students their progress in learning is not good enough. There is an urgent need for the colleges to continue to improve the attendance and achievement rates[374].

6.68 The problems outlined over the previous paragraphs suggest that some students have difficulty in accessing advice and support. The FE sector should ensure there are structures in place to provide key pastoral support and curricular guidance for all students.

6.69 Colleges recognise that the vocational or professional and technical qualifications landscape is both complex and often confusing. Colleges are committed to a programme of collaborative work that will further expand the development of Traineeships and Advanced Technical Awards and see this work as instrumental in simplifying the system for parents and young people. The branding of Traineeships and Advanced Technical Awards is key to achieving this. The development of new qualifications is needed to ensure that the project-based learning (PBL) pedagogy that underpins Traineeships and Advanced Technical courses remains at the core of these new awards. Colleges have already begun developing new qualifications for use on Traineeships. They have also been working with DfE and the regulator on an appropriate quality assurance system for such developments.

6.70 Colleges are of the view that future development of qualifications that underpin the vocational education and training (VET) system is best channelled through a Northern Ireland state-controlled vocational awarding organisation. In our view, it would be difficult to operate such an organisation cost-effectively in a small jurisdiction. There might also be questions over the portability of Northern Irish qualifications.

6.71 We fully recognise the need for industry backing and support for changes in qualifications. The qualifications reform programme and the out-workings of the traineeship and apprenticeship strategies will take time to generate a wider understanding and acceptance of the system of vocational learning in Northern Ireland.

6.72 Our view is that Northern Ireland needs to adopt an eclectic approach to qualifications. Using some qualifications based in other UK jurisdictions helps with recognition and portability but we recognise that there are instances where specifically Northern Ireland qualifications will be needed.

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374   Information provided by ETI.

6.73   The colleges are proactive and highly committed to establishing positive relationships with local post-primary schools in order to provide a comprehensive range of Entitlement Framework options across all levels, including at level 3. However, as a result of the increasing financial challenges experienced by schools, they have become less willing to send pupils to colleges on collaborative programmes for which they have to pay. As a result, recruitment at Level 3 varies noticeably across the colleges, with most experiencing a downward trend. It is ETI's view that FE colleges and schools should work as equal partners to create consortia, such as regional skills academies, to deliver industry-focused skills for 14–19-year-olds, thus ensuring that young people have access to vocational programmes that equip them with relevant skills and enable seamless progression to employment, further education or training. Such an approach has significant merits but would require a change in the financial arrangements between colleges and schools. This would be more easily achieved under a unified department for learning and skills.

6.74   There is an urgent need for all sectors across education, training, business, industry and wider society to recognise and utilise more fully the available high-quality FE resources to prepare young people and adults for better-skilled, higher-value jobs. The capacity, achievements and contribution of the FE sector in building a thriving economy should be communicated and celebrated better and more widely, thus addressing the negative public perception of the sector. FE colleges collectively should consider how to improve their public relations and marketing functions to articulate clearly and confidently the vision and mission of the sector[375].

Panel conclusion

We believe the education landscape needs a thriving college sector – with its first-class existing expertise and resources being fully utilised. For this to happen we suggest that FE needs a clearly defined "mission" that can be convincingly communicated to learners, parents, schools, industry, academia, etc. It also needs to overcome multiple challenges, many of which are structural (funding models, lack of collaboration, duplication, failures in area planning, etc.) while others are societal (parity of esteem).

Strengths of current FE

6.75   As well as challenges, FE has many strengths that should be further utilised. We have been fortunate to visit a number of FE campuses and it is clear that the FE estate and its access to technical equipment is second to none. The facilities are highly specified and provide learning experiences that are not available in schools. Continuing high levels of investment in the FE sector's estate is ensuring that all students across Northern Ireland have easy access to learning resources that are generally cutting edge and underpin exceptionally well the delivery of a curriculum suitably matched to the needs of the economy. In particular, there is well-thought-through investment in digital learning platforms, used by staff and students to good effect to enhance and support high levels of achievement. These platforms are also encouraging the use of self-directed learning. There is also ongoing investment in developing the capacity of the lecturers to enhance their digital skillsets and make best use of the digital learning resources.

6.76   FE's relationship with the economy including local businesses is another key strength and allows it to tailor its offering to be responsive to both strategic and local needs. The geographical spread of college campuses across Northern Ireland makes FE accessible to all

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375   Information provided by ETI.

and, if fully utilised, would be an ideal platform for a thriving adult learning programme.

6.77   During the academic year 2019/20, ETI was commissioned by DfE to evaluate the effectiveness of curriculum planning at Level 3 in FE provision across the six regional colleges. The resulting report noted a number of key strengths, including that the quality of the colleges' facilities and learning resources were judged to range from good to outstanding. Colleges are consistently welcoming, and are valued by the students. They are well-maintained with effective investment planning which maintains the curriculum offer in line with the pace of change in industry.

6.78   In a majority of the areas evaluated, the range of specialist equipment is outstanding and used to very good effect to support the students to develop contemporary industry-standard skills. In most Tier 1[376] areas, the learning environment closely mirrors industry practice, providing the students with very good opportunities to become competent users of contemporary equipment and technology.

6.79   A carefully composed complement of lecturers and support professionals, with appropriate experience and high levels of expertise, works hard, and mostly to very good effect, to provide a well-targeted curriculum offer. Staff develop and successfully maintain a positive and affirming learning environment where diversity and tolerance are promoted and highly valued. The relationships between staff and students, and among students, are generally characterised by high levels of cooperation, mutual respect, inclusivity and support[377].

6.80   These very positive features are to be welcomed but do not negate the concerns of declining uptake and rising unit costs mentioned earlier.

6.81   It is therefore worth noting that Northern Ireland has an example of a college acknowledged to be thriving but that sits outside the main college system. The College for Agriculture, Farming and Rural Education (CAFRE) operates under the Department of Agriculture, Environment and Rural Affairs (DAERA). CAFRE has enjoyed increasing enrolment numbers (1,869 in 2021/22, up 9.8% since 2018/19) in contrast to enrolments at FE colleges. Stakeholders, including business, learners and educationalists, have been impressed by the college's approach and strategic focus.

6.82   The focus of CAFRE is not just those entering but also those already employed in the agri-food industry – it provides education to students and industry support to over 10,000 people working in the sector each year. It delivers a range of knowledge transfer and innovation programmes with over 20,000 farmers and 240 food businesses participating.

6.83   The CAFRE model is successful because:

- It has a **unique mission** and **clear selling point**.
- It offers **easily understood qualifications and pathways with a clear route to employment** – delivering educational pathways from Level 2 to Level 7 on the National Qualifications Framework.
- It is **aligned with the industry, the customer and the learner**, with excellent

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376   The term "Tier 1" relates to categories within the Sector Subject Areas. For inspection and other functions, such as college curricular management, subjects are grouped according to their related vocational area.

377   Information provided by ETI.

relationships and engagement with employers and industry including the provision of student bursaries.

- It has **partnership working with its parent department and clear alignment with policy direction**.
- It **works closely with schools** and provides careers advice, taster days and curriculum support for specific subjects such as GCSE Agriculture and Land Use and GCSE and A Level Food and Nutrition.

6.84   We do not recommend a change in CAFRE's governance structure. It should remain in DAERA. It offers a unique industry-specific provision closely aligned with DAERA's responsibilities. It must be recognised that CAFRE serves a single albeit complex industry while other colleges must operate in a more varied context. However, it demonstrates what can be achieved where there is customer focus, alignment with industry, understandable pathways and partnership working. This good practice could usefully influence the process of change in the main college system.

Panel conclusion

The college sector has important strengths. These include a skilled workforce with extensive experience beyond education, strong links with employers and business, and a generally high-quality estate with first-class facilities.

The future of FE

FE governance

6.85   If Northern Ireland is to retain a thriving college sector urgent and effective action requires to be taken. The proposals made earlier in this chapter in relation to area curriculum planning and the development of higher-level vocational learning need to be given high priority.

6.86   We have also concluded that there needs to be strategic reform on how the different elements of education are managed. There is no single department for education. Responsibilities are split between DE and DfE. This does not align with our thinking that the learner journey should be smooth and seamless. It is not in the best interests of the learner and can lead to competing priorities. This is particularly true where responsibilities overlap as in the case of provision for learners in the 14–19 age group, which urgently requires improved collaboration. This stage of the lifelong education journey should offer an easy transition into any form of learning in adulthood. This can be more easily achieved within a reformed departmental structure.

6.87   This has been recognised, to a degree, within the Framework to Transform 14–19-Year-Old Education and Training[378]. This cross-departmental approach is to be commended and the Framework should be fully implemented. However a truly collaborative approach requires a single department.

6.88   A single department with responsibility for the entirety of the education system – from early years to lifelong learning (and everything in between) – would be able to design and deliver a single education policy framework that works for all stages of the education journey. This

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378   Developing A More Strategic Approach to 14-19 Education and Training. A Framework to Transform 14-19 Education and Training Provision. (education-ni.gov.uk)

would, in turn, lead to greater consistency in the funding model. As an example, it would facilitate a move away from a situation in which one part of education (colleges) has to charge another (schools) to collaborate.

6.89 The restructuring of governance at a strategic level begs questions regarding the possible need for restructuring at an operational level (i.e., colleges). Apart from considering the governance of the colleges themselves, there may be merit in better aligning models of governance and the approach to funding of schools and colleges in order to facilitate collaboration and establish greater equity.

6.90 The current governance model, that has been in existence for more than a decade, has been successful in reducing duplication in course provision and has achieved some economies of scale. However, it can also be seen as an uneasy compromise. Grouping 16 largely single-campus organisations into six regional colleges inevitably sacrificed some element of responsiveness to local circumstances and the needs of local business. Five of the six colleges cover large geographical areas. At the same time, the opportunity was not taken to maximise the benefits of economies of scale.

6.91 There are, of course, different options that could be considered regarding future FE governance.

6.92 One option would be to replace the existing regional colleges with a single college governance model. This would achieve stronger strategic direction and facilitate the creation of shared services. It might also achieve other economies of scale. However, there is a real risk of local responsiveness being further eroded. This risk could be reduced by increasing managerial discretion at a local level. Some campuses are small and could not readily function in this way. Most, however, would be able to interact productively with local business and industry and respond directly to their requirements, but within the strategic framework established by the single college.

6.93 The main alternative would be the reinstatement of a network of local entities. Given problems of declining uptake and rising costs, we do not consider this a viable option.

6.94 On balance therefore we consider that the best way forward would be a single college governance model with clear direction and close connections to economic development and skills strategies. This should, however, be combined with increased freedom of action at a more local level, which will generally be that of the individual campus. In any large geographically dispersed organisation, a critical success factor is striking the right balance between centrally determined strategy and local responsiveness. The detailed design of the management structure of the single college is thus a matter of great importance.

6.95 An early priority within the reorganisation process should be the establishment of shared service arrangements for a range of college activities including HR, finance and legal advice. Given the compatibility of some of the existing services, this should be a relatively straightforward process.

6.96 Over time it should be possible for some internal services to be delivered in common with the schools sector such as aligning the mechanisms for funding areas of work that should be shared between the sectors. The aim would be to bring to an end the current position where

schools are reluctant to use the flexibility offered by the Entitlement Framework because colleges require to charge fees.

6.97   The single college would require a governing board. This needs to reflect economic as well as educational interests. However, it should be compact and have a genuinely strategic function.

6.98   Given the importance of HE in FE, articulation routes from further to higher education, and the effective delivery of higher-level apprenticeships, close collaboration between colleges and universities is a vital concern. We suggest that the new department initiate high-level discussions between the two sectors to determine what mechanism should be put in place to facilitate this.

6.99   Looking ahead across our 20-year timescale, we see this as a first step in developing a more unified and coherent approach to tertiary education as a whole.

Panel conclusion

The current structure of six regional colleges represents an uneasy compromise between centralisation and local empowerment. We recommend that there be a single college governance model but with increased discretion at a local level. There is a need for better collaboration between FE and HE. A mechanism is required to facilitate this.

A thriving sector

6.100   A theme of this Report is the need for all education providers to see themselves as part of a larger system which exists for the benefit of learners. Collaboration rather than competition is essential.

6.101   Due to a number of factors including the current policy and governance frameworks and the funding model, FE often finds itself competing with both schools and HE rather being able to work in effective collaboration. FE also has a significant task to effectively communicate its mission to a wide group of customers. This is more complex than in the case of schools or HE, which have more readily understood missions and a less varied customer base. As part of this there needs to be a clearer understanding and agreement on the respective roles and responsibility of schooling, FE and HE. Collaboration among sectors is essential but there are places where clear lines of demarcation are required.

6.102   This point is pertinent in connection with duplication in courses between sixth forms and FE colleges. This leads to competition rather than collaboration. Colleges should be the main providers of vocational education. Schools can legitimately offer options such as health and social care but courses requiring sophisticated workshops and similar facilities are best located in colleges.

6.103   There is also a need for clarity in connection with higher-level vocational and applied courses where the frontier between colleges and universities is unclear and can be contested. Colleges should be the main providers of specialist vocational and technical education at Levels 1 to 5 with well-defined articulation routes into university thereafter. As generally very well-equipped locally based institutions, colleges have great advantages

in being accessible to a wide client group, including many people in employment.

6.104   The provision of higher-level vocational courses including apprenticeships is often best carried out in close collaboration with the universities. College campuses can offer locally based tuition and support. Higher-level courses should, however, be designed at a national level with common content and assessment processes. Most will involve some provision at a higher education level and many should offer articulation into degree courses. We therefore recommend that the universities be closely involved in course design and validate course assessments. The system would thus offer a dispersed delivery system for a Northern Ireland-wide structure of vocational courses spanning the further/higher education boundary. Many students will be able to emerge holding degree-level qualifications awarded by one or other of the two local universities.

6.105   The detailed design of this system should be an early priority for joint action by the colleges, the new department, the universities and the Curriculum Council.

Valued and valuable vocational and technical pathways

6.106   Parity of esteem between academic and vocational pathways is of central importance. We see the introduction of pre-vocational pathways for all learners from 14 years old as a key recommendation and one that will increase parity of esteem and serve as a pre-cursor to more young people choosing vocational and technical pathways.

6.107   Northern Ireland has made significant progress in establishing a range of apprenticeships. This kind of provision is likely to grow in importance over the coming 20 years and is of central importance for the growth of the economy. The brand has widespread recognition and does not suffer to the same extent as other vocational learning from the public perception of being second-best when compared with academic routes leading into higher education.

6.108   The apprenticeship route offers the great advantage of training combined with employment. It also encourages the development of social and soft skills. Mentoring is available in some apprenticeship courses.

6.109   The framework favoured by the colleges and described in the previous section will enable an expansion of apprenticeship routes. In the immediate future, we see the priorities for expansion as being the creation of apprenticeships relevant to the public sector and the extension of availability beyond the age of 25. In effect, apprenticeships should become an all-age programme which can be accessed throughout adult life. Another issue requiring to be addressed at an early stage is the current gender imbalance.

6.110   It is important to engage a larger number of employers in apprenticeship schemes. Currently some employers do not participate but recruit young people who have completed apprenticeships provided through others. There are also difficulties in engaging with small and medium-sized enterprises (SMEs). However, such businesses make up a large part of key sectors such as software design. The work experience which could be provided by such enterprises is likely to be more typical of the working environment of the future than that found in large-scale businesses. Although awareness of apprenticeships is high, there are some employers who see them as being inferior to the academic route leading to the employment of graduates. Work remains to be done in disseminating the benefits of the

apprenticeship approach.

6.111 Colleges make strenuous efforts to engage positively with business. However, more needs to be done. In particular, there is a need for stronger contact with the SME sector. That sector changes rapidly, bringing a requirement to update contacts constantly.

Panel conclusion

There is a need for improved collaboration between FE and other sectors, particularly schools and HE.

Colleges should be the main providers of vocational and technical education/training at Levels 1–5. At higher levels, collaboration with HE is essential and courses should offer articulation into university education.

Apprenticeships are an important and growing area of provision. Immediate priorities for extension are in the public sector and providing access for learners aged over 25.

Retaining and attracting talent in higher education

6.112 Our Terms of Reference do not include higher education (except in relation to the FE/HE interface). Furthermore, the role of universities extends well beyond issues of learning and teaching, which are the main focus of this Report. They are developers of new knowledge and important economic players in their own right.

6.113 It would not be appropriate for us to look at the full range of university activities or even make suggestions in relation to those taught courses which are most similar to the provision made in other sectors. Instead, we have considered only two issues in addition to the provision of higher-level vocational courses mentioned in the previous section.

6.114 The first relates to funding. We have taken evidence from two local universities that would consider that they are less well-funded than equivalent institutions in England. We examine the issue in more detail below.

6.115 Secondly, we are of the view that Northern Ireland suffers from an annual "brain drain". In 2019, there were **17,000** young people from Northern Ireland who were studying in Great Britain. Only around **33%** of these return to Northern Ireland after graduating (although others may come back at a later date)[379].

Higher education funding

6.116 Universities and FE colleges offer a range of qualifications including doctorates, master's, bachelor's degrees, foundation degrees, Higher National Certificates (HNCs) and Higher National Diplomas (HNDs) in a range of subject areas. The higher education (HE) teaching grant in academic year 2021/22 was £147m, in respect of approximately 30,000 full-time equivalent students. HE quality related research funding for 2022/23 was £59.99m, (of which £13.36m was additional non-recurrent funding provided in-year) while the HE Innovation Fund was £3.96m.

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379 Stay-or-go-final.pdf (pivotalppf.org)

6.117   DfE provides financial support in the form of grants and loans to eligible higher education students undertaking eligible higher education courses. This support is provided through Student Finance Northern Ireland, consisting of the Education Authority and the Student Loans Company (SLC), on DfE's behalf. Grant support does not need to be paid back by the student. Loan support, however, is to be repaid by the student once they are in employment and earning above a certain threshold.

6.118   In the academic year 2021/22, DfE provided £213.3m of tuition fee loan support to just over 39,000 full-time undergraduate students living in Northern Ireland and elsewhere in the UK. Loan support was also provided for maintenance support totalling £124.7m. Grant support (maintenance and targeted support) totalling £50.6m was provided to approximately 19,000 students.

6.119   Support for part-time undergraduates for academic year 2021/22 totalled £1.8m in tuition fee loan support and £2.8m in grant support. Tuition fee loan support to 2,500 postgraduate learners in academic year 2020/21 totalled £9.9m. In addition, students experiencing genuine financial hardship during their studies can access support via DfE's Student Support Funds. For academic year 2022/23, the Student Support Fund allocation was increased from a baseline of £2.8m to £5.6m.

6.120   A total of just over £11.5m was provided to Student Finance Northern Ireland to deliver student support on DfE's behalf, consisting of £3.319m to the Education Authority and £8.256m to the SLC. £0.363m was also provided to HMRC.

6.121   From academic year 2023/24, Northern Ireland and other eligible full-time undergraduate students will be able to benefit from a 40% increase to the maximum maintenance loan currently available. The support to full-time undergraduate Northern Ireland-domiciled students and other eligible full-time undergraduate students will increase:

- for students living at home from £3,750 to £5,250;
- for students living away from home from £4,840 to £6,776; and
- for students living in London from £6,780 to £9,492.

6.122   Historically, both UU and QUB have reported that they have been significantly underfunded compared to their English and Scottish counterparts, with a funding gap that has been in the order of £21.3m (£760 per student place) for around 10 years. The universities report that per-unit income for universities is less than English competitors enjoy and this has implications for institutions' ability to invest and compete for Great Britain and international students (who sit outside the cap)[380].

6.123   DfE's findings supported these claims in 2016. However, since then there have been several changes which have affected the funding per EFTS for both England and Scotland. Recent

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380   Information provided by QUB and UU.

changes to funding[381] and to the subject price bands[382] in England have reduced, on average, the quantum of funding per head. Meanwhile, maximum tuition fee levels in Northern Ireland have risen in line with the projected rate of inflation, with English maximum fees remaining static albeit at a higher level. The table below shows that Northern Ireland FTEs were funded at a lower level than their English counterparts by an average of **£117.05** in 2021/22. This extrapolates to a sectoral deficit of **£2.6m** for that year. However, this is in contrast to the fact that Northern Ireland FTEs were on average better funded than their Scottish counterparts by a difference of **£512.55**, which equates to the Northern Ireland HE sector being comparatively better off by **£10.34m**. Given the much larger size of the English sector, this would leave the Northern Ireland universities funded at a level of around £1m–2m below the Great Britain average.

Table 6.e: HE funding in Northern Ireland compared to England and Scotland, 2021/22[383]

Region	Per FTE	Sector (QUB and UU)
England	(£117.05)	(£2,361,553)
Scotland	£512.55	£10,341,103

6.124 It must be noted however that this comparison only considers tuition fee income and teaching funding grant; it does not consider the various other funding streams paid to Northern Irish universities such as capital.

6.125 We understand analysis indicates that any funding gap between the Northern Ireland HE sector and the HE sector in other parts of the UK is much less than would previously have been the case. The increase in tuition fees in 2022/23 for Northern Ireland will cause the reported gap to narrow further as tuition fees elsewhere in the UK have remained static for a number of years.

6.126 Each funding authority has different methods to fund their universities so there will always be caveats to consider when comparing funding. However, DfE's preliminary forecast for academic year 2023/24 predicts that Northern Ireland institutions will be better funded than both their English and Scottish counterparts.

6.127 The continuing divergence in student support policy across the UK creates several challenges. Significant policy reform in England has a knock-on budgetary impact in relation to student loan borrowing. There are also operational challenges, especially for the

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381   In July 2021, the Office for Students (OfS) released their planned funding for the 2021/22 academic year in England. This followed consultation and new terms and conditions received from the then UK Secretary of State for Education, Gavin Williamson. According to these terms and conditions, when determining the amount allocated to universities and colleges for the specific recurrent "High-Cost Subject Funding" grant in academic year 2021/22, the OfS was required to ensure that any subject not specified on a protected list would be funded at half the rate at which it had previously been funded during the academic year 2020/21. This significant reduction applied only to the additional "High-Cost Subject Funding" subsidy received by English HEIs from the UK Government, and not to income received through course fees. No similar change has taken place in Northern Ireland.

382   In Northern Ireland, HE courses are placed into four subject price bands reflecting their teaching costs and strategic priority. This arrangement previously applied in England, but changes to price band categories mean that there are now six price groups in England. The additional price groups in the English system mean that some subjects have been reclassified and, under the new English funding model, now receive **no funding**.

383   Data provided by DfE.

SLC, in trying to deliver multiple products across four administrations[384].

Retaining talent

6.128   Due to the significant level of public funding provided to the universities, DfE has to control spending to ensure it stays within its budget allocation. The Maximum Student Number (MaSN) is the control mechanism used to ensure this. Queen's University, Ulster University and the six further education colleges all receive an annual MaSN allocation from DfE. The MaSN applies primarily to full-time undergraduates who are domiciled in Northern Ireland or the Republic of Ireland and enrolled in Northern Ireland. It does not curtail the recruitment of part-time or postgraduate students, not does it curtail the recruitment of students from other parts of the UK or international students, who represent an important income stream for the universities. The primary purpose of the MaSN is to control the two main costs associated with full-time undergraduate students: student support costs and teaching grant costs.

6.129   Each year, a significant number of young people leave every region of the UK in order to attend a university in another part of the country. This is a matter of personal choice. Living away from home and in a different environment can be a very useful formative experience. In 2020/21, 75% of Northern Ireland students enrolled in UK Higher Education Institutions (HEIs) were in Northern Ireland (compared to 25% in Great Britain institutions).

6.130   The influence of the MaSN cap on learners' choice of HE location is contested. The March 2021 publication[385] by Pivotal suggested that such educational migration might have been partly influenced by the cap. However, this was followed by a further qualitative piece[386], again by Pivotal, that highlighted factors such as poor community relations and political instability as having the greatest influence.

6.131   Research carried out by DfE on Universities and Colleges Admissions Service (UCAS) applications further considered the issue of "reluctant leavers"[387] versus "determined leavers"[388], detailed below.

384   Information provided by DfE.

385   Pivotal_Report_March_2021_V4 (pivotalppf.org)

386   Stay-or-go-final.pdf (pivotalppf.org)

387   Defined as those Northern Ireland-domiciled students who had a firm choice for a Northern Ireland Higher Education Institution (HEI) but ended up accepting a place at a Great Britain HEI.

388   Defined as those Northern Ireland-domiciled students who only applied for a Great Britain HEI (and took up a place).

Table 6.f: Northern Ireland-domiciled student UCAS applications 2010/11–2019/20 by "determined", "reluctant" and "other" leavers[389]

Year	Total leavers	Determined leavers		Reluctant leavers		Other leavers[390]	
2010/11	4,675	1,835	39%	320	7%	2,520	54%
2011/12	5,150	2,015	39%	310	6%	2,825	55%
2012/13	4,260	1,540	36%	330	8%	2,390	56%
2013/14	4,545	1,690	37%	310	7%	2,545	56%
2014/15	4,600	1,445	31%	345	8%	2,810	61%
2015/16	5,130	1,685	33%	550	11%	2,895	56%
2016/17	5,320	1,890	36%	520	10%	2,910	55%
2017/18	5,180	1,870	36%	515	10%	2,795	54%
2018/19	4,960	1,755	35%	445	9%	2,760	56%
2019/20	4,250	1,590	37%	305	7%	2,355	55%

6.132   Further analysis on the numbers of reluctant leavers and the relationship with the relevant total MaSN allocation does not show a direct correlation, i.e., increases or decreases in the MaSN did not result in a corresponding increase or decrease in "reluctant leavers".

6.133   "Determined leavers" are defined as those Northern Ireland students who applied only for HEIs in other parts of the UK. However, we do not know the motivation behind their decision. It is reasonable to assume that a number of these so-called "determined leavers" made their decision in the belief that they would not be successful in an application to a Northern Ireland HEI but could gain entry to one elsewhere in the UK with lower admissions requirements. If this is the case, there is a proportion of "determined leavers" who are misclassified as such.

6.134   It is worth noting, however, that data from the Higher Education Statistics Agency (HESA) suggests that the vast majority of students leaving Northern Ireland enrol at medium- or high-tariff universities.

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389   Information supplied by DfE following analysis of UCAS data.

390   Defined as those Northern Ireland-domiciled students who applied for places at NI HEIs as well as UK HEIs but the NI HEI wasn't their first preference/firm choice.

Table 6.g: Northern Ireland-domiciled first degree enrolments at Great Britain higher education universities by subject area and tariff grouping of institution, 2020/21[391,392,393]

Subject area	Tariff grouping of institution				Tariff grouping		
	Low	Medium	High	Total	Low	Medium	High
Medicine and dentistry	25	95	785	905	3%	11%	87%
Subjects allied to medicine	255	750	785	1,790	14%	42%	44%
Biological and sport sciences	130	380	305	810	16%	47%	37%
Psychology	95	225	195	515	18%	44%	38%
Veterinary sciences	5	20	240	260	2%	7%	91%
Agriculture, food and related studies	10	120	10	140	8%	83%	8%
Physical sciences	15	90	250	355	4%	26%	70%
Mathematical sciences	10	40	265	315	3%	12%	85%
Engineering and technology	95	160	485	745	13%	22%	65%
Computing	155	275	285	715	22%	38%	40%
Architecture, building and planning	20	115	60	190	10%	59%	31%
Social sciences	265	345	450	1,065	25%	33%	42%
Law	80	160	350	595	14%	27%	59%
Business and management	205	665	660	1,530	13%	43%	43%
Language and area studies	35	110	415	565	6%	20%	74%
Historical, philosophical and religious studies	140	70	245	450	31%	15%	54%
Education and teaching	225	250	140	615	36%	41%	23%
Combined and general studies	0	5	20	25	9%	13%	78%
Media, journalism and communications	60	140	80	280	21%	50%	29%

391   Source: Higher Education Statistics Agency (HESA) available from [Higher education ad hoc tables | Department for the Economy (economy-ni.gov.uk)](economy-ni.gov.uk)

392   The data is recorded as being "experimental statistics". This is an existing class or subset of official statistics with methodologies and outputs still under review and evaluation. Users should exercise caution when using data from experimental statistics, and evaluate the quality and coverage of any data that they intend to use in the context of the intended application to ensure that it is fit for the user's purpose.

393   The table above does not include enrolments at HE alternative providers in Great Britain. To prevent the identification of individuals, figures in the attached table are rounded to the nearest 5, with 0, 1, 2 rounded to 0. Due to rounding, the sum of numbers may not match the totals shown. Percentages are based on unrounded numbers and are rounded to the nearest integer.

Subject area	Tariff grouping of institution				Tariff grouping		
	Low	Medium	High	Total	Low	Medium	High
Design, and creative and performing arts	240	545	310	1,100	22%	50%	28%
Geography, earth and environmental studies	20	50	175	245	9%	19%	71%
Total	2,095	4,600	6,515	13,210	16%	35%	49%

6.135 Across the UK regions the movement of students in and out varies. In Scotland and Wales the inflow of students is higher than its outflow; the position is reversed in England with a considerably higher outflow than inflow. In the case of Northern Ireland, however, the outflow is large and the inflow small[394]. Suggesting that it is not the flow of students out of Northern Ireland but the lack of a corresponding inflow from elsewhere that is the source of difficulty does not address the main problem. Even if there were many more applicants to Queen's and Ulster from other parts of the UK than is the case, the lack of sufficient places for local students could still mean an annual loss of talent from Northern Ireland.

6.136 The local universities' MaSN increased from 22,844 to 25,255 between 2018/19 and 2021/22. The number of student places available locally is based on the budget allocation available. Without an increase in long-term baselined teaching grant funding, DfE is unable to increase the teaching grant to universities. Given the pressures faced by DfE across the budget period, there is no funding within the draft budget for further increases in the number of student places (excluding those relating to previously approved Executive commitments).

6.137 In 2021/22 the average cost per undergraduate student across the four different subject price bands was approximately £5k. Any increase in MaSN would be accompanied by subsequent increases to the level of student support for those additional students, which includes means-tested maintenance grants, dependants' allowances, disabled students' allowances and maintenance and tuition fee loans. The table below sets out the approximate additional annual cost requirement of increasing the MaSN by a range of percentages[395].

Table 6.h: Approximate cost of increasing MaSN, Northern Ireland

MaSN increase	2%	5%	10%
Teaching grant	£2.53m	£6.32m	£12.63m
Student support	£1.01m	£2.53m	£5.05m
Total	**£3.54m**	**£8.85m**	**£17.68m**

6.138 The local universities reported that to maintain current levels of HE provision for the growing population[396], a MaSN increase of 19% by 2030 is required. This equates to some 4,750 additional places across both institutions[397].

394 Pivotal_Report_March_2021_V4 (pivotalppf.org)

395 Information provided by DfE.

396 The population of 18-year-olds is expected to increase by 19% over the remainder of this decade according to the universities.

397 Information provided by QUB and UU.

6.139   Learners should have choices and be able to access appropriate pathways for which they are qualified. It is therefore a matter of regret that a significant number of learners have to leave Northern Ireland because they are not able to access an appropriate pathway locally. Addressing this situation will mean some increases in the MaSN but also better utilisation of "HE in FE" as an alternative pathway. The objectives must be to retain talent in Northern Ireland, attract new talent and provide a range of suitable pathways to align with economic priorities and future skills needs.

Panel conclusion

We believe that the current situation is deeply injurious to Northern Ireland's interests. A small economy at the western periphery of Europe with a legacy of recent conflict needs to attract inward investment and is most likely to do so on the basis of offering a highly skilled workforce. The qualifications of school leavers, the quality of vocational education and the strength of apprenticeship schemes at every level are all factors that investors and employers will consider carefully. However, so too are the prospects of recruiting high-quality graduates with appropriate qualifications. These prospects are seriously weakened by the regular "export" of talent.

Accordingly, we recommend that the MaSN number, governing entry to Northern Ireland's universities, be raised gradually until the ratio of undergraduate places to the age cohort is similar to that in the remainder of the UK. In order to help finance this expansion, the level of fees should be adjusted. We suggest that this process begin at the earliest practicable date, increasing progressively by 10%, and that parity with England should be achieved within 10 years.

Such an expansion should be targeted and closely aligned to the needs of the economy and identified skills gaps.

An open door back to education

6.140   The task for the education service as a whole is to equip people with the knowledge, skills and personal qualities that will allow them to secure employment to sustain a fulfilling lifestyle with which they are content. This is becoming an increasingly challenging task for both schooling and further or higher education to accomplish. The changing economy and new technology are influencing what skills are required for the modern workforce. In turn, this means that much of education will need to take place post-18.

6.141   Adults require access to further training and education to an unprecedented extent. Over the next 20 years that trend will accelerate thanks to technological change and its impact on the labour market. Many existing areas of employment will disappear while others will expand or emerge for the first time. Even where a job continues to exist, its content and the skills required are likely to be transformed. The impact of AI will certainly be significant although at present it cannot be predicted.

6.142   Meeting changing job requirements or seeking different employment will increasingly require additional education and training. This, in turn, will require changes in the provision of training and the way in which it is funded. This also reinforces the need for a greater focus on horizon-scanning in education – including investment in the lead department's technical capability and research functions.

6.143   This is not to imply that every aspect of these developments requires the attention or funding of the state. Employers have a major role to play. They should meet the costs of reskilling undertaken to meet their needs. There will, however, be many people who have no employer but whose need for additional learning and new skills is pressing. The state, therefore, needs to ensure that there are smooth pathways into education/training at all stages of adult life.

6.144   In part, this is a matter of providing information and guidance. The client group of the Careers Service will unquestioningly widen. It will also be necessary to ensure that the provision available is suited to the needs that are likely to emerge. The college sector is best placed to fulfil this role. It has a track record of adaptability and agility which should stand it in good stead. It is also regionally based and is therefore accessible and could provide a valuable resource for its local communities throughout the week.

6.145   The priority will not be for extended courses, fitted within the traditional academic year. Short courses leading to micro-credentials within readily understood frameworks are likely to be in demand. Timing will need to become more flexible. Collaboration with employers will be essential. New technology will play an important role in delivery.

6.146   It is essential that funding be available to those who require it. We suggest that the establishment of lifetime learning accounts be investigated and a pilot scheme put into operation. Courses at Levels 1 and 2 in literacy, numeracy and digital skills and courses at the same levels in English for Speakers of Other Languages (ESOL) are currently available free of charge to a number of groups of adults who meet the eligibility criteria. We recommend that all adults with few or no qualifications should be able to access the literacy, numeracy and digital skills courses without charge and that the ESOL courses should be available to all newcomers to Northern Ireland who have a limited command of English.

6.147   In developing improved opportunities for adult learning, it is important to understand that the state is neither the sole source of finance nor is it necessarily the most appropriate provider. Voluntary and charitable organisations have a very important contribution to make. Even within the state sector, less formal places of learning such as libraries and community centres will suit some people whose experience of school was one of alienation and failure. Nevertheless, the state must play a key role, ensuring the availability of adult basic education and education designed to facilitate entry/re-entry to the labour market. It will also have a particular role in relation to the needs of adults with special educational needs, newcomers and groups such as people from Traveller/Roma backgrounds who have traditionally been hard to reach, as outlined in our chapter on Disadvantage (Chapter 2).

6.148   Another area of demand that is likely to increase is learning for enjoyment and personal development, particularly post-retirement. Especially among already better-educated sections of society, organisations like the University of the Third Age have demonstrated the growing popularity of this kind of learning. With the decline in leisure courses in FE, there does not seem to be any significant provision available on a more general basis. There would be merit in the state encouraging other voluntary providers to enter this field.

6.149   The aim must be to develop a culture of lifelong learning throughout Northern Irish society.

Panel conclusion

Retraining and upskilling will be a growing requirement of the economy and society in future years. The concept that education ends at 16, 18 or 21 is obsolete – it is a lifelong endeavour. This requires a shift of focus and, potentially, a shift in resources.

Lifelong learning has historically been underfunded and undervalued but this will need to change. However, the state should not be expected to be the sole contributor: it is important that employers meet their obligations also. Costs for those in work should be met by business.

The state does have an essential function in relation to the low-qualified and out of work. Essentially, access (Level 1) provision should be available free to non-employed people with low incomes.

We have already recommended learner profiles, with unique learner numbers; these should continue into adulthood and morph into Lifelong Learning Accounts, with guarantees for learners with low or no qualifications to return to education free of charge.

We also believe that education should be promoted for interest and leisure. This has growing importance in an ageing population.

Recommendations and actions

6.150   Throughout the chapter, we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

We believe the education landscape needs a thriving college sector – with its existing first-class expertise and resources being fully utilised. FE should have a clearly defined "mission" that can be convincingly communicated to learners, parents, schools, industry, academia, etc.

There is an urgent need for simplification of the framework for vocational qualifications in order to promote public understanding. Where possible, generally understood labels such as GCSE and A Level should be used.

We support the framework being developed for traineeship and apprenticeship provision but courses at Level 1 should be made available to people in employment.

There should be a single college governance model but with increased discretion at a local level. There is a need for better collaboration between FE and HE. A mechanism is required to facilitate this.

The MaSN number governing entry to Northern Ireland's universities, should be raised gradually until the ratio of undergraduate places to the age cohort is similar to that in the remainder of the UK. In order to help finance this expansion, the level of fees should be adjusted. We suggest that this process should begin at the earliest practicable date, increasing progressively by 10%, and that parity with the rest of the UK should be achieved within 10 years.

Such an expansion should be targeted and closely aligned to the needs of the economy and identified skills gaps.

Retraining and upskilling will be a growing requirement of the economy and society in future years. Lifelong learning has historically been underfunded and undervalued. However, the state should not be expected to be the sole contributor. Costs for those in work should be met by business.

Courses that offer literacy, numeracy and digital skills development at Levels 1 and 2 should be available free of charge to all unqualified adults, as these skills offer access to the labour market. Additionally, courses in English as an additional language should be offered at the same levels to assist newcomer adults.

Learner profiles, with unique learner numbers, should continue into adulthood and morph into Lifelong Learning Accounts, with guarantees for learners with low or no qualifications to return to education free of charge.

We also believe that education should be promoted for interest and leisure. This has growing importance in an ageing population.

CHAPTER 7 – SUPPORTING THE EDUCATION WORKFORCE

Introduction and context

7.1   The purpose of schooling and the role of educators has changed dramatically since compulsory education was introduced over 100 years ago. Education goes beyond teaching and learning. It aims to develop young people as individuals, as contributors to society and as contributors to the economy and environment. The expanding remit of education has a direct impact on the demands placed on the educator. These demands are likely to increase and become more varied in the coming years. It is important to recognise this and equip educators with the necessary skills. At the same time, it is essential to value the entire education workforce and open up the potential for increased multi-disciplinary working, drawing in other professional expertise as required.

7.2   Initial teacher education (ITE) is of fundamental importance for the teacher and the education system as whole. In a changing world it is essential for ITE to be reviewed and refreshed so it meets the needs of teachers and the emerging needs of learners. This is not only a matter of keeping pace with curriculum change but refers equally to meeting complex pastoral needs, reflecting changing approaches to special needs and many other issues. However, ITE is just the first step. It prepares teachers to enter the classroom but, as with any profession, they require a period of induction and career-long professional development and training to remain effective for themselves, the school and the learner. Northern Ireland benefits from significant expertise and resource in teacher training – these resources must be effectively utilised to provide the highest quality of continuing support for the workforce.

7.3   Northern Ireland greatly benefits from having a committed, motivated and skilled education workforce. However, there is some evidence that education is losing high-quality teachers and future leaders. There are significant concerns among the workforce regarding workload, terms and conditions and a need for a better work-life balance. Practitioners have expressed to us that teaching, and school leadership in particular, is a less attractive profession than it once was. This should be of significant concern.

7.4   Leadership in education is of fundamental importance. There is a need to attract, nurture and retain talent and provide pathways to progress through appropriate professional development.

7.5   There are great benefits from having a stable and consistent workforce. However, stability and consistency should be complemented by increased opportunity for workforce movement. Providing flexible pathways for educators to work in different schools, sectors and settings or to gain experience outside of schooling (through secondments to business or to government) broadens the experience of individuals, enhances professional development and improves practice in the classroom. There should be an employment framework that allows for such flexibility.

7.6   Teaching is a profession. It should be valued and promoted through adherence to high standards and an emphasis on professional development. This is essential both to protect the profession and ensure public confidence. There is a need to ensure that poor performance is addressed where it exists.

7.7 Two intertwined issues currently adversely affect the operation of the education system. The first is workload. Educators must have the space and time to plan, teach and assess. Workload needs to be critically reviewed and effectively managed by local managers and by the responsible department. Secondly, action short of strike impacts directly on the learner and the delivery of education. Teachers' salaries and conditions of service lie beyond our remit but the implications for learners are central to the action. We emphasise, therefore, that the current situation is unacceptable and that those responsible – on both sides – have a duty to resolve it as soon as possible.

A multi-disciplinary workforce

7.8 No education system can be better than the quality of its educators. Northern Ireland is fortunate in having a well-qualified and highly committed teaching profession. It is essential that both initial teacher education (ITE) and subsequent professional development equip all teachers to maximise the contribution they make.

7.9 The education workforce extends well beyond teachers. There are many different roles that are vitally important to the education, development and wellbeing of learners both inside and outside of the classroom. It is important that all these individuals view themselves as being part of the same workforce with a common vision to improve the lives of children and young people.

7.10 The nature of education and the remit of schooling have changed over recent years. Education has become more closely involved with learner emotional health and wellbeing, pastoral needs and resilience. There is now a greater emphasis on helping learners to develop as individuals and make positive contributions to the economy and society. Increased demands on education place increased demands on educators and call for a wider range of skills in the workforce.

7.11 The composition of the workforce has changed over time. We comment in Chapter 3 on the increased number of classroom assistants and the vital contribution they make in supporting learners, particularly those with special needs, and assisting teachers. The early years workforce relies heavily on para-professionals. Furthermore, education relies on specialist support from educational psychologists, speech and language therapists, social workers, welfare officers, play therapists, youth workers, lunchtime supervisors and many more. Each of these has a vital role to play and development needs which should be met.

7.12 Education also relies on policy makers, legislators, inspectors and governors to manage the system, support improvement and reform, empower those in the classroom and provide assurance to the wider public. All those in such educational roles carry vital responsibilities and must have the knowledge, skills and positive attitudes required to fulfil their roles.

7.13 Northern Ireland has good examples of schools where the teaching workforce works closely with a range of different professionals, including from health services or from the community and voluntary sector, as well as with parents. It is important that such good practice becomes common practice in all schools and settings.

7.14 Our vision would be for it to be commonplace for schools, colleges and other educational institutions to have a truly multi-disciplinary team with classroom teachers directly supported by a range of other specialists. Early years settings and primary schools should

have more direct access to play therapists, speech and language therapists and educational psychologists. This would improve the experience of learners and provide specialist skills to aid early intervention for learners who need additional help. These skills are also required in post-primary and post-16 provision. However, at these stages there is also a greater need for access to counselling services, welfare officers and youth workers, as well as others. All schools, colleges and settings would benefit from increased involvement from local community and voluntary services. At all stages, the aim must be to offer learners a service that best uses all the expertise available to it in order to meet the full range of their educational needs.

7.15   All education establishments should have delegated authority and budgets that allow them to vary the number and composition of their workforce, including employing specialists in, for example, youth work or educational psychology. In many cases, the need may not be for a full-time member of staff. There should be nothing to prevent nurseries, schools or colleges collaborating to share access to expertise. However, the practice is not as widespread as it should be.

> **Panel conclusion**
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> The changing nature of education creates a need for a changing workforce. There needs to be a greater emphasis on multi-disciplinary working in schools, colleges and other settings so as to meet all the needs of learners. This varied workforce should share a common vision. That vision should unite policy makers and practitioners.

An equipped workforce

Initial teacher education

7.16   It is vitally important that the role of teachers be valued, and that they are equipped and empowered to make a positive and long-lasting contribution to their institution and, most importantly, to the learner. Initial teacher education (**ITE**) and continuing professional development (**CPD**) are of central importance to achieving better outcomes for our learners.

7.17   The education workforce also includes many others who have training needs. Furthermore, staff – including teachers – need to work together in closer collaboration and mutual regard. Therefore, workforce development requires a holistic dimension.

7.18   To an extent which is not true in some other jurisdictions, teaching remains a high-status occupation in Northern Ireland. The calibre of those wishing to become teachers remains high and the training they receive from the local institutions is generally well-regarded.

7.19   The extent of the provision of initial teacher education by the four universities and university colleges is as set out in the following table. It will be evident that there are some areas of duplication. The total number of ITE students is similar to the roll of many post-primary schools.

Table 7.a: Providers of initial teacher education in Northern Ireland, 2021/22

Institution	ITE course offered	Duration	No. of students[398,399]
Stranmillis University College[400,401]	Bachelor of Education (BEd) (Hons) Primary Education	4 years	380
	BEd (Hons) Post-primary in: • Business and Enterprise • Mathematics • Religious Studies • Technology & Design	4 years	200
	Post-Graduate Certificate in Education (PGCE) Early Years	1 year	15
St Mary's University College[402]	BEd (Hons) Primary	4 years	380
	BEd (Hons) Post-primary in: • Business Studies • Mathematics • Religious Studies • Technology & Design	4 years	200
	PGCE Irish-Medium Education	1 year	20
Queen's University Belfast[403]	PGCE Post-primary in: • English • Information Technology & Computing • Irish-Medium Education • Mathematics • Modern Languages • Religious Education • Science • Social Science	1 year	138
Ulster University[404]	PGCE Primary	1 year	33
	PGCE Post-primary in: • Art & Design • English with Drama & Media Studies • Geography • History • Home Economics with Food & Nutrition, and Nutrition & Food Science • Irish-Medium Education • Music • Physical Education • Technology & Design with Engineering & Manufacturing	1 year	84
Total no. of students enrolled on ITE courses in 2021/22			**1,450**

398   Table 20 - ITT students by HE provider and level of study 2014/15 to 2021/22 | HESA.

399   Approved intakes to Initial Teacher Education courses | Department of Education (education-ni.gov.uk)

400   Undergraduate - Stranmillis University College | A College of Queen's University Belfast

401   Postgraduate - Stranmillis University College | A College of Queen's University Belfast

402   Course Information (stmarys-belfast.ac.uk)

403   Queen's Coursefinder for UG, PG courses (qub.ac.uk)

404   Courses at Ulster University - Ulster University

7.20   It is essential that the content of ITE is kept up to date. This requires good two-way communication between ITE providers and the profession. Our proposal to establish a new Education Workforce Council should assist with this communication. Issues highlighted to the Panel as requiring attention include pastoral care, trauma-informed practice, autism spectrum disorder/special educational needs, emotional intelligence, relationship and sexuality education and digital skills.

7.21   There is only so much that can be covered in a time-bound initial training course especially given the importance of committing sufficient time for school placements. There is a balance to be struck between what is covered during ITE and what is delivered through CPD. Even where a topic is covered during ITE, it is often necessary for it to be studied in greater depth once the teacher is in post and has the benefit of real classroom experience. A re-established and re-purposed General Teaching Council Northern Ireland (GTCNI) (which we describe as the Education Workforce Council later in this chapter) has an important role in managing this issue and working with local ITE providers and the new single department.

7.22   Initial teacher education is the essential first stage of a process of learning which continues throughout a teacher's career. Its primary function is to enable the newly qualified teacher to function effectively in the classroom from the outset. Student teachers need to be aware of the complex issues currently facing schools and other educational settings. These include the increasing demands in relation to pupil wellbeing and pastoral care, the impact of special needs on mainstream schools and the growing importance of new technology and digital skills in education. However, in many cases issues are more meaningfully dealt with in depth after the newly qualified teacher has obtained some practical experience. For this reason, we attach importance to the process of induction into the profession in the years immediately following initial training and to continuing professional development thereafter.

7.23   An essential function of ITE is to enable new teachers to extend their experience beyond the boundaries of their own schooling and to provide a broader understanding of the educational landscape. It is vital, therefore, that ITE providers ensure that student teachers have placements in schools in different sectors and with a different ethos. Where possible, this should include placements within special schools. Schools play an essential role in teacher training not only through the provision of placements but also by contributing the expertise of in-school teacher tutors or mentors.

7.24   Teacher education is currently the responsibility of two government departments. DE is responsible for determining the number of students to be admitted each year to courses of ITE while DfE funds the provision. As a general point of principle, working across two or more departments creates greater challenges than working within a single department. This consideration further strengthens the case for creating a single department for the entire education journey, as we recommend elsewhere in this Report.

7.25   Northern Ireland has a small but complex system of teacher education. Two universities and two university colleges (both attached to the same university) are involved. The entire training system is small although there is considerable scope for the greater involvement of the four institutions in the later professional development of teachers.

7.26   We are also concerned that the present structure of ITE contributes to division on religious grounds. While the universities both take students from all backgrounds the colleges appear to be less diverse. In May 2022, initial teacher education enrolment at Stranmillis

was 63% Protestant and 37% Catholic while in 2017/18, St Mary's was 1% Protestant and 96% Catholic[405].This division may make it more difficult to arrange for student teachers to have placements in different school types and sectors and contributes to a situation where the great majority of teachers are employed in schools in the same sector where they were educated.

7.27   There is strong evidence of close working arrangements across the two teaching colleges and this should be encouraged further in the short term. Considering our 20-year timescale, we suggest that a singular approach to ITE be implemented in the longer term, removing any unnecessary duplication across the existing providers.

7.28   The structural problems of the existing system might be eased if a more holistic view were to be taken of continuing professional development. There is a need for greater emphasis and support for ongoing professional development. In the current structures there is skewed focus on ITE and an obvious gap regarding CPD. The colleges should work collaboratively to fill this gap.

7.29   Given our recommendation regarding a single department, it will be for that new organisation to carry out a critical review of the current provision of ITE in terms of both structures and delivery. The purpose of such a review should be to improve efficiency and effectiveness and remove duplication. We are of the view that a new delivery model may be required within our 20-year timeframe and the end goal should be a unified model of delivery, a single core curriculum for ITE and a greater emphasis on continuing professional development. The future model should also exploit the research expertise within the colleges and HE as a whole.

Panel conclusion

The foundational stage of professional learning for teachers is their initial education, which equips them with the knowledge and skills needed to function effectively in the classroom and the broader educational context. To stay current, it requires periodic updates and should connect to the ongoing stages of induction and continuing professional development.

The design, delivery and governance of initial teacher education is another example of responsibility for education policy and delivery being unnecessarily split across two separate departments. Our proposal for a single department would rectify this situation.

Furthermore, the existing arrangements for ITE are over-complex and tend to reinforce community separation. We also view the current structures as focusing excessively on ITE to the detriment of ongoing professional development. There is potential to introduce a new approach based on equal status for initial training and ongoing professional development.

Continuing professional development

7.30   The education workforce, including all who work directly with learners, should be reflective, self-evaluating and constantly improving. Professional development should not be seen as an optional extra; rather it is a central prerequisite to being a professional and effective educator. The largest group of professionals involved in education consists of teachers and

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405   TEUU_Report_18_Divided_Society_Divided_Education.pdf (ulster.ac.uk)

lecturers. Arrangements for their initial training and subsequent development are much better established than for other staff. The following paragraphs are mainly concerned with their needs but, over time, the same principles should be applied to other groups.

7.31　The focus should be on continuing professional development (CPD) (self-improvement) and ongoing sharing of best practice (institutional improvement). While there should be expectations and requirements to undertake regular professional development and to engage in professional dialogue with others, unnecessary bureaucracy should be avoided. It is, however, necessary for all educators to record their own professional learning and development.

7.32　DE's Strategy for Teacher Professional Learning: Learning Leaders was published in March 2016. It sets out DE's vision for continuing professional development together with a number of underpinning policy commitments. The vision is **"Every teacher is a learning leader, accomplished in working collaboratively with all partners in the interests of children and young people."**

7.33　Its overall aim is to empower the teaching profession and to strengthen its professionalism and expertise to meet the challenging educational needs of young people in the 21st century. This requires developing a continuing professional development framework, identifying and disseminating effective practice, establishing professional learning communities and building leadership capacity.

7.34　During our Review we have sought to better understand how funding for continuing professional development is managed and what level of resource is available. The nature of the delivery of CPD has meant that these questions are difficult to answer. There are a range of organisations involved in CPD, both public and private. For example, the EA provides training, as to do some of the sectoral bodies. Courses are also available from local HE providers, including the ITE colleges. There are also, of course, private operators. We recommend that a more formal structure be developed for professional development. This would involve:

- All educational institutions having in place a policy on CPD for their staff.
- The new Education Workforce Council setting down expectations both in relation to the period of induction into the profession and continuing profession development thereafter.
- DE managing a centralised fund that could be allocated to schools that have such a policy in place.
- Educational institutions having delegated responsibility to source CPD via external providers, alongside sharing good practice within and across institutions.
- Schools monitoring the impact of such professional development.

7.35　CPD will require some investment from DE and educational institutions, but it is reasonable for the individual educator, as well as their employer, to meet some of the costs of their professional development. This reflects the fact that professional development benefits both the institution and the educator.

7.36　At the heart of any systematic approach to continuing professional development is a process of regular professional review. An early task of the new Education Workforce Council (see below) will be to oversee its design and implementation for teachers but over the longer

term similar approaches should be established for lecturers and other members of the education workforce. It should accord with the following principles:

- Reviews should normally take place annually or more frequently in cases of concern.
- Review meetings should involve the teacher and his/her manager.
- The meeting should consider strengths of the teacher's practice and areas for development, the teacher's interests and aspirations and any relevant implications of the institution's plans for its own future development.
- The outcome of the meeting should be agreement about the teacher's professional development over the coming year, including the time to be made available and how any costs are to be met.
- The agreement about CPD should take account of the needs of the institution as well as the needs and interests of the teacher.

7.37   It should not be assumed that attendance at formal courses will be the normal way of meeting staff development needs. In many cases less formal mechanisms such as involvement in a network of fellow professionals will be both more effective and less costly. We see the establishment and support of such networks as a priority. Likewise we envisage over the next 20 years a move towards more online and blended opportunities that facilitate a more flexible approach to CPD.

7.38   Area learning communities provide a convenient network through which professional development can be promoted. All ALCs should see this as one of their core functions. Much of this may be of a relatively informal character involving, for example, collegiate working, sharing of good practice, mentoring and short-term exchanges to broaden professional experience. We would wish to see ALCs playing an important role in the development of teacher learning networks, which we see as making a vital and highly cost-effective contribution to professional development.

7.39   The universities and university colleges are an important reservoir of professional expertise. Their contribution to ongoing development is vital. However, it is essential that the opportunities they offer align with the requirements of practitioners.

7.40   A very important area of professional development concerns leadership. It is essential that there be clear developmental pathways enabling teachers to be prepared for their first leadership responsibilities, for middle leadership positions and for senior posts including Principal. These pathways should include opportunities such as short-term secondments and work-shadowing, and working with leaders in fields other than education. Leadership courses should encourage creative and divergent thinking and cultivate a capacity for innovation. It would, therefore, be important that they be designed and run independently of the Department. The universities, university colleges and private providers have important contributions to make.

7.41   All educational establishments need to see investment in their own staff as an essential priority. They can be assisted by the delegation of centrally held funding but this will be small. They will need to weigh the importance of providing resources and time for professional development against other priorities when determining the use of their own resources.

> **Panel conclusion**
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> Insufficient attention is currently paid to continuing professional development. Both schools and practitioners should view this as a prerequisite to being an effective and professional educator.
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> A process of professional review should be established so that the needs of both the practitioner and educational institution will be taken forward. This would involve a formal record of the professional learning undertaken. All educational institutions should have in place a policy for professional development, and this should be proactively managed by the institutions' leadership and governance teams.

A valued workforce

7.42 We have not seen it as part of our remit to comment on teachers' specific salaries or working conditions. However, we obviously consider it essential that these reflect the value that society attaches to education and be such as to ensure the recruitment and retention of highly motivated and capable teachers in all sectors and in all the specialisms required.

7.43 Over the past decade or so, however, persistent industrial relations problems have impeded the operation of the education system. Long-running "action short of strike" and equally long-standing teacher concerns about workload are unacceptable features of the working climate in many schools. It is essential that genuine problems be tackled and unilateral action brought to a halt as soon as possible.

7.44 The Jordanstown Agreement sets out the terms and conditions of employment of teachers. However, these are now almost 40 years old. The role of educators has changed dramatically in recent years and continues to do so – it is important those terms and conditions be regularly reviewed to reflect changes in education and teaching. There should be a review of the Jordanstown Agreement with an ambition to develop new terms and conditions that meet the needs of a modern curriculum, address concerns over workload and provide job satisfaction.

7.45 The strong educational outcomes achieved in Northern Ireland compare favourably with those in most other jurisdictions and speak of the success of its teachers. Historically, teaching in Northern Ireland has been a high-status profession and demand for places greatly exceeds the capped admission figure[406]. Each year around 540 teachers qualify from the four institutions in Northern Ireland. There are also a considerable number of additional graduate teachers that register with the GTCNI each year. These are mainly from Great Britain but also from the Republic of Ireland and further afield. On average (based on 2013–2022), 1,130 graduates register with the GTCNI on an annual basis.[407]

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406   https://www.bbc.co.uk/news/uk-northern-ireland-53840930

407   DE's annual Teacher Demand Model (TDM) produces two outputs (A and B). Output A includes adjustments for the number of non-Northern Ireland graduates who are likely to take up teaching posts in Northern Ireland. Since 2010/11, Output B has been run without the adjustments for inward and outward migration. In this scenario, the TDM does not take account of the number of non-Northern Ireland graduates who are likely to take up teaching posts in Northern Ireland or the number of Northern Ireland graduates who would not take up teaching posts in Northern Ireland. It is Output B which is used by the Department as part of the ITE student intake decision-making process for these past number of years.

7.46   DfE has however published research which indicates that, at current levels, there will be an oversupply of around 140 teachers per annum over the next 5 years. The research notes that "… the low growth in public sector spending and the likely lower levels of recruitment will influence the demand for skills in subject areas popular across the public services. These include subjects such as education and social studies. This is reflected in the supply gaps using more detailed subject categories, with the top two most oversupplied subjects being training teachers and academic studies in education"[408]. The figure of 140 is not disaggregated into subject areas or phase of education. This oversupply stands in stark contrast to England where the number of students undertaking ITE was only 71% of the target number of trainees the Department for Education (England) estimates the school system needed to recruit to meet future staffing needs[409]. Historically, in Northern Ireland only a small minority of newly qualified teachers (NQTs) is able to find a permanent teaching position post-qualification, with the majority taking up supply teaching posts for a number of years before securing permanent employment.

7.47   It is neither fair to individuals nor financially sustainable to train year on year more teachers than are required. Intakes to ITE are kept under regular review. It is important that the implications for the structure of the training system also be regularly reviewed.

7.48   However, while we there is evidence of a historical oversupply of teachers in Northern Ireland and a high demand for places, we foresee significant challenges in the future in continuing to attract and retain a sufficient workforce, as well as providing pathways for the next generation of education leaders. This issue of attracting staff is of particular concern for certain subjects or roles as well as specific sectors. In future this may have implications for the salaries structure. As in all matters relating to education, the interests of learners – in this case their need for access to teachers in an appropriate range of subject disciplines – must take priority over other interests.

7.49   There are, already, signs of emerging areas of shortage. Some of these relate to post-primary subject specialisms, especially those that require skills that can attract higher salaries in the private sector, such as mathematics, computing/IT, technology and science. These are, however, not the only cases. There is also a shortage of teachers with expertise in the area of special education needs. The Teacher Vacancy Survey indicates that the highest number of vacancies (five or more, as at 1 November 2022) exists in the following subjects/specialities:

   • mathematics
   • English
   • special educational needs.

7.50   It will become increasingly important that schools can and do act in partnership to employ specialist expertise by recruiting staff on a shared basis that can work across two or more schools. This would be of particular benefit in relation to minority subjects and could be helpful in recruitment for some STEM subjects. Joined-up employment arrangements would facilitate this further.

7.51   The growing numbers of learners identified as having special educational needs and the growing special school sector needs to be factored into workforce planning. All trainee

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408   https://www.economy-ni.gov.uk/sites/default/files/publications/economy/Skills-Barometer-2019-Summary-Report.pdf

409   Teacher Labour Market in England Annual Report 2023 - NFER

teachers should receive adequate SEN training and have the opportunity to undergo a placement in a special school or unit. Elsewhere we discuss the need for a Learner Support Workforce Programme. As part of this, there should be consideration of establishing pathways for experienced special school classroom assistants to upskill and retrain to become special school teachers. Furthermore, we have already highlighted the need for greater emphasis on SEN in all initial teacher education courses as well as the importance of a 1-year course for university graduates leading to the award of a Post-Graduate Certificate in Education (PGCE) in Special Educational Needs.

7.52   There is also an issue regarding attracting male teachers. This is not unique to Northern Ireland, but it has increased importance given our concerns about underachievement among boys. It is important they have positive male role models helping to inspire them and keep them engaged in education. The trends for the past 8 years are shown below and show an ongoing drop in the proportion of the male workforce. Indeed, between 2008/09 and 2022/23, the proportion of the teaching force made up by men dropped from 25.1% to 23.0%.[410] The figures are most stark in the nursery sector and the primary sectors, which are 100% and 84% female respectively[411].

Figure 7.b: Teacher headcount by gender, 2013/14–2022/23, Northern Ireland

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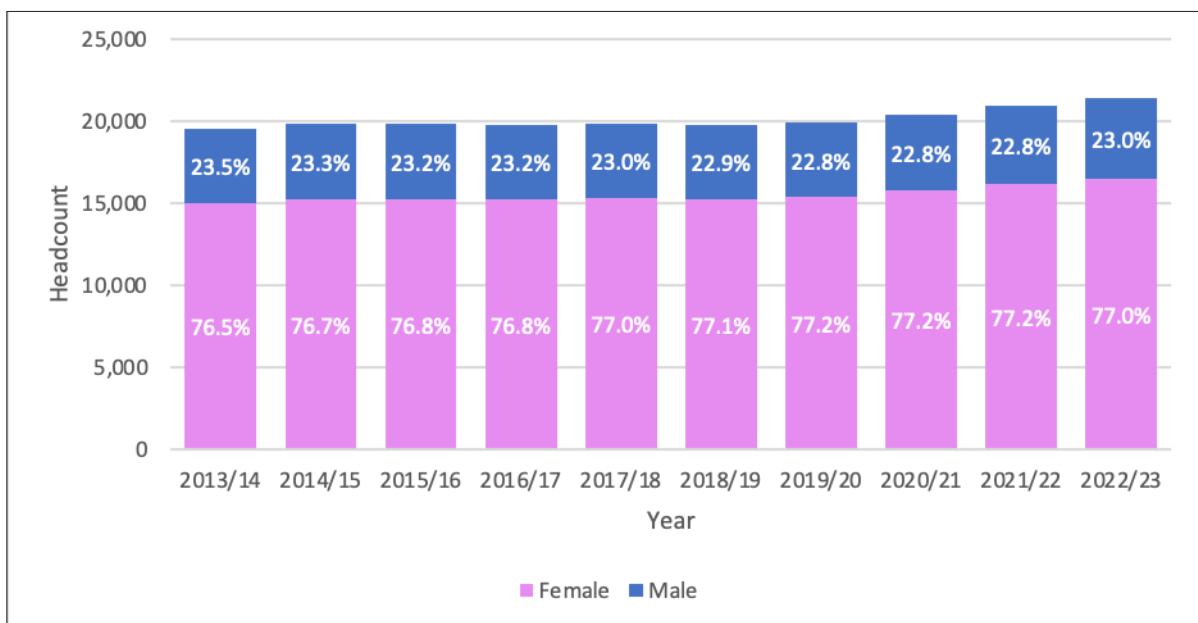
410   Pupil: Teacher rations and teaching workforce statistics 2009/10 and
Teacher workforce statistics 2022/23 | Department of Education (education-ni.gov.uk)
411   Teacher workforce statistics 2022/23

Figure 7.c: Age distribution of teachers by gender, 2017/18 and 2021/22
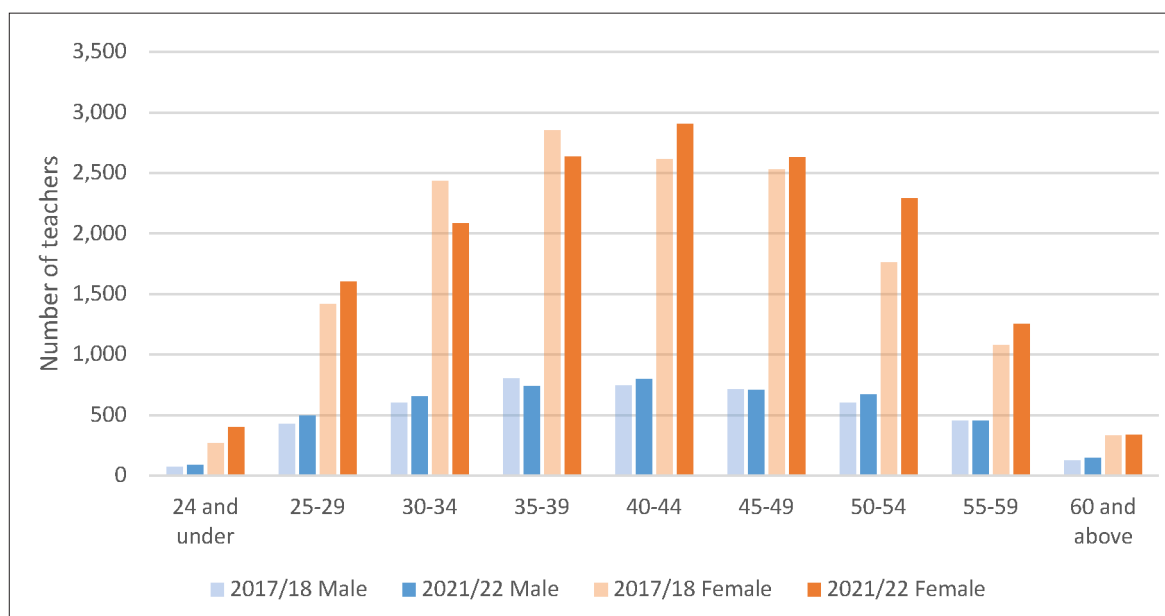
7.53 It is not legally possible to address this issue through the provision of financial incentives. However, it is important that government uses the means at its disposal including the Careers Service, advertising and publicity to increase the supply of male teachers.

7.54 The Irish-medium education (IME) sector faces problems in recruiting sufficient teachers. The Irish-medium sector is a small but growing part of the education landscape. Currently 2.1% of pupils attend Irish-medium schools or units. However, the number has increased steadily since 2015/16, with a 32.3% (to 2022/23) increase being observed over the last 8 years[412]. The increased demand for IME comes with an increased need for qualified teachers across all stages of education. To resolve this issue there is a need to establish pathways and programmes for fluent Irish speakers to qualify as teachers and for post-primary subject specialists to acquire language fluency. We recommend that DE initiate discussions with the universities and university colleges to agree how these new pathways can best be established. There may also be the need to explore recruiting fluent Irish speakers from outside of Northern Ireland and to remove any barriers to doing so.

7.55 In our chapter on early years (Chapter 1), we advocate an expansion of the existing service in a number of ways. We also recommend that those in leadership positions, including teachers, have appropriate early years qualifications. Therefore, it is essential that appropriate courses be available.

Panel conclusion

Northern Ireland has a good supply of highly qualified teachers, however, an area of significant concern is the emerging areas of shortage in some post-primary specialist subjects. There are shortages of male role models, expertise in SEN, Irish-medium staff and specialists in a small number of subjects. The training system requires to be kept under review with proactive workforce planning to address potential shortages before they arise.

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412   School enrolments - Northern Ireland summary data | Department of Education (education-ni.gov.uk)

7.56   Good leaders are vital to the success of our schools, colleges and other educational institutions. They should be well-prepared for their roles and supported to continue their learning once in post. Career-long professional development is essential. Leaders need access to support and advice. At the same time, they require a capacity for independent thought.

7.57   The task of leadership is highly demanding. The principal is the chief executive of the institution, shaping its strategy and future, managing the organisation and ultimately responsible for the learning experience provided. He/she represents the institution to the outside world and is the main contact for stakeholders, government, the Press and many others. As in all public bodies, accountability looms large.

7.58   All educational institutions are highly complex organisations. Their primary function is to provide a high-quality learning experience. However, much more is involved. Schools and early years settings accept that they are involved in the all-round development of young people. Institutions dealing with older learners also accept a duty of care. All educators deal with a very wide range of issues such as emotional wellbeing, mental health, trauma, family breakdown and the many consequences of poverty. To varying extents, all educational institutions provide pastoral care and this has major implications for the role and responsibilities of leaders.

7.59   It is the duty of those in senior management beyond the institution to ensure that leaders are challenged but at the same time supported. The various management bodies in education are there to provide necessary assistance. Their ethos should be one of responsiveness. Bureaucracy must be kept to a minimum.

7.60   At present some school leaders not only carry out the tasks indicated above but also have teaching responsibilities. This is not appropriate. Our proposals for "right-sizing" the school estate aim to achieve multiple objectives, including ensuring that all schools are both educationally viable and capable of fulfilling all the functions of a free-standing establishment.

7.61   Recruitment to these senior posts is becoming problematic. We have heard concerns from practitioners and stakeholders about increasing difficulty in filling Principal and Vice-Principal posts. It has been suggested to us that, due to workload pressures, these roles are not attractive to many teachers.

7.62   There is only limited data on this issue. However, in schools where EA was responsible for recruitment, during the period 1 January 2020 to 31 March 2023, only 82% of advertised Principal posts were filled, meaning on average that one in five vacant posts remained unfilled. Similarly, 89% of vacant Vice-Principal posts were filled, with one in ten remaining unfilled. With 65 Principals and 30 Vice-Principals retiring in EA schools in the same time period[413], it is of concern that schools are struggling to fill these posts.

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413   Data provided by EA's Human Resources and Corporate Services Directorate.

Panel conclusion

Educational institutions are complex organisations. The task of leading them is highly demanding. It is imperative that leaders are well supported and bureaucratic demands minimised. There are signs of difficulty in recruitment to senior posts, possibly because of workload pressures, concerns regarding terms and conditions and the desire for greater work-life balance. It has been put to us that school leadership is a less attractive occupation than it once was. This issue requires to be addressed.

In tandem with a review of the Jordanstown Agreement, DE should be developing a Workforce Strategy to bring forward innovative solutions to attract and retain teachers, improve professional development, target specific workforce shortages and, ensure future leaders are empowered and supported.

A flexible workforce

7.63   Northern Ireland experiences a remarkable degree of stability in staffing. While it is difficult to ascertain data on length in service and direct comparisons can be problematic, statistics on the age profile show a workforce that is older than that of other UK nations and most other OECD countries. This suggests a workforce that is more experienced and has higher retention rates than other places (or other professions). These can be considered positive features.

Table 7.d: Percentage of teaching workforce in each age range, Northern Ireland, 2018/19[414]

Country	Less than 30	30–39 years	40–49 years	50–59 years	60 and over
Northern Ireland	10.8	33.0	33.8	20.1	2.4

Table 7.e: Percentage of teaching workforce in each age range, OECD countries, 2018[415]

Country	Less than 30	30–39 years	40–49 years	50–59 years	60 and over
Austria	13.12	20.36	26.37	30.29	9.86
Belgium	15.78	29.18	26.36	24.73	3.96
Colombia	11.78	28.62	24.85	23.61	11.15
Costa Rica	8.78	36.25	30.16	20.81	3.99
Denmark	14.69	21.91	27.60	22.43	13.37
Estonia	9.20	19.04	25.53	27.73	18.50
Finland	8.73	23.62	29.82	28.79	9.04
France	9.86	26.21	34.62	24.54	4.77

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414   Teacher workforce statistics 2018/19 | Department of Education (education-ni.gov.uk)
415   Distribution of teachers by age and gender (jisc.ac.uk)

Country	Less than 30	30–39 years	40–49 years	50–59 years	60 and over
Germany	14.01	26.38	23.83	23.76	12.03
Greece	4.34	18.68	30.46	39.94	6.59
Hungary	5.78	20.26	31.27	32.31	10.39
Japan	16.71	23.95	25.85	26.86	6.64
Korea	14.23	27.99	29.60	21.98	6.20
Latvia	9.81	17.88	28.54	28.85	14.93
Lithuania	5.21	17.05	29.22	33.65	14.88
Luxembourg	16.40	36.84	25.86	18.18	2.73
Netherlands	15.10	27.05	21.08	23.54	13.23
New Zealand	13.75	20.82	26.98	23.08	15.37
Norway	17.13	23.98	27.54	19.24	12.11
Portugal	1.95	18.00	36.26	33.63	10.16
Slovak Republic	8.45	25.70	26.58	27.28	12.00
Slovenia	8.01	25.76	29.49	30.48	6.26
Spain	5.85	24.98	32.01	29.89	7.28
Sweden	10.78	22.09	29.06	24.42	13.65
Switzerland	10.82	23.78	27.49	27.87	10.05
Turkey	18.59	41.18	27.58	10.58	2.08
UK	20.24	30.51	25.00	18.46	5.80
Average	11.45	25.11	28.11	25.81	9.52

7.64 The development of a professional team requires some consistency in membership. Relationships with learners are adversely affected by rapid staff turnover. Northern Ireland has, therefore, historically benefitted from many teachers giving a long-term commitment both to the profession and to their schools. This should be valued, encouraged and retained.

7.65 However, both schools and individual teachers also benefit from new ideas and fresh experiences. Too little movement can inhibit the process of cross-fertilisation of ideas and sharing of professional expertise. At present, it is not uncommon for teachers to remain in a post for 20 years or more. Career advancement may largely consist of moving to posts of increasing seniority but within the same school. The system would benefit from increased flexibility and more opportunities for teachers to move to new schools, settings and sectors.

7.66 It is frequently said that the employment arrangements in Northern Ireland inhibit movement. The EA employs teachers within Controlled schools (including Controlled Integrated). CCMS employs teachers within Catholic Maintained schools. Other Maintained, voluntary grammar and Grant-Maintained Integrated schools are all responsible for the employment of their own teaching staff. Within the Other Maintained, voluntary grammar and Grant-Maintained

Integrated schools, it is impossible to move school without changing employer. However, this is not the case in the Controlled and Maintained sectors.

7.67   It is also worth noting that England has a large number of employers of teachers. These include academy trusts, standalone academies and others. Scotland has 32 local authority employers and single-school employers in the case of some special schools. It is not clear that the existing arrangements should impede movement of teachers any more than these other patterns of employment elsewhere in the UK.

7.68   We suggest that in advance of moves towards a single Authority, the relevant employers should consider how to promote greater mobility in their own sectors and should work with other employers to create a contract which would allow for time-bound secondments across sectoral boundaries.

7.69   The benefits of increased teacher mobility go beyond issues of professional development. There would also be benefit if more teachers had experience of working in different sectors. A recent paper by Ulster University's Transforming Education project[416] noted that, "The distribution of teachers between the various sectors of education in Northern Ireland demonstrates notable levels of consistency in respect of community identity. In 2018, over 1,000 teachers completed an online survey conducted through the UNESCO centre at Ulster University. It was shown that 2% of those teachers employed in Catholic Maintained (CCMS) primaries had attended a Controlled primary school in Northern Ireland and that 7% of those teachers employed in Controlled primary schools had been educated in a CCMS primary. Similarly, 8% of those teaching in CCMS post-primaries and 17% of teachers in Catholic voluntary grammar schools had attended non-Catholic primaries in Northern Ireland, while 17% of those employed in Controlled post-primary schools and 23% of teachers in non-Catholic grammars had attended CCMS primaries. The 7% of pupils who attend integrated schools are taught by a cohort of teachers that, on the whole reflects the target composition of the pupil body i.e., 40% Catholic, 40% non-Catholic, 20% "other"."

7.70   This research also found that many teachers follow a community-consistent career pathway, working within those sectors associated with their community of origin, having attended primary, post-primary and initial teacher education establishments associated with their community. These teachers were described by the authors as "culturally encapsulated".

7.71   It is important that we have a more flexible employment model to ensure teachers have greater breadth of experience. Collaboration between the different employing authorities should be used in order to promote movement on either a temporary or permanent basis between sectors. Discussions should take place with the Governing Bodies Association Northern Ireland (GBANI) with a view to facilitating temporary movement by guaranteeing a right of return to the teacher's original post.

7.72   Movement between schools and across sectors can also be used to promote school improvement. Short-term secondments were used in this way very effectively as part of the London Challenge. Secondments gave some teachers experience of working in better-performing schools while others were used to introduce improved working practices into weaker schools or subject departments.

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416   TEUU_Report_01_Feto_Final.pdf (ulster.ac.uk)

7.73   Experience in different schools and sectors is a source of strength and should be seen as such by appointment panels. The benefits of a more mobile workforce should be emphasised in governor training. In the same way, periods of secondment to other schools/colleges or, indeed, to experiences outside education, enlarge experience. Again, it is important to make those serving on appointment panels aware of the advantages.

> **Panel conclusion**
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> Although workforce stability is a source of strength, there is a need for greater movement between institutions, either on a permanent basis or through the use of secondments.
>
> Teachers should have knowledge of the education system as a whole but too many spend their careers in the same sector in which they were themselves educated. This is a matter of concern and requires to be addressed.

A professional workforce

7.74   Teaching is a profession. Teachers require to be educated to graduate level. They undergo extended training and take part in ongoing professional development. Furthermore, to retain public confidence, teachers must adhere to prescribed professional standards. The system, therefore, needs an effective regulatory body.

7.75   The history of the General Teaching Council Northern Ireland (GTCNI) has been characterised by poor performance and serious governance issues. It was established in 2002 to enhance the status of teaching and promote the highest standards of professional conduct and practice. Under its founding legislation, its functions were to establish and maintain a register of teachers; approve qualifications for the purposes of registration; regulate teachers in relation to serious professional misconduct, and provide advice to DE and employing authorities on registration, professional learning, career development and performance management of teachers, standards of teaching, and standards of conduct for teachers.

7.76   Since 2015, there has been a series of reviews that identified significant concerns regarding strategic leadership, direction and decision-making within the Council. An independent board effectiveness review in 2021[417] found entrenched problems that could not be resolved. The Minister of Education announced in December 2021[418] that the GTCNI would be dissolved and work has been ongoing regarding a replacement model.

7.77   Establishing an effective professional body for teachers is of fundamental importance. It should not simply be concerned with the administrative function of maintaining a register but should play a key role in setting, maintaining and improving standards of teaching and learning. It must perform in a manner which commands public confidence.

7.78   Work is under way in DE to determine how the functions of the GTCNI should be carried out

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417   General Teaching Council – Board effectiveness review by Baker Tilly Mooney Moore (November 2021). https://www.education-ni.gov.uk/publications/general-teaching-council-northern-ireland-board-effectiveness-review-executive-summary-report

418   Ministerial statement to the Northern Ireland Assembly on Monday 13 December 2021. Ministerial Statement - GTCNI - 13 December 2021 | Department of Education (education-ni.gov.uk)

in the future[419]. Consideration is being given to whether a new council is needed or whether functions should be subsumed into other organisations (such as DE or the EA). We believe it is essential to recognise the professionalism of the teaching workforce by re-establishing a teaching council. As indicated below, this could usefully develop over time into a council for the wider education workforce.

7.79   We suggest that the new council should carry out the following core functions:

- Setting the professional standards to which teachers must adhere.
- Co-designing with key stakeholders an agreed common curriculum for ITE.
- Co-designing with stakeholders an induction phase covering a period of 2–3 years after first entry to employment in teaching.
- Managing a register of teachers. This involves initial registration of teachers, maintaining registration and removing teachers from the register on grounds of incompetence, unacceptable unprofessional behaviour or any other disbarring activity such as conviction for serious criminal offences. There should be a mechanism to ensure Courts refer cases of criminal conviction to the body. Employers should also be obliged to report cases involving serious concerns.
- Ensuring reasonable regular professional update and continuing professional development. **This should be monitored and should be a universal professional obligation.**
- Setting out a code of conduct and competencies.
- Managing complaints (recording, investigating, actioning etc.).
- Providing professional advice and support to schools/employers.

7.80   It would be a requirement for teachers in schools to be registered with the Council. As soon as practicable, this requirement should be extended to college lecturers. Therefore, in the longer term, we recommend extending the role of the Council so that it would become an **Education Workforce Council**. Its responsibilities would cover all professionals and para-professionals employed within the publicly funded education service, other than in universities.

7.81   The prime responsibility for dealing with professional underperformance and misconduct does not lie with any council but with the employer. In the first instance, this will mean with the Principal or, where the Principal is personally involved, with the BoG or equivalent. Clear procedures need to be in place and Principal and board members require to be trained in their operation.

7.82   Public confidence in the profession and, indeed, in the education system depends on underperformance being tackled timeously and seriously. This includes issues of teaching competence as well as more specific failures and misconduct. There is some evidence that competence issues do not always receive the attention they should. Each institution has a responsibility to ensure that any shortcomings in this respect are rectified.

7.83   A chief concern, given the history of the GTCNI, is the composition and structure of the Council itself. The primary purpose of the Council is to act in the public interest. Its composition must reflect that purpose. It should have a majority of lay members who are selected using skills-based criteria and a public appointments process. They should include members drawn

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419   https://www.education-ni.gov.uk/consultations/consultation-functions-currently-delivered-by-general-teaching-council-northern-ireland-gtcni

from business and industry, academia and persons able to represent the views of parents and young people.

7.84 At the same time, a strong teacher voice is absolutely essential. Teacher members should be elected using a small number of separate constituencies to ensure a balance of sectors and between classroom teachers and senior staff. The overall size of the Council should be manageable. Total membership should be around twelve.

7.85 It will be important to avoid confusion between the disciplinary procedures of the Council and the processes used by employers in relation to poor performance or unsatisfactory conduct. It is possible – although it will probably not occur often – for the Council to initiate action in cases where no action is being taken by the employer. These will almost certainly relate to cases of alleged misconduct or incompetence, potentially sufficiently serious to warrant dismissal. In such instances employers will subsequently wish to have regard to any action short of removal from the register taken by the Council. Should the Council withdraw registration, it becomes illegal to employ the teacher and the employer must implement the Council's decision. Employers are, of course, free to take action on their own, independent of the Council. Serious cases should be reported to the Council after the employer has reached a decision. In appropriate circumstances, the employer may dismiss the teacher for reasons that do not merit grounds for deregistration.

7.86 A further consideration is the degree of independence that the council should enjoy. In the first instance, it would seem wise to ensure the priority of the public interest by giving the council a status akin to that of an ALB, thus reserving a limited right of intervention to DE.

7.87 It will be important to avoid confusion between the disciplinary procedures of the council and the processes used by employers in relation to poor performance or unsatisfactory conduct. It is possible – although it will probably not occur often – for the Council to initiate action in cases where no action is being taken by the employer. In such instances, employers will wish to have regard to any action short of removal from the register taken by the council. Should the council withdraw registration, it becomes illegal to employ the teacher and the employer must implement the council's decision. Employers are, of course, free to take action on their own, independent of the council. Serious cases should be reported to the council after the employer has reached a decision. In appropriate circumstances, the employer may dismiss the teacher for reasons that do not merit grounds for deregistration.

Panel conclusion

We recommend that the General Teaching Council be re-established with the functions set out above. The status and the composition should be determined in accordance with the principles outlined above. Consideration should be given at a later date to extending the categories of employee to be included in the scope of registration, hence becoming an Education Workforce Council.

Poor performance on the part of any member of staff is a matter of concern which the employer must address. This is separate from employer obligations in relation to registration.

Recommendations and actions

7.88 Throughout the chapter, we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

ITE should be kept under review to ensure that its content is appropriate. Topics such as special education needs and pupil wellbeing should be given greater emphasis than at present.

ITE providers must ensure that student teachers have placements in schools in different sectors and with a different ethos.

The new single department responsible for learning and skills should review the structure and delivery of ITE.

Education must invest in professional development of its entire workforce to ensure a culture of continuous improvement and sharing of best practice. There should be an increase in resource and the system should ensure teachers have the necessary time to undertake professional development.

A more formal structure should be created for professional development. This would involve:

- All educational institutions having in place a policy on CPD for their staff.
- The new Education Workforce Council setting down expectations both in relation to the period of induction into the profession and continuing professional development thereafter.
- DE managing a centralised fund that could be allocated to schools that have such a policy in place.
- Educational institutions having delegated responsibility to source CPD via external providers, alongside sharing good practice within and across institutions.
- Schools monitoring the impact of such professional development.
- All educators recording their own professional learning and development.

There should be a review of the Jordanstown Agreement to develop new terms and conditions to reflect changes in the education landscape.

In order to increase the supply of Irish-medium teachers, courses should be available to both qualified teachers with insufficient language expertise and fluent speakers lacking teacher qualifications.

All trainee teachers should receive adequate SEN training and have the opportunity to undergo a placement in a special school or unit. There should be pathways for experienced special school classroom assistants to upskill and retrain to become special school teachers. A 1-year course for university graduates leading to the award of a Post-Graduate Certificate in Education (PGCE) in Special Educational Needs should be established.

The Department should use available means such as careers advice and publicity to attract more men into teaching.

In tandem with a review of the Jordanstown Agreement, DE should be developing a Workforce Strategy to bring forward innovative solutions to attract and retain teachers, improve professional development and ensure future leaders are empowered and supported.

DE should ensure the Workforce Strategy identifies and addresses the significant concerns regarding the shortage of IM, SEN, and specialist subject teachers in some subjects in post-primary.

The GTCNI must be re-established to oversee adherence to professional standards and conduct.

As soon as practicable, this requirement should be extended to cover all professionals and para-professionals employed within the publicly funded education service, other than in universities – with the GTCNI becoming an Education Workforce Council.

CHAPTER 8 – STRUCTURES AND A SINGLE SYSTEM

Introduction and context

8.1   The issue of a "single system" of education has evoked significant interest during our Review and receives specific attention within New Decade, New Approach (NDNA) and our Terms of Reference. NDNA[420] also states that the existing system of education is not viable in the long term and that the Review should focus on quality and sustainability. It refers to a shared desire to "support educating children and young people from different backgrounds together"[421].

8.2   Neither document provides a clear definition of "single system". However, the fact that the Review is expected to consider "the prospects of moving towards a single education system" suggests that those who wrote and agreed the Terms of Reference believe that Northern Ireland does not currently have a "single system" but that it should. During our engagement, both these points have been contested.

8.3   Those who argue that a single system of schooling already exists tend to highlight that there is a single:

- Department of Education;
- Northern Ireland curriculum;
- Inspectorate for all schooling (and further education);
- Funding model for all schools;
- IT infrastructure for schooling;
- Careers Service;
- Qualifications framework;
- Policy framework across schooling for safeguarding, child protection, anti-bullying, health and safety, etc.

8.4   In addition, there are very few private/independent schools, with the state sector being almost a "single system".

8.5   Some of these points are open to dispute. For instance, although there is a single department for schooling, responsibility for further and higher education lies with DfE. Some people have suggested to us that, while there is a common curriculum, aspects of its delivery may differ across sectors.

8.6   Those who believe that Northern Ireland currently does not have a "single system" tend to highlight three core issues.

- The **administration of education** is unnecessarily complex and leads to fragmentation and duplication. They point to the separation of responsibilities between two lead departments and the existence of numerous arm's-length bodies and sectoral bodies as evidence of this.

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420   *New Decade, New Approach* (January 2020), p.7. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/856998/2020-01-08_a_new_decade__a_new_approach.pdf

421   *New Decade, New Approach* (January 2020), p.7.

- The **schooling system has a number of different sectors**, **employers and governance arrangements.** This leads to a perception of complexity and waste as well as inequitable treatment across sectors and competition between key education partners (such as schools and colleges). In addition, some stakeholders consider the use of academic selection by way of a test at age 11 to be evidence of a further unnecessary cause of division.
- **School enrolments demonstrate significant division of learners on the grounds of religion or community background.** Our analysis suggests than in 2021/22, 85% of primary school learners and 76% of post-primary learners attended a school where the minority group comprised of less than 10% of the enrolment. The need to promote learners learning together is discussed later in this chapter.

8.7   Those who argue for or against a single system tend to focus on schooling rather than education as a whole. Our remit extends beyond the schooling system and the phraseology in NDNA clearly refers to a "single **education** system".

8.8   Some of these arguments can be contested and some of the organisational complexities are often exaggerated. For instance, it is often suggested that the number of different sectors leads to variances in funding allocations. In reality, funding is distributed to schools via the Common Funding Scheme (CFS). This allocates resources to schools according to the relative need of their pupils, and in a way that enables the effects of social disadvantage to be ameliorated. The sector to which the school belongs has very little bearing on the funding that the school receives.

8.9   Additionally, the cost of the different educational bodies in Northern Ireland is often overstated. The total funding provided to CCMS, NICIE, CnaG, CSTS, CSSC and the GBA in 2021/22 was £6.8m[422,423]. If their functions were transferred to one organisation, a lot of those costs would remain. There may be valid arguments for considering changing the sectoral arrangements and consolidating functions but reducing costs by reducing the number of sectoral bodies is not a persuasive one.

Panel conclusion

Wording within New Decade, New Approach and the Terms of Reference for the Review suggests that there is general perception that a single system would be desirable but that Northern Ireland currently does not have one.

There are three key issues to be addressed when considering the extent to which the existing system should be simplified and made more uniform:

- Are the administrative structures effectively meeting the needs of the learner and Northern Ireland's society and economy?

- Are schools, colleges and other educational settings working together for the good of the learner and society?

- Is sufficient effort being made to ensure that learners from different community backgrounds have the opportunity to learn together on a regular basis?

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422   Answer to Assembly Written Question 26590/17-22 (December 2021)
423   Includes both Resource DEL and AME.

8.10 The debate regarding a "single system" has highlighted important issues and suggested ways in which the education system could be improved. Whether future changes result in a "single system" is of secondary importance to ensuring that improvements are made which result in an "excellent system".

8.11 In our interim report we stated that an excellent education system should bring benefits to individuals, society and the economy. It should:

- Put the needs of learners first and ensure they are fully supported by a skilled and committed education workforce in well-resourced settings. The system will protect and promote their wellbeing, respecting the reasonable rights of parents to ensure that children are educated in accordance with their religious and philosophical convictions[424]. Individuals will be treated fairly and the system will promote equity in society.

- Promote community cohesion, respecting the culture, identity, language and values of learners, families and communities. It will be transparent and accountable to learners, families and stakeholders. Educational decision-making will be largely delegated to those responsible for delivery, thus helping ensure that the system inspires public confidence.

- Equip learners at every stage of life with the knowledge, skills and attitudes to make a positive contribution to society and the economy. The system will cultivate critical thinking, resilience, adaptability and the ability to thrive in times of change. At the same time, it will make efficient and effective use of resources.

8.12 The delivery of such an education system should be the goal. The recommendations made throughout this Report are intended to realise this objective.

Panel conclusion

The issue of a "single system" should be of secondary importance to the need for an "excellent system". The interests of the learner should take precedence over those of educational institutions and vested interests. Collaboration rather than competition should be a guiding principle. The system should promote excellent educational outcomes for all learners. Such an approach can accommodate choice. There is no need to insist on uniformity.

Structures that meet the needs of the learner, society and the economy

8.13 The administration of schooling in Northern Ireland gives an impression of complexity. Numerous arm's-length bodies and sectoral bodies, boards of trustees and others seek to manage, support and advocate for a wide range of types of school. Schools may be distinguished from each other by religious faith, academic selection or its absence, pupil gender, language of instruction or any combination of these factors. This system is the product of history rather than design, with new varieties of school – Integrated and Irish-

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424 "In the exercise and performance of all powers and duties conferred or imposed on them by the Education Orders, DE and boards shall have regard to the general principle that, so far as is compatible with the provision of efficient instruction and training and the avoidance of unreasonable public expenditure, pupils shall be educated in accordance with the wishes of their parents"; from The Education and Libraries (Northern Ireland) Order 1986 (No. 594 (N.I. 3)), (1986), article 44.

medium – being added in relatively recent times. There are also differing employment arrangements in the Controlled and Maintained sectors and sub-divisions in governance within the relatively small Integrated and Irish-medium sectors. All this adds to an appearance of undue fragmentation.

8.14   Some attempts have been made in the past to simplify the structure. However, as Dr Tony Gallagher explains in *Education, Equality and the Economy*[425], outcomes have been, at best, a compromise. The following table demonstrates this with regard to the Review of Public Administration (RPA), which was launched in 2002.

Table 8.a: Northern Ireland education system governance – before RPA, goals of RPA and outcomes of RPA

Before RPA	Goals of RPA	Outcomes of RPA
a) Department of Education b) 5 Education and Library Boards c) Council for Catholic Maintained Schools d) Comhairle na Gaelscolaíochta e) General Teaching Council (Northern Ireland) f) Council for Integrated Education g) Council for the Curriculum, Examinations and Assessment h) Staff Commission for ELBs i) Youth Council j) Middletown Centre for Autism Ltd	a) Department of Education b) Single strategic authority c) Advisory Forum d) General Teaching Council (Northern Ireland) e) Youth Council f) Middletown Centre for Autism Ltd	a) Department of Education b) Single Education Authority c) Council for Catholic Maintained Schools d) Comhairle na Gaelscolaíochta e) Controlled Schools Support Council f) General Teaching Council (Northern Ireland) g) Council for Integrated Education h) Council for the Curriculum, Examinations and Assessment i) Youth Council j) Middletown Centre for Autism Ltd

8.15   We do not accept the view that the current administrative arrangements impose large-scale unnecessary costs (although modest savings could be made) but we do believe that there is scope for rationalisation and simplification. This would bring greater efficiency, assist public understanding and obviate unnecessary controversy. It is worth noting that the issue of over-complexity does not affect other parts of the overall education system in the same way as schooling.

8.16   However, simplifying structures does not necessarily mean rationalising organisations. There may be good reasons for having different organisations to deliver tasks that appear similar but that should be kept separate, either to maintain a clarity of focus or to guard against conflicts of interests. A simpler structure should also make it easier to ensure that due attention is given to the interests of smaller sectors and minority groups.

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425   [Education, Equality and the Economy by Tony Gallagher - DocsLib](#)

> ### Panel conclusion
>
> Northern Ireland could significantly benefit if unnecessary fragmentation or duplication, where it exists, were removed or rationalised. There are legitimate arguments that the current design is complex and cumbersome and there are examples of duplicated provision that can lead to wasted resources (although the extent of this is often exaggerated).
>
> Equally important is the significant evidence of poor service delivery for learners and institutions and widespread frustration among practitioners.
>
> There is potential to simplify the structures of education, create greater consistency and ensure all learners and all institutions receive excellent and equitable services.

A single department

8.17   Education is a journey that begins before birth and continues into adulthood. To ensure continuity and smooth progression from one stage to the next, responsibility for policy and service delivery should, as far as is possible, rest within a single entity.

8.18   There is a single government department for schooling but not a single department for education. Responsibilities are split between DE and DfE. This does not properly reflect the nature of the learner journey and can, on occasion, lead to confusion and a disconnect in policy delivery. This is particularly true where responsibilities overlap as in the case of provision for learners in the 14–19 age group, which urgently requires improved collaboration. Furthermore, this stage of the lifelong education journey should offer an easy transition into any form of learning in adulthood. This can be more easily achieved within a reformed departmental structure.

8.19   We therefore recommend the establishment of a new unified department for learning and skills to lead on policy making for all stages of education. This would include early years education, schooling, further and higher education, training, apprenticeships at all levels and lifelong learning[426].

8.20   This change would bring about improvements in a number of areas including promoting collaboration between schools and colleges, the delivery of initial teacher education and the promotion of lifelong learning. However, the link between further and higher education and the needs of the economy is of vital importance and a strength of the current arrangements. It must be protected within the restructuring. A unified department could promote greater synergy between the education system in its entirety and the needs of the economy.

A single curriculum advisory council

8.21   [Chapter 4](#) sets out the case for increased resources and new structures for curriculum support.

8.22   The Council for the Curriculum, Examinations and Assessment (CCEA) is responsible for keeping under review all aspects of the curriculum, examinations and assessment for grant-aided schools and colleges of further education and for undertaking statutory consultation

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426   To include to current responsibilities of DE and the Skills and Education Group within DfE (apprenticeships, careers

on proposals relating to legislation. It was responsible for drawing up the current Northern Ireland curriculum, which remains generally well-regarded. However, it is currently under-resourced in relation to its curriculum responsibilities and can provide only limited services to schools. At present, its resources are largely used in fulfilling its duties in relation to assessment and qualifications. These include acting as the regulatory body.

8.23   It would now be appropriate to separate the curricular and assessment/qualifications functions. This gives an opportunity to rebuild and properly resource the curriculum service.

8.24   This standalone curriculum body would have responsibility for:

- Keeping the curriculum framework under continuous review. This should include ensuring that the content prescribed is not excessive.
- Recommending curricular changes.
- Advising on the inclusion of work-related content to the curriculum
- Advising the body overseeing assessment and qualifications of implications for what is assessed and how.
- Advising educational institutions regarding curriculum content, pedagogy and associated matters.
- Providing support to institutions and professionals.

8.25   Chapter 4 contains a number of important recommendations relating to the curriculum. We are concerned that delivery of these recommendations could be delayed pending the establishment of the body referred to above. Therefore, in the interim, there should be an adequately resourced curriculum taskforce (including departmental officials, CCEA staff and other educationalists and professionals) to take forward the most pressing recommendations on curriculum reform as quickly as possible.

8.26   Northern Ireland should have separate bodies with oversight respectively of the curriculum and of assessment and qualifications. CCEA should be reconstituted as the Assessment and Qualifications Council for Northern Ireland. A curriculum council for Northern Ireland should be set up as quickly as possible with its more urgent tasks being undertaken in the interim by a curriculum taskforce. The curriculum and assessment bodies, although separate, would be expected to work collaboratively.

A single inspection and improvement body

8.27   Northern Ireland already has an inspection body, the Education and Training Inspectorate (ETI), dealing with schools and colleges. It is important that the Inspectorate have within its ranks expertise in relation to all sectors of education, particularly SEN but also smaller sectors such as Irish-medium.

8.28   Its legislative position should be strengthened in line with provision elsewhere in the UK to make obstruction of the inspection process an offence. See Chapter 9.

8.29   It is important to emphasise that inspection is intended to be part of a process of educational improvement. Although inspections necessarily involve making judgements, the primary purpose is to help the institution make improvements to the service it provides to learners.

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and vocational education, higher education, skills, further education, tertiary reform, quality improvement).

A single professional body

8.30 A new General Teaching Council for Northern Ireland should be set up. Over time, this should evolve into an **Education Workforce Council**. Its governing body would represent both the public and teacher professional interests. It would maintain a register of people deemed fit to teach in Northern Ireland's schools and colleges and establish and maintain professional standards. This proposal is set out in greater detail in Chapter 7 dealing with supporting the education workforce.

A strategic authority for planning and a single authority for education

8.31 Central to our considerations regarding a single education system and effective structures is how we manage, support and plan for our schools, colleges and other institutions. There are two main areas of concern. The first is the appropriateness of the current apparently over-complex arrangements. The second concerns the effectiveness of the support offered, particularly to schools, through the Education Authority.

Planning for schools

8.32 The current arrangements for reviewing the network of schools through area planning are ineffective. 17 years after the Bain report was published, Northern Ireland still has many non-viable schools and sixth forms. We have reviewed the existing sustainability thresholds and recommend retaining the figure for primary schools (105/140) but increasing the thresholds for post-primary (600) and sixth forms (240). We have also advised on efficient enrolments. These thresholds should be seen as minimum enrolments and enforced accordingly.

8.33 These proposals require a new approach to area planning as set out in Chapter 9. A single, independent fixed-term planning commission for education, operating within the existing legislative framework should be established with the aim of carrying out a complete review of the estate and achieving a "right-sizing" of the network of schools.

8.34 This should be seen as a short-term exercise to deliver a specific task. There also needs to be a longer-term solution in the form of a single strategic planning authority for all publicly funded schools and colleges. The intention of having a single authority is to vest all planning responsibilities in one organisation charged with delivering a learning-centred approach. Processes would be more streamlined, consistent and speedy. It is possible that planning responsibilities could sit with the new department or in a single organisation responsible for planning and supporting schools or in a separate body. We suggest that the new department would be the most appropriate single authority.

Supporting and managing schools

8.35 All grant-aided schools are managed on a day-to-day basis by a Principal, often supported by a number of senior colleagues with the Principal being accountable to a BoG, which provides strategic direction and is responsible for the good governance of the school. All grant-aided schools (with the exception of special schools or schools established in hospitals) are funded under the Common Funding Scheme (CFS). The Education Authority is the funding authority for all grant-aided schools covered by the CFS and is the Managing Authority for Controlled schools. The BoG, supported by CCMS, is the Managing Authority for Catholic Maintained schools with the BoG being the Managing Authority in all other grant-aided schools.

8.36 The EA was formed in 2015 after a protracted period of political debate. It replaced the five area-based Education and Library Boards but its responsibilities were not as extensive as was originally planned. The circumstances of its formation were not auspicious and a considerable period elapsed before it had a permanent chief executive and a relatively settled senior management group.

8.37 Our consultations with senior school staff, particularly in the Controlled sector produced a consistent pattern of criticism of the EA. The strong message from school leaders is that they want customer-focused, responsive and value-for-money services to meet the needs of their school and their learners. **This is not their current experience.**

8.38 Principals offered severe criticism of services provided in relation to minor works, maintenance and procurement as well as support services for learners with SEN. They have stated that the EA is not sufficiently customer focused or, perhaps, it is not entirely clear who its customers are. There is widespread frustration because of a perceived lack of responsiveness. The practice of working from home (while school leaders and teachers are in school) makes it difficult for schools to engage with the most appropriate member of staff or receive consistent advice when dealing with a succession of different staff members. Of course, this practice is not unique to the EA and is common across much of the public sector. It is essential that schools be kept aware of appropriate named contacts and that, where appropriate, this be done on a geographical basis.

8.39 The recent landscape review of the EA[427] produced similar findings and highlighted many of the same failings that have been highlighted to us. The report made 13 recommendations on the themes of:

- future form, function and financing of the EA;
- improvements required to support organisational effectiveness; and
- governance, accountability and relationships.

8.40 The report indicated that matters have improved over recent years but that many aspects of the operation of the EA remain profoundly unsatisfactory.

8.41 A key consideration for us, therefore, is whether to endorse and perhaps augment recommendations in the landscape review or to take the opportunity to recommend that the management arrangements for some or all groups of schools be changed and the EA reorganised as part of that process. If the performance of the EA is agreed to be suboptimal, a key question is whether it has the ability to reform and transform itself or whether the transformation has to be directed externally.

8.42 A relevant consideration is that Maintained post-primary schools tend to perform above expectations in relation to socio-economic circumstances and to a higher overall standard than Controlled schools. It has been suggested that this is due, at least in part, to a positive ethos within the Maintained sector fostered by strong leadership and school support from CCMS. By contrast, Principals in the Controlled sector have suggested that the EA is stretched too thin and is conflicted by servicing all school types, leaving Controlled schools relatively unsupported. At the very least this would indicate that sectors should be supported with greater consistency and equity.

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427   DE. Education Authority Landscape Review June 2022.pdf (education-ni.gov.uk)

8.43   The managing authority role has always been a challenge because the EA also provides a wide range of services to all other schools. This results in complicated systems for school management, which are, in particular, suboptimal for the Controlled sector. This is a problem that must be resolved. This has been compounded by the terms of the Integrated Education Act (Northern Ireland) 2022[428], which imposes on the Authority the duty to support integrated education.

8.44   From the EA's perspective, there appears to be an issue for schools (and possibly some staff) in understanding the role of the organisation, given that it acts as managing authority to the Controlled sector while supplying a myriad of different services to schools in all sectors and having an additional responsibility in relation to the Integrated sector. Within the EA's "customer" base, schools outside the Controlled sector appear to want flexibility to pick and choose services delivered to them on an "à la carte" basis. There is little clarity about which services are mandatory and which are optional. The reported lack of customer focus is therefore not entirely surprising given the lack of clarity on the EA's role in respect of different sectors and different schools within the different sectors.

8.45   There are, of course, wider problems within the structure of the EA. Its current form and functions bring into question whether the scope of the organisation is too large and varied to be effective. A recurring theme in Baker Tilly review[429] and in our own evidence gathering is a culture of silo-working, lack of clarity about role and poor customer service.

8.46   The EA is expected to deliver managerial services to schools[430] and, in some respects, control their activities. At the same time it is expected to provide support services which enhance educational outcomes[431]. There are important differences between these two types of activity. The former is about management and control. There is often little connection directly to educational activities. In these instances the EA is acting as an authority, and an ethos reflecting the power relationship with individual institutions is not wholly out of place. The latter functions are educational and focused on the development of the learners and professional capacity of the workforce. This requires a learner-focused culture, educational expertise and a strong customer service ethic.

8.47   For the longer term, logic strongly suggests a need to restructure and split the EA to recognise these two distinct roles:

- a single authority responsible for employment and other transactional support services;
- an early intervention and learner support agency.

8.48   In carrying out such a far-reaching reorganisation, it will be important to guard against unnecessary cost and complexity, the proliferation of separate agencies and the development of silo-working across organisations rather than within. School leaders, parents, learners and others should find using the various services to be straightforward. Such a complex change will necessarily take time to design and deliver. In the short term, however, there should be more limited change.

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428   Integrated Education Act (Northern Ireland) 2022 (legislation.gov.uk)

429   Landscape Review of the Education Authority (2022) (https://www.education-ni.gov.uk/publications/landscape-review-education-authority-ea)

430   Including roles such as Infrastructure and Capital Development; Transport; Facilities Management; Financial Support and Procurement; ICT; Budgetary Control; and Legal Advice.

431   Including roles such as Children and Young People Services; SEND Support; Pupil Wellbeing and Protection; Youth Services; School Improvement and Professional Development.

8.49   The immediate need is to have a specific support function for the Controlled sector. This could be achieved, without the need for legislation, by establishing a specific directorate within the current EA to mirror arrangements in the Maintained sector.

8.50   We see the longer-term objective as moving to a position where schools of all sectors enjoy the same support services, are treated equitably and provided with customer-focused, responsive and first-class support services. This would involve the establishment of a single authority (responsible for employment and other transactional support services) for all schools apart from those which are self-governing. This change would impact primarily on the current structure of the EA and CCMS but over time we would wish to see the opportunity for participation to be available to the Integrated and Irish-medium sectors. Given our recommendations on the departmental structure, the college sector could also be included. We envision that this will be established on a phased basis with the consent of the various parties.

A single early intervention and learner support body

8.51   As indicated above, there is a natural dividing line in the current EA that should in the longer term lead to the splitting of the organisation. This approach is closely aligned with our thinking about support service delivery, as outlined in the early years chapter (Chapter 1) and the inclusion and wellbeing chapter (Chapter 3).

8.52   These chapters envisage:

- Health and education services in the early years should be closely aligned and ultimately delivered through a single integrated service.
- The synergy between diagnosis of need in the early years and continuing support throughout education must be better managed. Learner-focused services such as those concerned with special educational needs, pupil support and emotional health and wellbeing should operate in a joined-up manner throughout the education journey of the learner.
- A new approach, focused on the learner, is needed in relation to pupil support services, particularly those concerned with SEN, which currently do not enjoy public confidence.

8.53   All of these objectives could be pursued effectively through an early intervention and learner support body formed as a result of the division of the EA.

8.54   As with other structural changes there will likely be a phased approach. We explain in Chapter 1 that the first step regarding early years should be a partnership board across health and education to deliver services and manage ring-fenced early years funding. We hope that this could eventually lead to greater synergy of these services and allow early years development to become a central part of a **single early intervention and learner support agency** with functions including:

- Parental support and engagement to support cognitive development in early years;
- Sure Start Management and Pre-School Education Programme;
- Learner Support Services (i.e., Special Educational Need Support);
- Pupil Wellbeing and Protection;
- Youth services;
- Emotional health and wellbeing;
- Education improvement and professional development;
- Careers education.

8.55   As an immediate step towards a restructuring of the EA, we recommend that, on an interim basis, the EA be internally restructured to form a management services group and an early intervention and learner support group, each with a single senior responsible officer.

8.56   In the longer term, the organisation would then split to form a single authority (which would function as a single employer for all schools apart from voluntary grammars and provide other transactional support services) and a separate early intervention and learner support agency.

A new structure

8.57   In the short-to-intermediate term, the key components of the education structure, at Northern Ireland level, would include:

- A single **department responsible for learning and skills**, to lead on policy making, service delivery and planning for all of education.

- A single time-bound **Independent Planning Commission** charged with reviewing the education estate and planning a new network of schools/colleges based on our recommendations.

- A single General Teaching Council (subsequently becoming an **Education Workforce Council)** to promote standards and professionalism across all educators.

- A single **Education and Training Inspectorate** body with responsibilities for school improvement, sharing of best practice and accountability.

- A **Curriculum Taskforce** to lead on priority areas of curriculum reform and refresh. Working closely with CCEA and the new single department.

- A **restructured Education Authority** with functions for service delivery, learner support and Controlled school management (separate directorates).

- An **Early Childhood Partnership Board** across health and education to lead on early years services (including Sure Start), childhood development, workforce planning, parental support and management of a ring-fenced budget.

8.58   In the longer term the following changes would occur, building on the above:

- The Planning Commission would deliver its plan for a new network of schools to the new single department. It would cease to exist and planning functions would revert to the department, which would act as a **Strategic Planning Authority**.

- The single **authority** with responsibility for employment and other transactional support services would be established, in the first instance for Controlled and Maintained schools with the opportunity for participation to be available for other sectors to join. Given the changes in departmental structure, it could also have responsibility for colleges. The development of such a body could itself be phased.

- Educational and learner support services would become the responsibility of an **Early Intervention and Learner Support agency**. It would lead on a range of services throughout the education journey from early childhood services through to careers advice and youth services. This would also be the lead agency for pupil support, school improvement, professional development and parental engagement.

- **A Curriculum Advisory Council** to support and monitor the delivery of the curriculum.

- A **Qualifications and Examinations Council**.

Sectoral support

8.59   Our proposed changes to the management structure of the education system would also have an impact on the functions currently delivered by sectoral support bodies. Bodies that provide such sectoral support have important roles to play in providing specific support on ethos as well as advocating for their sectors. This would continue with all sectors supported in a consistent way via a common funding model.

8.60   These bodies should be supported by the new department via a consistent funding model with clear duties to support their relevant sectors.

8.61   Following the establishment of a single authority, parallel arrangements for advocacy, ethos and sectoral support should be put in place for all sectors.

Panel conclusion
At the heart of an excellent system of education is the learner. The core principle is that the needs of the learner far outweigh the wants of an institution. This principle permeates our whole Report. The system of education should place the learner first, be designed with their needs in mind and be based on collaboration across institutions rather than competition.

Collaboration not competition

8.62   Proponents of a "single system" often suggest that the arrangements in Northern Ireland are uniquely complicated, contrasting unfavourably with simpler and more rational forms of management elsewhere. This is, at best, an oversimplification.

8.63   Few if any countries anywhere in the world have a single system if the term is taken to imply a single type of school and uniformity in management arrangements. Within the UK, the government categorises schools in England as falling into six types: faith schools, free schools, academies, city technology colleges, state boarding schools and private schools. However, this categorisation ignores the existence of different kinds of faith schools, the presence of grammar schools in some parts of the country, differences between local authority Maintained and voluntary schools and other distinctions. The overall picture is undoubtedly complex and has become more so over recent decades.

8.64   Scotland has four basic types of school: non-denominational, denominational, Gaelic-medium and private. Many of the non-denominational schools are now largely secular but this part of the system has its origins in Protestant schools transferred to the state. The

great majority of denominational schools are Catholic but there are a handful of Episcopal (Anglican) schools and one Jewish school. Catholic schools were transferred to the state in 1918 with the Church retaining some rights in relation to selection of staff and religious education. There is, however, no body comparable to CCMS.

8.65   In Wales, the vast majority (almost 80%) of publicly funded schools are "community schools". These are owned and run by local authorities, and it is the local authority which sets the entrance criteria (such as catchment area) and decides which children are eligible for a place. There are a small number (about 10%) of "voluntary aided" schools, often religious or faith schools, where the governing body has more autonomy, and a yet smaller number of "Voluntary Controlled" schools, where some management functions are run by the local authority. Just over a quarter of publicly funded schools in Wales are classified as "Welsh-medium" (with some additional schools classified as "bilingual" or "dual language"), and around 5% are classified as Roman Catholic schools.

8.66   Looking further afield, many countries have faith schools, often of more than one kind. There is always a state system, which may, as in France, be avowedly secular. Some systems have secondary schools with different specialisms, as in Germany.

8.67   In other words, having several categories of school is the norm rather than some kind of aberration. In most countries, some choice is considered a positive feature. However, choice is always limited. It is not open to parents to insist on options which the system does not make available.

8.68   Furthermore, the system in Northern Ireland can be described in different ways. For the purposes of considering Temporary Variations to enrolment arrangements, DE considers all grant-aided schools to belong to one of four types[432]:

- **Denominational** (Maintained primary or post-primary schools, denominational grammar schools);
- **Non-denominational** (Controlled primary or post-primary schools, non-denominational grammar schools);
- **Integrated** (Controlled or Grant-Maintained Integrated primary or post-primary schools); and
- **Irish-medium** (Irish-medium primary or post-primary schools or Irish-medium units within Maintained schools).

8.69   This is a much simpler categorisation than is usually publicly perceived.

8.70   However, an argument frequently presented to the Panel is that the differences in school type in Northern Ireland reinforce historical religious and community divisions and thus act against community cohesion. It is often suggested that the removal of faith schools would help to resolve this problem.

8.71   Schools exert great influence over the development of young people. They can – and should – play a part in making Northern Ireland a more peaceful and cohesive society. Furthermore, far more could be done to ensure learners from all backgrounds are educated together. This would help to reduce ignorance and prejudice. However, there are two further considerations that have to be kept in mind.

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432   At post-primary level no distinction is drawn between a grammar and non-grammar school within a sector.

8.72 Firstly, society in Northern Ireland is divided in ways which schooling alone cannot address. Historically, housing is often highly segregated[433]. As a result, schools that are dominated by one community background often reflect the makeup of their locality. At the same time, there are many cases of schools failing to embrace the diversity of their local community and instead drawing their pupils overwhelmingly from a single background. Strenuous efforts must be made to ensure that all pupils are educated alongside those from a different background, at least for part of the week, while recognising that even a wholesale reorganisation of the system along comprehensive lines would not ensure a mixed intake in every school.

8.73 Secondly, families have a right, enshrined in law, to exercise some choice in relation to schooling. In many ways, choice is a positive aspect of education. It recognises the position of parents, not merely as first educators, but as responsible for the upbringing and overall development of their children.

8.74 Furthermore, this right of choice reflects the legal position, both in Northern Ireland and in terms of international conventions. Article 44 of the Education (Northern Ireland) Order 1986 sets out the general principle of pupils being educated in accordance with the wishes of their parents.

> *Pupils to be educated in accordance with wishes of their parents*
>
> **44.** In the exercise and performance of all powers and duties conferred or imposed on them by *the Education Orders*, the Department and boards shall have regard to the general principle that, **so far as is compatible with the provision of efficient instruction and training and the avoidance of unreasonable public expenditure, pupils shall be educated in accordance with the wishes of their parents**. [emphasis added]

8.75 The language in the 1986 Order reflects that of Article 2 of Protocol 1 of the European Convention on Human Rights[434], which imposes general obligations upon the state to ensure educational provision is made available and parents' religious and philosophical convictions are respected. Article 26 of the UN Universal Declaration of Human Rights similarly reinforces a right of parental choice in relation to education.

8.76 Even if it were thought desirable, it would not be legally possible to try to establish a system in which there was no place for parental choice and families were obliged to make use of a single type of school. It is open to parents to make choices of which others disapprove.

8.77 People of goodwill throughout Northern Ireland, regardless of their background, wish to see the influence of schools used to further the interests of a peaceful society. In considering how best to do this, we have had to bear in mind the tension which exists between personal freedom and public good and make suggestions that are consistent with the legal position.

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433   Approximately 35% to 40% of the Northern Irish population is divided into completely segregated communities (Hughes et al., 2007; Stevenson et al., 2019), while more than 90% of social housing remains segregated into communities with more than 80% of a single ethnic/religious group (Shuttleworth and Lloyd, 2009).

434   Article 2 of the Protocol to the European Convention for the Protection of Human Rights and Fundamental Freedoms.

8.78 Any movement in the direction of a more unified school system thus has to rest on two principles which are to a degree in tension with each other:

- families should have the right to choose among different kinds of school; and
- children should have experience of being educated together alongside others from a different background.

8.79 Many families exercise their choice in the direction of Integrated education. When making their choice, these families will have been concerned with issues such as the quality of education on offer. However, many will also have felt that they were making a commitment towards better community relations and greater social cohesion.

8.80 The Integrated sector is of fairly recent origin. The first Integrated school in Northern Ireland was Lagan College which was established by parents in 1981 and catered for 28 pupils in temporary premises. It is now a greatly over-subscribed school with a roll of nearly 1,500, occupying modern premises at the southern edge of Belfast[435].

8.81 Over the ensuing 40 years, the number of Integrated schools has risen steadily as indicated in the following table.

Table 8.b: Number of Integrated schools, Northern Ireland, 2003/04–2022/23[436]

	Nursery schools	Primary schools	Post-primary schools	Total
2003/04	0	32	18	50
2004/05	0	36	19	55
2005/06	0	37	19	56
2006/07	0	37	19	56
2007/08	0	39	20	59
2008/09	0	39	20	59
2009/10	0	41	20	61
2010/11	0	42	20	62
2011/12	0	42	20	62
2012/13	0	42	20	62
2013/14	0	42	20	62
2014/15	0	42	20	62
2015/16	0	43	20	63
2016/17	0	45	20	65
2017/18	0	45	20	65
2018/19	0	45	20	65
2019/20	0	45	20	65
2020/21	0	45	20	65
2021/22	1	47	20	68
2022/23	2	47	21	70

435   About Us | Lagan College
436   School enrolments - Northern Ireland summary data | Department of Education (education-ni.gov.uk)

8.82   The growth of the sector seems destined to continue. At the conclusion of our Review, a further five schools were at some stage of the process of conversion to Integrated status[437]. The proportion of the overall pupil population attending Integrated schools has also increased. However, it remains small when compared with the Controlled and Maintained sectors. The following table shows the relative size of the various sectors.

Table 8.c: Enrolments by school management type, Northern Ireland, 2022/23[438]

	Primary schools		Post-primary schools	
	Number of pupils	% of pupils	Number of pupils	% of pupils
Controlled Integrated	4,686	3%	4,258	3%
Grant-Maintained Integrated	6,505	4%	10,865	7%
Total Integrated	11,191	7%	15,123	9%
Controlled	77,659	45%	46,180	30%
Catholic Maintained	77,411	45%	40,824	26%
Other Maintained	3,718	2%	1,177	1%
Voluntary – under Catholic management	-	-	29,996	19%
Voluntary – under other management	1,397	1%	21,012	14%
Total in all schools	**171,376**	**100%**	**154,312**	**100%**

8.83   In 2022 the Northern Ireland Assembly approved the Integrated Education Act which placed an obligation on DE, the EA and other educational bodies to support Integrated education[439]. This Act has been welcomed by many. It does not, however, override the right of parental choice as currently built into domestic and international law. It received criticism by some as privileging one sector over others and compromising the position of the EA in relation to its duties as managing authority for the Controlled sector. It is not yet clear what the practical impact of the Act may be.

8.84   A limiting factor affecting the growth of the Integrated sector is geographical spread. Although the recent conversion of 31 existing schools to Integrated status[440] has meant that the sector now has a presence in more localities, there are still large areas of the country where Integrated education is not readily available. There will certainly be quite numerous families who would choose to use an Integrated school if one was available within a reasonable travelling distance[441].

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437   There were five schools with Development Proposals that had been published for transformation as at 17 October 2023.

438   School enrolments - Northern Ireland summary data | Department of Education (education-ni.gov.uk)

439   Integrated Education Act (Northern Ireland) 2022 (legislation.gov.uk)

440   Between 1991 and 2022, 2 nursery schools, 23 primary schools and 6 post-primary schools transformed to integrated status. Source: DE's Analytical Services Unit.

441   A recent opinion poll found that 66% of people agreed with the statement "Integrated schools, which

8.85   There are other parts of the country where Integrated education is available, but some schools are oversubscribed[442]. There is thus an unmet need. Under the new legislation, the Department has a responsibility to try to measure and meet that need.

Panel conclusion

We believe that Integrated education has made a significant and highly positive contribution to Northern Irish education and to broader society. We would wish to see it expand.

Of course, our wider recommendations regarding the network of schools would see a significant growth in jointly managed community schools. These schools would promote social cohesion within a multi-sectoral context.

As soon as reasonably practicable, Integrated schooling or jointly managed community schools should be an option for all that wish it.

8.86   Shared Education is defined in the Shared Education Act (Northern Ireland) 2016. The Act places a duty on both DE and the EA to "encourage, facilitate and promote shared education, and to consider Shared Education in both policy and operational work".

8.87   The Act also confers the duty to consider Shared Education and the power to "encourage and facilitate" Shared Education on named education and sectoral bodies, which include CCMS, YCNI, CCEA, and any sectoral body (one recognised by the DE as representing the interests of grant-aided schools of a particular description and to which grants are paid under Section 4 of the Education Act (NI) 2014). The Act states that:

The purpose of shared education is—

(a) to deliver educational benefits to children and young persons;
(b) to promote the efficient and effective use of resources;
(c) to promote equality of opportunity;
(d) to promote good relations; and
(e) to promote respect for identity, diversity and community cohesion.

8.88   It defines shared education as:

The education together of—

(a) those of different religious belief, including reasonable numbers of both Protestant and Roman Catholic children or young persons; and
(b) those who are experiencing socio-economic deprivation and those who are not,

which is secured by the working together and cooperation of two or more relevant providers.

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intentionally educate together children every day in the same classroom, inclusive of different religions, gender, and race should be the main model for our education system". Source: Lucid Talk (2023) Integrated Education Fund - IEFNI Attitudinal Poll May Summary Report FINAL - Page 4-5 - Created with Publitas.com

442   A Strategy for Integrated Education in Northern Ireland (April 2023). See Figures 2-5 on pages 9-10. At https://www.education-ni.gov.uk/publications/strategy-integrated-education-northern-ireland

> (3) In subsection (2) "relevant provider" means a person providing—
>
>   (a) education at a grant-aided school, or
>   (b) services of any kind (including youth services) which provide educational benefit to children or young persons.

8.89   In recent years Shared Education has been taken forward through two funded programmes with assistance from other partners; the Delivering Social Change Shared Education Signature Project (DSC SESP), and the European Union PEACE IV Shared Education programme, comprised of two projects supporting both the school and pre-school phases. In addition, further investment has been made available through the Department of Education (DE). All of which has laid the groundwork for the current transition towards mainstreaming Shared Education.

8.90   Evaluations of the SESP have been positive. For example, the 2018 evaluation by the ETI stated that SESP "contributed to improving the learning experiences provided for, and the outcomes attained by, pupils across the phases. The pupils highlighted the contribution that their shared learning experiences has made to their personal, social and academic development. Through the SESP, the pupils accessed a range of creative, vibrant and stimulating learning opportunities that would not have been otherwise possible."[443]

8.91   The PEACE IV Shared Education Impact Evaluation stated that feedback was overwhelmingly positive, with partnerships highlighting the significant benefit to those involved. Overall the programme has had a positive impact on the following areas: cross-border collaboration, cross-community relations, educational outcomes for children, pre-schools, schools, practitioners and teachers, as well as societal outcomes for children, parents, and the wider community[444].

8.92   The other element is the Shared Education Campus Programme, with examples at Ballycastle[445] and Limavady[446], where schools from different sectors with a history of sharing have secured capital investment for new shared facilities.

8.93   In the context where resources remain tight, there is the need for a much greater emphasis on sharing and collaboration within education. This should become a universal expectation of schools rather than a specific project with restrictive entry requirements or dedicated funding. It should also involve institutions from all sectors and stages – primary working with post-primary, post-primary with colleges, and across sectoral boundaries.

8.94   In their discussion of "contact theory" in the article *Integrating Northern Ireland*, Blaylock et al.[447] set out four conditions that need to be in place as a means of promoting more positive relations between potentially opposing groups. They see it as essential to:

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443   The Shared Education Signature Project Evaluation Report - October 2018 | Education Training Inspectorate (etini.gov.uk)

444   Microsoft Word - PIV Shared Ed Eval Yr5 Ex Summary - FINAL Jan 2023 (seupb.eu)

445   https://www.education-ni.gov.uk/news/ps70million-investment-ballycastle-shared-education-campus

446   https://www.education-ni.gov.uk/news/works-starts-ps11million-scheme-limavady-shared-education-campus

447   Blaylock, D., Hughes, J., Wolfer, R., and Donnelly, C. (2018). "Integrating Northern Ireland: Cross-group friendships in integrated and mixed schools", *British Educational Research Journal*, https://doi.org/10.1002/berj.3452 Available at: Microsoft Word - ACCEPTED_Integrating_Northern_Ireland (qub.ac.uk)

- promote equal status between the group members in terms of power, influence or social prestige;
- encourage the pursuit of common or shared goals;
- foster cooperation between groups, not competition; and
- have institutional support or the sanction of appropriate authority figures.

8.95   These principles could assist in a wider re-imagining of what "shared education" should mean and could achieve, going well beyond the existing definition and parameters. It should mean new models of shared governance/management, shared resources and shared learning.

Shared governance

8.96   Elsewhere in this Report, we recommend that serious efforts are made to create a network of schools that is fit for purpose by ensuring that all schools are educationally viable and that the resources available are used prudently and equitably. However, our motives for recommending a thoroughgoing short-term review of the entire estate are not solely economic. The process will have an important positive effect in terms of bringing children and young people from different communities together. It will also play an important role in strengthening small communities where, for example, a village may be at risk of losing a number of schools from different sectors because none are viable but a single cross-sectoral school would be sustainable.

8.97   There will be many parts of the country, mainly rural areas and small towns, where the consequence of reviewing the network of schools will be that a number of schools (across different sectors) will be brought together. Some of these new combined schools will choose Integrated status. We suggest that another alternative should be **jointly managed community schools** that are cross-sectoral in their governance arrangements. Either of these options would ensure that children from different backgrounds were educated together on a full-time basis.

Shared resources

8.98   Schools should be free to share resources of all types, including staffing. There is no reason why, for example, two primary schools should not jointly finance the engagement of a specialist teacher of PE or science. Equally, they could decide that one school should be the employer and the other pay a fee for the use of the teacher's services. The same can equally well apply to facilities or teaching materials.

8.99   There are numerous potential benefits from these kinds of sharing, not least that they will help to instil an ethos of collaboration rather than competition in the education service. More specifically, there will be instances where the effect is to draw schools from different sectors into a close and purposeful relationship.

8.100   A single authority with management and employment responsibilities would support such an approach.

Shared learning

8.101   All young people should have regular and significant experience of learning together with others from different backgrounds. Some of that learning could be online but face-to-face contact is essential. While we welcome instances of young people sharing extra-curricular activities, joint expeditions and other experiences, we see shared learning within the mainstream curriculum as indispensable. In the primary sector, a large-scale interdisciplinary project could be an example of good practice. At the post-primary stages, a more practical approach might be for a number of subjects to be offered by schools from different sectors.

8.102   It will be evident that the approach we recommend is much more demanding and prescriptive than previous initiatives badged as shared education. Our more ambitious approach can perhaps be better described as "Learning Together". Resources currently available for these initiatives should be delegated to schools apart from a small reserve retained centrally to assist schools unable to meet our criteria for the new Learning Together programme without incurring very high transport costs. With this exception, schools should take full responsibility for their participation in the programme and should make provision in their budgets to meet the costs involved.

8.103   All schools should enter into a Learning Together partnership with one or more schools with a markedly different intake in terms of community background. In order to ensure that every school is able to participate there should be no numerical criteria governing entry to the programme. Each partnership should produce proposals for joint activities, which should include regular face-to-face learning within the curriculum. Practical considerations of transport costs and travelling time will affect the extent of such direct contact. Most partnerships will wish to supplement it with shared online learning. Joint extra-curricular activities should also be included where possible. Partnership proposals should be submitted to area learning communities. As well as enabling children from different community backgrounds to learn together for some part of the week, these networks will assist schools to learn from each other in the same way as the existing ALCs.

8.104   Similarly, existing ALCs should play a more significant role in promoting collaboration and sharing, building on existing good practice. However, these are currently limited to post-primary schooling. Primary schools should be supported to establish separate ALCs and there should be regular interaction between primary and post-primary groupings. The new primary groupings would not be limited to supporting Learning Together but should develop similar roles to the existing ALCs in relation to curriculum and professional learning. Participation in ALCs should be deemed to be an essential element of Learning Together.

**Panel conclusion**

We believe that educating children together is in the best interests of society and that this should be achieved in ways that respect both the rights of individuals and the public good.

Several options should be pursued simultaneously, including the promotion of shared governance, enabling the sharing of resources and delivery of shared learning experiences in the classroom.

Schools serving their communities

8.105   The final aspect of a "single system" is increasing the numbers of learners from different backgrounds who are educated in the classroom together. Already, learners in further and higher education learn together regardless of community and/or religious background. The same is largely true of early years. In the primary and post-primary sectors, however, this is not the case.

8.106   Cultural diversity is to be respected and celebrated. However, divisions between communities are problematic, especially in a post-conflict society such as Northern Ireland. It is important that differences be discussed and understood. Schools have a vital role in this process.

8.107   In the great majority of schools one or other of the main religious/community groups is in a very small minority. This, in itself, is likely to serve as a barrier to further integration. We firmly believe that all learners should have regular and significant experience of learning together with others from different backgrounds. From our stakeholder engagement and evidence gathering there appears to be significant appetite to do more to improve integration within our schools.

8.108   In addition to requiring all schools to engage in serious programmes of shared learning, we suggest that they also take active steps to ensure that their intakes increasingly reflect the nature of the community around them. We do not favour compulsory artificial forms of mixing brought about by bussing children in large numbers out of their communities and enrolling them in schools in distant areas. However, education can and should contribute to improved intercommunity relationships.

8.109   Although there is some limited evidence of recent change, Northern Ireland's schools remain sharply divided by religious/community background. Pupils are generally categorised as Catholic, Protestant or Other.

9.110   We looked at the proportion of children in each school who identified as either Catholic or Protestant and determined which of these two religious groups was the minority in each school. We then calculated how many pupils attended schools where the minority group made up:

- 2% or less
- more than 2% but less than 10%
- at least 10% but less than 20%
- at least 20% but less than 30%
- at least 30% but less than 40%
- at least 40% but less than 50% of the total enrolment of that school.

8.111   The "other" category includes pupils who are classified as other Christian, non-Christian, no religion or where religion is unknown or not provided. While pupils within this category were included in the total enrolment of a school, the minority group was determined with reference to Protestant or Catholic pupils only. In 2011/12, 90% of children attended a primary school where the minority group (Protestant or Catholic) comprised less than 10% of the enrolment (Figure 8.d). Two-thirds were in schools where the minority group was less than 2% of the total. 10 years later, in 2021/22, these figures had dropped to 85% and 57% respectively (Figure 8.e).

Figure 8.d: Pupils attending primary schools by proportion of minority religious group (Protestant or Catholic), Northern Ireland, 2011/12[448]
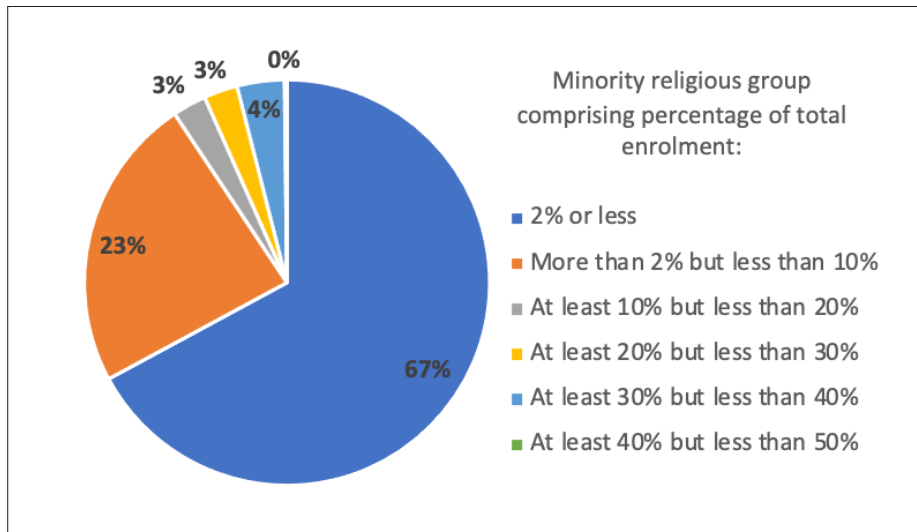
Figure 8.e: Pupils attending primary schools by proportion of minority religious group (Protestant or Catholic), Northern Ireland, 2021/22[449]
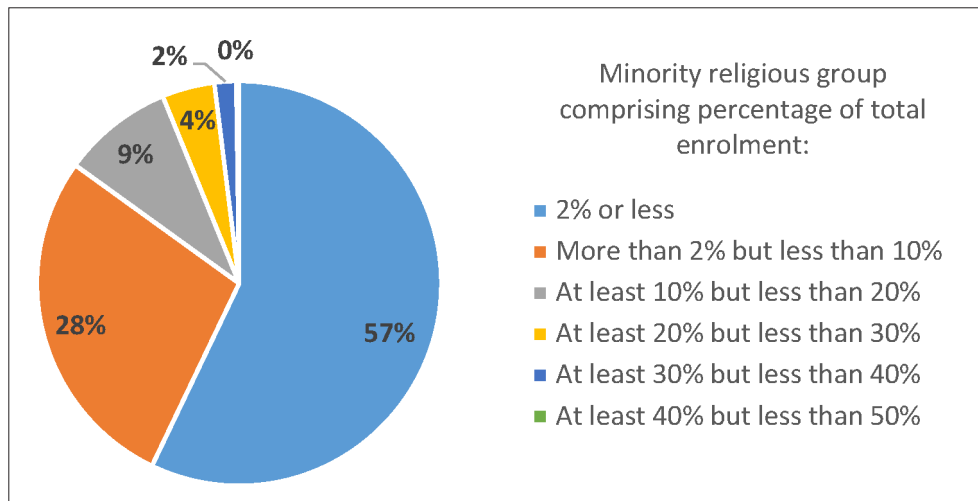
8.112   In the post-primary sector in 2011/12, 84% of pupils attended a school where the minority group accounted for less than 10% of the total and 65% were enrolled in schools where the minority constituted less than 2% of the enrolment (Figure 8.f). By 2021/22 the comparable figures were 76% and 48% respectively (Figure 8.g). Over the same 10-year period, the proportion of pupils attending schools in which the minority group was relatively substantial, i.e., between 20% and 49.9%, rose from 12% to 14% in the post-primary sector but actually declined from 7% to 6% in primary schools.

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448   Analysis by Panel based on data provided by DE Analytical Services Unit.

449   Analysis by Panel based on data provided by DE Analytical Services Unit.

Figure 8.f: Pupils attending post-primary schools by proportion of minority religious group (Protestant or Catholic), Northern Ireland, 2011/12[450]

Figure 8.g: Pupils attending post-primary schools by proportion of minority religious group (Protestant or Catholic), Northern Ireland, 2021/22[451]
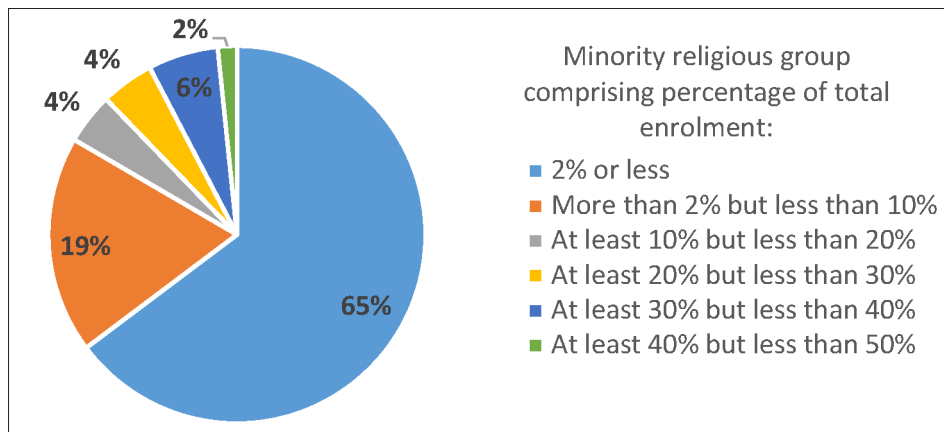

8.113 A different way of looking at the changes which have taken place is to note that the proportion of Catholic pupils in Controlled primary schools has risen from 6% to 8% (Figure 8.h) and in post-primary schools from 4% to 7% (Figure 8.i).

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450   Analysis by Panel based on data provided by DE Analytical Services Unit.

451   Analysis by Panel based on data provided by DE Analytical Services Unit.

Figure 8.h: Proportion of pupils in Controlled primary schools by religion, Northern Ireland, 2011/12 and 2021/22[452]
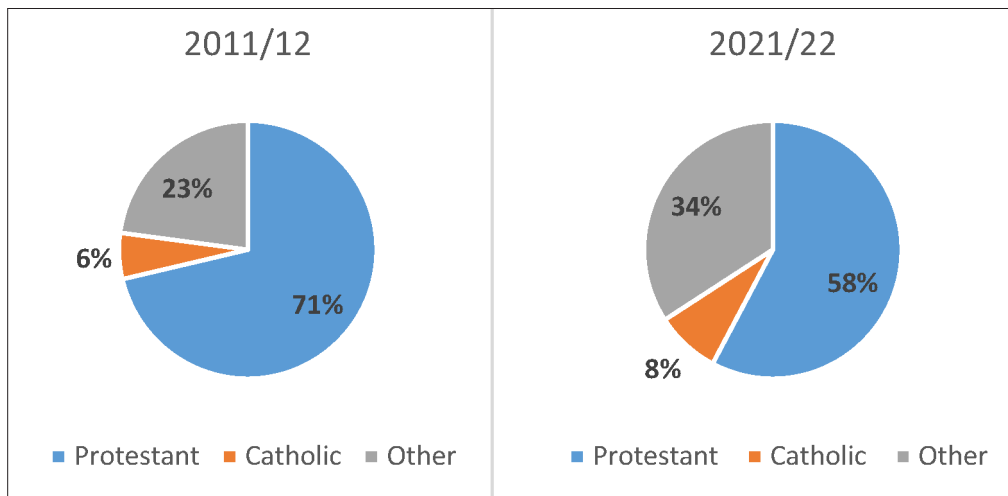
2011/12	2021/22

- Protestant - Catholic - Other

Figure 8.i: Proportion of pupils in Controlled post-primary schools by religion, Northern Ireland, 2011/12 and 2021/22[453]

2011/12	2021/22

- Protestant - Catholic - Other

8.114   The proportion of Protestant pupils in Maintained post-primary schools has risen from 1% to 2% (Figure 8.j) but the proportion in primary schools has remained unchanged at 1% (Figure 8.k). In all categories of school, the proportion of Other pupils has increased.
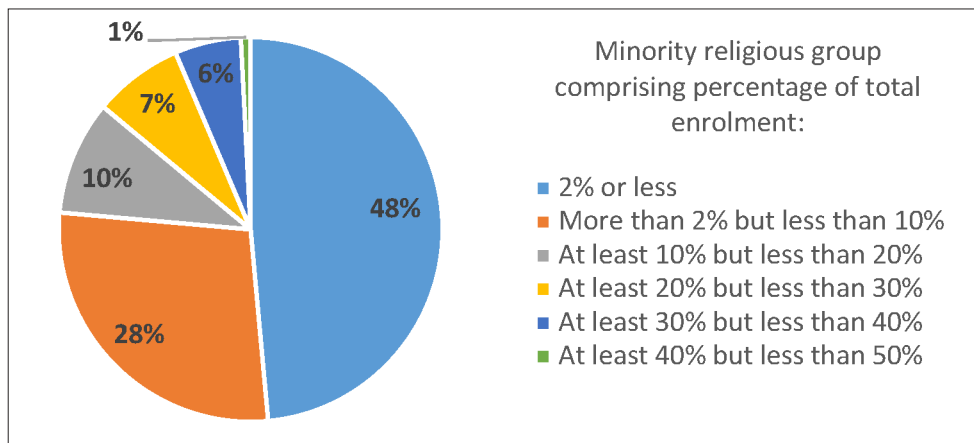
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452   Analysis by Panel based on data provided by DE Analytical Services Unit.

453   Analysis by Panel based on data provided by DE Analytical Services Unit.

Figure 8.j: Proportion of pupils in Catholic Maintained post-primary schools by religion, Northern Ireland, 2011/12 and 2021/22[454]
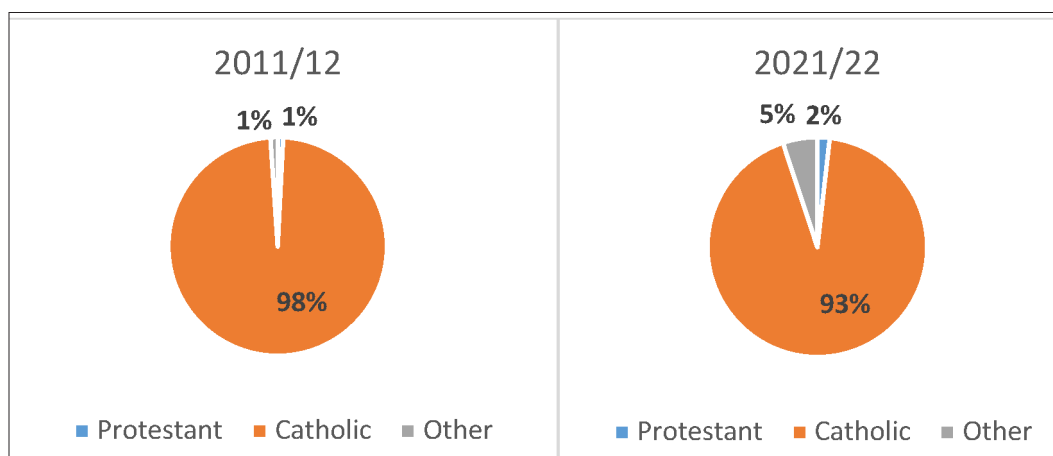
Figure 8.k: Proportion of pupils in Catholic Maintained primary schools by religion, Northern Ireland, 2011/12 and 2021/22[455]
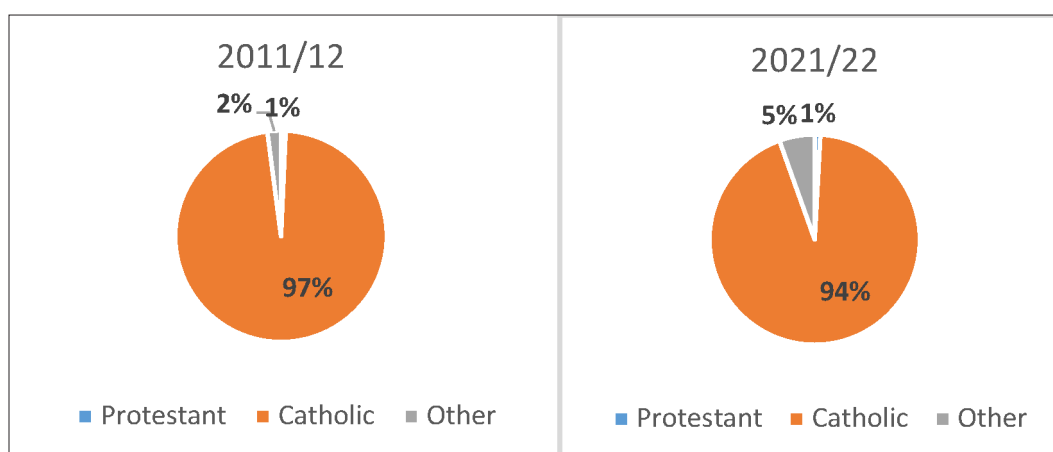
8.115 Looking only at the two largest sectors in 2021/22, at primary level, Catholic Maintained schools contained only 6% non-Catholic pupils (5% Other and 1% Protestant, Figure 8.k) while Controlled schools are 42% non-Protestant pupils (34% other and 8% Catholic, Figure 8.h). At post-primary level, Catholic Maintained schools contained 7% non-Catholic pupils (5% other and 2% Protestant, Figure 8.j) while Controlled schools were 30% non-Protestant (23% other and 7% Catholic, Figure 8.i).

8.116 At a system level, the rolls of Grant-Maintained Integrated primary schools are 29% Protestant, 39% Catholic and 32% other (Figure 8.l). In the case of Controlled Integrated primary schools, the figures are 34% Protestant, 27% Catholic and 39% other (Figure 8.m).
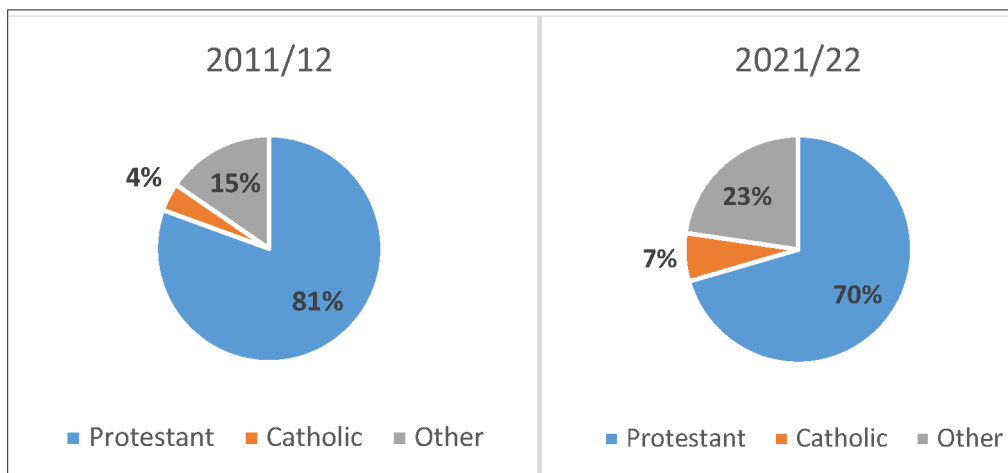

454   Analysis by Panel based on data provided by DE Analytical Services Unit.

455   Analysis by Panel based on data provided by DE Analytical Services Unit.

Figure 8.l: Proportion of pupils in Grant-Maintained Integrated primary schools by religion, Northern Ireland, 2021/22[456]
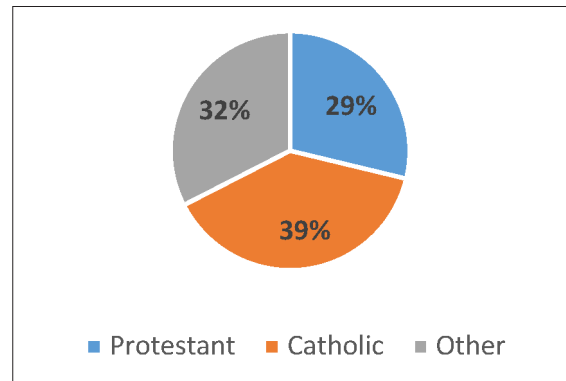
Figure 8.m: Proportion of pupils in Controlled Integrated primary schools by religion, Northern Ireland, 2021/22[457]

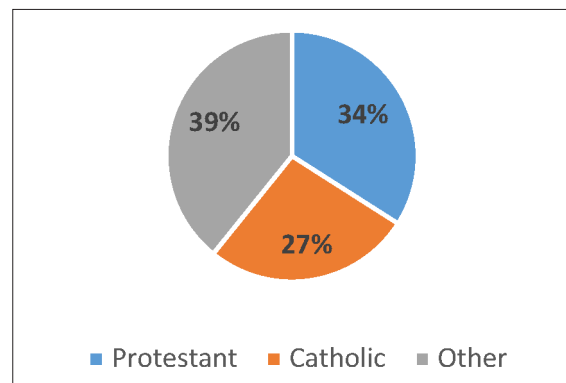8.117 As part of our analysis, we also considered the changes in schools that have transformed to Integrated status[458]. Since 1992, 23 primary schools have transformed to Integrated status[459,460]. The religious mix of transformed primary schools has changed over the years. At the time of transformation, the average proportion of Protestant pupils in these schools was 53% (Figure 8.n). By 2021/22, this had decreased to 33% with all but one of the transformed Integrated primary schools in the analysis seeing a decrease in the proportion of Protestant pupils. This decrease ranged from 4 to 60 percentage points. The average proportion of Catholic pupils at the time of transformation was 25%. By 2021/22 there had been an increase in the average proportion of Catholic pupils to 32%. Seven of the

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456   Analysis by Panel based on data provided by DE Analytical Services Unit.

457   Analysis by Panel based on data provided by DE Analytical Services Unit.

458   The legal process through which non-integrated schools can become integrated is known as transformation. Details of this process can be found in DE's "Integration works: Transforming your school" guidance. Integration-Works-Transforming-your-School-December-2017 (education-ni.gov.uk)

459   Three schools which transformed in 2021 were excluded from our analysis as it was too soon to observe any changes in enrolment patterns. One school which closed in 2021 was also excluded from the analysis.

460   It should be noted that the enrolments of some of the primary schools in the analysis were small, with 11 of them having an enrolment below 100 pupils at the time of transformation. This could skew the analysis as a small change in the number of pupils from a particular community background could have a disproportionate effect. Additionally, the analysis considered the time period between the date of transformation and 2021/22. The length of this time period varied from school to school and was between 5 and 29 years. Some schools have therefore had a longer period to experience a shift in enrolment patterns.

transformed primary schools saw a decrease in the proportion of Catholic pupils, with the remainder seeing an increase. The change in the proportion of Catholic pupils ranged from an increase of 46 percentage points to a decrease of 41 percentage points. On average, at the time of transformation the proportion of other pupils was 22%. This had increased to 35% by 2021/22. 16 of the 19 transformed primary schools in the analysis experienced an increase in the proportion of other pupils.

Figure 8.n: Proportion of pupils in transformed Integrated primary schools by religion, Northern Ireland, at time of transformation and 2021/22[461]

8.118 In 2021/22, at the post-primary stage, the rolls of Grant-Maintained Integrated post-primary schools contained 35% Protestant, 41% Catholic and 24% other pupils (Figure 8.o). For Controlled Integrated post-primary schools, the figures were 51% Protestant, 18% Catholic and 31% other (Figure 8.p).

Figure 8.o: Proportion of pupils in Grant-Maintained Integrated post-primary schools by religion, Northern Ireland, 2021/22[462]

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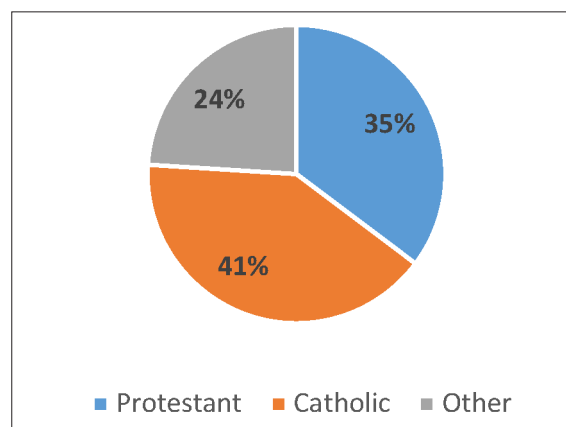
461   Analysis by Panel based on data provided by DE Analytical Services Unit.
462   Analysis by Panel based on data provided by DE Analytical Services Unit.
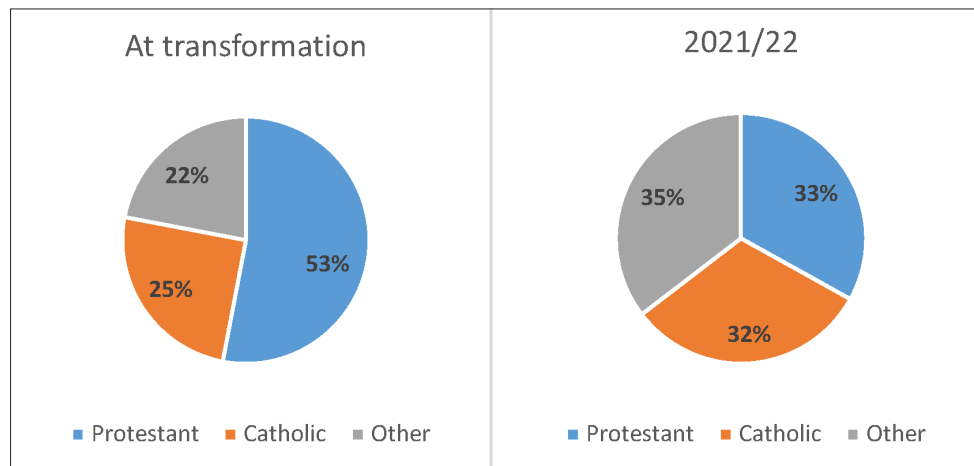
Figure 8.p: Proportion of pupils in Controlled Integrated post-primary schools by religion, Northern Ireland, 2021/22[463]
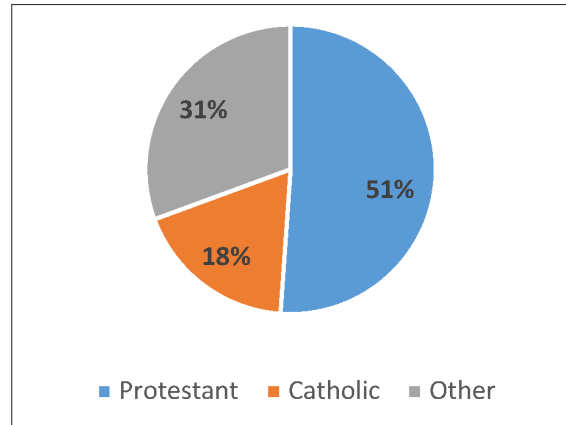
8.119 Six post-primary schools have transformed to Integrated status since 1991[464]. There has been a shift in the religious mix of transformed Integrated post-primary schools over the years. At the time of transformation, the average proportion of Protestant pupils in these schools was 71%. By 2021/22, this had decreased to 43%. All transformed post-primary schools saw a decrease in the proportion of Protestant pupils on their roll, ranging from a decrease of 17 percentage points to one of 57 percentage points. The average proportion of Catholic pupils in transformed post-primary schools was 13% at the time of transformation. This had doubled to 26% by 2021/22, with all schools seeing an increase in the proportion of Catholic pupils. The increase ranged from 6 percentage points to 29 percentage points. There has also been an almost doubling of other pupils in transformed post-primary schools, from an average of 16% at transformation, to an average of 31% by 2021/22 (Figure 8.q). All schools in the analysis experienced an increase in the proportion of other pupils, ranging from an increase of 1 percentage point to an increase of 27 percentage points.

Figure 8.q: Proportion of pupils in transformed Integrated post-primary schools by religion, Northern Ireland, at time of transformation and 2021/22[465]

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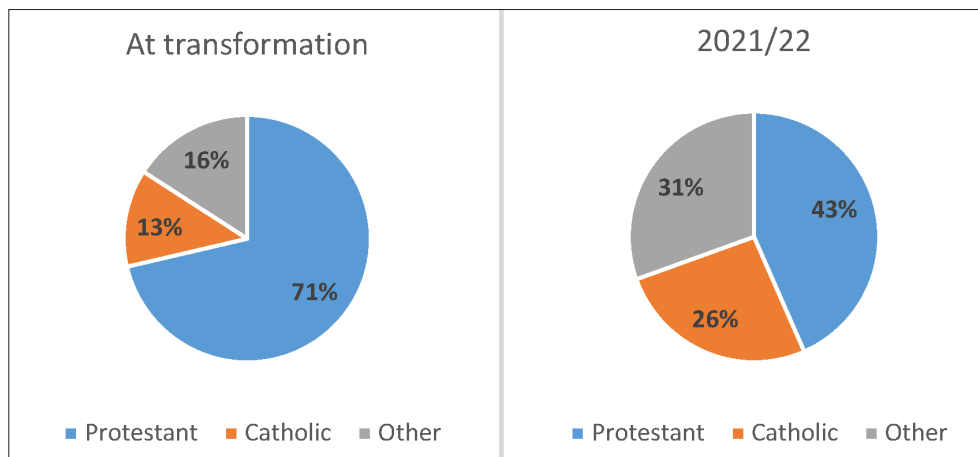
463   Analysis by Panel based on data provided by DE Analytical Services Unit.

464   One school transformed in 2021 and is excluded from our analysis. As with the primary schools, the date range under consideration varied from school to school, from 12 to 30 years.

465   Analysis by Panel based on data provided by DE Analytical Services Unit.

8.120 If the voluntary grammar school data is presented by the religious character of the school (i.e., under Catholic management or under other management), there appear to be distinct differences, with the Catholic voluntary grammar schools (Figure 8.r) having demographics which are very similar to Catholic Maintained post-primary schools while the rolls of "other" voluntary grammar schools are more diverse (Figure 8.s).

Figure 8.r: Proportion of pupils in voluntary grammar schools under Catholic management by religion, Northern Ireland, 2021/22[466]
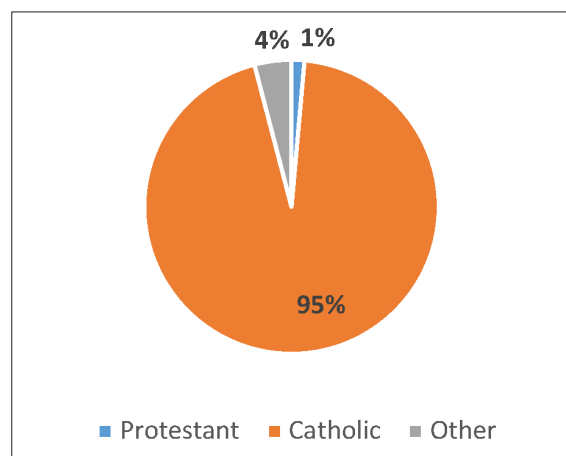
Figure 8.s: Proportion of pupils in voluntary grammar schools under other management by religion, Northern Ireland, 2021/22[467]
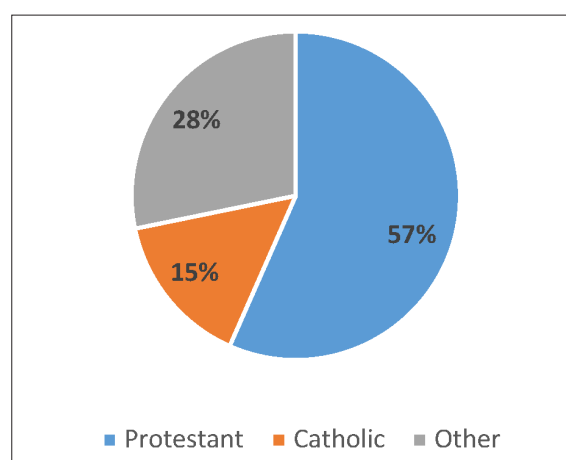
Panel conclusion
The data on community mixing in schools clearly shows an ongoing community divide in schools.
The Integrated sector is the most mixed in terms of community background. Furthermore, schools that transform to Integrated status often become more mixed over time.
The Controlled and Maintained sectors are less mixed, with the figures for the Maintained sector showing the least diversity based on religious/community background.

466   Analysis by Panel based on data provided by DE Analytical Services Unit.
467   Analysis by Panel based on data provided by DE Analytical Services Unit.

> There have been some improvements over time. However, changing figures often reflect a growing tendency for families to identify as "other" rather than a mixing of pupils from different backgrounds. In any event, the pace is unacceptably slow. More can – and should – be done to ensure that learners from all backgrounds are educated together in the classroom.

8.121   We have met with a large number of stakeholders from a wide range of organisations, including political parties and sectoral bodies. There is overwhelming agreement that increased integration in our schools should be encouraged and facilitated.

8.122   All sectors have told us that their schools are open to all and welcome learners from any background. They have all stated that they can be part of a more inclusive and more representative education system. While we do not doubt their sincerity, school-by-school enrolment statistics indicate that these objectives are not being achieved. More impetus is required if significant change is to be brought about.

8.123   The following comments from key education bodies illustrate this consensus.

> *EA believes that a single education system should provide the fabric for Northern Ireland's rich cultural and linguistic tapestry to flourish in the interest of children and young people; it should be an equitable system in this context. EA supports the development of common principles for all schools based on inclusiveness[468].*
> **(Education Authority)**

> *Catholic schools openly and warmly welcome pupils from other Christian and non-Christian traditions as well as those who do not identify as having any religious faith. It remains an important part of the vision of Catholic schools to work with the families of pupils from other religious traditions and cultures to support the development of their understanding of their own faiths[469].*
> **(Council for Catholic Maintained Schools)**

> *Within the Northern Ireland context it is vital that children and young people have an understanding of their community and wider communities and their place in society. It is also important that schools are actively open to all with an inclusive ethos that respects diversity[470].*
> **(Controlled Schools' Support Council)**

> *NICIE recognise the genuine intention of other school sectors to welcome and be inclusive of children and young people from Protestant and Catholic backgrounds in the one school[471].*
> **(Northern Ireland Council for Integrated Education)**

> *The IM sector is the only sector to have established provision in all other sectors with Controlled, Maintained and Integrated provision. When striving for an inclusive and diverse education system, the Irish-medium sector is an exemplar of such a system[472].*
> **(Comhairle na Gaelscolaíochta)**

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468   Education Authority.PDF (independentreviewofeducation.org.uk) p.5.

469   Council for Catholic Maintained Schools.pdf (independentreviewofeducation.org.uk) p.16.

470   Controlled Schools' Support Council.PDF (independentreviewofeducation.org.uk) p.4.

471   NI Council for Integrated Education.PDF (independentreviewofeducation.org.uk) p.2.

472   Comhairle na Gaelscolaiochta.pdf (independentreviewofeducation.org.uk) p.25.

> *Education in Northern Ireland is open and available to children and young people of all faiths and none, within a framework and ethos of non-denominational Christian values and principles*[473].
> ***(Transferor Representative Council)***
>
> *Schools are denominational, inter-denominational and non-denominational. Diverse and inclusive*[474].
> ***(Governing Bodies Association)***
>
> *An increasingly inclusive and diverse education system is emerging*[475]. ***(Catholic Schools' Trustee Service)***

8.124   There is agreement that it is important that schools (and, indeed, all education settings) be open and inclusive of learners of all faiths (and none) and of all community and cultural backgrounds. This becomes increasingly important in a pluralist society which is becoming more diverse. There has been a sustained growth in the number of those identifying as "other". (This can be seen as an unnecessarily pejorative term. However, in present circumstances it is useful in facilitating the collection of statistics, such as those quoted earlier in this chapter, relating to an important characteristic of the existing system. As circumstances change, it should be replaced by more accurate and acceptable descriptions.)

8.125   It is an important principle that all schools are open and welcoming to all. All sectors support this principle. However, much more could be done to obtain a better religious mix in the large number of schools where currently the minority community is seriously under-represented.

8.126   Schools should ask themselves, "What can we do to make our school more welcoming while still retaining our founding ethos?"

8.127   Schools should take proactive steps to encourage applications from the minority community by, for example, establishing close contacts with local primary schools and seeking to engage with parents. At the same time schools should review their admissions criteria with a view to altering or removing any which might indirectly discourage such applications or make them less likely to succeed. There may also be aspects of the ethos or mode of operation of the school which make it difficult to obtain a better community mix. Conversely, embracing sports or celebrations from another community could have a very positive effect.

8.128   However, we recognise that in some areas majority community post-primary schools seeking to attract pupils from the minority community could present problems. For example, if the majority school did succeed in increasing the number of minority community pupils this may be perceived as potentially undermining the sustainability of a nearby minority community post-primary school. Such a school could be an important part of the community's social infrastructure. Schools seeking to implement this recommendation should therefore take into account any wider community impact.

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473   Transferor Representatives Council.pdf (independentreviewofeducation.org.uk) p.4.

474   Governing Bodies Association.pdf (independentreviewofeducation.org.uk) p.1.

475   Catholic Schools' Trustee Service.pdf (independentreviewofeducation.org.uk)

8.129   We are well aware that much of what we have outlined is already happening in many schools. During our Review, we have seen first-hand examples of schools taking proactive action to promote greater community mixing just as we have outlined above.

8.130   We support Integrated education and believe that it is in the interests of Northern Irish society that the number of Integrated schools should increase. Our proposals for far-reaching changes to the network of schools (proposed in Chapter 10) would also serve to increase the number of pupils from different community backgrounds learning in the same classroom. These approaches can be actively pursued in parallel.

8.131   Other recommendations in this Report related to reinvigoration of area learning networks and support for shared education campuses will serve to bring schools from different traditions together and provide a context for assessing the current unmet demand for Integrated education.

8.132   Society cannot be transformed solely through schooling nor by measures opposed by a significant section of the public. Choice remains an important principle that must be maintained.

8.133   All pupils in Northern Ireland should have regular and significant experience of learning face to face alongside others from different backgrounds and traditions. We see this as being an important part of the contribution which education can make to developing a more cohesive and peaceful society. However, it also has a directly educative function. All young people should develop an understanding of the society in which they live. That understanding requires direct personal experience of its diversity and differing traditions and beliefs.

8.134   We recommend that the objective of having all young people learning together be fulfilled by simultaneously pursuing the following courses of action:

- Increasing the number of Integrated schools and/or the creation of jointly managed community schools and reconfigured sixth forms, with expanded numbers of learners from different communities attending the same school and learning together. All families should have such options within a realistic travelling distance as soon as possible. Our modelling suggests the theoretical potential to create 177 new or reconfigured jointly managed community schools and sixth forms with expanded numbers of learners from different communities attending the same school and learning together.

- All schools should be taking steps to ensure a greater mix of religious background in their pupil population. These steps should include actively encouraging applications from any under-represented community, reviewing admissions criteria to eliminate any unintended barriers and ensuring that the ethos and workings of the school are genuinely welcoming to all.

- The new single department reporting annually on the community mix of learners at an individual school level and schools reporting annually on the proactive steps they are taking to ensure a broader community mix in their pupil intake.

- There should be greater emphasis on area learning communities fostering joint learning opportunities. This should not only relate to maximising opportunities for learners to be

educated together in the same classroom (where practical) but also to placing greater emphasis on sharing of "best practice" between schools from all sectors.

- Where there is clearly an educational and value-for-money case, shared education campuses should be actively promoted as mechanisms to improve community cohesion in the longer term.

8.135   Within our Terms of Reference, we were asked to consider a number of outstanding recommendations[476] from the 2017 Independent Review of Integrated Education[477]. One of them had already been overtaken by the decision to remove the exemption of teachers from the Fair Employment regulations. The Integrated Education Act[478] also changed the landscape.

8.136   The remainder of the recommendations would be superseded by the recommendations in our own Report. In particular, our suggested review of the network of schools would result in numerous cross-sectoral amalgamations and the introduction of jointly managed community schools, which would represent a cross-sectoral approach to serving the needs of the local community. The review will also lead to a large-scale reorganisation of sixth form provision. Furthermore, the area planning process will be reformed in ways which will overtake the objectives of recommendations in the earlier report.

8.137   Our Report reaches similar conclusions in relation to initial teacher education (ITE). ITE should equip new teachers to work in any publicly funded school by giving them experience of different sectors during training.

8.138   The pressures on the capital programme have intensified since the 2017 review. Our Report makes recommendations which will have the effect of ensuring that Fresh Start capital funding is better used than is currently the case but the amount available is sufficiently limited to render the earlier report's suggestion of baseline designs inappropriate.

Panel conclusion

Although all sectors insist that their schools are welcoming to all learners, there remains a very substantial element of separation by religion/community background. We believe that this is best tackled by pursuing simultaneously a range of mutually supportive and reinforcing initiatives.

Recommendations and actions

8.139   Throughout the chapter we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

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476   These are recommendations 1, 3, 4, 6, 7, 8, 9, 10, 11, 13, 14, 16, 33, 37 and 38 of the 2017 report.
477   The Report of the Independent Review of Integrated Education | Department of Education (education-ni.gov.uk)
478   Integrated Education Act (Northern Ireland) 2022.

At Northern Ireland level, the new landscape should comprise a single responsible department; single bodies responsible for curriculum, assessment and qualifications, inspection and improvement, and professional standards; and a single authority, responsible for employment and other transactional services, for schools.

In the immediate future (prior to the creation of the single authority, which will require legislation), a directorate should be set up within the EA with responsibility for Controlled schools.

Subsequently, the functions of the EA should be split to form (a) a body for school management and employment and (b) an early intervention and learner support service.

On creation of the single authority for schools, symmetrical arrangements should be established to provide support for ethos and advocacy functions for all individual sectors, with consistency of funding.

The principle of support for parental choice should be maintained but should be subject to an imperative that increasingly all learners should learn together.

Arrangements should be put in place to support the formation and governance of jointly managed community schools.

The aim of all learners learning together should be energetically pursued.

- Increasing the number of integrated schools or jointly managed community schools. All families should have such options within a realistic travelling distance as soon as possible.

- The proposed reconfiguration of the network of schools offers the theoretical potential to create 177 new or reconfigured jointly managed community schools and sixth forms with expanded numbers of learners from different communities attending the same school and learning together.

- All schools should take steps to ensure a greater mix of religious background in their pupil population. These steps should include active encouragement of applications from any under-represented community, reviewing admissions criteria to eliminate any unintended barriers and ensuring that the ethos and workings of the school are genuinely welcoming to all.

- The new single department should report annually on the community mix of learners at an individual school level and schools should report annually on the proactive steps they are taking to ensure a broader community mix in their pupil intake.

- There should be greater emphasis on area learning communities fostering joint learning opportunities. This involves learners being educated together in person in the same classroom but there is also merit in joint extra-curricular activities.

- Where there is clearly an educational and value-for-money case, shared education campuses and jointly managed community schools should all be actively promoted as mechanisms to improve community cohesion in the longer term.

CHAPTER 9 – INSTITUTIONAL GOVERNANCE AND ACCOUNTABILITY

Introduction and context

9.1   Good governance is an essential prerequisite of any well-functioning system. Financial probity and legal compliance are absolute necessities, but sound governance also involves strategic foresight, openness to innovation and promotion of a positive culture. Institutions must be free to take well-considered decisions in the interests of learners while at the same time being accountable to their boards and the broader public for the decisions made and the quality of service provided.

9.2   Educational institutions in Northern Ireland have numerous forms of governance depending on stage of education (school, college, etc.) and sector (grant-aided, Controlled, Maintained, etc.). These differences affect the autonomy of the institution and its governors. At a more basic level, they also affect operational detail such as the number of governors and the method of their appointment. The system reflects a complex history rather than being designed with the future learner or the public interest in mind.

9.3   The Northern Ireland educational landscape would benefit from a simplified governance model and a focus on ensuring all governors and board members are supported to provide effective oversight of their institutions. Governors play a vital role in the delivery of education, the experience of learners and in ensuring the confidence of the wider public. Board membership should combine a mix of necessary skills and representation of key stakeholders while remaining of manageable size.

9.4   Governance arrangements should be flexible enough to enable innovation and be capable of accommodating new types of institution. Effective governance is a key enabler of sound educational practice, freeing up educators to focus on teaching and learning.

9.5   Some smaller schools lack the capacity to deliver on the broad range of administrative, financial and legal duties that arise. Our proposed "right-sizing" exercise is likely to result in amalgamations taking place involving schools from different sectors. There is already guidance in place regarding the operation of "jointly managed schools". This concept should be extended to allow for jointly managed community schools which would provide a range of services for the local community.

9.6   The concept of area planning is sound and essential for the management of the network of schools. However, the current structures are flawed and the approach lacks adequate pace. There is a need for both short-term change (to deliver a plan for a new network of schools) and longer-term change based on the principle that planning our schools and colleges should be focused on the needs of learners and not the interests of institutions.

9.7   Many of our recommendations will require new legislation. Unwieldy and overly prescriptive legislation – such as often pertains in Northern Ireland – can be constraining, confusing and inhibiting of innovation. DE should begin a legislation consolidation exercise to produce a Single Education Act which focuses on strategic matters to be supplemented by regulations allowing for more responsive reaction to changes in context and policy.

Simplified and effective governance

9.8   Elsewhere in this Report, we suggest important changes to the governance of education at a Northern Ireland-wide level including the creation of single department with responsibility for the entire learning journey and changes to the existing sectoral arrangements and delivery bodies.

9.9   In our chapter dealing with Structures and single system (Chapter 8), we recommend changes to the existing sectoral arrangements and make proposals for a more coherent infrastructure at national level, with separate agencies dealing with curriculum and assessment/qualifications. At the same time, we suggest that the EA should be restructured in a way which would separate management/control functions from functions concerned with providing services to schools, colleges and other educational institutions.

9.10   These recommendations are aimed at improving service delivery to the learner, educational institutions and the wider public. They also seek to streamline structures and simplify a complex landscape. We wish to do the same for governance and management at the level of the individual institution.

9.11   Northern Ireland has numerous forms of school governance. Grant-aided schools have a very high level of independence while at the same time being wholly funded by the state[479]. We discuss below whether the current arrangements adequately reflect the public interest in organisations which are wholly or mainly publicly funded. Other schools are managed and governed in ways which allow the state and its agencies much greater direct influence.

9.12   The current pattern of institutional management and governance is complex. All grant-aided schools have in common that they are managed by a Principal (who may have a management team consisting of senior colleagues) and governed by a Board of Governors (BoG). These boards contain representatives of various interests. Their exact composition varies considerably between stages and sectors. Similar arrangements pertain in the college sector (but without the complexity in relation to the composition of Boards).

9.13   In the school sector, detailed arrangements are set out in a Scheme of Management[480], which will differ depending on sector. All schools should have such schemes. The schemes for the Controlled and Maintained sectors are issued by the EA and CCMS. Some schools, such as voluntary grammar schools or Grant-Maintained Integrated schools, have schemes devised by their boards.

9.14   The differing governance arrangements across schools and sectors reinforces a picture of a fragmented and diverse system.

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479 The vast majority of schools receive 100% funding for capital works, with the exception of a small number of voluntary grammar schools. Source: Glossary of terms | Department of Education (education-ni.gov.uk)

480 https://www.eani.org.uk/school-management/school-governors/school-policy-documents-resources/scheme-of-management

Table 9.a: Membership of school BoGs by governor category[481]

Controlled schools in public ownership	Number of Governors on the Board	Foundation Governors	EA Governors	DE Governors	Parent Governors	Teacher Governors
Primary & Secondary	9	4	2	None except model schools	2	1
	16	6	4		4	2
	24	9	6		6	3
Nursery, Grammar & Special	8	0	3	2	2	1
	16	0	6	4	4	2
	24	0	9	6	6	3
Integrated Primary & Secondary[482]	14	2 Transferors / 2 Trustees	4	0	4	2
	21	3 Transferors / 3 Trustees	6	0	6	3
Integrated Grammar or other Integrated school[483]	14	0	4	4	4	2
	21	0	6	6	6	3
Schools in private ownership (Catholic Maintained, VG, Integrated)	Number of Governors on the Board	Foundation Governors	EA Governors	DE Governors	Parent Governors	Teacher Governors
Primary & Secondary (Voluntary Maintained 100% capital grant)	9	4*	2	1	1	1
	18	8*	4	2	2	2
	27	12*	6	3	3	3
	*Trustee governors must include at least one parent in their nominees					
Primary & Secondary (Voluntary Maintained 85% capital grant)	10	6*	2	0	1	1
	18	10*	4	0	2	2
	27	15*	6	0	3	3
	*Trustee governors must include at least one parent in their nominees					

481 The Principal and Co-Opted Governors are additional to the membership shown below.

482 Applies to a school which prior to transformation was a Controlled or Catholic Maintained school.

483 Applies to a school which prior to transformation was a voluntary school other than a Catholic Maintained school.

Schools in private ownership (Catholic Maintained, VG, Integrated)	Number of Governors on the Board	Foundation Governors	EA Governors	DE Governors	Parent Governors	Teacher Governors
Primary & Secondary (Grant-Maintained Integrated)	16	6	0	4	4	2
	24	9	0	6	6	3
Voluntary grammar (100% capital grant)	9	4*	0	3	1	1
	18	8*	0	6	2	2
	27	12*	0	9	3	3
	36	16*	0	12	4	4
	*Trustee governors must include at least one parent in their nominees					
Voluntary grammar (85% capital grant)	10	6*	0	2	1	1
	18	10*	0	4	2	2
	27	15*	0	6	3	3
	26	20*	0	8	4	4
	*Trustee governors must include at least one parent in their nominees					
Voluntary grammar (no capital grant)	13 or fewer	No set no.*	0	0	1	1
	14 or more	No set no.*	0	0	2	2
	*but must include at least 1 parent in their nominees					

9.15   The table above demonstrates that there is a very wide variation in the composition of BoGs. This can be seen in the number of members with some in the state sectors having as many as 27 while others have only 8. In the voluntary grammar sector, the range is from 9 to 36. All schools, except the very small number of voluntary grammars which receive no capital grant, have governors representing the public interest, appointed either by DE or EA or both. All have both teacher and parent governors. With the exception of Controlled nursery, special and grammar schools and some Integrated schools, all have some foundation governors, appointed in a variety of ways.

9.16   These arrangements need to be simplified and, to some extent, standardised to reflect best practice in organisational governance. There should be greater consistency of governor arrangements across sectors including a review of size, membership and fitness for purpose with a simplified structure based on a reduced range of appointing bodies. There should be only one appointing body on behalf of the state. The current arrangements where DE and EA both appoint governors should end with all appointments being made by the Department.

> **Panel conclusion**
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> The current approach to school governance is complex and diverse, lacking consistency across sectors and stages and adding the perception of a fragmented system. This involves differences in numbers of governors, appointment routes and the range of interests represented.
>
> These differences reflect a complex history. However, it is not clear that the current model is in the best interests of the learner.

9.17   The simplification of governance arrangements is secondary to ensuring their effectiveness. BoGs have significant influence on the success of an institution and the experience of the learner. They provide direction, challenge and local oversight. Any future governance model should enable improved local accountability as well as faster and better-informed decision-making. This requires effective, expert and well-supported local governors.

9.18   Currently there are approximately 11,000 governor positions, of which a small proportion will be unfilled at any given time. A review of the size of boards should lead to a reduction in overall numbers and in the extent of vacancies at any given time. Nevertheless, boards should have limited powers of co-option and the maximum length of a governor's term of office should be extended to two terms of 4 years.

9.19   Boards should have a blend of skills. Governors should be trained for their roles and have the confidence to deliver their functions. The training currently offered by the EA provides a good model.

9.20   Boards should listen to and understand the needs of their customers, in this case learners and, in earlier stages, their parents. Many schools have pupil-led councils. These can be an effective method of gathering pupil opinions on the school environment or testing new ideas that the school leadership may wish to introduce. Such councils should be a standard feature of all schools. The BoG has a role in ensuring that they are in place and effective. This may involve boards providing the opportunity for Council members to present to them and share ideas. There may also be the possibility for pupils to attend appropriate parts of board meetings to understand better how the school is managed.

9.21   The following principles for school-level governance should be applied in all sectors, apart from voluntary grammars, which are entitled to make their own arrangements. In doing so, they will have to have regard to any conditions surrounding their foundation but should also apply these principles as far as possible.

   a. Boards need to be a suitable size to allow for considered decision-making. Boards that are too big or too small will be ineffective. Ideally, boards should not have more than 16 members. However, the appropriate mix of skills is more important than size. Boards should have limited powers of co-option to enable them to fill skills gaps in their membership.
   b. Boards should be a good forum for decision-making. This means they need a blend of experience, expertise and skills relevant to education, child development or child-centred education, human resources, and legal and financial matters. Governors need to be sufficiently trained to fulfil their role appropriately.
   c. All schools should have both parent (minimum of 2) and teacher governors.

d. The public interest should be represented on all boards via a single appointing authority on behalf of the state. It is not necessary to have both the responsible department and an Arm's-Length Body (ALB) involved in choosing governors. The appointing authority should seek to match prospective governors with schools to ensure the appointment benefits the school and the governor. This may involve skills-matching, verifying that BoGs are representative of their community or ensuring the prospective governor can easily travel to or has an existing legitimate interest in the institution.

e. Where the conditions under which the school was established require it, there should be foundation governors, but the number should be limited.

f. Governors should have access to high-quality training. ETI should conduct a thematic inspection of governors' experience of their work, gathering views on, *inter alia*, their effectiveness, training and relationship with school management. In the light of the outcomes it would be for the Department to judge whether changes are required to current training programmes.

g. BoGs should be refreshed on a staged basis, rather than wholesale changes being made at intervals. This should be introduced over time to ensure a level of continuity of membership at all times.

h. BoGs should put in place processes to ensure that the voice of learners is heard and considered within the school. This might involve inviting pupil representatives to present at meetings or attend as non-voting participants.

Panel conclusion

BoGs play a vital role in the delivery and management of education at a community level. Being a member of a BoG should be seen as a valuable and rewarding role – directly influencing the educational experience of learners and the success of an institution.

Boards should operate in accordance with the principles set out in the paragraph above and have in place procedures for listening to the views of learners.

Increased autonomy balanced with increased accountability

Autonomy

9.22   Local decision-making is an important principle within the delivery of education at all stages. Much of our thinking is based on the premise that decisions should be taken closest to where they will have their effect, in this instance education providers, with appropriate accountability.

9.23   There are already good examples of this principle operating in education. For example, Sure Start projects have a high level of autonomy and we would wish to see this continue, as their services expand, as they fulfil a vital role in relation to early years services.

9.24   Our proposals for college management advocate both a strengthening of the centre and increased decision-making at a local level. The following paragraphs deal with the school sector in more detail.

9.25   All schools are expected to implement the Northern Ireland curriculum (although interpretations can legitimately vary), carry out certain standardised assessments and make

use of recognised qualifications. Government and its arm's-length bodies will issue guidance. However, important decisions on educational policy and practice as well as the running of the school are matters for local decision-making. BoGs need to be equipped and have the skills necessary to play their part in such processes. They need to take responsibility for their actions. Where these conditions are in place, extensive school autonomy makes for faster and better-informed decision-making.

9.26   Furthermore, delegation of extensive operational decision-making creates responsiveness to local needs, opportunities for innovation, and the diversity which any complex system requires if it is to progress and flourish. Principals and BoGs can make speedy, effective and well-informed decisions and must be trusted to do so. It is important, however, that any increased delegation of powers is desired by the institution, can be effectively delivered and is linked to increased accountability.

9.27   A survey was carried out by DE in 2016 to determine schools' attitudes to a proposed increase in financial delegation. There was a relatively low response rate – 17.7% of all grant-aided schools responded (196 responses in total). Some schools (such as Grant-Maintained Integrated (GMI) and voluntary grammar schools) saw themselves either as already having "full" delegation or as likely to enjoy little benefit from any extension of current levels of delegation.

9.28   The responses indicated a 50:50 split in terms of support for the concept of increased delegation. Some schools which were not supportive made strong representations that they were already struggling to cope, without levels of delegated authority being extended further. Many responses from schools opposed to the concept of increasing delegation levels saw this as merely adding to their responsibilities without appropriate funding, backup support, or addressing of their core concerns about insufficient funds to cover existing responsibilities.

9.29   Post-primary schools, in general, were more likely to state that they wanted to see an extension of current levels of delegated authority – seeking additional funding to support this increased delegation and freedom from what they portrayed as the restrictions and bureaucracy arising from these responsibilities currently lying centrally within EA.

9.30   However, over half of the schools which supported increased delegation qualified this view by stating that extended delegation should only be for schools wishing it and capable of meeting its demands. There was a strong view that no change should be imposed on schools.

9.31   It is natural that larger schools may feel more confident in taking on increased delegation of powers whereas smaller schools, perhaps with teaching principals, often prefer centralised support. The "right-sizing" operation proposed in this Report will reduce the number of small schools and, it is likely, increase both the will and capacity for greater delegation. Even so, some flexibility may be required in implementing new levels of delegation.

9.32   There is scope for further delegation to schools, primarily with regard to financial management. This would bring significant advantage, particularly in relation to the following areas:

   a. **Delegated budgets for SEN interventions**. Elsewhere we have set out detailed proposals in relation to SEN. If fully implemented, these would result in schools having a significant

delegated budget for SEN. We recommend that schools have greater freedom to vary the way in which any staffing resource attached to a child with a statement is used and deployed. In other words, schools should be able to use the resource flexibly, putting in place hours of support by a classroom assistant, teacher, educational psychologist, speech and language therapist or other professional as deemed appropriate for the learner's needs. Schools should also be able to use resources in a way that benefits a group of pupils so long as there is benefit to the relevant individual.

b. **Special schools**. At present special schools do not have delegated budgets. These schools should be capable of accommodating greater delegation. However, it will be necessary to retain a resource centrally to fund schools to cater for children whose complex needs will entail particularly high expenditure.

c. **Maintenance and minor works**. All schools should be empowered to take decisions about minor maintenance and upgrades. This would allow schools, if they wish, to make flexible use of local suppliers and avoid bureaucratic delay. They would be allowed to make use of their own delegated funds for this purpose. Thought should also be given to the possibility of delegating additional resources from centrally held funds, although any sums would inevitably be small. Guidance should be issued indicating the kind of works that schools could undertake and the procurement procedures they should use.

d. **Professional development**. As stated in Chapter 7, all schools should have an obligation to ensure the ongoing professional development of their teaching and other staff. This also requires investment. This would mean an increase in the resource held centrally, which could then be allocated to schools for resourcing professional development. Within their overall resource as thus augmented, schools would have to determine the priority attached to professional development.

9.33 Delegation operates well when schools act with demonstrable competence and follow agreed rules. Currently this is not always the case. For instance, schools are expected to manage their budget within 5% or £75k, whichever is the lower. At 31 March 2023 there were 778 Controlled and Maintained schools[484] that were either in surplus or deficit by more than 5% or £75k. Of these schools 577 had reported a similar position (surplus or deficit of at least 5% or £75k) for each of the last 3 years.

9.34 Given the number of schools operating outside the current rules, it is clear that further delegation should be linked to proven competence and increased accountability.

Panel conclusion
Autonomy and delegation of powers is a valuable concept but needs to be linked to competence and accountability. There is a need for increased delegation to all schools in relation to SEN, maintenance and minor works and professional development. Furthermore, special schools should be able to expect a greater level of delegation.

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484 Due to the way in which they are funded, Grant-Maintained Integrated and voluntary grammar schools are excluded from these figures as they are technically not permitted to enter a deficit position. However, in circumstances where they are about to overspend on their allocated budget, they can apply for an emergency grant from the EA. Seven schools were granted emergency grants during 2022/23.

Accountability

9.35   All education institutions are responsible for the education of learners. Some also have responsibility for the care of young people. However, institutions are not directly accountable either to learners or in the earlier stages to their parents. Instead, they are immediately accountable to their BoGs and ultimately to government through DE or DfE.

9.36   Inspection by ETI is an important element in accountability as well as being a means by which the performance of the system as a whole can be monitored. Inspection of individual schools, colleges and other bodies should be geared towards ensuring continuous improvement and sharing of best practice. Judgements on performance should be made in this context and be focused on how to bring about improvement. While performance in relation to examinations and qualifications is important, it should not be the sole basis of evaluation.

9.37   We consider the present position where school inspections are not taking place because of a limited form of industrial action to be unsatisfactory and incompatible with necessary standards of accountability and the promotion of public confidence.

9.38   In other UK jurisdictions the relevant legislation makes it an offence to obstruct the process of inspection. The Education Act 2005, applicable to England and Wales, makes it an "offence intentionally to obstruct the Chief Inspector in relation to the inspection of a school"[485]. Similarly, Section 66 of the Education (Scotland) Act 1980[486] makes it an offence "if any person wilfully obstructs any person authorised to make an inspection". We recommend that similar provisions be enacted in Northern Ireland.

9.39   All institutions should have in place a system for regular self-evaluation and the identification of development priorities. This should be based on a non-bureaucratic process of producing and reviewing formal development plans. It is essential that boards be involved in agreeing the priorities in such plans and the progress being made towards achieving them. Any necessary amendments should be made to legislation[487] to allow this kind of approach.

9.40   This process of self-evaluation and development planning is fundamental to school improvement. The evaluation needs to be honest and rigorous. The role of senior staff is pivotal. Schools may find it helpful to engage in mutual evaluation processes in which schools compare practices and outcomes, identifying strengths and weaknesses in both their own and their partner's performance. Such arrangements need not be confined to two schools but could involve small collaborative groupings. The partnership can involve short-term secondments and teacher networking as successfully practised in the London Challenge.

9.41   However the self-evaluation is conducted, the effectiveness of the resulting school development plan requires to be carefully monitored. Again this calls for honesty and rigour. So far as possible, the development plan should set out measurable objectives. As with the evaluation, the monitoring of outcomes can be done in collaboration with others.

9.42   With only minor exceptions in relation to capital spending in a small number of voluntary

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485   The Education Act 2005, Section 10(2).
486   Education (Scotland) Act 1980 Section 66.
487   The Education (School Development Plans) Regulations (Northern Ireland) 2010 (legislation.gov.uk)

grammar schools, all institutions with which we are concerned are wholly funded by the public purse. In return it is reasonable for government to make clear the conditions on which the funding is made available. For this reason, the regulatory role of DE should be made more explicit and, where necessary, should be strengthened.

9.43   Over the past 14 years, many schools have been subject to "action short of strike". This has had a direct impact on the experience of learners, in some cases for the full duration of their education. Persistent industrial relations problems have a corrosive effect on the system as a whole.

9.44   It is essential that genuine concerns be tackled and unilateral action brought to a halt.

9.45   Workload management should be a chief priority for DE and steps taken to ensure that unnecessary bureaucracy is removed and educators are focused on teaching and learning. However, we are equally clear that practices such as imposing a unilateral interpretation of the scope of the job and non-cooperation with Inspectors are inappropriate and can legitimately be regarded as a breach of contract.

Panel Conclusion

All educational institutions are responsible for the quality of education provided to learners. However, they are immediately accountable not to learners but to their boards and ultimately to government.

The Inspectorate plays an important role in relation to accountability and its position in legislation should be strengthened.

All institutions should have in place a mechanism for self-evaluation and should be focused on continuous improvement.

Enabling innovation and flexibility to allow for new types of institution

Jointly managed community schools

9.46   Northern Ireland has a number of different types of school. At primary level there are Controlled, Catholic Maintained, Other Maintained, Controlled Integrated and Grant-Maintained Integrated. Each sector is distinctive in relation to management arrangements and ethos. The post-primary model is more complicated, with differences between independent schools and grant-aided, as well as between Controlled, Voluntary and Grant-Maintained Integrated, and further differences between grammar and non-grammar. The system should be rationalised and simplified in accordance with the recommendations made elsewhere in this Report.

9.47   Our proposals for improved area planning and the "right-sizing" of the network of schools are designed to provide a better educational experience for learners, to deliver a broad curriculum and to make efficiencies in how the system uses resources. However, they will also create circumstances in which new governance models and new ways of managing schools may need to be considered, for example where it is decided to amalgamate schools from different sectors.

9.48   Current legislation[488] already refers to the concept of "community schools", described as being characterised in the following ways[489]:

   (a) activities other than school activities ("non-school activities") are carried on the school premises; and

   (b) the activities which are so carried on are carried on wholly or mainly under the management or control of the BoG of the school.

9.49   There is also departmental guidance on jointly managed schools[490]; specifically on "jointly managed church schools". In effect, these schools would most likely be formed from the amalgamation of a former controlled and Catholic maintained school with all relevant religious interests being represented on the BoG. No such schools yet exist.

9.50   We view the concepts of "jointly managed" and "community" schools as closely aligned and envisage a solution whereby "jointly managed community schools" could be established on a truly multi-sectoral approach – where the different sectors work collaboratively for the good of the local community. The formation of new jointly managed community schools would assist in making the process of area planning more effective and, at the same time, promote social cohesion.

9.51   The "right-sizing" exercise we recommend will create many circumstances where two or more small schools will be expected to come together to form a larger, more sustainable school which will meet the established roll thresholds. This may involve schools from the same sector amalgamating but it is more likely that such proposals will involve a number of different sectors. Such schools will often be the sole school in a village or rural locality. It is likely that the school can be used to deliver other services, thus also meeting the requirements of a community school.

9.52   The existing circular on jointly managed schools deals specifically with what is described as being a "jointly managed church school" resulting from an amalgamation of a former controlled and Catholic maintained school. This will not be sufficient in the delivery of the proposed "right-sizing" programme as there may be instances where schools from three different sectors (Controlled, Maintained and Integrated) could be amalgamated.

9.53   DE should, therefore, put in place procedures (including guidance and, if necessary, legislative provision) that facilitate and encourage two or more schools from different sectors to merge to become either a jointly managed school or a jointly managed community school.

9.54   In accordance with the 1989 Order[491] community schools should provide activities other than school activities and these should take place on the school premises under the management of the BoGs. Fundamentally, these schools would serve the local community in a range of different ways – extending beyond education.

9.55   There are important questions about the governance of these schools. When such schools are established as a result of the amalgamation of schools from different sectors, trustees from

488   The Education Reform (Northern Ireland) Order 1989 (legislation.gov.uk)

489   The Education Reform (Northern Ireland) Order 1989, Section 139 (2).

490   Circular 2015/5 (https://www.education-ni.gov.uk/sites/default/files/publications/de/2015-15-jointly-managed-schools.pdf)

491   The Education Reform (Northern Ireland) Order 1989 (legislation.gov.uk)

the sectors directly involved should have equal representation on the BoGs. Furthermore, the Board should have representation from the local community, local businesses and/ or the local voluntary sector. DE should take these issues into account when making its appointments. For instance, for such jointly managed community schools, membership should include education sectors not already represented on the Board, ensuring the governance is truly multi-sectoral and the schools can serve learners and families of all faiths and none.

9.56   Although there would be an assumption that the new school would be a jointly managed school or jointly managed community school, the management type of the school would be determined by the Board with the possibility of it being classified as Controlled or Maintained (Other Maintained).

9.57   Various concerns have been raised regarding certain practical arrangements for such types of schools. However, all of the issues are soluble assuming there is a will among the existing schools to make the new arrangement work. These potential issues include:

- **Ownership of land/buildings:** As with the new shared campus building at Ballycastle, it is proposed that the current freehold owners (whether current trustees or the EA) would retain the freehold but offer the new jointly managed school a long-term lease effective for as long as the school exists on the site. Should the school no longer operate from that site in the future, the lease would fall and the site would effectively return to control of the freehold owner.

- **Transport:** Transport policy is set by DE and can be changed to incorporate a new school type. However, assuming the specific proposal relating to transport set out elsewhere in this Report is implemented, the revised charging policy would not take sector into account. Therefore, this issue would effectively no longer exist.

- **Sectoral management/support:** Again, assuming the recommendations set out in the "single system" chapter of this Report (Chapter 8) are implemented, support/management would be supplied via a single organisation. Therefore, this would not be an issue.

9.58   The "right-sizing" exercise recommended in this Report has important implications for the sustainability of sixth forms. It will result in the closure of small unsustainable sixth forms and ensure that those that remain meet the roll threshold. These might be part of an existing post-primary school, a standalone sixth form college or a constituent part of a tertiary college.

9.59   Where larger sixth forms are housed within an existing post-primary school there will be a need to ensure they are open, welcoming and inclusive of all learners in the local community. This is especially the case where a single sixth form has, perhaps, been created through the closure of a sixth form linked to one sector and an expansion of a sixth form within another sector. We recommend that consideration be given to a governance model that would allow for the creation of community sixth forms (as part of an existing school) taking learners from all schools that do not have similar provision.

9.60   It is important that the governance model (and the underpinning legislation) provide greater flexibility for such innovative approaches.

9.61   We also expect that in many instances such approaches will require additional investment, both capital and resource. In the short term, in parallel to the establishment of the Area Planning Commission and development of a its proposals, the Department should actively seek pilot projects for community schools and innovative approaches to sixth form provision.

Panel conclusion

Governance arrangements should be flexible enough to accommodate new types of school which will result from cross-sector amalgamations.

The "right-sizing" exercise will create many circumstances where two or more small schools will be expected to come together to form a larger, more sustainable school which will meet the established roll thresholds. This may involve schools from the same sector amalgamating but it is more likely that such proposals will involve a number of different sectors.

Such amalgamated schools will often be the sole school in a village or rural locality. It is likely that they can be used to deliver other services, thus also meeting the statutory requirements in relation to a community school.

The Department should, therefore, put in place procedures (including guidance and, if necessary, legislative provision) that facilitate and encourage two or more schools from different sectors to merge to become a jointly managed community school. This approach should be piloted as soon as possible.

Flexibility will also be required at sixth form level where amalgamations may take several forms. Similarly, the opportunity should be taken to pilot new arrangements such as sixth form and tertiary colleges.

9.62   Careful consideration needs to be given to the ability of schools to act as standalone highly autonomous units. Schools are highly complex organisations that serve many different purposes. Learning is their primary function, but they also have vitally important responsibilities for pupil welfare. They are involved in the all-round development of young people. They make use of the services of a variety of other agencies and collaborate with other organisations both in the public and private sectors. They undertake a wide range of budgetary and human resource functions. Their activities frequently have legal implications. Some schools do not have the human and financial resources to undertake all of these functions and thus operate fully as autonomous units. One of the purposes of our suggested "right-sizing" exercise is to reduce – ideally to zero – the number of such cases.

9.63   In the longer term there needs to be greater flexibility to extend the range of choice available to parents. Northern Ireland already has many types of school. However, the choice currently available to families mainly relates to religious and community background. In some but not all areas the option also exists to opt for a school not associated with either of the main traditions. The extent of choice available on directly educational grounds is limited.

9.64   Irish-medium education could be said to fit into this category although community and cultural tradition are also important. In a different sense, the existence of a grammar school sector can be said to offer a choice between more and less academic pathways, but the choice is limited by the need to score sufficiently highly in the transfer test.

9.65   There is no option available for a genuinely different pedagogical approach such as might be offered by a Steiner or Montessori school although there is no reason in principle why such a school should not be funded by the state. While Irish-medium education is available, there is no option for immersion or bilingual education in a modern foreign language.

9.66   The Panel has also considered the history of specialist schools in Northern Ireland and whether these could be promoted as part of a future system to broaden choice. These would be more appropriate to post-primary education and could help to improve standards by encouraging schools to focus on areas of strength. Specialist schools could be a viable option in larger towns. In small towns and rural areas, it would be important to ensure that the locally available education is of a mainstream variety.

9.67   Elsewhere in the world, innovative approaches, generally based on the application of new technology are on offer. Some of these provide online or blended education. Some are directly supported by major new technology companies. Others are highly international in character.

9.68   We cannot foresee what options might emerge over the coming 20 years, nor whether they will be considered appropriate to the circumstances of Northern Ireland. However, it seems overwhelmingly likely that the combination of rapid technological change and the rigidity of current methods of school organisation will produce new possibilities worthy of serious consideration.

9.69   There would be merit in having in place legislation setting out mechanisms which would permit the introduction of new forms of schooling. This might permit the state to respond to approaches from innovators seeking funding or partnership arrangements for setting up a different kind of school. It would also provide a route whereby an innovative school set up privately, which had demonstrated its viability over a stated period of time and was judged by ETI to be providing good-quality education, could be admitted to the state system and funded accordingly. We are not advocating the early establishment of any new types of school but suggest that legislation be put in place to make future innovation possible.

Panel conclusion

The existing educational landscape contains numerous types of school but offers very limited choice based on purely educational considerations.

The future design of education should not be constrained by our existing thinking nor by current policy or legislation. There needs to be greater flexibility to allow for the introduction of different school types providing they deliver an excellent educational experience for learners.

These new school types will become more important in the future in the light of technological, economic and social change. There should be greater flexibility in policy and legislation to allow for new options in education to be implemented at pace, should the need arise.

A new approach to area planning

An imperfect process

9.70   Northern Ireland currently has too many non-viable small schools and too many small sixth forms, some in otherwise viable schools but others in schools which are themselves too small. To tackle this problem – which has both educational and financial dimensions – we need a new approach to area planning. This requires changes in how area planning is delivered – both in the short term and the longer term.

9.71   As things stand, there are a number of key contributors to the area planning process with differing statutory and nonstatutory roles. DE, the EA and CCMS have statutory functions.

9.72   **DE** sets the direction for strategic area planning; sets and reviews policy; provides advice and guidance to support the planning authorities; leads on preparatory work for the area planning pre-planning year and scrutinises/challenges/monitors the development and implementation of the Area Plan. In undertaking this work, DE must be mindful of its statutory duties.

9.73   The **EA** has overall operational responsibility (under the Education Orders) for the planning of provision on an area basis within the policy and strategic framework set by DE. **CCMS** has a subsidiary planning role in relation to Catholic Maintained schools.

9.74   A number of other bodies have non-statutory roles in area planning. These include the sectoral support bodies (i.e., NICIE, CnaG, GBANI, CSSC and CSTS) that advise and advocate on behalf of their sector, and DfE, which represents the FE sector. The TRC is also involved in the process and represents Church Schools.

9.75   The current processes and structures inhibit innovative cross-sectoral solutions and hinder the pace at which transformation can occur. Thresholds for school sustainability should be strictly enforced rather the current arrangements whereby schools can operate under sustainability thresholds for an extended period of time. In some instances (for post-primary and sixth forms) current thresholds should be revised upwards in order to guarantee educational viability and improve the experience of the learner.

9.76   The strategic planning of education provision was a concept originating within the recommendations of the Bain review in 2006. The Bain review focused on the quality of education for children and recommended an estate of fewer, larger schools characterised by greater collaboration and integration across sectors and planned according to a coherent view of the needs of local areas. It was envisaged at that time that there would be a strategic planning authority (SPA) – the Education and Skills Authority (ESA) – to plan education provision for all sectors and school types across the region. However, the establishment of ESA was not supported politically. After considerable delay, the EA was established in April 2015. It is a very different body with a more restricted role and responsibilities than were envisaged for ESA. Specifically, it does not have overall responsibility for the planning of school provision.

9.77   Area planning has therefore been progressed in a less than ideal context. Multiple organisations have statutory and non-statutory input to a planning process based on legislation that was not designed to support the type of strategic planning envisaged by

Bain. The pace of area planning has been slower than anticipated for a number of reasons including the existence of numerous bodies responsible for sectoral planning; the challenges around the establishment/embedding of the EA; deficiencies in cross-sectoral collaboration; local/community opposition to change; and severe limitations on availability of resources to incentivise change.

9.78   DE has been carrying out work to improve the current process. This has involved reviewing and updating a number of existing structures, processes and guidance with the intention of clarifying roles and responsibilities. While this work has brought about some improvements, progress has been very limited with little impact on the current Area Planning Cycle (2022–2027)[492]. It is time for fundamental change to the way strategic planning of the school estate is undertaken.

An Independent Planning Commission to lead on reform

9.79   In the short term, we are recommending the establishment of an **Independent Planning Commission** that would take the lead in developing a Northern Ireland-wide plan for a new network of schools based on our recommendations on sustainability (see Chapter 10) as well as on the new school governance models referred to in this chapter.

9.80   This programme to transform the network of schools will be ambitious, far-reaching and challenging. It could lead to the establishment of over 100 new jointly managed community schools as well as new solutions for sixth form provision. The current DP process and what is effectively a sectoral-based area planning process are not appropriate for implementing the proposed changes. A large-scale, time-bound exercise managed on a non-sectoral basis will be required to achieve the step-change which is needed.

9.81   The short-term Commission would be expected to deliver its plan to DE within 2 years of establishment. DE would then need to set out plans for implementation. Our expectation is that the work of the Commission and the implementation of its findings could take up to 10 years at a cost of £1bn, with a future net saving of £100m per annum. These costs, savings and assumptions are detailed in Chapter 10.

9.82   Implementation of such a plan will ultimately be for DE and will likely require new legislation that could be prepared in tandem with the development of the plan. While it would be the hope that implementation would be by consent, legislation may be required to ensure decisions can be taken in a timely manner. The current lack of pace within area planning caused by cumbersome processes and structures is not acceptable. DE has a duty to ensure an efficient network of schools for the taxpayer and an effective education experience for the learner.

A single strategic planning authority

9.83   In the longer term, a permanent single strategic planning authority should be established with responsibility for the ongoing planning of the network of schools and colleges. This aligns with our recommendation regarding a single department.

9.84   The intention of having a single authority is to vest all planning responsibilities in one organisation charged with delivering a learner-centred approach. We would expect

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492   Area planning | Department of Education (education-ni.gov.uk)

processes to be more streamlined, consistent and speedy. It is possible that planning responsibilities could sit with the Department, or the proposed single authority for other transactional services (including employment) or in a separate body, solely focused on planning. We suggest that the Department would be the most appropriate single strategic planning authority.

9.85   There are, of course, other changes to the area planning policy framework and process that could be taken forward in advance of the formation of the single strategic planning authority. These include:

- Reviewing of the DP process, including allowing schools to alter their approach to academic selection without the need for a DP.
- Amending the process for setting admissions and enrolment numbers to align with proposals on sustainability and efficient enrolments and to simplify the process.
- Putting in place a process to ensure that learners with a statement of SEN are not considered as supernumerary to school enrolments and that SEN learners receive school placements well in advance of transition periods.
- Reviewing the appropriateness of the small school funding factor, in the light of wider changes to sustainability thresholds.
- Revising the Sustainable Schools Policy to develop new indicators for sustainability (that are measurable and can inform future planning needs).

Panel conclusion
Our recommendations for a new approach to area planning are based on the conclusion that the concept of area planning is sound and essential for the management of the network of schools but that the current structures are flawed and the approach lacks adequate pace.

We recommend the establishment of an Independent Planning Commission that would take the lead in developing a Northern Ireland-wide plan for a new network of schools based on our recommendations on sustainability as well as the new governance model (for jointly managed community schools).

The programme to transform the network of schools is ambitious, far-reaching and challenging.

The longer-term solution for area planning would see the establishment of a single strategic planning authority, to be responsible for the ongoing planning of the network of schools and colleges. Such an authority would work in the interests of the learner and deliver at greater pace, working cross-sectorally across all stages of education. There are different options for how such an authority could be established. We suggest that the Department would be best placed to act as the authority. |

The legislative framework

9.86   Many of our recommendations will require legislative changes, in some cases of a fundamental nature. In other cases, progress can be made in the interim within the existing legislative framework but such progress will be limited.

9.87   In addition to legislation intended to bring about the proposed changes, there would be

great merit in consolidating existing legislation and, so far as possible, bringing all provisions within a single statute and removing statutory requirements that have been superseded or no longer fulfil a useful purpose. The legislative framework in Northern Ireland is unduly complicated and can be overly prescriptive. This inhibits change, which is highly counter-productive given the need for education to be innovative and responsive in light of rapid economic, technological and social change.

9.88 This process of legislative consolidation will need to take into account the following important pieces of primary legislation that relate to education in Northern Ireland. This list is unlikely to be comprehensive.

- The Education and Libraries (Northern Ireland) Order 1986
- The Education (Northern Ireland) Order 1987
- The Youth Service (Northern Ireland) Order 1989
- The Education Reform (Northern Ireland) Order 1989
- The Education and Libraries (Northern Ireland) Order 1993
- The Education (Northern Ireland) Order 1996
- The Education (Northern Ireland) Order 1997
- The Education (Northern Ireland) Order 1998
- The Education and Libraries (Northern Ireland) Order 2003
- The Special Educational Needs and Disability (Northern Ireland) Order 2005
- The Education (Northern Ireland) Order 2006
- The Education Act (Northern Ireland) 2014

9.89 In addition, there are around 150 pieces of subordinate legislation that are relevant to education policy and delivery. These will also need to be considered in relation to the consolidation exercise.

9.90 When there is significant pressure on budgets, statutory services are protected at great cost to non-statutory services. Decisions are thus taken on the basis of legislative status rather than impact on learners. It is highly likely that, in the past, non-statutory services have suffered significant cuts despite contributing more to better outcomes for children and young people than some statutory services that have been protected. This is an unintended consequence of overly prescriptive legislation. The suggested consolidation will have as one of its objectives seeking to avoid such occurrences in the future.

9.91 We recommend a legislation consolidation exercise to produce a single education bill which brings together existing legislation of continuing relevance and implements the proposals of this Report. The primary legislation should focus on strategic matters with subsidiary legislation allowing for more expedient change to better reflect a changing context and policy requirements. A Bill Team should be established immediately with the Act to be in place within 5 years. We would estimate the costs of such a team to be in the order of £750k–£1m per annum[493].

9.92 In the interim, progress on our recommendations should be made within existing statute or by way of legislative changes that would subsequently be incorporated in the consolidation Act.

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493   Assuming a team consisting of 8 FTEs including one specialist legislative advisor/drafter.

Panel conclusion

Education legislation should be consolidated in a way which avoids the tendency in existing legislation towards excessive specificity. It is unwise to build into statute provisions containing a high level of detail that will often quickly become irrelevant or outdated. This is particularly unwise in political circumstances such as those of Northern Ireland where legislation demands a level of consensus which is difficult to obtain.

A Bill Team should be established immediately with the aim of having a new Single Education Act in place within 5 years. This should not mean a cessation of new legislation, especially where this is required to implement any of the recommendations of this Report. The new Act would need to incorporate such new legislation.

Recommendations and actions

9.93   Throughout the chapter we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

The Northern Ireland educational landscape would benefit from a simplified governance model and a focus on ensuring all governors and board members are supported to provide effective oversight of their institutions. Such a simplified governance model and focus should be prioritised.

The following principles for school-level governance should be applied in all sectors apart from voluntary grammars, which are entitled to make their own arrangements. In making such arrangements, they must have regard to any conditions surrounding their foundation but should also apply these principles as far as possible:

- Boards should be a good forum for decision-making. This means they need a blend of experience, expertise and skills relevant to education, child development or child-centred education, human resources and legal and financial matters. Governors should be sufficiently trained to fulfil their role appropriately.

- Boards should be a suitable size to allow for considered decision-making. Boards that are too big or too small will be ineffective. Ideally, boards should not have more than 16 members. However, the appropriate mix of skills is more important than size. Boards should have limited powers of co-option to enable them to fill skills gaps in their membership.

- All schools should have both parent (minimum of two) and teacher governors.

- The public interest should be represented on all boards via a single appointing authority on behalf of the state. It is not necessary to have both the responsible department and an Arm's-Length Body involved in choosing governors. The appointing authority should seek to match prospective governors with schools to ensure the appointment benefits the school and the governor. This may involve skills-matching, verifying that BoGs are representative of their community or ensuring the prospective governor can easily travel to or has an existing legitimate interest in the institution.

- Where the conditions under which the school was established require it, there should be foundation governors, but the number should be limited.

- Governors should have access to high-quality training. ETI should conduct a thematic inspection of governors' experience of their work, gathering views on, *inter alia*, their effectiveness, training and relationship with school management. In the light of the outcomes it would be for DE to judge whether changes are required to current training programmes.

- BoGs should be refreshed on a staged basis, rather than wholesale changes being made at intervals. This should be introduced over time to ensure a level of continuity of membership at all times.

- BoGs should put in place processes to ensure that the voice of learners is heard and considered within the school. This might involve inviting pupil representatives to present at meetings or attend as non-voting participants.

There should be further delegation of budgetary powers to schools involving SEN resources, maintenance and minor works, and monies for CPD. Special schools should be able to receive greater delegation.

Proportionate accountability is in the interests of learners, the wider public and all providers of education.

The current position where staff and schools have not been engaging with the ETI inspection regime for an extended period is unacceptable. The legislative position in Northern Ireland should be brought into line with other UK jurisdictions.

All educational institutions should have in place mechanisms for self-evaluation and taking forward the process of continuous improvement.

The formation of new jointly managed community schools would assist in making the process of area planning more effective and, at the same time, promote social cohesion. DE should, therefore, put in place procedures (including guidance and legislative provision) that facilitate and encourage two or more schools from different sectors to merge.

A governance model should be developed for shared community sixth forms which are situated within a school associated with a particular sector.

DE should actively seek pilot projects for community schools and innovative approaches to sixth form provision.

A new approach to the area planning process is necessary to create a school network that meets the needs of all learners and promotes social cohesion, while also providing a comprehensive curriculum in a cost-effective manner.

An Area Planning Commission should carry out a review of the existing network of schools in Northern Ireland. This Commission should prepare a plan for a revised network of schools with more efficient and sustainable admissions and enrolment numbers. Proposed changes to the

network of schools should be made on a "sector-blind" basis prioritising the needs of learners and efficiency of delivery.

This process has the potential to generate annual savings of approximately £100m could be generated for reinvestment in education.

In the longer term, a single strategic planning authority should be established to oversee the ongoing development of this revised network of schools.

Various aspects of the area planning process should be reviewed and improved, including the use of DPs, the setting of admissions and enrolment numbers, the practice of considering pupils with SEN as supernumerary and the need for a small schools funding factor.

Existing legislation should be consolidated to create a Single Education Act that incorporates any new legislation required to implement the recommendations of this Report.

Regulations should give flexibility to meet changing circumstances.

CHAPTER 10 – FUNDING - SUFFICIENCY, EFFICIENCY AND IMPACT

Introduction and context

10.1 Education funding should be viewed as an investment for the good of the individual, the Northern Ireland economy and wider society. Investing in education, improving outcomes and reducing the incidence of low achievement benefit society and the economy as a whole.

10.2 Spending on education – especially early in life – can avoid the need for more expensive interventions at a later stage in welfare, health and the criminal justice system. It leads to better use of human talent and more fulfilled lives. Less must be spent remedying the many social ills that are associated with educational failure. However, investing in education is not merely about preventative spending. It represents a positive commitment to improving the quality of life of everyone in Northern Ireland.

10.3 Currently, there is a funding crisis in education. This is the result of systemic underfunding. It is evidenced by the numbers of schools in deficit and the comparative analysis of funding in other jurisdictions. However, underfunding is not confined to the school sector but affects all parts of the education system.

10.4 Properly investing in our future calls for much more than filling the existing funding gap. The Executive must therefore raise the priority of education and progressively increase its funding.

10.5 The case for increased funding has greater strength if efforts are consistently made to reduce inefficiencies where they exist. We have highlighted inefficiencies in the way the current education system is designed and services are delivered, but the scale of the potential savings should not be exaggerated. Even if all the savings identified were realised, a significant funding gap would remain.

10.6 If we are to view education funding in this way, we need a more robust methodology for tracking outcomes, understanding benefits and demonstrating a return on that investment. The spend must be effective and be seen to be effective.

Adequacy of education funding

Northern Ireland education spend

10.7 DE and the wider public education system receive a significant proportion of the block grant. The 2023/24 non-ring-fenced resource Departmental Expenditure Limit[494] (DEL) budget for Northern Ireland, as announced by the Secretary of State in April 2023[495], was £14,211.967m. Half of this budget (£7,300.895m) was allocated to DoH. DE had the second largest allocation with 18% of the Executive budget (**£2,576.508m**). This was a **2.5% cash-**

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494   Non-ring-fenced resource DEL reflects the ongoing cost of providing services (e.g., pay, operating costs and grants to other bodies).

495   Department of Finance 2023/24 Budget Factsheet (finance-ni.gov.uk)

terms reduction on the prior year's budget[496] and resulted in an estimated funding gap of around **£300m**. Additionally, over 70% of DfE's budget of **£772m** supports skills, further education and higher education. Savings achieved in 2022/23 totalling £75m must be replicated in 2023/24. DfE must also identify further savings of £55m. This means that, in effect, DfE's opening budget for 2023/24 will be £130m (16%) lower than expected under the draft budget of the previous Minister of Finance[497].

10.8   On an initial analysis it appears that around 60% of the budget available for school education is directly allocated to schools. This compares to a figure as high as 91% in England[498]. This "60%" figure is often quoted as a sign of inefficiency in the system, with the inference that 40% is used on back-office functions and administration. We have been presented with arguments that efficiencies could be achieved if a greater proportion of funding were allocated to schools rather than being handled centrally.

10.9   However, on further analysis, it becomes clear that the vast majority of the budget (86% in 2023/24) is either delegated to schools or spent directly on their behalf. The issue, therefore, is not about the proportion of the budget spent for the benefit of schools and learners but whether some part of the fraction which is spent centrally might be used more effectively if delegated to schools.

10.10   Funding to schools consists mainly of the Aggregated Schools Budget (ASB) (amounting to 54% of the total DE budget in 2023/24), which is distributed to schools through the Common Funding Formula (CFF). In addition, £832m (or 32%) is provided to schools via the EA Block Grant. This covers areas such as SEN (half the block grant), school meals, transport, rates and school-based staff substitution costs.

10.11   The remaining 14% is funding for areas such as youth work, early years, EA earmarked budgets and Other Non-Departmental Public Bodies (NDPBs). This is outlined in the table below.

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496   Based on a comparison of the opening 2023/24 budget as per the SoS's Written Ministerial Statement of 27 April 2023 to the opening 2022/23 budget as per the SoS's Written Ministerial Statement of 24 November 2022.

497   Information provided by DfE's Skills and Education Group.

498   Sibieta, L. and Jerrim, J. (2021) *A comparison of school institutions and policies across the UK*, Nuffield Foundation, EPI-UK-Institutions-Comparisons-2021.pdf

Table 10.a: DE opening non-ring-fenced resource DEL budget, 2023/24[499]

Total Budget – £2,576.5m (100%)			
Funding for schools and pupils – £2,221.4m:		Other funding – £355.1m (13.8%)	
ASB – £1,389.3m (53.9%)	EA Block Grant – £832.1m (32.3%)		
Allocated to schools through the CFF	• Special educational needs – £437.8m **(17.0%)** • C2k & PPP costs – £85.5m **(3.3%)** • School meals – £71.2m **(2.8%)** • School transport (excluding SEN transport) – £59.1m **(2.3%)** • Central admin/headquarters – £51.0m **(2.0%)** • Rates – £37.7m **(1.5%)** • Pupil support – non-SEN – £33.1m **(1.3%)** • Staff substitution – £26.2m **(1.0%)** • Other EA services to schools including crossing patrols, library service, school development service, music service, legal services and clothing allowances – £25.5m **(1.0%)** • VAT – VG/GMI schools – £4.7m **(0.2%)**	Contingency[500] – £126.9m **(4.9%)**	EA earmarked funds – £85.8m **(3.3%)**
		DE costs – £35.9m **(1.4%)**	Youth and community relations – £36.6m **(1.4%)**
		Early years provision – £34.9m **(1.4%)**	Other NDPBs – £27.1m **(1.1%)**
		Other education services – £7.9m **(0.3%)**	

10.12   The table above demonstrates that funding for other NDPBs is limited at £27.1m or 1.1% of the DE budget. Additionally, very little is spent on administration, with the total DE and EA running costs accounting for approximately £74.9m of total spend in 2022/23[501].

10.13   We have explained in Chapter 9 that it may be possible for a greater proportion of funding to be delegated to schools in Northern Ireland for certain areas. Any increased delegation would be accompanied by additional accountability and, potentially, by administrative complexity.

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499   Figures provided by DE Financial Monitoring Team.

500   At the time of writing, there was c. £126.9m being held as contingency against emerging pressures in those areas where expenditure is difficult to control.

501   Figures provided by DE Financial Monitoring Team. Figures were unaudited at the time of writing and therefore subject to change. Includes c. £22.5m for DE admin costs (of which c. £3.7m were notional) and £52.372m for EA central admin/HQ costs, excluding SEN-related admin costs.

> ### Panel conclusion
>
> Nearly 90% of the available resource is either delegated to schools or spent centrally on services of direct benefit to schools. Although the Panel considers that there is some limited scope for further delegation, it does not accept the view, often repeated, that too much is spent on the central apparatus of education in Northern Ireland to the detriment of what is spent on schools.

10.14 One of the most visible measures of underfunding is the number of schools that are in deficit. The number of schools in deficit rose each year between 2012/13 and 2019/20, just as the number of schools in surplus fell (Figure 10.b). More recently, the stabilisation of the figures since 2019/20 coincided with additional funding being made available following agreements on teachers' pay and the situation being subsequently masked by both additional costs and additional funding during the Covid-19 pandemic. At 31 March 2023 there were 428 Controlled and Maintained schools in deficit (44% of the total of 982 Controlled and Maintained schools). The accumulated deficit across these 428 schools was £102.3m (Figure 10.c) with 25 of the schools having a deficit in excess of £1m, and 332 schools having been in deficit for each of the last 3 years[502].

Figure 10.b: Controlled or Maintained schools in surplus or deficit, Northern Ireland, 2012/13–2022/23

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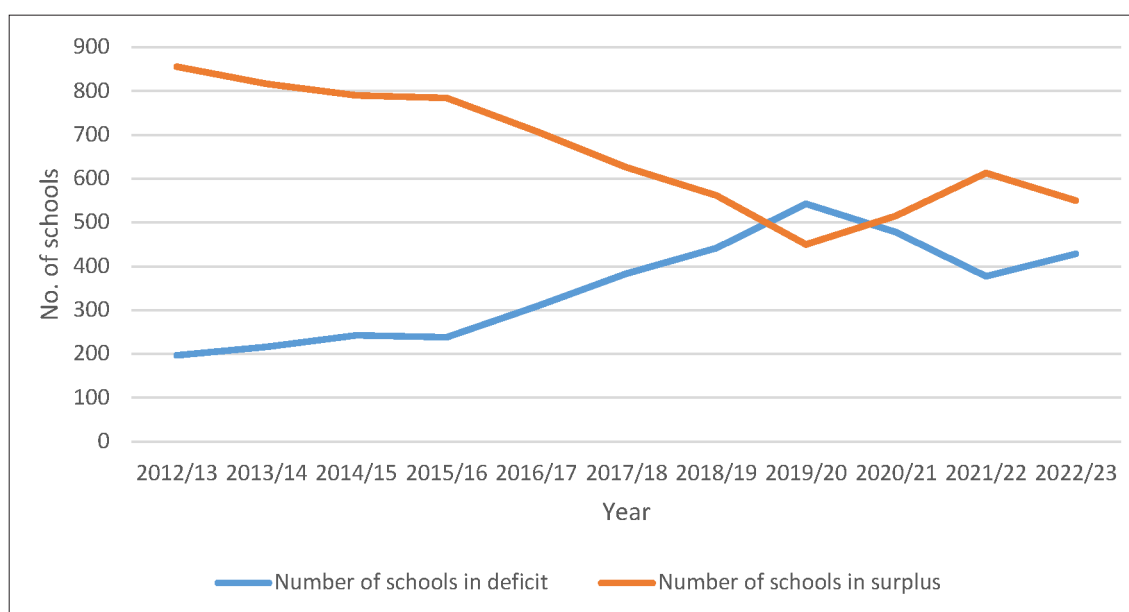
502   Panel analysis based on data provided by DE Financial Management Team.

Figure 10.c: Accumulated position of surpluses and deficits in Controlled or Maintained schools, Northern Ireland, 2012/13–2022/23
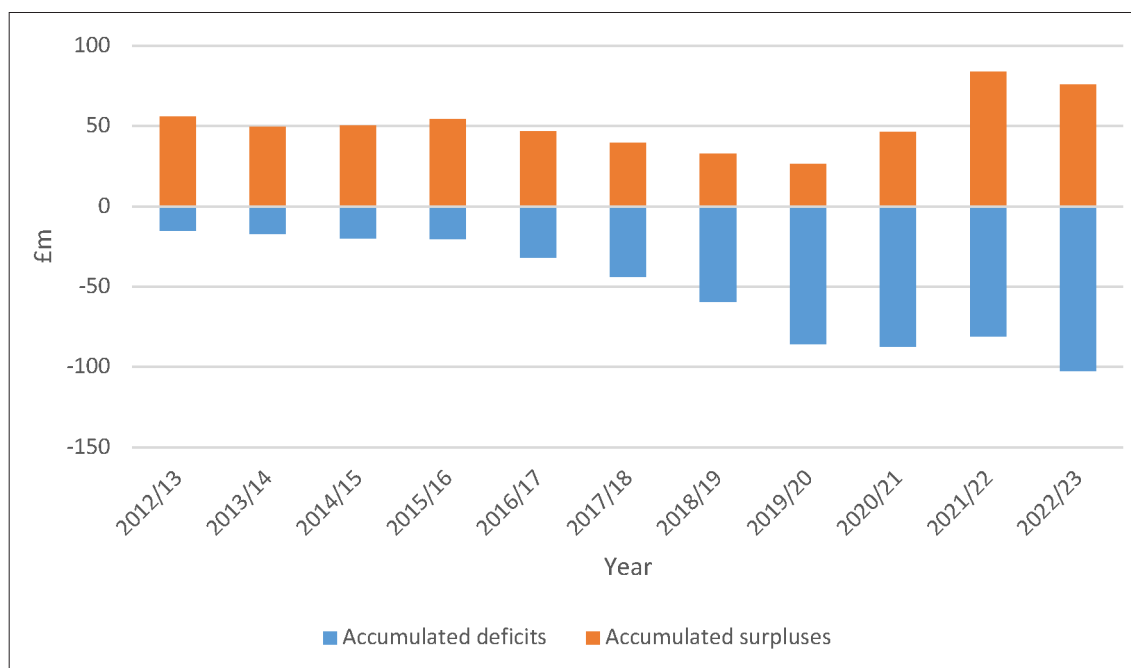
10.15   DE estimates a funding pressure of over **£500m** in 2024/25. Since 2010/11, resource funding reduced in real-terms[503] by £145m (6%), and per-pupil funding reduced in real-terms by c. 11%[504].

10.16   There is significant education spend outside of DE. DfE is responsible for funding the further and higher education sectors, among other responsibilities. The £130m reduction in that department's opening budget will inevitably impact these sectors. However, irrespective of the budget allocation, DfE must maximise the resources available to deliver its vision for a 10X Economy to ensure Northern Ireland's economy continues to grow[505].

10.17   The Northern Ireland Executive's Skills Strategy for Northern Ireland[506] explains the fall in education investment as follows.

> *As a proportion of all public expenditure in Northern Ireland, investment in education and skills has fallen from 14.8% in 2010/11 to 12.7% in 2018/19 using figures published by HM Treasury. To put some (real-terms) figures around that, expenditure on:*
>
> - *primary and pre-primary education has fallen by 1% (£6 million);*
> - *secondary education, including further education, has fallen by 16% (£202 million);*
> - *tertiary education has fallen by 40% (£216 million);*
> - *skills in industry has fallen by 48% (£60 million);*
> - *other resource has increased by 4% (£22 million).*

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503   "Real-terms" means after the effect of inflation has been removed.
504   Information provided by DE Finance.
505   Information provided by DfE's Skills and Education Group.
506   Skills Strategy for Northern Ireland - Skills for a 10x Economy (economy-ni.gov.uk)

Panel conclusion

Education in Northern Ireland has suffered from significant real-terms cuts over the past 13 years. This is true across all stages of education including schooling, further education and higher education. The growth in the number of schools operating in deficit is particularly concerning given the direct impact on learners. These cuts are having a lasting and detrimental impact on learners and, in turn, will have negative consequences for the wider economy and society. They need to be reversed.

Comparison with England, Scotland and Wales

10.18   According to a research paper by the Northern Ireland Fiscal Council[507], public spending on education in Northern Ireland in 2019/20 was **£1,528** per person. This compares favourably to other parts of the UK, with only Scotland having a higher spend (£1,685). The composition of public spending per person across the UK is illustrated in Figure 10.d.

Figure 10.d: Composition of UK public spending per person, 2019/20[508]
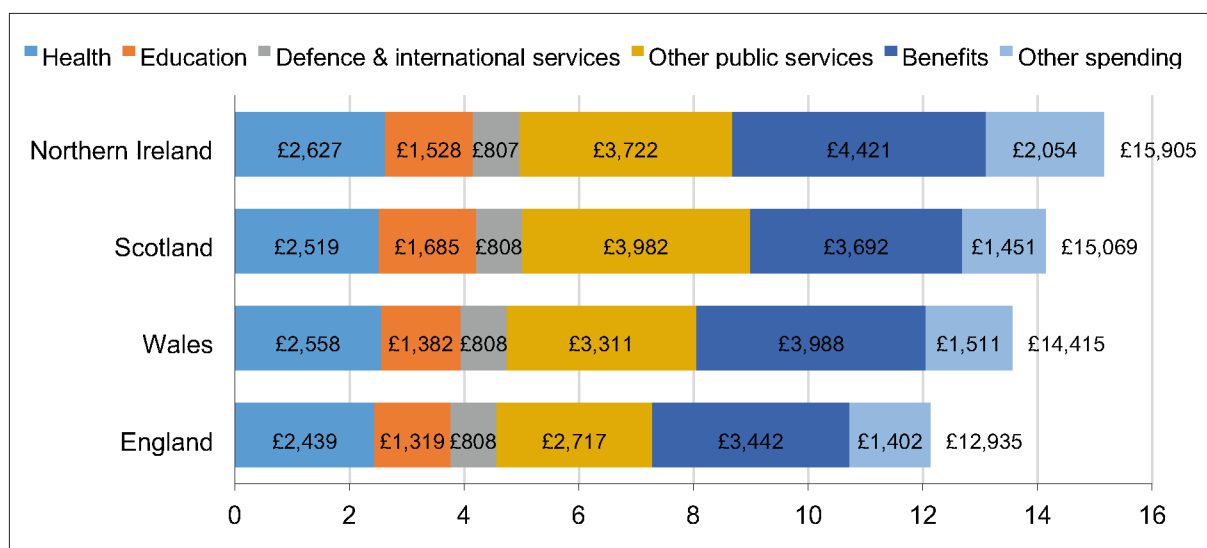
10.19   Total public spending per person is higher in Northern Ireland than in the rest of the UK. It has been consistently around £2,500 a year higher in real-terms than in England over the past 20 years, although in percentage terms this premium has declined by around a quarter. Public spending per person is higher in Northern Ireland than elsewhere in the UK mainly because:

• Spending on welfare benefits is higher in Northern Ireland. Lower average incomes and employment rates increase entitlement to benefits for people of working age. Northern Ireland also has a relatively young population, with more spending on child benefit outweighing less on old-age benefits.

• Spending on most domestic public services is higher. Health and education are the big-ticket items in absolute terms, but the percentage differential is even greater in sectors like agriculture, adult social care and public order and safety. Transport is the main area

507   The public finances in NI: a comprehensive guide (November 2021) | NI Fiscal Council
508   The public finances in NI: a comprehensive guide (November 2021) | NI Fiscal Council

in which spending (specifically capital spending) in Northern Ireland is lower, reflecting partly its less extensive transport network[509].

10.20 When the Northern Ireland Executive sets spending or charging policies that are more generous than those in England or the rest of the UK, this is known as "super-parity". Spending resulting from such decisions has to come from the Northern Ireland Block Grant. Super-parity measures include lack of domestic water charges, rates reliefs, welfare mitigations, student fees, concessionary fares, prescription charges and domiciliary care costs. The Northern Ireland Fiscal Council estimated that the cost of these policies was around £600m in 2021. The greatest single super-parity policy in monetary terms is lack of domestic water charges which is estimated to cost £344.5m annually. It is often argued that bringing these policies more into line with UK policy would free resources to spend elsewhere, but it is for the Executive and Assembly to decide. There are relatively few examples of "sub-parity" policies in Northern Ireland, but notable ones, in relation to our Review, include less generous childcare and spending on apprenticeships[510].

10.21 While the figures quoted at Figure 10.d suggest that the education spend per head of the population is higher than in other countries, this is a misleading and inappropriate comparison as Northern Ireland has a higher proportion of young people than any other part of the UK. According to the Office for National Statistics (ONS), in 2021, 25.1% of the population in Northern Ireland was aged 19 or younger; the equivalent figures were 23.1% for England, 22.1% for Wales and 20.8% for Scotland[511]. This means that the education budget is stretched further than that of other UK nations.

10.22 An analysis carried out by the Institute for Fiscal Studies[512] (IFS) showed that per-pupil spend in Northern Ireland was around **£7,200** and was on a par with England and Wales in 2022/23. However, **for most of the previous decade, per-pupil spend in Northern Ireland was the lowest of the four UK jurisdictions** (Figure 10.e).

509 The public finances in NI: a comprehensive guide (November 2021) | NI Fiscal Council
510 the-public-finances-in-northern-ireland-final-version_0.pdf (nifiscalcouncil.org)
511 Estimates of the population for the UK, England, Wales, Scotland and Northern Ireland - Office for National Statistics (ons.gov.uk)
512 How does school spending per pupil differ across the UK? (ifs.org.uk)

Figure 10.e: School spending per pupil across England, Wales, Scotland and Northern Ireland (2022/23 prices), actual and planned spending, 2009/10 to 2022/23[513]
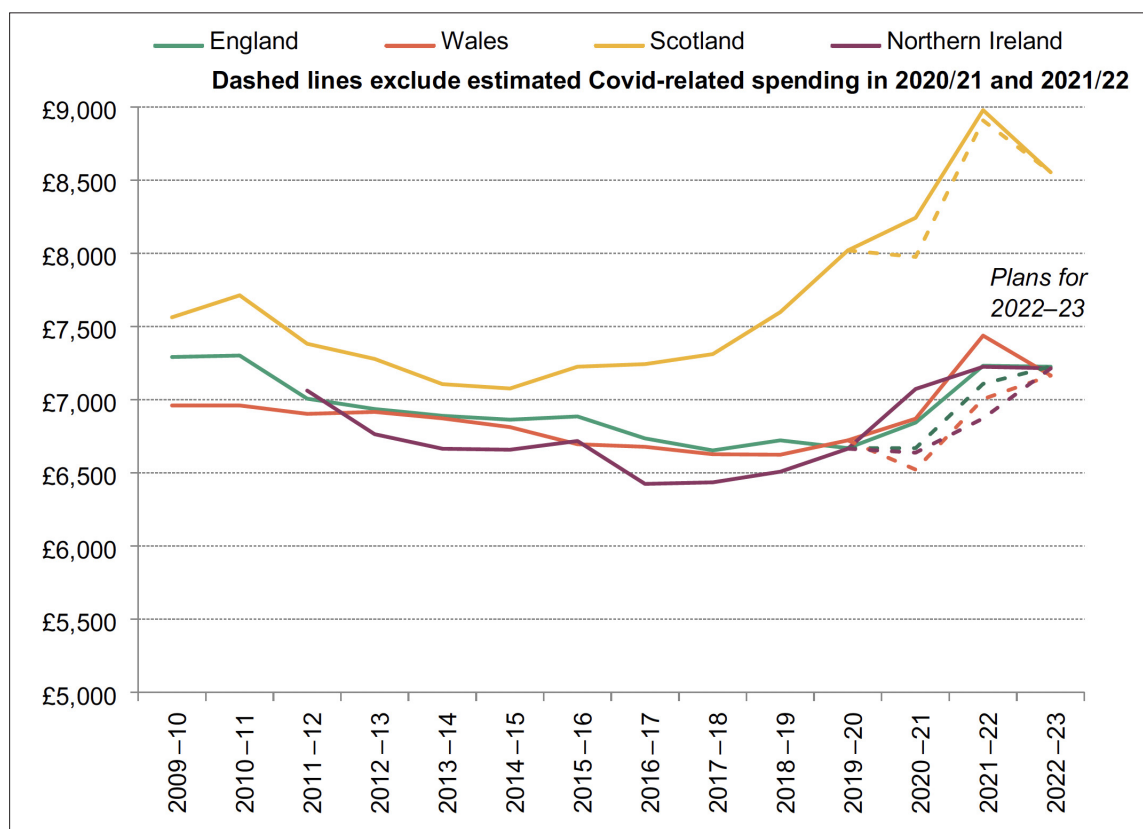
10.23 The IFS paper found that there was a real-terms fall of 8% in school spending per pupil in Northern Ireland between 2011/12 and 2018/19. Falls ranging from 5% to 8% were experienced by each of the other nations over a similar time period.

10.24 Since 2018/19, there has been a real-terms increase of 11% in per-pupil funding in Northern Ireland. This was higher growth than in England or Wales and partly reflects delays in agreeing and funding salary raises for teachers, which led spending per pupil to be depressed in 2017/18–2018/19 and increased for 2019/20 and 2020/21. Pay awards for 2021/22 and 2022/23 are also still to be agreed and will likely lead to another spike in funding to cover back-pay in 2022/23 or 2023/24. The author of the IFS report cautions that the figure for spending per pupil in 2022/23 should be treated as provisional. Figures for Scotland and Wales for 2022/23 are likely to increase as a result of agreements on teacher pay. The same could also apply to England when agreements are reached.

10.25 Scotland's spending per pupil was planned to be over £8,500 in 2022/23, over 18% or £1,300 higher than in England, Wales and Northern Ireland. This reflects an expansion in early years funding and increases in teacher pay.

10.26 As stated previously, the education funding position has been impacted significantly by Covid-19 and school spending per pupil was boosted by Covid-19-related money in both 2020/21 and 2021/22. This is part of the explanation for apparent falls in spending per pupil in 2022/23. Figures for spending per pupil across all four nations will include some Covid-19-related funding in 2022/23, as well as legacy initiatives that have effectively merged

513 Reproduced from How does school spending per pupil differ across the UK? (ifs.org.uk)

into core funding. In Northern Ireland, Covid-19 funding of **£55.5m** which was in place in 2022/23 was discontinued in 2023/24[514].

10.27   Interestingly, while per-pupil funding in England has historically been higher than in Northern Ireland, a report by the Association of School and College Leaders (ASCL) found that there was a **shortfall** of approximately **£5.7bn** in the amount of funding needed by primary and secondary schools in England in 2019/20[515].

10.28   It is difficult to predict the future trend of per-pupil funding across the UK. However, **it is likely that spending per pupil in Northern Ireland will again end up a lot lower than the rest of the UK in 2023/24**, given the **2.5% cash-terms reduction in the DE budget[516]**, and planned increases to education budgets in the other jurisdictions. England has seen a 7.3% cash-terms increase in core school funding per pupil in 2023/24[517], while funding in Wales is expected to grow by at least that amount in 2023/24, or more given they have agreed a higher teacher pay offer of 5%. The total increase of 7% in teacher pay in Scotland would also lead to the conclusion that there will be a large increase in funding in 2023/24, almost certainly higher than 7%[518]. There will always be fluctuations on a year-by-year basis based on different pay settlements and jurisdictions, but Northern Ireland still trended below the other three jurisdictions for 10 years.

10.29   The estimate of the per-pupil spend by DE for 2023/24 is **£7,010**. It should be noted that this remains an estimate, as it includes assumptions regarding pay awards, and uses estimated census data for 2023/24 (i.e., October 2022 census data uplifted by 0.5%, in line with recent trends) on the basis that 2023 census data will not be available until January 2024[519]. This figure was cited in correspondence from the Northern Ireland Office (NIO) to a Member of Parliament regarding per-pupil education spending in Northern Ireland, at the time of the second reading of the Northern Ireland Budget (No. 2) Bill. The correspondence noted that this estimate equates to a decrease of £215 (c. 3%) per pupil compared to 2022/23. It was also conceded that "with the recently announced school funding package for England, Northern Ireland education funding is not on a par with the levels allocated in England and Scotland". However, the letter goes on to highlight that "per-pupil spending is not the only factor that determines educational outcomes and there is the broader question of both how much funding is allocated to education in Northern Ireland and how that budget is spent that deserves our attention".

10.30   Per-pupil funding in England in 2023/24 is estimated at £7,460[520]. This equates to a difference of £450 per pupil compared to Northern Ireland. When this is multiplied by the 2022/23 school population[521], it gives a funding gap of **£155m**.

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514   Information provided by DE Finance.

515   ASCL - The True Cost of Education

516   Based on a comparison of the opening 2023/24 budget as per the SoS's Written Ministerial Statement of 27 April 2023 to the opening 2022/23 budget as per the SoS's Written Ministerial Statement of 24 November 2022.

517   https://ifs.org.uk/articles/how-big-teacher-pay-offer-england

518   Personal communication with IFS.

519   Information provided by DE Finance.

520   School funding: Everything you need to know - The Education Hub (blog.gov.uk)

521   School population estimated at 344,925 based on part-time nursery pupils being counted as 0.5 FTE, in line with IFS methodology. Source: Annual enrolments at schools and in funded pre-school education in Northern Ireland 2022/23 | Department of Education (education-ni.gov.uk)

10.31   Analysis by DE Finance in 2021/22, showed that the average financial position for schools in Northern Ireland was "less healthy" than the position for schools in England, with a greater proportion of schools in an accumulated deficit position (38.14% in Northern Ireland compared to 8.8% in 2021/22). This analysis clearly pointed to the fact that schools in Northern Ireland were experiencing significant budgetary shortfall with more than a third of Controlled and Maintained schools reporting a deficit in that financial year. As noted above, the position has worsened in 2022/23, with 43% of Controlled and Maintained schools reporting a deficit.

Table 10.f: Financial position of schools, England and Northern Ireland, 2021/22

Financial Year	School revenue reserves for local authority Maintained schools in England[522]			Accumulated financial position of Northern Ireland Controlled and Maintained schools[523]		
	Average revenue balance per school	% schools with a negative revenue balance (deficit)	% schools with a surplus revenue balance	Average accumulated financial position per school	% schools with an accumulated deficit	% schools with an accumulated surplus
2015/16	£124,415	6.00%	93.10%	£33,325	23.34%	76.66%
2016/17	£105,683	9.10%	90.00%	£14,712	30.29%	69.71%
2017/18	£103,690	10.20%	88.60%	-£3,964	37.92%	62.08%
2018/19	£110,448	9.90%	89.30%	-£25,981	44.02%	55.98%
2019/20	£110,692	12.00%	87.30%	-£59,139	54.68%	45.32%
2020/21	£160,486	8.40%	91.10%	-£40,946	48.14%	51.86%
2021/22	£178,500	8.80%	90.60%	£3,337	38.14%	61.86%

Panel conclusion

While direct comparisons are difficult (particularly in recent years given the impact of Covid-19) there is sufficient evidence to demonstrate that, when comparing funding per learner, the Northern Ireland education system has been significantly underfunded over the last decade in comparison to England, Scotland and Wales. This puts learners in Northern Ireland at a disadvantage in comparison to their peers in other jurisdictions.

It is estimated that per-pupil funding in 2023/24 will be £450 less in Northern Ireland than in England. This equates to an overall funding gap of £155m.

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522   LA and school expenditure, Financial Year 2021/22 – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)

523   Department of Education Final Outturn, 2015/16 – 2021/22.

Key budget pressures

10.32   The education budget is currently under extreme pressure. Elsewhere in this chapter we demonstrate that school education – the largest component of educational spending – is seriously underfunded compared with other UK jurisdictions. The effects are clear at the individual school level. Schools and other settings are often being asked to deliver more but with less funding. Resourcing pressures in schools, particularly those relating to pay, have meant that schools' finances have been stretched year on year, as evidenced by increasing school financial deficits and decreasing school surpluses. However, the school system is not the only instance of budgetary problems. Representatives of the HE sector would argue that they are also relatively underfunded as too would stakeholders within Youth Services.

10.33   While we agree that education is underfunded and requires significant additional investment, we also believe that any argument for additional funding will be strengthened if we can identify the core pressures in the education budget and demonstrate that existing funds are being used as efficiently as possible. There are examples of significant pressures on schools where there is little potential for efficiency e.g. teachers' pay. However, there are other areas where decisions could be taken that would save money in the long term creating the opportunity **to directly reinvest these funds in the classroom**.

Staff costs

10.34   Teacher pay accounts for the majority of school budgets, at all stages. This, in turn, reduces any discretionary spend by school leaders. The proportion of teaching staff costs varies depending on stage and sector. The breakdown by stage is provided below. In general terms, the proportion of teaching staff costs (of total delegated resource) increases from nursery to post-primary, i.e., 58% for nursery, 78% for primary, 86% for secondary and 76% for grammar schools. The low percentage for nursery is due to the fact that a high proportion of staff are not teachers.

10.35   Total staff costs account for 91% of total delegated resources in nursery, compared to 95% for primary, 99% for secondary and 92% for grammar schools. This constrains the flexibility that schools have in using their delegated budgets.

Table 10.g: Proportion of teaching staff costs and total staff costs by stage of education, Northern Ireland, 2020/21[524]

Stage of education	Teaching staff costs as a proportion of total delegated resources	Total staff costs as a proportion of total delegated resources
Nursery	58%	91%
Primary	78%	95%
Secondary	86%	99%
Grammar	76%	92%
Total all schools	**79%**	**95%**

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524   Panel analysis based on data provided by EA.

10.36 In 2021/22, almost 88% of teachers in Northern Ireland were on the Upper Pay Scale and just over 70% were at the top of that pay scale[525]. The age profile of teachers in Northern Ireland may be a contributing factor – in 2020/21, only 12% of teachers were less than 30 years old[526]; the equivalent figure in England was 21%[527].

10.37 There have been two large (2-year) pay awards in recent years – covering 2017/18–2018/19 and 2019/20–2020/21. The funding for the latter was in the region of £44m but was not baselined, meaning that in the years after these awards, schools have not been given additional funding to pay for these rises and have had to fund them out of their existing budgets.

Panel conclusion

Northern Ireland benefits from a committed and dedicated workforce that views their role as a true vocation. This, in turn, means that teachers tend to stay in roles for longer and do not leave the profession to the extent we see in other jurisdictions. This leads to staff being paid at the top of their scale and although this impacts on schools' budgets, it is a necessary (and positive) trade-off for having an experienced and committed workforce.

Special educational needs

10.38 At present the greatest pressure being exerted on the education budget is the rapidly escalating cost of providing for special educational needs. We have dealt with this issue in Chapter 3, highlighting concerns regarding the costs and effectiveness of current interventions and setting out our proposals for the future. We return to the subject here because of its implications for the funding of the system as a whole.

10.39 SEN expenditure has risen sharply over recent years. This is additional to such pupils' proportionate share of spending generated by the Common Funding Formula. Between 2017/18 and 2022/23, SEN expenditure incurred by DE and EA rose from £255m to **£479m**, an increase of 88%. This rise is faster than the increase in the number of children with statements (Figure 10.h). Most of the increased spend is due to support for children with a statement attending mainstream school, which increased from £91m in 2017/18 to £210m in 2022/23. Transport for children with SEN saw the greatest percentage increase, from £17m to £49m, or 188%, over the same timeframe[528].

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525   Panel analysis based on data provided by DE Pay & Pensions Team.
526   Teacher workforce statistics 2020/21 | Department of Education (education-ni.gov.uk)
527   School workforce in England, Reporting year 2021 – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)
528   Panel analysis based on data provided by DE Finance.

Figure 10.h: Number of pupils with statements and total SEN spend, Northern Ireland, 2017/18–2022/23[529,530]
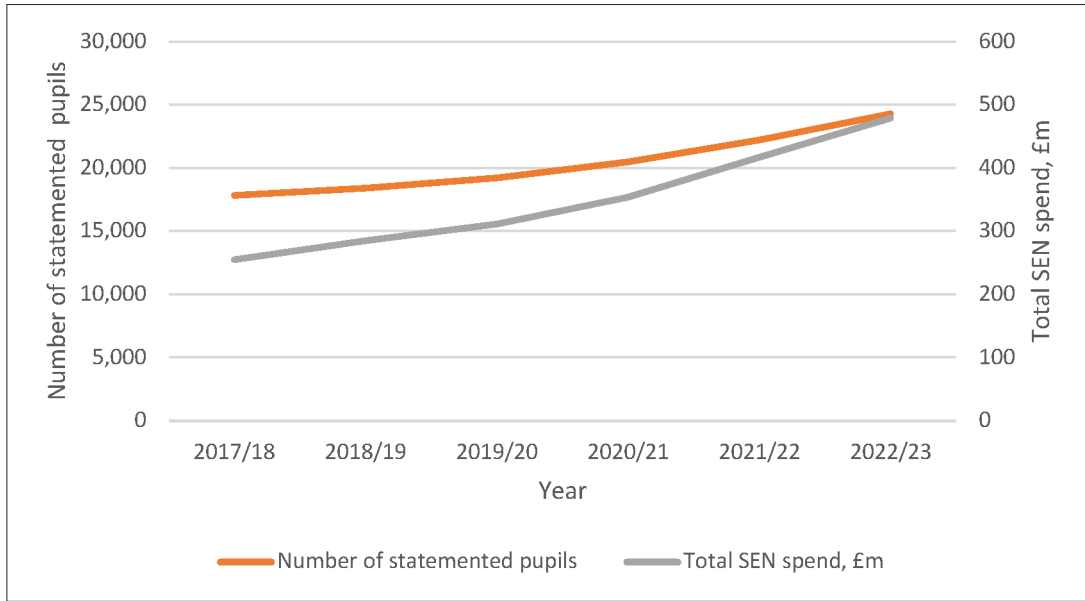
10.40 These costs are becoming unaffordable and unsustainable. If they continue as projected, without a policy or funding change, they will disproportionally impact the entire education budget. Indeed, if the 88% increase in costs that occurred between 2017/18 and 2022/23 is projected into the future, and the DE budget remains flat, the proportion of the education budget dedicated to SEN will rise to 34% (Figure 10.i). Significant policy reform is urgently required to ensure learners get the support they need within a framework that is affordable for the wider system.

Figure 10.i: Extrapolated spend on SEN based on recent trends, Northern Ireland, 2022/23– 2027/28

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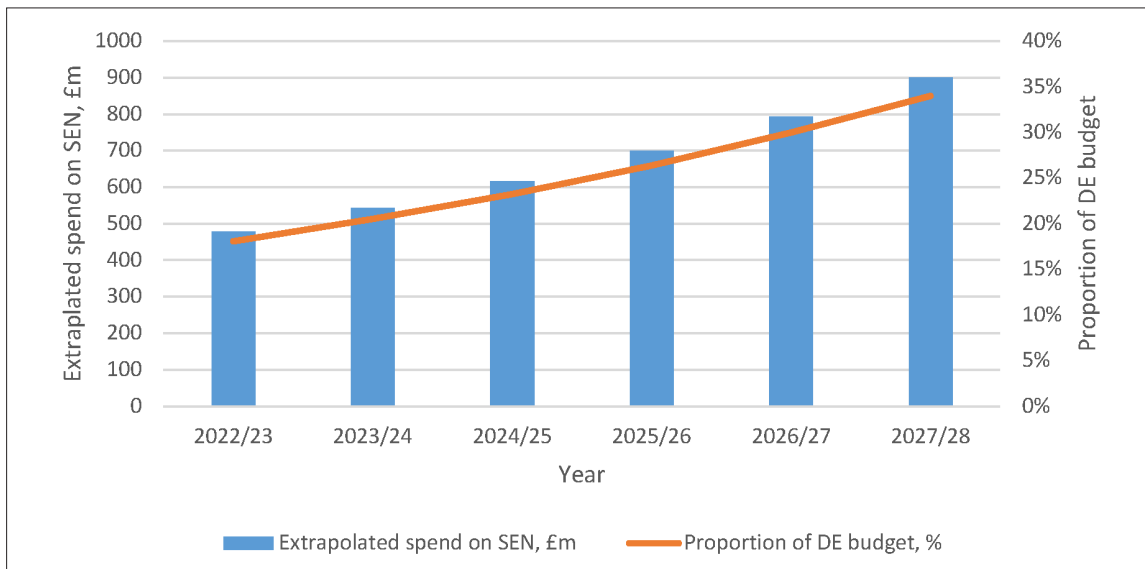
529 School enrolments - overview | Department of Education (education-ni.gov.uk)
530 SEN spend data provided by DE Finance.

10.41   SEN expenditure in England increased from £4.7bn in 2013/14 to £9.0bn in 2022/23, an increase of 91%[531]. This compares to the increase in Northern Ireland of 143% over the same time period. In July 2019, the House of Commons Education Committee in Westminster published its report *A ten-year plan for school and college funding*[532], which described SEN and disability funding as "completely inadequate … [with] simply not enough money in the system to provide for the scale of demand. Local authorities are expected to face a funding shortfall in excess of £1bn by 2021". The report also highlights what it describes as a "vicious cycle" whereby the neglect of lower-level interventions under SEN support are a key underlying factor driving increasing system-wide costs. It also notes that "widespread perceptions and experiences of inadequate lower-level support in mainstream schools appeared … to be driving a crisis of confidence among parents, who were increasingly viewing EHC plans as a "golden ticket" to ensuring adequate support provision … the increase in parental pressure to obtain an EHC plan was diverting resources away from SEN support …"

10.42   As noted in the Ipsos review of SEN services and processes in Northern Ireland[533] there are limitations to undertaking a comparative review of SEN rates in Northern Ireland and England due to differences in data collection methods and categorisation. While figures may not be directly comparable, it would appear that the proportion of pupils with a statement in Northern Ireland[534] is considerably (58%) higher than the proportion of pupils with an EHC plan in England[535] (6.8% compared to 4.3%). The additional cost of having more pupils with statements in Northern Ireland, over and above the basic cost of educating a child in mainstream school, is estimated to be in the region of £136m[536].

10.43   Learners with SEN generally require additional and specialist interventions, thus incurring additional costs. It is important that these costs are met so far as is consistent with allocating the overall budget on an equitable basis that takes account of the needs of all learners. At present DE faces an insoluble dilemma. Its overall budget is determined through the normal budget process and remains fixed. Expenditure on SEN is demand led and is currently increasing exponentially, thus reducing the resources available to fund all other aspects of the service. A new approach is needed. Our proposals for such an approach are set out in Chapter 3.

10.44   Our proposals for special educational needs entail the delegation of significant sums to both mainstream and special schools. This will give schools much greater freedom to cater for pupils' needs effectively but will also require schools to take on significant additional responsibilities. At the same time DE and EA will need to retain funding to deal with exceptionally complex needs.

10.45   The guiding principle of the suggested new arrangements is that the budget as a whole must be managed to meet the needs of all learners in an equitable manner at the same time as funding timely and effective interventions on behalf of those with special needs.

531   SN07020.pdf (parliament.uk)

532   A ten-year plan for school and college funding - Education Committee - House of Commons (parliament.uk)

533   Independent Review of Special Educational Needs Services and Processes. Ipsos, March 2023 (Section 9)

534   Annual enrolments at schools and in funded pre-school education in Northern Ireland 2022-23 (education-ni. gov.uk)

535   Special educational needs in England, Academic year 2022/23 – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)

536   Calculated on the basis of approximately 9,000 additional pupils with statements in Northern Ireland at a cost of around £15k per learner over and above mainstream funding.

> **Panel conclusion**
>
> The costs associated with SEN interventions are becoming unaffordable and unsustainable. If they continue as projected, without a policy or funding change, they will disproportionally impact the entire education budget. Significant policy reform is required to ensure learners get the support they need while also ensuring that the wider system is not adversely affected.
>
> It appears that Northern Ireland has a higher proportion of learners with a statement of SEN than England. We estimate the additional cost to the Northern Ireland system (over and above the basic cost of educating a child in a mainstream school) to be in the region of £136m.
>
> We believe there is an opportunity to use existing resources more effectively to provide earlier support, to increase access to professional services and to deliver needs-based interventions. This will require greater delegation of funding to schools and greater flexibility in how SEN interventions are delivered, moving away from a one-size-fits-all model of classroom assistant support.

System effectiveness and efficiency

The network of schools

10.46   During our stakeholder engagement and evidence gathering there was significant debate about the current network of schools and the impact that small schools have on the education system. This is of particular concern considering the projected decline in the pupil population (Figure 10.j). It is important that the network of schools be "right-sized" so that all learners can experience the same curricular offering and to avoid inefficiencies.

Figure 10.j: Projected population of 4–15-year-olds, Northern Ireland, 2020–2070[537]

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537   Source: NISRA.
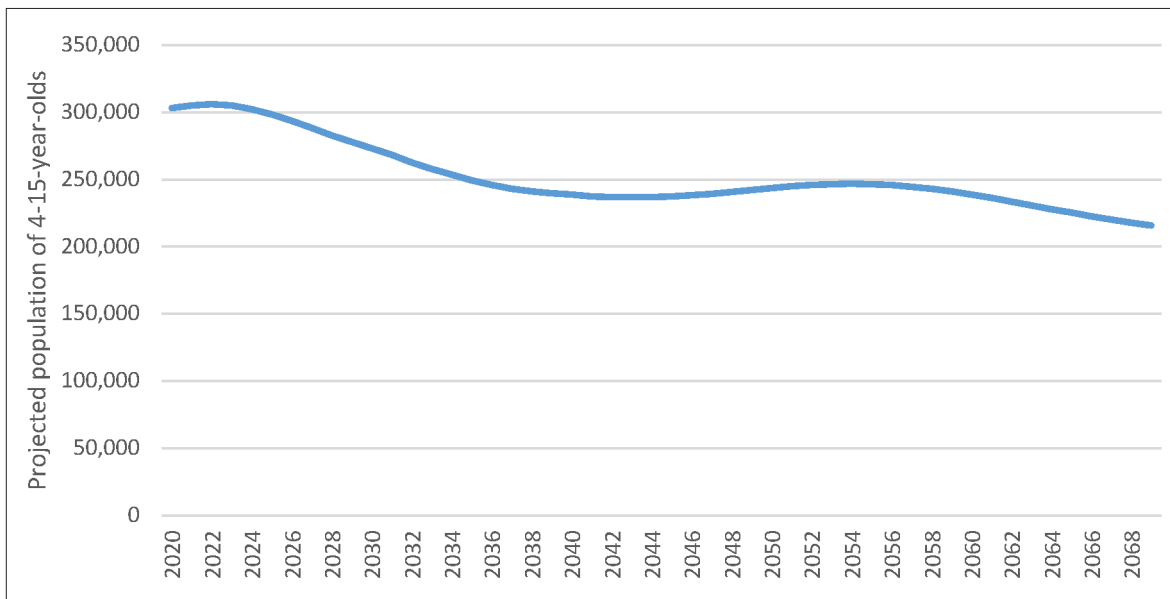
10.47   As a starting point we have considered whether Northern Ireland is "over-schooled" in comparison to the rest of the UK or the Republic of Ireland and found the data to be inconclusive.

Table 10.k: Number of schools per 10,000 pupils, UK and Republic of Ireland, 2020/21

	Northern Ireland[538]	England[539]	Scotland[540]	Wales[541,542]	Republic of Ireland[543,544]
No. of schools per 10,000 pupils					
Primary	46.3	36.0	51.3	44.8	56.2
Post-primary	13.0	9.9	11.6	10.5	19.3
Total	30.9	24.8	33.8	31.4	41.2
Average school size (number of pupils)					
Primary	216	278	195	223	178
Post-primary	772	1,010	859	957	519

10.48   The number of primary schools in Northern Ireland is similar to Wales but lower than Scotland and the Republic of Ireland. The average size of primary schools is broadly in line with other nations. The post-primary picture is perhaps slightly different. Northern Ireland generally has smaller post-primary schools than the rest of the UK but they are generally larger than those in the Republic of Ireland.

10.49   It should be noted that the geographies of the nations are very different. Scotland, for example, has many genuinely remote areas where it is necessary to maintain very small schools. This is also true, to a lesser extent, of the Republic of Ireland. It is difficult to draw firm conclusions, but it is not immediately apparent that Northern Ireland is "over-schooled" (at a regional level) to any significant extent.

10.50   We are, however, concerned regarding the number of small schools in Northern Ireland. The Sustainable Schools Policy (2009)[545] sets out minimum school enrolment thresholds as follows.

538   annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020/21 (education-ni.gov.uk)

539   Schools, pupils and their characteristics, Academic Year 2020/21 – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)

540   Summary Statistics For Schools In Scotland 2021 - gov.scot (www.gov.scot)

541   Schools' census results: April 2021 | GOV.WALES

542   The total number of schools in Wales per 10,000 pupils is higher than Northern Ireland, despite the number of primary and post-primary schools per 10,000 pupils being lower. This may be due to the fact that Wales has proportionately more primary schools – Wales has 6.7 primary schools for every secondary school, whereas in Northern Ireland there are 4.2. This is likely to skew the overall figure.

543   gov.ie - Primary schools enrolment figures (www.gov.ie)

544   gov.ie - Post-primary schools enrolment figures (www.gov.ie)

545   https://www.education-ni.gov.uk/publications/schools-future-policy-sustainable-schools

Table 10.l: Current minimum enrolment thresholds per the Sustainable Schools Policy, Northern Ireland

School Type[546]	Pupil Numbers (minimum)
Rural Primary	105
Urban Primary	140
Post-Primary[547]	500
Sixth Form	100
Dickson Plan Junior High	300
Dickson Plan Senior High	400

10.51   In 2020/21, there were 21 primary schools with fewer than 30 pupils – well below the minimum thresholds set. There were 25 urban primary schools (20%) and 220 rural primary schools (33%) below the minimum thresholds. In the same year there were 67 post-primary schools (35%) with fewer than 500 pupils enrolled in Years 8–12. Some stakeholders raised concerns about the sustainability of these schools and the additional financial support that they may require and questioned the educational experience that pupils receive. Others emphasised the importance of small schools as being at the heart of rural communities and providing a family atmosphere to pupils due to small class sizes.

10.52   A study by Ulster University[548] examined duplication of primary school provision in Northern Ireland. This duplication typically (though not always) occurs where a Controlled school and a Maintained school are located close to each other, often in small settlements. However, while located close to each other, one or both may be too small to be sustainable. Were these schools to find arrangements to remove duplication and to become more sustainable, they would be more likely to avoid closures, to the benefit of local communities of all backgrounds. The authors of this study identified 32 pairs of primary schools which were of different management type (Controlled or Catholic Maintained) and located less than one mile apart and more than three miles by road from other schools of the same management type. In 26 of these pairs, at least one of the schools was not sustainable.

10.53   The authors estimated the cost of duplication among these pairs of schools, based on elements such as the cost of each school requiring a Principal, higher pupil-teacher ratios than the Northern Ireland average (in some cases as high as 1 teacher per 8 pupils compared to the average of 1 teacher per 22.3 pupils in 2018/19) and duplication of ancillary staff.

10.54   The average annual funding per pupil for the isolated pair of schools with the smallest combined enrolment (199 pupils), that for the pair of middle-sized schools (combined enrolment of 237 pupils) and also for the largest enrolment in the pairs (combined enrolment of 779 pupils) was calculated and then compared to the average funding per pupil in a single primary school of the same size as the combined size of the isolated pairs.

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546   In the original publication of the SSP, urban was defined as "Belfast and Derry City Council areas" and all other areas were described as rural but it was subsequently agreed that the NISRA default definition of urban/rural should be applied on a transitional basis (to help mitigate the potential impact on affected schools).

547   Excluding sixth form provision.

548   Roulston, S. and Cook, S. (2019) *Isolated together: Pairs of primary schools duplicating provision.* Available at: TEUU_Report_03_Isolated_Pairs.pdf (ulster.ac.uk)

The results showed that for the school pairs with the lowest enrolment, per-pupil funding was 35.6% higher than it would have been had those two schools been combined into a single school. For the mid-sized school pairs, the difference was 10.4%, while for the largest paired schools the difference was 1.6%. The results are reproduced in Table 10.m.

Table 10.m: Formula funding for primary schools: pair and individual schools of comparable enrolments, Northern Ireland, 2018/19[549]

	Average funding per pupil per year (£)	% difference (pairs compared to individual school)
Lowest enrolment in the isolated pairs of schools (119 pupils when combined)	4,290	+35.6
Average of the five primary schools across Northern Ireland with the same enrolment (119)	3,163	
Mid-enrolment isolated pair of schools (237 pupils when combined)	3,250	+10.4
Average of the five primary schools across Northern Ireland with similar enrolment (236.8)	2,945	
Highest enrolment in the isolated pairs of schools (799 pupils when combined)	2,671	+1.6
Average of the five primary schools across Northern Ireland with similar enrolment (799.2)	2,714	

10.55 There is often debate as to whether rationalisation of the network of schools could generate savings, especially given the fact that the number of pupils, the driving factor in expenditure, does not reduce in any such programme. To aid our thinking, we commissioned a series of desktop modelling exercises covering primary, post-primary and sixth form.

10.56 The modelling was entirely financial and aimed at providing evidence on the financial impact of different area planning decisions. The model was also "sector-blind". A real-world implementation of a "right-sizing" exercise would be delivered differently and the resulting figures would be different, but this modelling gives a feel for the level of efficiency savings that may be possible. A summary of the approach taken to the exercise is available at **Appendix 4**.

Primary school model

10.57 At primary level the modelling involved redistribution of pupils from below-threshold schools to their nearest school until the enrolment at all schools was at least 105 (i.e., the Sustainable Schools Policy threshold for rural primary schools). We found that theoretical

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549   Reproduced from Roulston, S. and Cook, S. (2019) *Isolated together: Pairs of primary schools duplicating provision.*

savings of approximately **£29m per annum** could be achieved. There would however be additional, one-off capital costs incurred in providing additional accommodation either on an existing site or a new site.

10.58   Following completion of this modelling process the end result was a network of 640 primary schools, a reduction of 163 or 20%.

10.59   The anticipated capital cost of implementation is difficult to gauge as it could range from the installation of some modular accommodation to accommodate the additional pupils through to a significant school refurbishment or new school build, depending on local circumstances. These costs are estimated to be in the order of **£399m** (over a potential 10-year implementation period) based on the assumptions set out in **Appendix 4**. This figure would be offset by potential capital receipts generated from release of the school sites no longer in use following implementation of the plan. No allowance has been made in the capital cost estimate to reflect this potential receipt as the value released will vary greatly from site to site and sector to sector.

10.60   The Panel does however recognise that any changes to the existing network of schools along the lines proposed would likely be contentious. Making sufficient capital available to ensure that the revised network of schools is attractive to pupils and staff would be an important factor in the successful delivery of the changes proposed.

10.61   The figures above are based on moving schools to enrolments aligned to the Sustainable Schools Policy (SSP); however, there is a strong case to be made that, where possible, the process should go further, aiming to create primary schools with enrolments reflecting multiples of c. 25–30 above the base threshold as this would be more efficient and provide a fuller educational experience.

Post-primary school model

10.62   At post-primary the analysis was split between models relating to Years 8–12 and a separate approach to sixth form provision.

10.63   Two different models were run relating to Years 8–12. Firstly, a model that redistributed Years 8–12 pupils from schools where enrolments fall below the relevant SSP threshold to their nearest sustainable school. This resulted in estimated savings of approximately £25.8m per annum, with a resulting network of schools consisting of 153 post-primary schools, equivalent to a 21% reduction.

10.64   An alternative approach involved the identification of theoretical "optimum" admission numbers for each school, i.e., year group sizes that facilitate an optimum configuration of classes in order to deliver the curriculum in the most efficient manner. Overall, it was found that the most efficient delivery model would result from enrolments of 30 pupils per class, ideally with a four-class intake as a minimum i.e., **minimum 600 pupils in Years 8–12**.

10.65   This version of the post-primary school desktop modelling exercise noted that savings in the region of £35m per annum were possible by planning school enrolments at more efficient enrolment boundaries where possible (i.e., at least 600 for Years 8–12, with multiples of 150 thereafter). One-off capital costs in the order of £**407m** (over a typical 10-year implementation period) were estimated based on similar assumptions to those used

in the primary school model. Again, no offset relating to release of sites has been included due to the variability across sites and sectors.

10.66   The end result, in terms of numbers of schools, would be 154 post-primary schools, a reduction of 38 or 20%.

10.67   This model would see c. 8% of school places moved to new or existing schools within the network.

Sixth form model

10.68   In relation to sixth form provision, we wanted to establish the impact of enrolment numbers on the cost of delivering the curriculum.

10.69   The average number of teachers required to teach the year group also increases but much less rapidly than the number of learners. Based on our analysis when sixth form enrolment is very small, the per-pupil cost is very high. There is a rapid decline in costs as the year group size increases, even though there is an increase in the number of teachers required. However, per-pupil costs remain fairly constant for schools with sixth forms larger than 120 per year group (240 total). This is detailed below.

Figure 10.n: Estimated per-pupil cost and number of teachers required per year group, Year 13–Year 14[550]
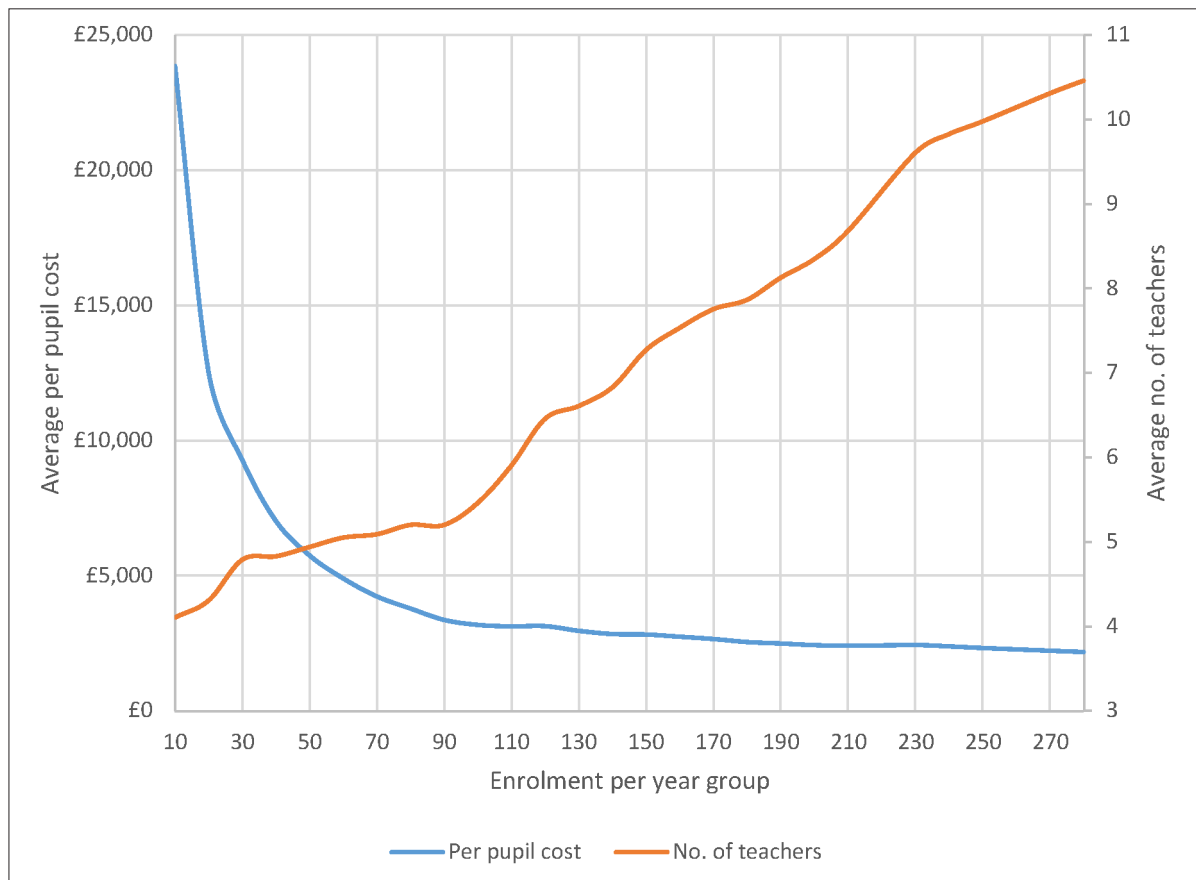
10.70 Any sixth form should be able to offer a wide range of choice and at a cost which does not involve reducing the staffing that is available to younger year groups. We have recommended in Chapter 9 that area planning mechanisms be transformed and strenuous efforts made to reduce to an absolute minimum the number of non-viable schools. We apply the same logic to unviable sixth forms. The review of the network of schools that we have recommended should result in the closure of small non-viable sixth forms and consideration of potential new options of delivery – options were set out in Chapter 5.

10.71 Our financial modelling exercise found that enrolments of at least 120 per year group (i.e., total of 240 pupils in sixth form) were required to ensure efficient curriculum delivery. Further, though lower, savings would accrue by increasing the minimum sixth form year group enrolment beyond 120 pupils. The modelling suggested that if sixth forms were reconfigured such that all sixth forms had at least 240 pupils, with pupils being redistributed to their nearest sixth form, this could result in annual savings of c. £30m per annum and would result in 75 schools with sixth forms, a reduction of 84 or 53% on the current schools network. This forms the basis of our proposals for "right-sizing" sixth form provision set out in Chapter 5.

10.72 Additional one-off capital costs of approximately £**249m** (based on the assumptions set out in **Appendix 4** and requiring an assumed 10-year implementation period) may be required to accommodate the redistributed sixth form pupils.

Table 10.o: Summary of right-sizing desktop modelling exercises

Phase	Basis of exercise	Potential savings per annum	Potential capital costs	Reduction in number of schools/ sixth forms	Resulting number of schools/ sixth forms
1) Primary	Move pupils to nearest school until all schools have at least 105 pupils	£29.3m	£399.3m	20.3%	640
2) Post-primary	Change enrolment numbers to at least 600 for Years 8–12, with multiples of 150 thereafter	£35.0m	£406.6m	19.8%	154
3) Sixth form	Move pupils to nearest sixth form until all sixth forms have minimum 240 pupils for Years 13–14	£29.9m	£249.3m	52.8%	75
Total potential annual saving		**£94.2m**	**£1,055.2m** (excluding receipts for vacated sites)		

10.73   Therefore, the modelling suggests that c. £94m is currently being spent annually on the network of schools that would not be spent in a more efficiently organised system. We recognise that the practical implementation of the desktop model is unlikely to achieve all of the identified savings and that this figure should be considered a theoretical maximum indicative level of saving. However, it is still worthwhile considering the impact that redistribution of this funding could have for the reconfigured network of schools, as this would be to the benefit of all schools and all learners.

10.74   As an example, we have estimated that if the "right-sizing" of the primary school estate occurred as outlined above, the age weighted pupil unit (AWPU) value for nursery and primary schools would increase from £2,371.83 to £2,468.07, an increase of £96.24 per pupil (**4.06%**). The additional funding that would be received by primary schools is in the region of £43.7m[551]. Note that this is higher than the £29m figure identified above, as this £29m is an estimated saving associated only with operating costs. The £43.7m available for redistribution represents not only the operating saving, but also budgetary elements such as the "small schools support factor", the need for which would be reduced in the funding formula. A proportion of this budget, previously allocated to small schools that would no longer exist, could then be allocated across all the schools remaining in the network.

10.75   The out-workings would likely involve the amalgamation of a number of schools and sixth forms but also the potential for standalone sixth form colleges. Where amalgamations occur across sectoral boundaries, "community schools" should be established, managed jointly by representatives of all of the sectors involved. (The "jointly managed community school" concept is explained in Chapter 9.)

10.76   While the modelling process was a desktop exercise that did not take local issues into account and would not therefore represent the "real-world" plan that would ultimately be implemented, the Panel believes the changes projected by the model in terms of school and sixth form numbers are representative when viewed at a network level. Based on the assumptions set out above, the model resulted in the creation of:

- 99 new jointly managed community primary schools;
- 22 new jointly managed community post-primary schools; and
- 56 new sixth forms located in existing schools but managed on a cross-sectoral basis.

Practical implementation

10.77   It is acknowledged that the delivery of the proposed programme to "right-size" the network of schools would be complex and potentially controversial. It is, however, both necessary and beneficial and would:

- improve the curricular and extra-curricular experience of all learners, particularly given the projected fall in overall enrolments driven by changing demographics;
- increase opportunities for pupils from different communities to share the same learning experience together in the same classroom; and
- remove inefficiencies driven by the current configuration of schools.

10.78   Implementing a programme along these lines would release funding which would be distributed across all schools, not only benefitting existing pupils, but also strengthening

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551   Based on the 2021/22 CFF.

bids for additional funding by demonstrating a willingness to take difficult decisions and improve efficiency.

10.79 It is likely that any practical implementation of the programme would not achieve all of the theoretical savings and may cost more than the estimated £1bn of capital investment over the anticipated 10-year implementation period. Furthermore, it is recognised that change on this scale would be difficult in many communities.

10.80 The planning for the restructuring programme should be delivered outside of existing area planning structures by an independent body tasked with developing a single plan covering all sectors to deliver on all our findings and recommendations.

10.81 A significant element of the work will involve leading a "change" process for schools that will ultimately become "jointly managed community schools" when the restructuring plan is implemented. It is important that this change process is properly led and that schools are supported during this transformation. Funding should be made available for both a central team involving all stakeholders (the Department, the EA and the various sectoral bodies) and for the schools involved in the process to ensure that the implementation of the transformation process is delivered successfully.

10.82 Schools that transform to jointly managed community schools should receive additional funding for a period of 7 years (i.e., a full school cohort) to ensure the process is successful and to help smooth any difficulties that occur due to transformation. We estimate that c. £135m would be required over a 10-year implementation period to fund both the central change team and the schools involved. This would serve as a "transformation fund" with the precise methodology for allocating funding to be determined by the Department during the initial two-year period when the plan is being developed.

10.83 DE should, at pace, formulate and publish guidance on a recommended process, ensure that appropriate legislation is in place and immediately seek to implement a number of pilot projects (through joint cross-sectoral working) in parallel with the formulation and implementation of the longer-term plan, which may require legislation to assist with efficient delivery.

Panel conclusion

The current network of schools creates inefficiencies. While the potential savings that could be generated through a "right-sizing" programme are not as high as some would suggest and would take time to realise, there is scope to reconfigure the network of schools in a manner that would both release funding for the wider schools network and improve the curriculum offer available to pupils. This would both enhance the educational experience for learners and increase cohesion in the communities involved. Reallocating the money saved directly to all schools in the reconfigured network would generate benefits for all learners.

The plan for the reconfigured network of schools should be based on the following:

- Strict adherence to the following minimum enrolment levels:
  - Primary = Rural 105 / Urban 140;
  - Post-primary (excluding sixth form) = 600 and Sixth Forms = 240 (120 learners per year group).

While there will always be exceptional circumstances where this may not be possible, these occurrences should be extremely rare.

- For all schools, an additional focus on "efficient" enrolment numbers in multiples of c. 25–30 above the base threshold for primary schools and 600 for post-primaries (excluding sixth form), with larger post-primary schools sized on intervals of an additional c. 150 pupils above the 600 base i.e., thirty per year group.

- All sixth forms to be sized at a minimum of 240 pupils (120 pupils per year group) as the evidence presented demonstrates that this is not only the cost-effective minimum enrolment but also the point at which pupils are best served by full curriculum delivery.

Furthermore, the current DP process and (what is effectively) a sectoral-based area planning process are not appropriate for implementing the proposed changes. A large-scale time-bound exercise managed on a non-sectoral basis will be required to achieve the step-change proposed.

Additional capital funding in the order of £1bn and resource funding of £135m over an anticipated 10-year implementation period will be required to ensure successful delivery of such a radical reconfiguration to the network of schools.

The implementation of such a plan would require legislation, would take a number of years and would be facilitated by new school management arrangements whereby all sectoral interests are managed jointly within the concept of a "jointly managed community school" (explained in Chapter 9). Piloting such an approach through agreement across sectors in a small number of locations while the overall plan is being developed and any required legislation prepared, would be worthwhile.

Future pressures

10.84   This Report advocates an expansion of services in a variety of areas. Increasing services will have financial implications, which are reasonably foreseeable, and where possible these have been quantified.

10.85   There is, however, another area of future budgetary pressure which is much more difficult to estimate but which will certainly have a significant impact over our 20-year timescale. This relates to expenditure on lifelong learning.

10.86   Accelerating technological change will bring about far-reaching economic change which in turn will have a huge impact on the demand for learning in adult life. The requirement for reskilling and upskilling throughout working life will inevitably increase and come to be a feature of life for most of the workforce. Those who leave employment for a time, whether as a result of raising a family, failing to find work or some other reason, will often need to improve their skills or acquire new ones before re-entering the labour market. In later life, people will increasingly turn to learning whether simply for enjoyment or to help them make a contribution through volunteering or activity in their communities.

10.87   The costs of this growing need for learning will be substantial. However, they need not – and should not – all fall on the state. So far as the employed population is concerned, it is reasonable to expect that the costs of work-related education and training will primarily

fall on the employer or, in some cases, be shared between employer and employee. There is a role for charities. However, there will certainly be cases – for example that of a poorly qualified unemployed person seeking paid employment – where the state will have an essential role.

10.88 We make no claim to be able to foresee the future in the kind of detail that would be required to suggest how the growing educational needs of adults might be met or what would be the cost implications. However, a well-managed system is aware of the pressures the future will bring and constantly adapts its planning as the implications become clearer.

Home-to-school transport

10.89 Home-to-school transport is provided to approximately 88,000 children at a cost of c. **£91.4m** per annum (as at 2020/21). Costs rose by 19.8% between 2016/17 and 2020/21[552]. The EA estimates that the spend for 2023/24 will be **£122.3m**, demonstrating a continued upward trend in costs. This is largely due to the significant increase in SEN pupils. About one-quarter of this expenditure relates to children who attend special schools, and a further 20% to children with a statement of SEN in mainstream schools[553].

10.90 We have considered options for reducing the cost of home-to-school transport, including introducing charges and changing eligibility criteria. We estimate that the maximum savings that could be generated from charging would be in the region of **£30m[554]**.

10.91 We recommend the introduction of a charging model for home-to-school transport with three broad principles:

- There should be appropriate exemptions for FSM learners.
- Learners attending special schools should be exempt, as should SEN learners with identified transport requirements.
- Learners should not be subsidised where they have chosen not to attend their closest school (of chosen type).

10.92 Based on the above we estimate that the maximum savings that could be generated would be in the region of £10m to £20m.

10.93 In the longer term, and to link with wider changes to the structures to manage and support schools, there would be merit in reviewing the existing model of delivery.

Panel conclusion

The current home-to-school transport policy is overly generous and, in the current financial climate, potentially unaffordable. A change of eligibility criteria is required and the introduction of charging. However, protections should be provided to learners who are entitled to free school meals. The model of delivery may need to be reviewed as structures to support and manage schools change over time.

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552 Figures provided by DE Finance.
553 Figures provided by EA.
554 Based on calculations provided to the Panel from the Education Authority.

Administration of education

10.94 Undoubtedly, there is potential to streamline the administration of education in Northern Ireland – as outlined in Chapter 8. This is an issue that is intertwined with the existence of unsustainable schools. We have demonstrated above that small schools with inefficient enrolment numbers have a cost impact; however, while the issue of multiple sectors impacts this cost to some extent, it is enrolment numbers that are the key cost driver.

10.95 Research undertaken by Ulster University recently estimated that the total additional cost of maintaining a "divided education system" was in the order of **£226m** per annum or c. **£600k** per day[555]. DE described the report as "a flawed and over simplified analysis of complex education issues that is misleading at a time when education for children and young people in Northern Ireland is seriously underfunded"[556]. DE advised that the methodology used was flawed and that many of the costs attributed to "a divided system" were either incorrect or that it was not appropriate to attribute them to a divided system. We agree with DE's assessment of this particular report.

10.96 Furthermore, the cost of funding the various sectoral bodies is often overstated, and if their functions were transferred into one organisation, a lot of the existing costs would remain. The total funding provided to the sectoral bodies in 2021/22 was £6.8m[557].

Panel conclusion
There are merits to streamlining the administration of education and potential rationalisation of arm's-length bodies but the savings that could be secured are modest, especially if it is assumed that the functions they currently deliver would remain and be delivered by another body.

Capital programmes

10.97 In recent years, DE's capital budget (excluding ring-fenced Fresh Start capital) has been in the order of **£160–£200m** per annum. A static budget during a time of increasing costs within the construction market has caused significant strain. This has been added to by mounting demand, most acutely in respect of minor works to expand SEN provision both in units in mainstream schools and at special schools.

Table 10.p: DE capital expenditure, 2018/19–2022/23[558]

	2018/19 £m	2019/20 £m	2020/21 £m	2021/22 £m	2022/23 £m
Capital programme	Final outturn	Final outturn	Final outturn	Final Outturn	Final Outturn
Major works capital[559]	32.2	34.8	36.8	50	49

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555 TEUU_Report_18_Divided_Society_Divided_Education.pdf (ulster.ac.uk)

556 Divided education report branded flawed and over simplified by department - BBC News

557 Answer to Assembly Written Question 26590/17-22 (December 2021)

558 Figures provided by DE Investment & Infrastructure Directorate.

559 Omagh, Corran and Portadown IPSs have been funded from Major Works from 2017/18 onwards. 2022/23 Major Works Outturn figures includes £1,609k to fund Fresh Start Agreement (FSA) budget shortfall.

	2018/19 £m	2019/20 £m	2020/21 £m	2021/22 £m	2022/23 £m
Schools' Enhancement Programme	17.7	7.2	4.5	3.6	3.3
Minor works	84.2	82.8	74.6	79.3	98.1
Youth	13	12.4	7.7	4.9	2.5
School transport	1.9	1.9	13	18	5.7
EA ICT	15.9	12.8	21.3	18.7	30.7
Other capital[560]	1.1	5.7	2.5	25.7	3.4
Capital DEL total	**166.0**	**157.6**	**160.4**	**200.2**	**192.7**
Fresh Start Agreement[561]	8.1	11.2	6.2	14.5	24.5
Overall capital total	**174.1**	**168.8**	**166.6**	**214.7**	**217.2**

10.98   Despite these pressures, Ministers have continued to announce new capital schemes, which are now proceeding through the design process. These represent significant levels of future capital spend commitments and can be summarised as follows:

- Major works (announced pre-2022)   £482m
- Major works (announced March 2022)   £794m
- Announced SEP projects (not yet completed)   £420m
- Executive contribution to completion of FS-funded projects: £486m

10.99   In addition, there are significant other increasing demands on DE's capital budget:

- Investment in ICT infrastructure will exceed £30m per annum over the next number of years.
- There are emerging and urgent requirements for significant investment of over £400m in new special schools, extensions to the current special school estate and the creation of specialist SEN provision in mainstream schools over the next 6 years.

10.100   If the capital budget remains at or around its existing level, then it is likely that a situation would exist in which c. £50m is all that would be available annually to fulfil ministerial commitments. This would mean that all existing, announced projects would not be completed for around **44 years** assuming construction prices remain at today's levels.

10.101   Due to the shortfall in budget available against capital demands in 2023–2024, a number of decisions were taken at beginning of the current financial year in order to control expenditure. These included stopping the following projects:

- new major works construction contracts;
- new School Enhancement construction contracts;
- priority 2 EA ICT requirements (approximately £24m and including EdIS end-user devices for schools across Northern Ireland and EdIS online payments);

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560   Other capital in 2021/22 includes Covid-19-funded capital expenditure of £19.8m for teachers' laptops, £2m for CO_2 & ventilation and £1m for Fair Start children's devices.

561   Fresh Start Agreement (FSA) - Earmarked capital funding available from the 2016-17 F/Y onwards to take forward shared and integrated education major works projects incl. Strule SEC from 2018/19.

- land purchases for major works and school enhancement projects (five major works purchases as well as urgent purchases to extend two special schools);
- procurement of integrated consultancy teams for the planning of the 28 major works projects announced;
- curriculum related minor works and all traffic management schemes;
- removal of delegated authority for Local Management of Schools capital spend by schools;
- new youth capital construction contracts;
- Fair Start pupil devices;
- outdoor provision for special schools;
- EA bus replacement; and
- a range of miscellaneous smaller projects.

10.102   Implementation of our suggested radical transformation of the network of schools based on "right-sizing" proposals, including the introduction of jointly managed, community schools and the reorganisation of sixth forms, will require significant additional capital spending.

10.103   Furthermore, the most recent capital announcement did not include any support for special schools. Special schools support our learners with the most complex needs. They require additional space and specialist equipment. It is important that they receive greater priority within capital investment programmes. There are also examples of EOTAS centres and Irish-medium schools operating in sub-standard premises. These should also receive attention.

10.104   An immediate reprioritisation of the current DE capital investment programme is required. This should involve the prioritisation of SEN works (in special and mainstream schools) and, in due course, prioritisation of the "right-sizing" programme articulated earlier in the chapter. There is also a need to consider how capital investment could help transform delivery of the curriculum.

10.105   While it is not appropriate for the Panel to plan this reprioritisation process, we do feel it is appropriate to question the validity of investment in some of the existing high-profile projects where significant amounts of capital have already been committed but where value for money is questionable. A good example of this is the Strule Shared Education Campus. While the majority of the funding for this project is coming to Northern Ireland as part of the Fresh Start Agreement, it is likely that DE will need to contribute both capital funding and ongoing resource funding to the Programme. In any event, no matter where the funding originates, there is the need to ensure value for money.

Strule

10.106   We have concluded that the Strule Project is unaffordable and can proceed only if there is a massive addition to school capital or, failing that, all other school capital spends are reduced to unacceptable levels. We therefore recommend the immediate ending of the Strule Programme and the transfer of Fresh Start resources to other education projects that in current circumstances could not be funded from DE's inadequate capital budget. We do not rule out that some of these resources could be used to complete some of the planned shared education facilities on the Strule site particularly PE and possibly sixth form provision and digital learning. We would also suggest that DE recognise that some

necessary maintenance in the five existing schools may have been avoided because of the new build. We recommend that any such works be given the highest priority by DE in the allocation of capital resources.

10.107   In this section, we set out the detailed consideration that has led us to this conclusion.

History of the Strule Project

10.108   The Hillsborough Agreement of 2010 included provision for the transfer of a number of former military bases to the Northern Ireland Executive. These included two sites in Omagh. The Hillsborough Agreement stated that "it would be anticipated that a portion of the land in Omagh would be used for an educational campus". Subsequently the Strule Shared Education Campus (SSEC) Project was developed by DE with the support of the Executive. The concept involved the building of six new schools to replace five existing post-primary schools in Omagh and a special school. The five schools would retain their existing configuration, ethos and governance. The campus would include shared facilities that could be accessed by all participating schools.

Progress to date

10.109   HM Treasury approved Fresh Start Agreement funding of £500m[562] in 2016 to include the shared education programme through to 2025/26. The special school, Arvalee, was relocated to premises within the campus in 2016 and a new road scheme was completed in 2019. Site preparation work for the campus has also been completed.

Table 10.q: Total expenditure and sources of funding to date, Strule Programme, 2012/13–2021/22[563]

	Capital £	Resource £	Source of funding (Capital Only)
Prior to 2012/13	2,4000,000	70,000	DE
2012/13	526,000	395,000	DE
2013/14	790,000	346,000	DE
2014/15	1,737,000	237,000	DE*
2015/16	7,560,000	74,000	DE*
2016/17	9,800,000	40,000	DE*
2017/18	8,224,000	43,000	DE
2018/19	6,872,000	32,000	Fresh Start
2019/20	6,600,000	5,000	Fresh Start
2020/21	1,017,000	14,000	Fresh Start
2021/22	1,242,000	71,000	Fresh Start
Totals	**£44.4m**	**£1.3m**	

Includes contribution from Reinvestment and Reform Initiative (RRI)

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562   £413m was allocated to education, the remainder to housing.

563   Fresh Start contributions are drawn down from the original £500m.

Next steps

10.110   The next phase is the building of the five new post-primary schools and facilities for sharing.

10.111   The cost of the complete Strule Project is currently estimated to be £341m. While it is currently planned that the majority of funding will be from the Fresh Start allocation, a balance of c. £170m will be required from DE/Executive mainstream capital budget. We have considered the impact on the DE budget if DE is obliged to find these funds from its future capital resources.

Impact on DE budget

10.112   DE's capital budget for 2023/24 is £217m. The shortfall for inescapable and high priority capital requirements is £180m; so DE's capital need for 2023/24 is £397m. Assuming no increase in the budget in following years, the shortfall rises to £466m by 2025/26.

10.113   Given these shortfalls, fundamental decisions are required to shape capital expenditure for 5 years and beyond.

10.114   The Fresh Start programme, including Strule, requires £837m for completion. The UK Government contribution will be £412m. While no future capital budgets have been set, if we assumed a static budget (akin to 2023/24 levels) then, for all current planned projects to proceed, the Executive would have to provide an additional £60m in 2024/25, £79m in 2025/26 and run-off in future years of £256m. If Executive funds are not available, and current budget discussions suggest this is the most likely outcome, the DE capital budget would have to contribute £170m over 3 years, reducing the capital available for all other needs to about £157m. To put this in context, there is a requirement for £55m for inescapable minor works in each of these 3 years.

10.115   If Fresh Start, including Strule, continues as currently planned, and no new resources are provided, DE will be able to fund only a very small number of projects for a significant number of years. If Fresh Start were used to fund only Strule, then other funding options will need to be considered for other Fresh Start projects. This may even include abandoning some, or all, of these projects. Even this may not close the gap and could cause difficulties for DE including potential legal challenges from stakeholders affected by the withdrawal of funds.

10.116   This assessment of the impact on the capital budget does not take account of two further areas of potential capital requirement. First, there is new capital expenditure on special needs, including at least two new schools, and improving or replacing sub-standard EOTAS premises. Second, there is the cost of "invest to save" reforms outlined in our recommendations on sixth form reform and "right-sizing" the school estate. Of course, these projects would not have the same timeframe as currently planned for the Strule campus. It should also be noted that present costing of future projects is based on current prices; it is likely that these will increase.

10.117   If new capital is not provided to meet Strule costs, the only alternative means of delivering the project is to devote the vast majority of the capital budget to Strule, which in turn would mean drastic reductions in other capital spend on education. It should be noted

that Strule also involves increased resource costs but these pale into insignificance compared to the capital impact.

10.118   Such a re-engineering of the schools' capital budget would require political but also wider societal consent. In addressing this challenge, the potential benefits of Strule need to be assessed and weighed against the costs. In the following paragraphs we consider the potential benefits. We also outline some of the other considerations we believe should be addressed in the decision-making process.

Strule Project programme design

10.119   Strule is described as a pioneering programme which will provide a state-of-the-art shared centre of learning which is designed to encourage cohesion, collaboration and partnership. "It will be a vibrant and inspiring place which will broaden horizons through facilitating access to a broad and balanced curriculum matched to pupils' needs to support pupil progression in life, further study, employment and training. It will become a model for the future of education locally and further afield, inspiring others in Northern Ireland and on a global platform." (Strule Programme Vision, Aims and Objectives).

10.120   We are of the view that it is unlikely that Strule will prove to be pioneering. The element of educational innovation is minimal. Furthermore, the very high cost of the project would make its replication unaffordable. Currently, there are no targets for efficiency savings as an outcome of sharing.

10.121   The sharing element in Strule appears to be limited. Each of the five transferring schools will remain largely as at present, offering the same curriculum in five separate new schools. Planning for the project expresses sharing aspirations but there is no obligation on campus schools to participate in shared learning. Potential shared learning components could include some of the following.

- Planned timetabled classes.
- Own school delivery to include short-term themed projects between classes.
- Planned and facilitated extra-curricular activity.
- Social and informal contact.

10.122   These could be further reinforced through digital-shared learning and community led-shared experiences.

10.123   As things stand, the UK Fresh Start resources must be used within the specified 10-year period. What is not spent within that timeframe will be lost. This is a serious concern. We find it difficult to understand the inflexibility of the 10-year condition. We believe there must be scope to at least attempt to extend the Fresh Start ten-year period in order to facilitate the reallocation of Fresh Start funds to other shared education or integrated education projects.

10.124   Each of the five transferring schools will enjoy state-of-the-art new facilities and this must enhance the learning experience. However, these new schools are not provided on the basis of the priority attached to replacing the existing premises. Strule is essentially a supply-driven – rather than a demand-led – concept. This is also true of other Fresh Start projects (including Shared Education Campuses) that were not selected based on a relative assessment of need or the condition of existing premises.

10.125   The new Strule campus will provide accommodation for 4,220 pupils[564]. The current (2022/23) enrolment of the five post-primary schools is 3,584[565]. Total enrolments, including Arvalee (181 in 2022/23), will be 3,765. We are advised that the campus has been planned for future demographic growth, including increased need for SEN placements. However, we are mindful that demographic decline rather than growth is forecast.

10.126   Two of the five transferring schools fall below the sustainability levels set out in SSP. The total enrolment of Omagh High School in 2022/23 is 423 (SSP 600). Sacred Heart Sixth Form currently falls below the sixth form sustainability threshold. In terms of our proposed efficient admissions and enrolment thresholds, only two of the five schools meet the target threshold of 600 pupils in Years 8–12 and only two of the sixth forms meet the target threshold of 240 pupils. We have not seen any evidence that the new campus will yield ongoing resource savings.

10.127   Project planning envisages that the Common Funding Formula provision to the schools will be lower than at present given the reduced floorspace in the home schools. There is an additional resource allocation of up to £155k per annum to completion. Beyond that we anticipate there will be additional funding required in order to meet the costs of shared facilities. The quantum of these costs is unknown.

10.128   In terms of urban impact, it is intended that the Strule Programme will contribute to the regeneration of Omagh by development of an unused site and through an integrated approach to the management of the vacated sites. The Strule Programme and the school site owners are liaising with Fermanagh and Omagh District Council to ensure that the vacated sites can be included as part of the future zoning work which the council is taking forward as part of its Local Development Plan. Of course, this does not guarantee a market will be found for the sites and we are not aware of any evidence of such demand. If, as is likely, the sites remain in current ownership for some time ahead, there will be ongoing security, maintenance and insurance costs.

10.129   In December 2022 we were informed that the Full Business Case (FBC) would be available in the Spring of 2023. However, a delay in the procurement process meant that we have not yet had sight of the FBC. We understand that the FBC is now due for completion in the near future. However, we have set out relevant VfM considerations above. We also note that Strule new build will cost significantly above £40k per-pupil place in more conventional new build projects.

10.130   It is the role of the Panel to outline our vision for the future of education in Northern Ireland. We have set out as one of our principles that policy should be guided by the needs of the learners, not the institutions. It is not clear to us how the Strule scheme will significantly change the existing learning experience.

10.131   It has been argued that funds available for Strule from UK Fresh Start will be lost if the project is not completed. This in itself cannot justify switching scarce capital resources from a wide range of projects to complete a single site. It will be scant consolation to those who will be denied much needed new capital projects that the previously available resources denied to them have created a state-of-the-art centre of learning in Strule.

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564   Information provided by DE Strule Programme Directorate.

565   School enrolment - school level data 2022/23 | Department of Education (education-ni.gov.uk)

10.132   We therefore recommend the ending of the Strule Programme and the transfer of Fresh Start resources to other education projects that in current circumstances could not be funded from DE's inadequate capital budget.

Reprioritisation of the Capital Programme

10.133   We have highlighted Strule as an example of where savings could be made in the existing capital programme. Given that the existing programme of announced projects would take 44 years to be completed at current funding rates, a pragmatic and realistic review of the existing capital programme is required to remove lower priority projects and properly prioritise those that remain. We also recommend that this process include the aim of redirecting capital funding towards:

- new facilities for SEN pupils in both special and mainstream schools; and
- implementing the proposed "right-sizing" transformation programme outlined earlier in this chapter.

10.134   Achieving this reprioritisation will require not only significant reduction of the existing capital programme but also an immediate injection of capital to ensure more rapid delivery of planned projects and those areas highlighted in the previous paragraph. While it is not within scope for the Panel to compare the benefits of capital projects from outside the education sector with the areas suggested above, it was clear from our work that the FE sector has had significantly greater levels of capital investment over the past two decades than the school sector. We therefore recommend that the Executive consider an increase in capital funding for schools of c. £25m per annum over current levels, to aid pressures within minor works. This would be required for a period of up to 5 years.

10.135   While the Panel recognises there will be existing and immediate pressures on the Northern Ireland capital budget, finding the capital to fund a longer-term investment strategy prioritising the areas identified is a priority, and in the case of the project to restructure the network of schools, will generate resource savings in the longer term.

Panel conclusion

Additional capital needs to be made available in order to achieve the proposed significant transformation in the configuration of the network of schools. Currently, DE's capital budget is earmarked for the next 44 years. There is therefore an immediate need for DE to review its current capital investment programme (construction, ICT and other capital) to prioritise investment in the restructuring of the school network in line with our other findings. There also needs to be greater prioritisation of those most in need including the special school estate.

This will mean the cancellation or long-term postponement of many capital projects that have been announced but not yet delivered.

In parallel with this reprioritisation process, we recommend that the Executive increase the capital allocation for education by £25m per annum over current levels.

We are satisfied that completion of Strule will require either significant new Executive resources or drastic reductions in all other DE capital expenditure. Furthermore, we are not convinced that

the benefits of Strule could justify either course of action. Indeed, as we have indicated, not only is the value-for-money aspect of the Strule SEC project doubtful, but the presumed benefits do not come close to justifying the disproportionate cost and the damaging impact of reducing investment elsewhere across the education estate.

Measuring the impact of investment

10.136   The evidence demonstrates that education is underfunded and requires significant additional investment. Evidence also demonstrates that there are some areas of education spend that could be implemented more efficiently. Finally, greater emphasis must be placed on ensuring the effectiveness of our education spend. This means focusing on measuring the outcomes delivered by the investment, reviewing and re-evaluating spend to embed best practice, and putting in place practical arrangements to aid efficiency. This may also require the establishment of formal partnerships with academia to evaluate programmes, policies and expenditure on an ongoing basis as well as investment in departmental technical capacity.

Focusing on outcomes

10.137   All of education spend should be seen as an investment for wider society. Increased spending in education has the potential to reap many wider benefits in terms of economic activity, health, social cohesion, etc. Likewise, disinvestment will create problems that will need to be addressed, and paid for, in later years.

10.138   Viewing education funding as an investment should impact on how we spend it. It means having a greater understanding of the impact of investment in terms of outcomes and it also means greater targeting of spend based on the expected benefits. We need to ensure that there is more emphasis on measuring the impact of our interventions – currently it is not always possible to do this. As an example, we have spoken elsewhere about the significant resources being invested in providing classroom assistants for children with SEN. This is being done in the absence of a solid evidence base on the educational value of this intervention. Alternative models, for example, schools being given delegated budgets for SEN and being able to resource other interventions such as specialist teachers, may offer better outcomes. Similarly, there is currently no way of assessing how Targeting Social Needs (TSN) money is being spent by schools and whether this is benefitting the pupils it is intended to support. Greater consideration needs to be given at the design stage of new initiatives to ensure that evaluation is built into programme design.

10.139   We do, of course, need to guard against additional bureaucracy and workload. It is the responsibility of those designing the policy or the service to consider appropriate methods to measure outcomes. Responsibility should not be devolved to those delivering the policy or service nor should it unduly add to their workload.

Panel conclusion

Education is an investment for wider society as a whole and should be treated as such. This requires the collection and analysis of better information on how we spend our money and on the impact of that investment.

This could also mean investment in a central education "intelligence" function – ensuring there is the technical capacity and appropriate access to research to make informed decisions, monitor programmes and interrogate spending.

Regular review and evaluation

10.140   As a first step, DE should consider a zero-based review of all spend. This would allow a critical evaluation of programmes, projects or policies that are costly to deliver but have a limited evidence base on the outcomes delivered.

10.141   Over recent years there has been a growth of new funded schemes or initiatives, often via earmarked funds. They frequently begin as a short-term measure but are then rolled forward over many years. Initiatives are welcome but separately funded projects are often administratively complicated. They can also seem disconnected from mainstream activities. Such schemes should be limited in number and genuinely temporary with decisions being taken after a pilot phase on their value and on whether or not to incorporate them into mainstream.

10.142   In 2022/23, £183.7m of forecast spend, representing 6.9% of the DE budget, was non-statutory. The anticipated non-statutory resource requirement for 2023/24 is £359.4m, or 12.8% of total resource requirements. Non-statutory requirements include Sure Start, Extended Schools, Literacy and Numeracy Projects, Pathway Fund, Nurture Provision and Fair Start. Although non-statutory, these are vital areas of educational provision. In recent years, DE has relied on Confidence & Supply funding to continue to fund many of these services. We believe that education as described in this Report should be funded by core funding.

Panel conclusion

DE should review all current spend to ensure it aligns with policy objectives and is delivering positive outcomes. Re-approval of funding for programmes should be dependent on achieving specified outcomes. This review programme should be ongoing and relentless.

Proper planning

10.143   There are also practical considerations on how the education budget is spent. At a strategic level, the education budget is characterised by being reliant on in-year allocations (by way of monitoring rounds). This uncertainty leads to difficulty in long-term planning. This is exacerbated by the use of 12-month budget cycles, and complicated by the conflict between the academic year and the financial year.

10.144   The last multi-year budget settlement was for the financial years 2011/12 to 2014/15. Since then, there have been 1-year budgets[566]. Education needs greater certainty and the ability to plan over a multi-year future. This would help policy design and service delivery and aid long-term planning. A fully funded system is the key first step, but this should be supported by the return to multi-year budget cycles and longer-term investment. Such an approach would likely be of benefit to a range of government departments and services.

10.145   Of course, proper planning goes beyond managing budgets and allocating resources. We speak elsewhere of the need for education to become more responsive to changing societal or economic needs and technological advances. This is particularly true when planning the curriculum but also when delivering services. There are different ways education can position itself to be more responsive and this includes investing in its own technical capacity and also taking seriously the need for a horizon-scanning function so that education can continually plan and prepare for change.

Panel conclusion

Education would benefit greatly from multi-year budgets. These would provide greater certainty and aid in long-term planning.

Aside from resources planning, education must take seriously the need for long-term horizon-scanning so that policy and service delivery can adapt, at pace, to external changes.

Recommendations and actions

10.146   Throughout the chapter, we make numerous recommendations or highlight areas where action is required, either in the short or long term. These are summarised below. All key recommendations are detailed in Volume 1.

The Executive should immediately increase the annual education resource budget by £155m to address the per-pupil funding gap with England and Wales.

The network of schools should be reconfigured to adhere strictly to minimum enrolment thresholds (105/140 for rural/urban primary schools, 600 for post-primary schools (excluding sixth form) and 240 for sixth forms) and to maximise the number of schools with enrolments on efficient enrolment boundaries.

To achieve this, DE should formulate and publish guidance on a recommended process, ensure that appropriate legislation is in place and immediately seek to implement a number of pilot projects in advance of formulation and implementation of the longer-term plan.

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566   Budget plans | Department of Finance (finance-ni.gov.uk)

A charging model for home-to-school transport with three broad principles should be introduced:

There should be appropriate exemptions for FSM learners.
Learners attending special schools should be exempt, as should SEN learners with identified transport requirements.
Learners should not be subsidised where they have chosen not to attend their closest school (of chosen type).

DE should review its current capital investment programme (construction, ICT and other capital) to prioritise investment in the restructuring of the network of schools in line with our other findings. There also needs to be greater prioritisation of those most in need including the special school estate. This will mean the cancellation or long-term postponement of many capital projects that have been announced but not yet delivered, including the Strule Shared Education Campus Programme.

An additional annual allocation of £25m of capital funding (above current capital budget levels) should be allocated to accelerate delivery of capital projects and meet identified priority needs.

There should be greater flexibility regarding the time period of Fresh Start funding to facilitate the reallocation of funds to other shared education or integrated education projects.

The Strule Programme should be ended and the transfer of Fresh Start resources to other education projects that in current circumstances could not be funded from DE's inadequate capital budget. Some of these resources could be used to complete some of the planned shared education facilities on the Strule site. DE should recognise that some necessary maintenance in the five existing schools may have been avoided because of the new build.

DE should review all current spend to ensure it aligns with policy objectives and is delivering positive outcomes. Re-approval of funding for programmes should be dependent on achieving specified outcomes. This review programme should be ongoing and relentless.

DE should invest in an education "intelligence" and horizon-scanning function – ensuring there is the technical capacity and appropriate access to research to make informed decisions, monitor programmes and interrogate spending.

The Executive should put in place multi-year budgets for education.

In addition to the funding required to bridge the financial gap with other jurisdictions, there is a need to invest in education to implement the recommendations of this Report. This will require an Executive-led Education Investment Strategy. Additional funding should be made available progressively over future years by means of both additional budget allocations and through implementation of the recommendations in this Report which will generate efficiencies.

IN CONCLUSION

Over the past 2 years we have carried out as comprehensive a Review of education in Northern Ireland as time allowed. Our main conclusions are to be found in Volume 1 of our Report and much of the evidence and our more detailed thinking in Volume 2.

We found a system with very significant strengths. It serves the great majority of learners very well. Standards are generally high. Staff are capable and committed. Outcomes for most learners are very good.

At the same time, there are weaknesses. The system of schooling is overly complex and does not contribute as much as it could to developing social cohesion. Too many young people do not overcome the effects of socio-economic disadvantage. Northern Ireland exports many of its most talented young people.

However, our most immediate concern is that education is seriously underfunded. It needs to be seen as an essential investment in the future. A post-conflict society on the periphery of Western Europe will thrive only if it is committed to developing the talents of every individual and offering the highest quality of life.

A Review of this kind should not be concerned only with reinforcing strengths and suggesting how shortcomings might be remedied. We have tried to anticipate how society and the economy will change over the next 20 years and how education should adapt in order to meet different circumstances and fulfil different needs. The issues we discuss are not particular to Northern Ireland but are of global significance.

We have tried to set out a manageable programme for deliverable change over the next few years and a much more ambitious and transformative vision for the remainder of our timescale. We hope that they will meet with public approval. However, that will not be enough. Giving Northern Ireland the education system that it needs will require sustained and determined action by government.

GLOSSARY OF TERMS

AEP	Assistant Educational Psychologist
AI	Artificial Intelligence
ALB	Arm's-Length Body
ALC	Area Learning Community
AMH	Action Mental Health
AQE	Association of Quality Education
ASB	Aggregated Schools Budget
ASCL	Association of School and College Leaders
AWPU	Age Weighted Pupil Unit
BoG	Board of Governors
CAFRE	College for Agriculture, Farming and Rural Enterprise
CAMHS	Child and Adolescent Mental Health Services
CA	Classroom assistant
CCEA	Council for the Curriculum, Examinations and Assessment
CCMS	Council for Catholic Maintained Schools
CEIAG	Careers Education, Information, Advice and Guidance
CDR	Consolidated data return
CES	Centre for Effective Services
CFF	Common Funding Formula
CFS	Common Funding Scheme
CLA	Children Looked After
CnaG	Comhairle na Gaelscolaíochta
CPD	Continuing professional development
CPTSD	Complex post-traumatic stress disorder
CREU	Centre for Research in Educational Underachievement
CSSC	Controlled Schools' Support Council
CSTS	Catholic Schools' Trustee Service
CYP	Children and Young People
DAERA	Department of Agriculture, Environment and Rural Affairs
DE	Department of Education
DEL	Departmental Expenditure Limit
DfC	Department for Communities

DfE	Department for the Economy
DoH	Department of Health
DoJ	Department of Justice
DP	Development Proposal
EA	Education Authority
EdIS	Education Information Solutions
Ed Psych	Educational Psychologist
EFTS	Equivalent full-time student
EHC	Education and Health Care
EILSA	Early Intervention and Learner Support Agency
EMA	Education Maintenance Allowance
EOTAS	Education Otherwise Than At School
EP	Educational Psychologists
EPS	Educational Psychology Services
ERAP	Economic Recovery Action Plan
ESF	European Social Fund
ESL	Early School Leaving
ESOL	English for Speakers of Other Languages
ESRI	Economic & Social Research Institute
ETB	Education and Training Board
ETI	Education and Training Inspectorate
EU	European Union
EWC	Education Workforce Council
EYFS	Early Years Foundation Stage
FBC	Full Business Case
FE	Further education
FEC	Further education college
FESR	Further Education Statistical Return
FM	Financial Memorandum
FSM	Free school meals
FSME	Free school meal entitlement
FTE	Full-Time Equivalent
GAA	Gaelic Athletic Association
GBANI	Governing Bodies Association Northern Ireland

GCSE	General Certificate in Secondary Education
GL	Granada Learning
GMI	Grant-Maintained Integrated
GTCNI	General Teaching Council for Northern Ireland
HE	Higher Education
HEI	Higher Education Institution
HESA	Higher Education Statistics Agency
HM	His Majesty
HNC	Higher National Certificate
HND	Higher National Diploma
Hons	Honours
HQCE	High-Quality, Cost Efficient
HR	Human Resources
HSC	Health and Social Care
HSCB	Health and Social Care Board
ICT	Information and Communication Technology
IFA	Irish Football Association
IFS	Institute for Fiscal Studies
ILiAD	Investigating Links in Achievement and Deprivation
IM	Irish-medium
IPS	Integrated Primary School
IT	Information Technology
ITE	Initial Teacher Education
KS	Key Stage
LLW	Learning for life and work
LSA	Learning Support and Assessment service
MaSN	Maximum *Student* Number
MCA	Middletown Centre for Autism
MDM	Multiple Deprivation Measure
MIS	Management Information System
MLA	Member of Legislative Assembly
MoJ	Ministry of Justice
NCB	National Children's Bureau
NDNA	New Decade, New Approach

NDPB	Non-Departmental Public Body
NEET	Not in Education, Employment or Training
NESF	National Economic and Social Forum
NFER	National Foundation for Educational Research
NI	Northern Ireland
NIAO	Northern Ireland Audit Office
NICCY	Northern Ireland Commissioner for Children and Young People
NICIE	Northern Ireland Council for Integrated Education
NIECS	Northern Ireland Early Childhood Service
NIESC	Northern Indiana Educational Services Centre
NIO	Northern Ireland Office
NISRA	Northern Ireland Statistics and Research Agency
NQF	National Qualifications Framework
NQT	Newly Qualified Teacher
OECD	Organisation for Economic Co-operation and Development
OfQual	Office for Qualifications and Examinations Regulation
ONS	Office for National Statistics
OT	*Occupational Therapist*
PA	Psychology Assistant
PAC	Public Accounts Committee
PBL	Project-Based Learning
PDMU	Personal Development and Mutual Understanding
PE	Physical Education
PFI	Private Finance Initiative
PGCE	Post-Graduate Certificate in Education
PIAAC	Programme for the International Assessment of Adult Competencies
PIRLS	Progress in International Reading Literacy Study
PISA	Programme for International Student Assessment
PPTC	Post-Primary Test Consortium
PSEP	Pre-School Education Programme
PSS	Pupil Support Services
PTSD	Post-traumatic stress disorder
QUB	Queen's University Belfast
RPA	Review of Public Administration

ROI	Republic Of Ireland
RRI	Reinvestment and Reform Initiative
SARS	Statutory Assessment and Review Service
SEAG	Schools' Entrance Assessment Group
SEN	Special educational needs
SENAC	Special Educational Needs Advice Centre
SENCO	Special Educational Needs Coordinator
SEND	Special educational needs and disability
SENDIST	Special Educational Needs and Disability Tribunal
SESP	Shared Education Schools Programme
SLC	Student Loan Company
SLCN	Speech, language and communication needs
SLT	Speech and language therapy
SoS	Secretary of State
SSEC	Strule Shared Education Campus
SSP	Sustainable Schools Policy
STEM	Science, technology, engineering and mathematics
TEO	The Executive Office
TFC	Tax-Free Childcare
TIA	Trauma-Informed Approach
TIMSS	Trends in International Mathematics and Science Study
ToR	Terms of Reference
TRC	Transferor Representative Council
TSN	Targeting Social Needs
UC	Universal Credit
UCAS	Universities and Colleges Admissions Service
UK	United Kingdom
UN	United Nations
UNCRPD	United Nations Convention on the Rights of Persons with Disabilities
UNESCO	United Nations Educational, Scientific, and Cultural Organisation
US	United States
UU	Ulster University
VES	Voluntary Exit Scheme
VET	Vocational Education and Training

VfM	Value for Money
VG	Voluntary grammar
YCNI	Youth Council Northern Ireland

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