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Your ref: PMcC/KM/1869

17 December 2014

Dear Peter

SHARED EDUCATION BUSINESS PLAN

Your correspondence of 12 December refers.

The document referred to in a recent press article attributed to Professor Smith,
University of Ulster is the Business Case for the Delivering Social Change shared
Education Signature Project.

A copy of the Business Case is attached.

Yours sincerely

Veronica

VERONICA BINTLEY
Departmental Assembly Liaison Officer

DE GENERAL BUSINESS CASE TEMPLATE FOR EXPENDITURES GREATER THAN £500k

This template is designed to facilitate documentation of an expenditure appraisal for **total expenditures (i.e. capital plus revenue) expressed in real terms including Optimism Bias where appropriate** greater than £500k. It identifies the main elements of a business case to be covered, followed by spaces or tables for inserting the relevant information. *The spaces and tables should be enlarged or modified as required to accommodate all the necessary information.*

Note that this is a general template covering basic requirements; it can be adapted and tailored to suit particular spending areas as desired (were significant changes to the template are planned, prior agreement should be sought from EAU). There are no precise rules about the length of the business case document for these expenditure decisions, however, it would be expected that a particularly large or significant project will have a greater degree of detail.

For detailed guidance on business cases and expenditure appraisal, consult the Northern Ireland Guide to Expenditure Appraisal and Evaluation (NIGEAE) at http://www.dfpni.gov.uk/eag or seek advice from DE's Economic Advisory Unit (EAU).

PROJECT TITLE: DELIVERING SOCIAL CHANGE SHARED EDUCATION SIGNATURE PROJECT

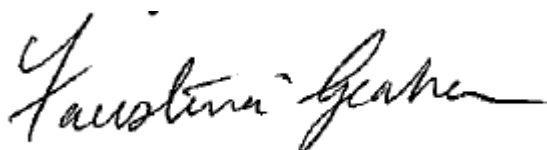**SPONSORING DEPARTMENT:** Department of Education

Date of Business Case Initiation: 28 January 2014

Date of Business Case Completion: 7 April 2014

SENIOR RESPONSIBLE OFFICER: FAUSTINA GRAHAM, COLLABORATIVE EDUCATION & PRACTICE DIRECTOR

SIGNED: **DATE: 8 April 2014**

A DE pro forma must be completed and signed off by the Director (G5) prior to formal submission of the business case to Finance Directorate (EAU).

DE Finance Director approval is required for the proposed expenditure.

BUSINESS CASE

DELIVERING SOCIAL CHANGE SIGNATURE PROJECT

SHARED EDUCATION PROGRAMME

Northern Ireland Executive
www.northernireland.gov.uk
DELIVERING SOCIAL CHANGE

April 2014

CONTENTS

1. BACKGROUND, STRATEGIC CONTEXT AND NEED

1.1 Strategic Context & Policy Objectives

1.1.1 Legislative Requirements
The Education Reform Order 1989 (Article 6) places a duty on the Department to encourage and facilitate the development of integrated education, that is to say the education together at school of Protestant and Roman Catholic pupils.

Section 75 and Schedule 9 to the NI Act 1998 places a statutory obligation on public authorities in carrying out their various functions relating to Northern Ireland, to have due regard to the need to promote equality of opportunity –

- between persons of different religious belief, political opinion, racial group, age, marital status or sexual orientation;
- between men and women generally;
- between persons with a disability and persons without; and
- between persons with dependants and persons without.

In addition, without prejudice to this obligation, Public Authorities are also required to have regard to the desirability of promoting good relations between persons of different religious belief, political opinion, and racial group.

1.1.2 Programme for Government: 2011-15 (PfG)
One of the five Executive priorities contained within the Programme for Government (2011-15) is to build a strong and shared community. Within that priority there is a particular focus on building better relations between communities. Under this priority, the PfG sets out three specific objectives relating to Shared Education. They are:

- establish a Ministerial Advisory Group to advise on advancing shared education;
- ensure all children have the opportunity to participate in shared education programmes by 2015; and
- substantially increase the number of schools sharing facilities by 2015.

1.1.3 The Children and Young People Strategy
The Children and Young People Strategy (2006-2016) sets out Executive commitments to ensure that, by 2016, all children and young people are fulfilling their potential. Expected outcomes include:

- Living in safety and with stability;
- Contributing positively to community and society; and
- Living in a society which respects their rights.

One of the pledges, recognising that Northern Ireland is emerging from a prolonged period of conflict, commits to ensuring that our children and young people are supported to grow together in a shared, inclusive society where they respect diversity and difference.

By producing positive impacts for all parts of society, the strategy has particular importance for children and young people through the creation of sustainable relationships, built on trust between individuals and communities, to ensure a peaceful and prosperous future.

1.1.4 Together Building a United Community

The 'Together: Building a United Community' (T:BUC) Strategy, published on 23 May 2013, reflects the Executive's commitment to improving community relations and continuing the journey towards a more united and shared society.

The strategy commits to "*enhance the quality and extent of shared education provision, thus ensuring that sharing in education becomes a central part of every child's educational experience.*" The strategy references the Programme for Government Commitments and the recommendations of the Ministerial Advisory Group on Shared Education.

1.1.5 The Delivering Social Change (DSC)

The Delivering Social Change (DSC) framework was established by the Executive to tackle poverty and social exclusion. It represents a new level of joined-up working by Ministers and senior officials across Executive departments to drive through interventions which have a genuine impact on the ground.

The framework aims to deliver a sustained reduction in poverty and associated issues across all ages and to improve children and young people's health, well-being and life opportunities thereby breaking the long term cycle of multi-generational problems.

The DSC framework aims to deliver the following outcomes:

(i) a sustained reduction in poverty and associated issues, across all ages; and
(ii) an improvement in children's and young people's health, wellbeing and life opportunities thereby breaking the long-term cycle of multi-generational problems.

1.2 Definition of Shared Education

Shared education has been defined as the organisation and delivery of education so that it:

- meets the needs of, and provides for the education together of learners from all Section 75 categories and socio-economic status;

- involves schools and other education providers of differing ownership, sectoral identity and ethos, management type or governance arrangements; and

- delivers educational benefits to learners, promotes the efficient and effective use of resources, and promotes equality of opportunity, good relations, equality of identity, respect for diversity and community cohesion.

By shared education we mean the provision of opportunities for children and young people from different community backgrounds to learn together.

We expect shared education also to be organised and delivered in such a way that promotes equality of opportunity and social inclusion by providing opportunities for children from differing s75 groups (e.g. children from different racial backgrounds, children with and without disabilities, children who are carers or school age mothers) and from differing socio-economic backgrounds to learn together at school and in less formal education.

1.3 Educational Policy Context

The Department of Education's (the department) vision is - "*To ensure that every learner fulfils his or her full potential at each stage of development.*"

Fulfilling this vision is underpinned by goals identified as priorities by the Department in its Corporate Plan. The department's two overarching goals are:

- raising standards for all – through high quality teaching and learning, ensuring that all young people enjoy and do well in their education and that their progress is assessed and their attainment recognised, including through qualifications.

- closing the performance gap, increasing access and equity – addressing the underachievement that exists in our education system; ensuring that young people who face barriers or are at risk of social exclusion are supported to achieve to their full potential.

The strategic drivers for the promotion of sharing in education are:

- the education case – improving access for learners to the full range of the curriculum, to high quality teaching, and to modern facilities;

- the economic case – making more effective and efficient use of limited resources to deliver more value for money; and

- the social case – improving societal well being by promoting a culture of tolerance, mutual understanding and inter-relationship through significant, purposeful and regular engagement and interaction in learning.

Shared Education provides a mechanism for peer learning whereby schools that are educationally stronger are incentivised to collaborate with schools that are marginally weaker.

Potentently, it also results in a wider curriculum choice for pupils, the promotion of the efficient and effective use of resources, good relations, equality of identity and community cohesion.

It follows that greater sharing will benefit all learners, from all Section 75 categories and socio-economic status, the community, and the economy through more efficient and effective use of resources on a shared basis.

Better educational outcomes for young people, including life and work skills, capacity building and skill sharing between teachers and more accessible schools engaging with the wider community are expected.

1.4 KEY STAKEHOLDERS

1.4.1 OFMdFM

OFMdFM's Equality and Strategy Directorate is responsible for developing and monitoring the Programme for Government, for providing economic advice and for a range of cross-cutting issues and initiatives to address equality, good relations, deprivation and social exclusion.

It has oversight responsibility for the Delivering Social Change framework which was set up by the Executive to tackle poverty and social exclusion.

It also has oversight responsibility for the cross-cutting 'Together: Building a United Community' (T:BUC) Strategy.

1.4.2 The Atlantic Philanthropies

The Atlantic Philanthropies is a philanthropic organisation that works in conflict zones around the world. Atlantic grant making here dates back to the early 1990s. Initial efforts supported peacemaking and strengthening higher education. Since 2004, Atlantic has focused on three programme areas: Ageing; Children & Youth; and Reconciliation & Human Rights.

As a life limited foundation, the Atlantic Philanthropies are due to conclude their grant making by 2016. They have identified shared education as an area where they wish to help make a lasting impact by collaborating with the Executives where programmes can overlap with the Programme for Government. These will be joint funded Executive/ Atlantic Philanthropies programmes.

Atlantic jointly funded Shared Education pilot programmes since 2007 involving over 165 schools and have developed models of sharing that has lead to economic, education and reconciliation benefits involving pupils, teachers, governors, parents and the wider community.

Their aspiration is that Protestant and Catholic children across Northern Ireland being educated together becomes the norm rather than the exception, and that government policy and practice fully incentivise shared education.

In discussions with OFMDFM, Atlantic Philanthropies propose to provide financial support of up to £10m towards the cost of the Shared Education Signature Project, given the alignment with their grant closure priorities providing match funding was made available from government sources.

1.4.3 Managing Authorities & Arms Length Bodies

Operational delivery of the Shared Education Signature Project will fall primarily to the Educational and Library Boards and CCMS (or Education & Skills Authority).

In seeking to meet the Programme for Government commitment to increase the number of school sharing facilities, Managing Authorities will also have a role through Area Planning to identify opportunities and encourage schools to share existing and any future new facilities.

It is anticipated that other arm's length bodies including CnaG, NICIE, Youth Council NI and CCEA will have a stakeholder interest.

1.4.4 Schools

School will have a direct role in delivering on the Programme for Government commitments to ensure all children have the opportunity to participate in shared education programmes by 2015; and to substantially increase the number of schools sharing facilities by 2015.

The Shared Education Signature Programme will assist schools in meeting these commitments by providing funding for additional costs as well as assisting the Minister of Education in deciding the most appropriate way to mainstream shared education funding.

Schools will also be expected to co-operate with managing authorities in identifying and exploring opportunities to increase the level of sharing of facilities.

1.4.5 Pupils

Pupils will ultimately be the main beneficiaries of the opportunity to participate in a programme of shared education.

Based on the Education and Training Inspectorate's evaluation of a number of strategic shared education projects funding by the International Fund for Ireland , it is anticipated that pupils will benefit from an increase in self-confidence, self-awareness and self-reflection; being open to meeting others with differing perspectives; improved skills in problem solving, decision making, critical thinking and creative thinking.

Shared Education is also expected to lead to improvement in the delivery of minimum curricular requirements for Personal Development and Mutual

Understanding at Primary level and Learning for Life and Work (Local and Global Citizenship) and for the curricular requirement to "Developing Pupils as Contributors to Society" across the range of subject areas at Key Stage 3 and above.

Shared education will improve access for pupils to the full range of curriculum (i.e. wider curriculum choice), to high quality teaching, and to modern facilities. It can allow opportunities for peer learning whereby schools that are educationally stronger are incentivised to collaborate with schools that are marginally weaker.

It follows that greater sharing should ultimately result in better educational outcomes for young people.

1.4.6 Wider Community

As a society emerging from conflict, building a strong and shared community continues to be a key objective within the Programme for Government. Against the background of a diverse education system, shared education is seen as a way to break down barriers and improve community relations.

Improving attitudes amongst young people and building a community where they can play a full and active role in building good relations is recognised as a key priority within T:BUC. Equipping young people for a future in which the cycle of sectarianism and intolerance is broken is a key objective.

In turn this will benefit the wider community.

1.5 IDENTIFICATION OF NEED

1.5.1 Background

As noted in Paragraph 1 above, the PfG commitment (2011-15) contains three specific objectives relating to Shared Education one of which is to establish a Ministerial Advisory Group to advise on advancing shared education;

In order to progress the Ministerial Advisory Group's recommendations on shared education, it is planned that a Shared Education Programme will be delivered under the DSC framework.

The four year programme (2014-15 to 2017-18) will be based on lessons learnt to date from existing shared education pilots that have been operating in schools and will provide an evidence base for mainstreaming shared education funding in the longer term in a way that is sustainable.

In addition, the Department has a complementary programme of work to further mainstream shared education addressing other recommendations by the Ministerial Advisory Group. This includes defining shared education within legislation; directing the Education & Library Boards/Education & Skills Authority to encourage and facilitate shared education; reflecting shared education within the schools inspection process; teacher training; reviewing existing education policy on a rolling basis to reflect shared education and continuing to encourage the establishment of school councils.

All of the above interventions will contribute to meeting the PfG Shared Education targets.
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1.5.2 Shared Education - Baseline Statistics

1.5.2.1 School Omnibus Survey

The School Omnibus Survey (2013) is a multipurpose survey of all Principals in grant-aided schools. The 2013 survey had an overall response rate of 52%. The latest results from the 2013 school omnibus survey indicate:

- that 76% of respondent school were involved in some form of shared education in the 2011/12 academic year. Participation in shared education was higher in post primary (94%) than primary (71%).

- In the 2011/12 academic year, 83% of respondent schools partnered with another school in relation to curricular or extracurricular activities.

- In the same academic year, 51% of schools were involved in sharing facilities with another school, 38% in sharing resources; 30% in shared teachers and 26% in sharing equipment.

- Of those responding schools, 13% had partnered between one class; 72% with more than one class and 15% on a whole school basis.

- Of these, 65% partnered on a cross community basis, 51% with a school from the same sector; 35% between primary and post primary; 15% between secondary and grammar; and 8% between nursery and primary.

1.5.2.2 Young Life & Times Survey

According to the Young Life & Times Survey 2011 (which is an annual attitudinal survey targeting 16 year olds), 31% of young people said they rarely or never socialise with people from a different religious community, while 22% said they had no close friends from the other main religious community.

The 2011 survey indicated that 49% of young people agree that most people would like to have friends of a different religion but never have the opportunity.

The 2012 survey included a module commissioned by the NI Commissioner for Children and Young People on shared education. The results indicated that 55% of respondents had undertaken projects with pupils from other schools; 46% had classes with pupils from other schools and 25% had used shared facilities or equipment.

Respondents to the 2012 survey indicated that 71% had shared with children of a different religion (with 16% not knowing).

89% thought projects with pupils from other schools a good idea, 83% thought shared facilities and resources was a good idea, while 76% indicated that classes with pupils from other schools was a good idea.

1.5.2.3 Existing Shared Education Work

Shared education programmes have been taking place in a limited number of schools over the last few years, most notably with significant investment from the International Fund for Ireland and the Atlantic Philanthropies in relation to twenty two strategic projects delivered locally i.e. the Sharing in Education Programme (SiEP).

This work has been subject to evaluation by the Education & Training Inspectorate (see Appendix 3), IFI Evaluation Report: Sharing in Education Programme) as well as a series of evaluations by individual projects. This, together with other research (including a report by the NI Commissioner for Children and Young People), provides a strong evidence base for progressing shared education through existing educational policies as well as new approaches.

These programmes have ranged from teachers learning and planning together, through to coordinate timetabling with the curriculum being taught to mixed classes in different schools as well as extra-curricular activity and joint projects – whatever best meet the needs of local schools and the community.

1.5.3 Historical Context

Shared Education programmes, such as SiEP were set against the background of 92.6% of the school population was educated in either Catholic maintained schools or controlled or voluntary schools attended mainly by Protestant children or young people. The SiEP aimed to break down the barriers arising from the historic conflict in NI by providing a range of opportunities for young people to learn together and to reach the highest possible standards of educational achievement. Shared education should not be seen as just another initiative nor is it a new concept.

The SiEP sought to build on the lessons learned across many years in the development of community relations in Northern Ireland.

1.5.4 The Policy Context

In line with the Programme for Government commitments, the Ministerial Advisory Group was appointed by the Minister of Education in July 2012, and published its findings on 22 April 2013 (report available at

http://www.deni.gov.uk/index/schools-and-infrastructure-2/shared_education/shared-education-ministerial-advisory-group.htm

> *'Shared education is not a bolt- on or an optional extra. It is fundamental to delivering good schools and central to my vision that every learner should achieve his or her full potential'.* - Minister of Education - October 2013

The development of shared education aligns closely with the role of the Department to improve educational outcomes for young people and to promote personal well-being and social development, so that young people gain the knowledge, skills and experience to reach their full potential as valued individuals and active citizens, as envisaged in the department Community Relations, Equality and Diversity in Education (CRED) policy. The Programme for Government (PfG) 2011-15 commitments for the department with respect to shared education include:

- to ensure that all children have the opportunity to participate in shared education programmes by 2015; and
- to increase substantially the number of schools sharing facilities by 2015.

In addition, the work of shared education as evidenced by the SiEP links well to the four tenets of the department's policy of school improvement (Every School a Good School) through promoting child-centred provision, high-quality learning and teaching, effective leadership and a school connected to its local community.

Given these developments, the Minister of Education appointed a Ministerial Advisory Group whose independent report was issued in March 2013 detailing 20 recommendations to advance shared education which are based around five themes:

- Mainstreaming Shared Education;

- Supporting schools in Shared Education;
- Schools and other educational institutions;
- Area Based Planning and Schools Estate; and
- Academic Selection.

In a statement to the Assembly in October 2013, the Minister of Education accepted the recommendations of the Ministerial Advisory Group, reserving final decisions on a small number pending further work

http://www.deni.gov.uk/index/schools-and-infrastructure-2/shared_education.htm

1.5.5 The Curriculum Context

The statutory curriculum provides a core enabling framework to promote shared education. The Curriculum in the north of Ireland was revised in 2007 with the aim of empowering young people to develop their potential and make informed and responsible decisions throughout their lives through three key objectives:

- the development of the young person as an individual;
- a contributor to society;
- a contributor to the economy and environment.

Key elements which focus on the real and relevant issues that young people need to assimilate in preparation for life and work in NI society are embedded in the individual areas of learning (subjects).

The learning areas of Personal Development and Mutual Understanding (PDMU), Local and Global Citizenship and Learning for Life and Work (LLW) are key vehicles for embedding shared education through the NI Curriculum. They were developed specifically to enable young people across the key stages to learn about themselves and others, developing tolerance, respect and open-mindedness through understanding similarities and respecting differences between people in the local community and beyond in order to help them address the challenges and opportunities they may encounter in society.

In addition, all subject strands but in particular, religious education, history, geography, English, languages, drama and art and design provide opportunities for teachers to design learning programmes that explore identity, diversity and promote reconciliation, developing the attitudes and dispositions as shown in Appendix 5.

The evaluation of the SiEP found evidence to demonstrate that shared education activities have the potential to meet the aims of the NIC in a more holistic way through preparing young people better for life and work in an interdependent NI and a globalised world.

Shared education also provides practical experiences and contexts for young people to develop better their thinking skills and personal capabilities, skills needed for lifelong learning; for example, applying critical thinking in shared

classes helps young people to suspend judgement and become open-minded; to be willing to explore alternative viewpoints and imagine "otherwise".

Independent thinking and personal awareness through engaging with different viewpoints develops the young people's confidence and self-esteem to safeguard them against dogmatisms and peer pressure. The development of interpersonal skills through shared classes enables young people to listen carefully in order to adapt language and behaviour to take account of others' feelings, and to develop the ability to work together, manage disagreements and reach agreed outcomes.

1.6 THE CONCEPT OF SHARED EDUCATION

The SiEP Evaluation acknowledges that sharing will always require compromise. Compromise will not and cannot always be equal for both parties but the vision statement of '*Every School a Good School*' provides a clear guiding principle placing the interests of young people rather than institutions at the centre of efforts to improve educational improvement and tackle underachievement.

The professional view of ETI is that shared education is not an event or series of lessons but, rather a process in which to embed a whole-school approach to shared education to prepare young people better for life and work. The evidence from the SiEP Evaluation confirms that schools/organisations are at different starting points along a continuum.

1.6.1 IFI Evaluation Report: Sharing in Education Programme (SiEP)

A formal evaluation was carried out by the Education & Training Inspectorate on nineteen of twenty-two strategic Shared Education projects funded by the International Fund for Ireland (IFI). The remaining three projects, which were jointly funded by IFI and Atlantic, were subject to a separate evaluation.

Details of the ETI findings are summarised at Appendix 3. A full copy of their report is available at: http://etini.nics.gov.uk/investmentfundireland/

In summary, in almost all of the projects the participants:

- developed good personal and social skills through their engagement with others in exploring controversial, sensitive, complex and relevant issues to their lives;
- increased their awareness of t he impact of their attitudes and actions on other individuals and communities; and
- were able to evaluate their own learning through, for example, reflective journals/diaries, questionnaires and discussions.

The majority of the projects provided them with the opportunity to achieve an accredited qualification or an award designed with set criteria.

In going forward, the evaluation report identified a need:

- for schools/organisations to evaluate consistently the impact of the work of reconciliation on the young people's attitudes, behaviours, understanding and skills to be able to demonstrate clearly the progress of young people and to inform future planning;

- for schools/organisations to focus on the development of the young people's maturity and higher-level skills of negotiation, compromise, collaborative problem-solving, managing disagreement, conflict and confrontation through innovative, inspiring and experiential learning strategies;

- for all stakeholders to recognise, value and reward shared learning through accreditation and assessment arrangements across phases; and

- for support staff across all phases to develop further their confidence and competence in using a wide range of learning strategies necessary for work in shared classes, to provide progressively challenging experiences for young people in tackling controversial and sensitive issues.

1.6.2 The Challenge going forward

It is a commendable goal to provide all young people with a shared education opportunity throughout their school career. However, while the quantitative target is useful, much remains to be done to ensure the experience is effective, sustained and progressive, particularly in schools that have not yet begun the process.

Schools will need support to move along a continuum to embed high-quality shared education.

In helping to address these challenges DE officials need to work more collaboratively to ensure that school improvement policies signpost connections to, and opportunities for, shared education.

The longer-term aim for all schools is for shared education to be so integral to the ethos and fabric of each school community that it becomes 'the way we do things around here'. All of the requirements to achieve this aim are enshrined in the aims of the curriculum, but schools, like our society, are at different starting points.

Only by honest self-reflection will any school community be able to identify its starting point and only with a genuine commitment from all stakeholders can schools be supported to work through the complexities of achieving an aim for children and young people that has so far eluded our wider society.
In the short to medium term that will only be achieved through ongoing collaborative practice which allows schools to reflect on how much progress they have made in meeting that longer-term aim.

They will continue to need to be supported by each other but also through initiatives such as the SiEP and project-led work gradually reintegrating what they learn into custom and practice.

2. AIM & OBJECTIVES

2.1 The overall aims of the programme are to scale up the level of sharing drawing on existing evidence; mainstream financial support for any additional costs and improve the educational and reconciliation outcomes in school working collaboratively.

A baseline exercise has been completed to establish the current level of shared education through the 2013 Schools Omnibus Survey (a multi-purpose survey of all Principals in grant-aided schools designed to collect a range of information as determined by DE policy teams.

Research evidence from a number of reports and survey data and baseline information has been taken into account in developing measurable targets.

Project Objectives	Measurable Targets
Improve education outcomes through schools working collaboratively [Note 1]	For participating schools: Primary • Increase the percentage of pupils achieving KS2 Communication in English from 2013/14 level by 2017/18; • Increase the percentage of pupils achieving KS2 Using Maths from 2013/14 level by 2017/18; Post-Primary • Increase the percentage of pupils achieving KS3 Communication in English from 2013/14 level by 2017/18; • Increase the percentage of pupils achieving KS3 Using Maths from 2013/14 level by 2017/18; and • Increase the percentage of pupils achieving 5+ GCSE (or equivalent) A*-C including English & Maths from 2013/14 level by 2017/18. As the level of increase will be dependent on the exact cohort of participating schools, it is proposed that schools will set their baseline and outcome target as part of the application process. Outcomes will be measured at the end of the project with progress being reported in monitoring reports during the project.
Increase the number of schools participating in Shared Education [Note 1]	-Using the definition of shared education in the Ministerial Advisory Group Report, to increase the percentage of schools providing shared classes with pupils (other than Entitlement Framework) from 23% to tba% by end of 2017/18
Improve reconciliation outcomes through schools working collaboratively [Note 2]	-By 2017/18, to show increase in reconciliation outcomes between schools working cross-sectorally and those which are not, using the following measures: Cross Group Friendship (from 1.94 - 2.37) Positive Action Tendencies (from 2.71 – 3.14); and Intergroup Anxiety (from 1.66 - 1.57).

Increase the number of young people participating in Shared Education [Note 3]	-Using the definition of shared education in the Ministerial Advisory Group Report: • Maintain the percentage of schools engaged in shared education on a whole school basis at 15% (114) in the 2014/15 academic year and increase to 20% (152) by 2017/18. • Maintain the percentage of schools involving *only* one class at 13% (99) in 2014/15 academic year and increase to 80% involving *more than* one class (610) by 2017/18. • Schools in receipt of shared education funding to jointly deliver LLW and PDMU on a shared basis by 2017/18.
To work collaboratively to provide educators with professional development and develop their confidence and competence in using a range of learning strategies necessary for work in shared classes	-By 2017/18, 95% of participating schools have provided teachers with professional development on a range of learning strategies necessary for work in shared classes. [Note 4] For participating schools, provision of joint professional development training (to include tackling the challenges of providing and teaching shared classes).
Enable schools to implement a progressive approach to shared education	-Refine the QUB continuum of shared education by end of 2014/15. -Further develop the quality indicators for identification of effective practice by 2017/18. -All participating schools/partnerships to progress at least one step up the continuum of shared education model by 2017/18 (confirmed through ETI assessment)
To ensure shared education becomes a core element of strategic planning within the Department of Education, Education and Library Boards/ Education & Skills Authority and schools	Shared education targets to feature in DE's strategic and business plans; Education & Training Inspectorate to work towards integrating shared education into the normal inspection process. Shared Education targets to feature in ELBs/ESA Resource Allocation Plans Shared Education targets to feature in school development plans

Note 1 *Due to the variation across schools it is not possible to set a specific generic target increase at the business case stage. Instead, existing baselines, current projected increases, and revised projections resulting from involvement in this programme will be established as part of the application process. This will provide a target increase relevant to each participating school which will allow comparison against ELB and NI averages.*

Note2 *Evidence shows that improved community relations are natural by-product of cross-community sharing (e.g.: Shared Education Initiatives in Northern Ireland: A Model for Effective Intergroup Contact in Divided Jurisdictions (Blaylock & Hughes Dec 2013). A QUB longitudinal survey, funding by Atlantic Philanthropies will provide the source data, including 2013/14 baselines and Atlantic will funds the continued survey work.*

Note 3 *Measured through School Omnibus Survey; 2014/15 targets represent baseline figures from 2013 Survey as £21m IFI/AP funding terminated in Dec 13, maintaining current levels represents a challenging target. The final outcome target is based on current experience of what is likely to be achievable, but will be re-assessed following the application stage and adjusted if necessary. As the programme will target 65% schools (762) the relevant percentages are calculated against the number targeted by the programme.*
Recording precise numbers of pupils would impose significant bureaucracy on schools and would be subject to risk of over/under recording as pupils may be involved in more than one programme; proposed measure has a direct correlation on number of pupils.

Note 5 *Measured by comparing self assessment baselines at application stage with final outturn at end of programme*

2.2 **Quality Indicators**
As a result of previous pilot programmes, a set of quality indicators were developed by ETI to provide a benchmark for this work which school can use to self assess; this will be further refined during the period of the programme. A copy of these indicators can be found at the attached link:
 http://www.etini.gov.uk/index/international-fund-for-irelands-sharing-in-education-programme/quality-indictors-for-use-by-international-fund-for-irelands-sharing-in-education-programme-projects.doc

2.3 **Shared Education Continuum Model**
One of the ETI recommendations from evaluation of pilot programmes was the development of a continuum of shared education model against which schools can self assess.

An example as to what this could look like is provided in Appendix 4. The model would be refined to enable it to be used for self-assessment purposes by schools.

3. CONSTRAINTS

3.1 Timing

This will be a four year project commencing from April 2014 (with implementation in schools expected to commence in the 2014/15 academic year) in line with availability of Atlantic Philanthropies' funding window.

3.2 Funding

Agreement was reached with Ministers to establish a fund of up to £25m over the four year period, with contributions of up to £10m from the Atlantic Philanthropies, £10m from OFMDFM through central funds and up to £5m from the Department of Education.

The availability of joint funding will be the incentive for schools to plan and have approved a shared education partnership at primary and post –primary level.

Atlantic funding in year 4 is subject to a commitment by DE (and/or Executive) to provide resources to mainstream shared education in the longer term.

Constraints	Measures to address constraints
Funding level over 4 year period to end 2017/18 FY	Funding is set and agreed over a 4 year period at up to £25m due to closure constraint of the Atlantic Philanthropies funding. Programme will operate over the period funding is available. It will inform decisions on mainstreaming funding in the longer term.
Excludes capital costs, including shared education campuses, which are structural approaches to implementing shared education	The programme excludes capital costs relating to structural building. Capital costs related to Shared Education Campuses are being taken forward through an alternative funding programme and therefore will be excluded from this programme.
Atlantic funding in year 4 is subject to a commitment by DE (NI Executive) to provide resources to mainstream shared education in the longer term	In his statement of 22 October 2013 to the Assembly, Education Minister acknowledged the need to mainstream financial support for any additional costs in relation to shared education. Regular reports on plans for mainstreaming will be made to Project Board and DSC Programme Board. Discussions are on-going to ensure the Memorandum of Understanding between Atlantic Philanthropies, OFMdFM and DE clearly outlines how this commitment will be met.
Only Schools already engaged in some form of Shared Education (i.e. those at level 2 and above on the continuum model (see Appendix 4) will be eligible to avail of the DSC SEP.	The application criteria will exclude schools currently working in isolation. A separate funding stream and programme will be established to address the needs of schools working in isolation.

4. IDENTIFICATION AND SHORTLIST OF OPTIONS

A number of options have been considered and assessed against the objectives of the programme. An overview of each option is provided below and assessment is provided for short listing purposes.

4.1 **Option 1: Status Quo (Do Nothing)**
Evidence shows that there are a number of current shared education programmes, which have been funded through a variety of existing policies and philanthropic funding.   Evidence also indicates that there are a number of additional costs for schools to successfully implement shared education.

Philanthropic funding is set to reduce over the next few years as existing funding streams, such as the International Fund for Ireland and the Atlantic Philanthropies prepare for closure. Hence the opportunity for school to secure funding will be significantly reduced.

Research shows that schools have also financed shared education through existing earmarked funding such as Community Relations, Equality and Diversity, Extended Schools and Entitlement Framework, while others have drawn on their LMS budgets.

As this has been the position for some years, it would suggest that while the status quo does not preclude shared education taking place, it would be difficult to meet the Programme for Government commitments to advance shared education. It would also result in a piecemeal approach with varying degree of opportunity being provided to pupils.

In addition, the status quo would not facilitate actions agreed by the Minister of Education in response to the Ministerial Advisory Group report and would be a barrier to advancing shared education.

While the status quo would not sufficiently meet the Executive's commitment to advancing shared education, it remains a shortlisted option for comparative baseline purposes only.

4.2 **Option 2: Shared Education Programme**
The Shared Education Programme would provide earmarked funding to support collaborative activities though an open application process to all schools.

Applications would be assessed against specified criteria and scoring framework, which would include level of sharing to date; educational improvement; societal benefits and value for money considerations. As the programme is designed for schools that have already engaged in some form of shared education (i.e.: those at level 2 and above on the continuum model in appendix 4), the application criteria will exclude schools currently working in isolation. A separate funding stream and programme will be established to address the specific needs of schools that are working in isolation.

Consequently it is envisaged that around 65% of schools (equating to 762 schools) would be eligible to participate in the programme).

The programme would be administered and implemented through the ELBs.

A dedicated ELB support team would encourage and promote shared education to all schools and provide advice and support in self assessment of the current level of sharing (against a continuum model) and identification of appropriate actions. The ELB support team would continue to support and monitor implementation over the period of the programme. Experience already exists both within ELBs and in external organisations on implementing shared education

This would ensure experience is developed within managing authorities in advance of mainstreaming shared education in line with Minister's commitment to do so.

Two implementation options have been identified in respect of a dedicated ELB support team:

- 2(a) a central regional delivery team/unit located within one ELB but providing services to all ELBs (for which there is already precedent and which reflects the regionalisation envisaged through the creation of ESA); or
- 2(b) a dedicated team in each of the five ELBs.

Both options are viable and will be considered separately.

The Education and Training Inspectorate would undertake on-going evaluation of the programme.

Potential Displacement/Duplication of Funding
Consideration has been given to the implications of introducing a new funding programme for other funding streams currently used by schools to fund shared education. In practice, schools have used a mix of funding sources to deliver shared education programmes.

The closure of the International Fund for Ireland's *Sharing in Education Programme* of £17m over four years in December 2013 together with further Atlantic Philanthropies funding of almost £4m has immediately created a £21m funding gap for schools that wish to undertake additional shared education activities.

While some schools can continue to draw on other funding streams, the introduction of this programme will address the funding gap resulting from the reduction and closure of philanthropic and external funding. Hence there is no potential for displacement of existing funding.

The application process will seek information on what other funding streams schools are accessing to ensure that there is no duplication of funding.

4.3 **Option 3: Continue IFI Sharing in Education Programme (SiEP) Projects**
Significant investment of £17m by the International Fund for Ireland established on twenty two strategic shared education projects over the period 2009-13. Funding for these projects terminated on 31 December 2013 with the closure of the IFI SiEP. Although the level of funding was significant, the scope of the Programme did not extend to all schools (around 450 schools were involved).

The projects covered a range of curricular and extracurricular activities, involved all sectors and range of school types and met the definition and objective of shared education (Appendix 5 provides further detail on the nature of these projects).

Projects were subject to independent evaluation, in the majority of cases by the Education & Training Inspectorate, but with three shared class projects subject to a separate evaluation. Evaluation reports indicated that these projects were effective and in a number of cases the projects were evaluated as outstanding.

Option 3 is based on continuing to maintain funding for these programme/projects.

The Education and Training Inspectorate would continue to undertake on-going evaluation of the programme/projects.

As in option 2, there is no potential for displacement or duplication of existing funding.

4.4 **Option 4: Scale up existing Sharing in Education Programme projects for rollout to all schools**
It would be feasible to scale up the scope of the projects identified in option 3 to provide all schools with the opportunity to participate in at least one shared education project. The range of projects which were undertaken provides a high level of assurance that a school could implement at least one which would be appropriate to the needs of the individual school/pupils.

As with previous options, the Education and Training Inspectorate would continue to undertake on-going evaluation of the programme/projects.

As in option 2, there is no potential for displacement or duplication of existing funding.

4.5 **Option 5: Schools and Supported Organisations Programme**
It would be feasible to provide funding to schools through a range of voluntary and community organisations to support delivery of shared education through separate funding streams.

In order to ensure sufficient capacity, this would require core funding to these organisations. However, departmental policy is to move away from core

funding of organisations and this option would result in a complex funding mechanism with the potential for overlaps and gaps in provision.

It would also be difficult to ensure consistency of provision.

Previous schemes, such as the Community Relations Funding Schemes which used a similar model were shown to have a number of distinct disadvantages.

Given the more discrete nature of the implementation methodology which this option would involve, it would not be feasible for the Education & Training Inspectorate to undertake a robust evaluation of what is likely to result in a myriad of smaller projects. Consequently for this option independent evaluations would be commissioned by the delivery organisations.

Given the dispersed nature of this option, there would be a higher risk of duplication (and potentially displacement) of other funding streams.

4.6 Assessment of Options

Assessment of the options is summarised in the table below:

Option Number/ Description	Shortlisted (S) or Rejected (R)	Reason for Rejection
1) Status Quo	S	
2) Shared Education Programme (a) Regional Delivery Team (b) Delivery by each of 5 ELBs	S	
3) Continue IFI Sharing in Education Programme projects	S	
4) Scale up existing Sharing in Education Programme projects for rollout to all schools	S	
5) Schools and Supported Organisations Programme	R	Not in line with departmental policy Inconsistent delivery Complex to administer Historical evidence indicates a number of distinct disadvantages

5. MONETARY COSTS AND BENEFITS OF OPTIONS

Monetary costs and benefits of each shortlisted option are considered below.

Option No. 1: Status Quo	Yr 0	Yr 1	Yr 2	Yr 3	Totals
Capital Costs					
	0	0	0	0	0
(a) Total Capital Cost	**0**	**0**	**0**	**0**	**0**
Revenue Costs					
(b) Total Revenue Cost	**0**	**0**	**0**	**0**	**0**
(c) Total Cost = (a) + (b)	0	0	0	0	0
(d) Discount Factor @ 3.5%pa	1.0000	.9662	.9335	.9019	
(e) Present Cost = (c) x (d)	0	0	0	0	0
(f) Total Net Present Cost (summation of Present Costs [e])	**£0**				

Option No. 2a Shared Education Programme (Regional Delivery Team)	Yr 0	Yr 1	Yr 2	Yr 3	Totals
Capital Costs					
	0	0	0	0	0
(a) Total Capital Cost	**0**	**0**	**0**	**0**	**0**
Revenue Costs					
Salary (Admin)	107,000	107,000	107,000	107,000	428,000
Salary (Support Staff)	234,000	540,000	540,000	360,000	1,674,000
Planning (Sub-cover)	135,000	685,800,	685,800	685,800	2,192,400
Transport	162,000	1,066,800	2,074,800	2,198,700	5,502,300
Delivery (e.g.: sub-cover, training, facilitation, venue/ equipment hire)	526,350	3,688,080	4,905,756	4,905,756	14,025,942
Evaluation (ETI)	56,070	204,542	227,044	262,344	750,000
(b) Total Revenue Cost	**1,220,420**	**6,292,222**	**8,540,400**	**8,519,600**	**24,572,642**
(c) Total Cost = (a) + (b)	1,220,420	6,292,222	8,540,400	8,519,600	24,572,642
(d) Discount Factor @ 3.5%pa	1.0000	.9662	.9335	.9019	
(e) Present Cost = (c) x (d)	1,220,420	6,079,545	7,972,463	7,683,827	
(f) Total Net Present Cost (summation of Present Costs [e])	**£22,956,256**				

ASSUMPTIONS - Option 2a

All costs are at 2013/14 prices. Year 0 is 2014/15

Salaries and wages
Estimated salaries are based on previous experience of running the previous IFI programme.   Gross Salaries are included.

Salaries are split between Administration and Support staff:
- Administration - staff including part-time support during application, sift and evaluation process.
- Support staff – recruitment and employment of 15 development Officers @ £36k p.a. There may be some variance in these costs due to recruitment in year 1 and a reduction of officers in the final year as staff move back to schools. It is anticipated that skills transfer is in place leaving schools requiring less support.

Admin Staff

Staff Role	Gross Figures £'000	Total Costs £'000
Programme Manager (Adviser Level)	60	60
Admin Officer(senior clerical Officer)	22	22
p/t Admin support in each of 5 ELBs	5	25
Total		107

Support Staff

Staff Role	Year 1	Year 2	Year 3	Year 4
15 Development officers @ £36k p.a.	_	540	540	_
5 full time and 3 part time posts (@50%)	234	_	_	_
30% reduction in staff	_	_	_	360
Total	234	540	540	360

The remaining costs based on the number of targeted schools as set out below:

	Year 1	Year 2	Year 3	Year4
Number of schools	150	762*	762	762
percentage		65%	65%	65%
Partnerships	75	380	380	380

- 762 schools is 65% of 1,172 schools. BELB 154 schools, NEELB 277 schools, SEELB 209 schools, SELB 298 schools, WELB 234 schools. Total 1,172.

Planning Costs

Planning Substitute cover costs based upon 6 days per school for 1 teacher capped @ 150 per full day by the above number of schools per year.

Transport Costs

Based on previous experience of similar projects
Post Primary Schools @ £175 per day * 9 shared classes * 2 year groups
Primary Schools @ £175 * 12 shared classes per year for one key stage group
Note
- these are based on minimum numbers for shared classes and may increase depending on schools.
- The Business Case assumes 152 schools will attain level 5 in year 4, 610 schools will attain level 4 (i.e. total 762) and of these 99 (60% primary and 40% post primary) will move from level 2 through to Level 4.
- The levels of sharing in the 'shovel ready' schools participating in year 1 should increase in years 2, 3 and 4 but that new schools participating from year 2 through to year 4 may be at level 2 in the continuum model in the first year and therefore have lower levels of shared classes depending on the requirements of these schools.
- Funding for transport will be provided to schools and flexibility applied to meet the needs of schools as they move upwards on the continuum.

Delivery Costs

This includes employment costs of shared teachers, training, sharing co-ordinator, sub-cover to attend training and shared classes, visits, travel and subsistence costs, venue hire, materials and equipment @ £2,509 in year 1, £3,840 in year 2 and £5,438 in years 3 and 4 per school where maximum sharing level will take place..

Training sub cover is calculated at 3 days @£150 sub cover per school attending
Training for 3 day course @ £550 1 teacher per school attending.

Same calculation used for each teacher in the following years.

Note: Flexibility to transfer funding across the three budget lines relating to front line delivery – Planning; Transport and Delivery – will be applied as necessary. For example, where cost savings can be made in relation to planning or transport costs, flexibility will be afforded to schools to use in relation to delivery costs to ensure maximum impact on pupils.

Evaluation Costs
Evaluation costs estimated based on 3% of the overall costs of the project from start of 2014/15.

The profile for the evaluation costs over the 4 year programme was agreed with ETI to coincide with their recruitment timetable - 1 backfill Inspector in year 1, with further backfill in other years and culminating with peak for final evaluation in last year.

Option No. 2b Shared Education Programme. Delivery by each of 5 ELBs	Yr 0	Yr 1	Yr 2	Yr 3	Totals
Capital Costs					
	0	0	0	0	0
(a) Total Capital Cost	**0**	**0**	**0**	**0**	**0**
Revenue Costs					
Salary (Admin)	210,000	210,000	210,000	210,000	840,000
Salary (Support Staff)	234,000	540,000	540,000	360,000	1,674,000
Planning (Sub-cover)	135,000	685,800	685,800	685,800	2,192,400
Transport	162,000	1,066,800	2,074,800	2,198,700	5,502,300
Delivery (e.g.: sub-cover, training, facilitation, venue/ equipment hire)	526,350	3,688,080	4,905,756	4,905,756	14,025,942
Evaluation (ETI)	59,760	208,232	230,734	251,274	750,000
(b) Total Revenue Cost	**1,323,420**	**6,395,222**	**8,643,400**	**8,622,600**	**24,984,642**
(c) Total Cost = (a) + (b)	1,323,420	6,395,222	8,643,400	8,622,600	24,984,642
(d) Discount Factor @ 3.5%pa	1.0000	.9662	.9335	.9019	
(e) Present Cost = (c) x (d)	1,323,420	6,179,063	8,068,614	7,776,723	
(f) Total Net Present Cost (summation of Present Costs [e])	**23,347,820**				

ASSUMPTIONS – Option 2(b)

As above for Option 2a with the exception of the following:

Administration Staff

Staff Role	Gross Figures £'000	Total Costs £'000
Programme Manager p/t	40	40
Assistant Advisory Officer p/t in 5 ELBs	20	100
Admin support in each of the 5 ELBs	12	60
Other p/t Admin support in each of 5 ELBs	2	10

Total		210			

Option No. 3 Continue IFI Sharing in Education Programme projects	Yr 0	Yr 1	Yr 2	Yr 3	Totals
Capital Costs					
	0	0	0	0	0
(a) Total Capital Cost	**0**	**0**	**0**	**0**	**0**
Revenue Costs					
Salary (Admin)	1,507,320	1,507,320	1,507,320	1,507,320	6,029,280
Running Costs	357,120	357,120	357,120	357,120	1,428,480
Delivery (e.g.: sub-cover, training, facilitation, venue/ equipment hire)	4,345,920	4,345,920	4,345,920	4,345,920	17,383,680
Evaluation (ETI)	186,310	186,310	186,310	186,310	745,240
(b) Total Revenue Cost	**6,396,670**	**6,396,670**	**6,396,670**	**6,396,670**	**25,586,680**
(c) Total Cost = (a) + (b)	6,396,670	6,396,670	6,396,670	6,396,670	25,586,680
(d) Discount Factor @ 3.5%pa	1.0000	.9662	.9335	.9019	
(e) Net Present Cost = (c) x (d)	6,396,670	6,180,462	5,971,291	5,769,157	
(f) Total Net Present Cost (summation of Present Costs [e])	**£24,317,579**				

ASSUMPTIONS - Option 3

All costs are at 2013/14 prices. Year 0 is 2014/15

The total number of schools assumed to be engaged on this programme was approximately 360 individually but in reality some of these organisations worked with the same schools giving a total number of schools recorded as 533 meaning that 173 schools were engaged in more than one of these projects.

The existing group without additional funding and resources do not have the capacity to deliver across all 5 ELB areas and engage with all schools.

The costs here are based upon 22 organisations working at full capacity at the end if SiEP period i.e. 360 individual schools each year. All costs are based on the experience of the existing programme costs.

Salary Costs
Salary costs are for Administration and Delivery staff and include part-time and staff paid through sub-cover figures based on costs across all 22 projects for staffing against school.
Estimated salaries are based on previous experience of running IFI programme. Gross Salaries included (pensions and NIC).

Running Costs
Running costs here are those associated with the overall costs of the organisation such as rent, rates, heat, light, telephone, broadband etc and based against the number of schools involved.

Delivery Costs
Delivery Costs includes facilitation/consultant, OCN accreditation, materials, transport, purchase of equipment or hire, set up costs for offices etc based on the number of schools involved.

Evaluation Costs
Evaluation is based on 3% of annual spend.

Option No. 4 Scale up existing Sharing in Education Programme projects for rollout to all schools	Yr 0	Yr 1	Yr 2	Yr 3	Totals
Capital Costs					
	0	0	0	0	0
(a) Total Capital Cost	**0**	**0**	**0**	**0**	**0**
Revenue Costs					
Salary (Admin)	837,400	1,256,100	1,884,150	1,884,150	5,861,800
Running Costs	198,400	347,200	607,600	607,600	1,760,800
Delivery (e.g.: sub-cover, training, facilitation, venue/ equipment)	2,414,400	10,937,232	12,228,936	12,228,936	37,809,504
Evaluation (ETI)	103,506	376,216	441,621	441,621	1,362,964
(b) Total Revenue Cost	**3,553,706**	**12,916,748**	**15,162,307**	**15,162,307**	**46,795,068**
(c) Total Cost = (a) + (b)					
(d) Discount Factor @ 3.5%pa	1.0000	.9662	.9335	.9019	
(e) Net Present Cost = (c) x (d)	3,553,706	12,480,162	14,154,014	13,674,885	
(f) Total Net Present Cost (summation of Present Costs [e])	**£43,862,767**				

ASSUMPTIONS - Option 4

All costs are at 2013/14 prices

This option is a scaled up version of Option 3. All costs are based on the number of schools against the costs from each budget heading to meet the school profile to be engaged each year.

First year calculations will show a decrease from Option 3 given that only 200 schools will be engaged as opposed to the 360 as in Option 3 above. The schools profile will be as with Options 2(a) and 2(b).

	Year 1	Year 2	Year 3	Year 4
Number of schools	150	762	762	762
percentage		655	65%	65%

Salary Costs
Salary costs are for Administration and Delivery staff and include part-time and staff paid through sub-cover. It is anticipated that staff numbers should only increase by 1.5 times the original number after the first year as once staff are in place they should have the skills and capacity to increase delivery to the number of schools in the project. This was calculated on the number of staff providing support to 533 schools and then calculating the number of additional staff required to deliver to all schools.

Running Costs
Running costs here are those associated with the overall costs of the organisation such as rent, rates, heat, light, telephone, broadband etc. It is anticipated that these will increase with the number of staff at 0.75 times and then also remain the same.

Delivery Costs
There should not be an increase in actual delivery costs as delivery costs include facilitation/consultant, OCN accreditation, materials, transport, purchase of equipment or hire, set up costs for offices etc based on the number of schools involved
Delivery will increase proportionately with the number of schools engaged as above (Option 3 figures being based on 360 schools).

Evaluation Costs

Evaluation is based on 3% of annual spend.

The total number of schools assumed to be engaged on this programme was approximately 360 individually but in reality some of these organisations worked with the same schools giving a total number of schools recorded as 533 meaning that 173 schools were engaged in more than one of these projects.

6. NON-MONETARY COSTS AND BENEFITS

A number of non-monetary costs and benefits have been identified in relation to the programme drawn from evaluations of shared education pilot projects. Key non-monetary criteria have been weighted and each option assessed against these as outlined in the tables below.

Non-Monetary Criteria	Weighting of Criteria	Rationale for Weighting
1) Exchange of ideas and good practice between schools	10	Evidence shows that shared education provides more opportunity for schools/teachers to share best practice across a wide range of educational areas. Such shared learning facilitates improved quality.
2) Improved confidence and competence for teaching staff in using a range of learning strategies necessary for quality shared education and tackling controversial &sensitive issues	25	Skills and confidence of teaching staff has been highlighted by both Ministerial Advisory Group and ETI as a key enabler in delivering quality shared education. Hence has a higher weighting,
3) Meaningful interaction for pupils	20	Relates to the quality of the educational experience for the pupils and has been identified by ETI as a key enabler to achieving quality shared education. Hence has a higher weighting,
4) Normalised cross-sectoral relationships built through regular contact within mainstream education	5	Research evidence indicates that normalising cross sectoral relationships provides a number of benefits for pupils, teachers, schools and the wider community.
5) Improved cross-community understanding and relationships leading to reduction in community tension	20	Increase in shared education, particularly on a cross community basis, is expected to contribute to a reduction in community tensions by challenging and removing pre-conceived ideas. It is a primary driver for shared education, second only to educational outcomes & reflects Executive commitment.
6) Increase in the level of interdependence in the school system	10	This relates to schools collaborating to provide a larger range of curricular/extracurricular offerings and/or other additional educational benefits for pupils. It is expected that this will increase the pace of sharing by building relationships, reducing competition and benefit pupils.
7) More co-ordinated approach	5	This relates to consistency and quality of delivery and support to all schools. A more co-ordinated approach will ensure equality of opportunity and ease of quality control.
8) Disruption of teaching time	5	This relates to lost teaching time and disruption in transporting pupils/teachers between partner schools. Survey evidence indicates that this is a key concern for schools, parents and pupil. Options with less disruption are more favoured.

Each option has been assessed against the delivery of the primary non-monetary costs and benefits identified above.

Non-Monetary Criteria	Option 1		Option 2 2(a)		2(b)		Option 3		Option 4	
	S (out of 10)	WS	S (out of 10)	WS	S (out of 10)	WS	S (out of 10)	WS	S (out of 10)	WS
1. Exchange of ideas and good practice between schools 10	1	10	10	100	9	90	6	60	8	80
2. Improved confidence and competence for teaching staff in using a range of learning strategies necessary for quality shared education and tackling controversial and sensitive issues25	0	0	9	225	9	225	6	150	8	200
3. Meaningful interaction for pupils in shared activity20	2	40	8	160	8	160	6	120	8	160
4. Normalised cross sectoral relationships built through regular contact within mainstream education5	0	0	10	50	10	50	7	35	9	45
5. Improved cross-community understanding and relationships leading to reduction in community tension20	1	20	8	160	8	160	6	120	8	160
6. Increase in the level of interdependence in the school system10	0	0	8	80	8	80	5	50	6	60
7. More co-ordinated approach 5	0	0	10	50	7	35	4	20	5	25
8. Least disruption to teaching time5	9	45	3	15	3	15	6	30	3	15
Total Weighted Score	**115**		**840**		**815**		**585**		**745**	

Non-monetary costs and benefits have been identified by scoring each option against identified benefits using a scale

system based on the relative importance of each benefit in accordance with DFP guidance with 0 indicating no

benefits and 10 indicates likely to deliver maximum benefits

Scoring Rationale

1. Option 1 does not provide opportunity for structured exchange of ideas and good practice (although informal exchange is possible) and is the lowest. Options 2(a) and 2(b) provide the highest level of ideas exchange/good practice through the ELB Support Team and ETI involvement in a structured and managed way; with option 2(a) providing an increased opportunity for sharing ideas and practice through the regional delivery team. Option 3 provides good opportunity for ideas exchange/good practice amongst schools although less structured, but due to only around 1/3 of schools being involved scope is limited. Option 4 is similar to Option 3 but rated higher due to its more extended scale across all schools.

2. There is no provision for improving confidence and competence for teachers in option 1. Training, together with support to reinforce knowledge, is a key feature of Options 2(a) and 2(b) and therefore has the highest score; while both options 3 and 4 include a level of teacher training, but with more limited scale of delivery.

3. Actions within option 1 are largely at the discretion of individual schools and there is no mechanism to assess quality, and limited opportunity to learn from others, hence its low score. The provision of a continuum model and quality indicators, combined with ELB support and ongoing ETI evaluation means that option 2(a) and 2(b) provides for good quality meaningful interaction between pupils. Shared practice with a degree of support provide some element of quality of meaningful engagement in Option 3 and 4 but with Option 4 offering wider scale of delivery.

4. Option 1 provides very limited opportunity to address educational outcomes which are reliant on skills and experience within schools who participate in shared education. Options 2(a) and 2(b) are likely to achieve the high level of educational benefit/outcome as a result of the availability of funding, ELB support, quality indicators and ETI involvement – all of which will raise standards as well as likely to provide the best scope to enhance curricular and extra-curricular provision. ETI evaluation evidence from pilot projects on which option 3 is based shows this was successful in improving educational outcomes, but on a reduced scale, with option 4 likely to offer a similar level of benefit to Option 2.

5. Option 1 does not provide any structured approach to normalising relationships on a cross-sectoral basis, while options 2(a) and 2(b) provide for the highest level of cross sectoral partnership and regular contact across schools enabled by criteria based funding. Options 3 and 4 also provide for a more normalising of cross sectoral partnership, but on differing scale of delivery.

6. Option 1 offers limited cross-community understanding, while by the definition of shared education being 'between more than one sector' other options provide for this, but on a range of scale, with Options 2(a) ,2(b) and 4 offering the highest potential (short of a single integrated system).

7. Option 1 does not impact on interdependence of school system as collaboration is at the discretion of individual schools and not in a structured manner. Other options offer more interdependence through collaborative working between partner schools, with options 2(a) and 2(b) likely to offer the highest benefit due to its scale and ELB support, with options 3 and 4 differing in scale and lack of support.

8. Option 1 does not offer any co-ordinated approach, while option 2(a) offers the highest level of co-ordination and consistency through its centralised model offering regional support. Option 2(b) has the risk of less co-ordination and consistency due to its more devolved management across 5 ELBs; while option 3 and 4 offer some scope for co-ordination through the individual project structures.

9. Option 1 offers the least disruption to teaching time as involves only very limited collaboration and requirement to transport pupils to other schools, while options 2(a), 2(b) and 4 are likely to impact most on disruption due to likelihood for transporting pupils; with option 3 involving less disruption across all schools due to its reduced scale.

7. ASSESSMENT OF RISKS AND UNCERTAINTIES

7.1 The following table outlines identified risks and uncertainties.

Risk Description	OPTIONS					State how the options compare and identify relevant risk management / mitigation measures
	1	2		3	4	
		2(a)	2(b)			
1. Lack of participation by all schools	H	M/L	M/L	H	M	Requirement on ELBs to promote/encourage shared education through RAP target. Incentives for schools, including in option 2 a support mechanism. Monitoring of involvement at ELB and DE level; targeted intervention for non-participating school. Education & Training Inspection Reports
2. Lack of participation by pupils *Note 1*	H	L	L	L	M	Increased educational benefits
3. Lack of skills/confidence to deal with sensitive & controversial issues amongst teaching staff	H	M	M	M	M	Teacher training needs will be addressed through the Shared Education Programme. School need to release teachers for appropriate training.
4. Objections by parents/wider community	M	M/L	M/L	L	M/L	Schools engaging with parents/wider community to explain shared education & outline benefits.
5. Insufficient capacity to deliver to all schools	n/a	L	L	H	H	Option 2 includes provision of a dedicated support team. Evidence indicates that there is existing capacity to deliver on option 3. Sufficient capacity within statutory and voluntary organisations to scaling up existing provision is judged to be of higher risk.
6. Underspend/ Overspend by schools	n/a	M/L	M/L	H	H	Historical evidence indicates a high level of risk of schools achieving spending profile. In particular, evidence shows that transport costs are liable to variation. Support staff included in option 2 would have a monitoring role in spending; where savings in transport are identified, flexibility will be afforded to direct to frontline delivery to ensure maximum impact on pupils.
7. Schools fail to identify their starting point and set realistic aims & objectives within broader education plan/school development plan/ wider area learning community plans impacting on expected outcomes.	H	M/L	M/L	M/L	M/L	Access to facilitation to identify realistic aims and objectives. Governance structures will ensure several layers of monitoring to track achievement of benefits
9. ELBs unable to agree on regional delivery	n/a	M	n/a	n/a	n/a	In this circumstance option 2(b) would deliver the same benefits at a slightly increased cost, but within 10% limit against overall cost.
Overall Risk (H/M/L):	H	M/L	M/L	H/M	M	

KEY: H = high   M = medium   L = low   N/A = Not Applicable

Note 1   *Programme for Government target is for all children to have the opportunity to participate in shared education programmes by 2015; it is recognised that in some communities children may withdraw from taking up the opportunity*

7.2 **Risks and Uncertainties – Sensitivity Analysis**

All projects have a range of possible outcomes, although the range will be wider, and variability more important, for some cases than for others. The analysis of risks and uncertainties is a key element in appraisal.

The treatment of any potential uncertainty is generally best dealt with using sensitivity analysis which involves varying the value/number of key project indicators which are likely to be subject to the greatest degree of uncertainty.

In order to determine the impact of potential increases in total cost of the project as a result of uncertainties, NPC calculations have been performed using costs calculated below and subject to the following sensitivities (see also attached Appendix 8):

- Sensitivity 1 - a 10% increase in overall staffing costs
- Sensitivity 2 - a 25% increase in transport/delivery costs

The results of the above sensitivity on the calculated NPV's are shown below.

Options	Original NPC	Ranking	Sensitivity 1 NPC	Ranking	Sensitivity 2 NPC	Ranking
Option 2(a)	£22,956,256	1	£23,155,385	1	£24,234,399	1
Option 2(b)	£23,347,820	2	£23,586,106	2	£24,625,964	2
Option 3	£24,317,581	3	£24,890,603	3	£28,447,943	3
Option 4	£43,862,766	4	44,413,687	4	£52,719,502	4

It can be clearly seen from the above Table that increasing salaries by 10% does not affect the ranking of the options. Option 2a remains the preferred option in this case.

Evidence from previous shared education programmes shows that transport costs are liable to variation in relation to the distance between schools, number of classes involved and whether transport is via ELB buses or private hire coaches.

Support staff included in option 2 would have a monitoring role in spending; where savings in transport are identified flexibility will be afforded to direct to frontline delivery to ensure maximum impact on pupils.

However, it has been considered necessary to sensitise the transport costs across the options. Given the level of uncertainty here an increase of around 25% in transport costs is considered reasonable. The results are set out in the Table above. Clearly a variation in transport costs does not affect the ranking of the options.

As this is a revenue project an Optimism bias adjustment is not considered necessary.

A sensitivity analysis around the Non Monetary Score (NMS) is not considered necessary as there would have to be a significant reduction in Option 2a's NMS to affect its ranking against Options 3 and 4. At the same time Option 2a scores similar to Option 2b, with the exception of Option 2a having a higher score on 'a more co-ordinated approach' which is unlikely to change in the life of this programme.

8.   CALCULATION OF NET PRESENT VALUES

Net present values have been calculated for each option (Appendix 8 refers). A detailed breakdown of costs is included in Appendix 9.

9. SUMMARY OF OPTION COMPARISONS & IDENTIFICATION OF PREFERRED OPTION

9.1   The 4 shortlisted options have been appraised with reference to both monetary and non-monetary indicators, the results are summarised below:

Options	Total Cost (Resource)	Net Present Cost (NPC)	Non Monetary Score	NPC per Benefit Point	Ranking
Option 1	£0	£0	115	NA	-
Option 2(a)	£24,572,642	£22,956,256	840	£27,329	1
Option 2(b)	£24,984,642	£23,347,820	815	£28,648	2
Option 3	£25,586,680	£24,317,581	585	£41,568	3
Option 4	£46,795,068	£43,862,766	745	£58,876	4

9.2   In terms of choice of the preferred option, Option 2(a) has the lowest total costs, as well as the lowest Net Present Cost (NPC).   Option 2(b), however, ranks a close second in terms of total cost and NPC.

9.3   The choice of preferred option should be based upon the consideration of both the monetary costs and non-monetary benefits of each option. Option 2(a), however, also scores highest in terms of its non-monetary impact (840 compared to 815 for Option 2(b)) giving Option 2(a) the overall lowest NPC per benefit point of £27,329.

9.4   Considering the above, Option 2a The Shared Education Programme via a regional delivery mechanism is clearly the preferred option in terms of both costs and benefits.

9.5   In terms of Risks Options 2(a) and 2(b) both have the lowest overall risk rating of M/L.

9.6   Options 2(a) also fully meets with the objectives of the Programme and is within budget. Option 2a is therefore our preferred option.

10. ASSESSMENT OF AFFORDABILITY AND FUNDING ARRANGEMENTS

	Yr 0 £000's	Yr 1 £000's	Yr 2 £000's	Yr 3 £000's	Totals £000's
Current DEL Provision:					
(a) Capital	0	0	0	0	0
(b) Revenue	0	0	0	0	0
(c) Depreciation Allowance (if required)					
Additional DEL Required:					
(a) Capital	0	0	0	0	0
(b) Revenue [Note 1]	1,247,269	6,392,898	8,702,668	8,681,472	25,024,307
(c) Depreciation Allowance (if required)					
Total DEL Requirement:					
(a) Capital	0	0	0	0	0
(b) Revenue	1,247,269	6.392,898	8,702,668	8,681,472	25,024,307
(c) Depreciation Allowance (if required)					

[Note 1] *Adjusted for inflation March 2014 GDP Deflators*

Budget from which funding to be allocated	Sum funded & % of total	Funding secured? Yes/No	If not secured, indicate status of negotiations
The Atlantic Philanthropies	£10m (*40% of total*)	Yes	Atlantic Philanthropies Board approved a matched funding contribution of up to £10m in December 2013.
OFMdFM (DSC Funds)	£10m (*40% of total*)	No	Bid required to central funds; pending business case approval.
Department of Education	£5m (*20% of total*)	No	Bid logged with DE finance; pending business case approval.

The total resource costs of £24,572,642 (in constant prices) or £25,024,307 (including inflation) should fall within the anticipated funding profile available.

	2014/15	2015/16	2016/17	2017/18	Total
Atlantic Philanthropies	£1,600,000	£3,500,000	£3,640,000	£1,260,000	£10,000,000
OFMdFM (DSC Funds)	£400,000	£3,680,000	£3,740,000	£2,180,000	£10,000,000
Department of Education	£500,000	£1,820,000	£1,620,000	£1,060,000	£ 5,000,000
Total	**£2,500,000**	**£9,000,000**	**£9,000,000**	**£4,500,000**	**£25,000,000**

11. PROJECT MANAGEMENT

11.1 **Executive Ministerial Sub-Committee on Children and Young People**
Governance arrangements for the programme will be consistent with those in place for Delivering Social Change Signature programmes. The DSC Framework is led by Ministers through the Executive Ministerial Sub-Committee (MSC) on Children and Young People.

11.2 **DSC Programme Board**
The MSC will be supported by the Delivering Social Change Programme Board which meets every 8 weeks and oversees the delivery of the DSC delivery framework. They will oversee all of the projects. The responsible DE Deputy Secretary is a member of the DSC Programme Board.

11.3 **Atlantic Philanthropies/DSC Programme Board**
A joint Atlantic Philanthropies/DSC Programme Board will oversee three projects, including the Shared Education Project, where part funding is provided by the Atlantic Philanthropies. The AP/DSC Programme Board will be chaired by OFMDFM and will comprise of reps from AP, DHSSPS, DE and if required, OFMDFM Special Advisers. The Programme Board will provide the Projects with the necessary authorisation to proceed and to overcome any problems.

11.4 **Shared Education Project Board**
A Shared Education Project Board, chaired by the DE Senior Responsible Owner and comprising representatives from OFMdFM, the Atlantic Philanthropies and ELB representatives. The direct management of each of the projects will be through individual Project Boards (PB).

A Memorandum of Understanding between OFMdFM, The Atlantic Philanthropies and DE will provide the necessary authority and set out roles and responsibilities for the overall governance arrangements. A draft copy is provided in Appendix 6.

Detailed project initiation documents and project plans will be prepared for the project based on PRINCE 2 methodology.

A high level project plan is provided at Appendix 7. This will be further refined by the Project Implementation Team within the Project Initiation document.

11.5 **Expert Advisory Committee**
An independent Expert Advisory Committee (EAC) will be established to provide advice to each project on service design and implementation including guidance on evaluation and performance measurements. Members will be nominated by OFMdFM, DHSSPS, DE and Atlantic Philanthropies. EAC will report through the SEP Project Board to the AP/DSC Programme Board.

Appendix 6 (Annex A (1)) provides an overview of the governance structure through which the project will be managed.

12. Monitoring and Evaluation Arrangements

12.1 Monitoring

The SEP Project Board will be responsible for monitoring the projects, with oversight from the AP/DSC Programme Board. The SEP Project Board will receive regular update and exception reports on progress at scheduled meetings.

The manager of the ELB support team will be responsible for providing regular progress reports (to include outcome and expenditure against profiled budget) to the SEP Project Board.

In the event of slippage against outcomes or expenditure, the project board will agree remedial action.

12.2 Programme Evaluation

Though a formal agreement, the Education and Training Inspectorate will be engaged to evaluate the schools partnerships against the aims and objectives over the period of the project and give support and guidance when necessary.

ETI has experience in evaluating shared education programme given their involvement for several years with the International Fund for Ireland's Sharing in Education Programme.

ETI will have a future role in inspecting shared education in schools when it is mainstreamed as part of advancing shared education process. Their involvement will ensure building of existing capacity and knowledge.

In addition, external researched may be commissioned by the Atlantic Philanthropies to complement the work of ETI (however this is outside the scope of this business case).

A monitoring and evaluation process will be developed to assess the impact of AP/DSC Shared Education project over a three year period.

The overarching evaluation framework will be agreed by the SEP Project Board with support and guidance from the SEP/Expert Advisory Committee.

Additional information will be collated from a number of surveys. A series of questions have been developed and are included in the schools omnibus survey. This is completed by the head of the school annually and the available

information used to setup baseline data. It will continue to be run on a yearly basis to access the numbers etc involved in sharing in education.

DE contributes questions to the Young Life and Times Annual Survey. At present shared education questions will be included every 2 years to measure the increase in sharing in education partnerships over the next few years. These questions focus on the experiences of 16 year old young people.

12.3 **Post Project Evaluation**

A post project evaluation, which will incorporate a project evaluation review (to determine the effectiveness of project management procedures, will be undertaken within 6 months of the end of the programme. The PPE will be led by an individual not involved in the programme; the SRO will be responsible for appointing the relevant person.

The review will draw on the finding of the ETI report; any additional reports commissioned by the Atlantic Philanthropies and any related research/surveys.

The PPE evaluation will take into account out-turn against anticipated monetary costs & benefits; non-monetary costs & benefits, any identified unexpected benefits and disbenefits. The review will also provide an outline of lessons learned and recommendations for future projects.

Risk Log for the Preferred Option

Risk Description	Category (e.g. funding, operational, etc.)	Impact (L/M/H)	Probability (L/M/H)	Proximity (short, medium, long-term)	Countermeasures	Owner	Author	Date Identified	Date Last Updated	Current Status
1. Lack of participation by all schools	Operation	M	M	Medium term	Requirement on ELBs to promote/ encourage shared education through RAP target. Incentives for schools including support mechanism. Monitoring of involvement at ELB and DE level; targeted intervention for non-participating school Education & Training Inspection Reports	DE SRO DE SRO ELB Support staff/SEP Project Board ETI				
2. Lack of participation by pupils *Note 3*	Operation	M	L	Short term	Increased educational benefits Access to larger range of opportunities	ELB Support staff				
3. Lack of skills/ confidence to deal with sensitive/controversial issues by teaching staff	Operation	M	M/L	Long-term	Funding application to include baseline audit by schools of current skill levels. Provision for teacher training	ELB Support staff				
4. Objections by parents/ wider community	Operation	M	L	Short-term	Schools engaging with parents/wider community to explain shared education & outline benefits.	Schools				

Risk Description	Category (e.g. funding, operational, etc.)	Impact (L/M/H)	Probability (L/M/H)	Proximity (short, medium, long-term)	Countermeasures	Owner	Author	Date Identified	Date Last Updated	Current Status
5. Insufficient support staff in ELBs	Funding	M	L	Long-term	Provision of a dedicated support team	SEP Project Board				
6. Underspend/ Overspend by schools	Funding	M/L	M/L	Long-term	Support staff to have monitoring role against spending profile.	ELB support staff/SEP Project Board				
7. Schools fail to identify their starting point and set realistic aims and objectives within broader education plan/school development plan and plans for wider area learning community	Operation	M/L	M/L		Self assessment by schools against shared education continuum model. Facilitation is eligible cost to assist schools to identify their starting point realistic aims and objectives	ELB Support staff				
8. Failure to Deliver expected benefits	Operation				Regular monitoring by support staff; Governance structures ensure several layers of monitoring to track achievement of benefit.	DE SRO				

Benefits Realisation Plan

Appendix 2

Benefit Owner	Benefit Description	Benefit Ranking	Baseline Value	Target Value	How will it be measured?	Responsible Officer [Note 1]	Dates/ Timing
DE SRO	A: Improve education outcomes through schools working collaboratively	1	77.1% of pupils achieving KS2 Communication in English; 78.5% of pupils achieving KS2 Using Maths; 72.2% pupils achieving KS3 Communication in English; 73.9% of pupils achieving KS3 Using Maths; and 62.0%of pupils achieving 5+ GCSE (or equivalent) A*-C including English & Maths. *Note: Baseline & target value to be revisited in light of application data.*	88.2% of pupils achieving KS2 Communication in English; 88.4% of pupils achieving KS2 Using Maths; 83.6% pupils achieving KS3 Communication in English; 83.1% of pupils achieving KS3 Using Maths; and 68.0% of pupils achieving 5+ GCSE (or equivalent) A*-C including English & Maths.	DE Educational Improvement Stats		By March 2018

Benefit Owner	Benefit Description	Benefit Ranking	Baseline Value	Target Value	How will it be measured?	Responsible Officer [Note 1]	Dates/ Timing
DE SRO	B: Increase the number of schools participating in Shared Education	4 (enabler of primary objective)	76% (2012/13)	85% (2017/18)	School Omnibus Survey		By March 2018
DE SRO	C: Increase the number of young people participating in Shared Education	3 (primary objective)	15% (whole school basis) 13% (only than one class)	20% (whole school basis) 80% (more than one class)	School Omnibus Survey		By March 2018
ELB CE(s)	D: To provide educators with professional development in using a range of learning strategies necessary for work in shared classes	5 (enabler of quality outcomes for primary objective)	-	95% of participating schools to have provided teachers with professional development on range of learning strategies	Baseline at application stage Outturn at end of programme		By March 2018
ELB CE(s)	E: Enable schools to implement a progressive approach to shared education	6 (increasing degree of engagement within schools will achieve increase in pupil participation)	-	50% of participating schools to have moved at least one point against the continuum of shared education model	Baseline at application stage through self assessment by schools Outturn at end of programme		By March 2018
ELB CE(s)	F: Improve reconciliation outcomes through schools working collaboratively	2 (Primary objective)	Cross Group Friendship: 1.94 Positive Action Tendencies: 2.71 Intergroup Anxiety: 1.66	Cross Group Friendship: 2.37 Positive Action Tendencies: 3.14 Intergroup Anxiety: 1.57	QUB Research Data		By March 2018

Note 1: *Individual officers names will be added once appointed,*

No. A	Benefit	Senior Benefit Owner		Operational Benefit Owner		
	Improve education outcomes through schools working collaboratively	ELB CE(s)		ELB Delivery Manager		
Benefit to be Measured	**Method of Measurement**	**Baseline Value**	**Target Value**	**Measurement Dates**	**Measurement to be done by**	**Actual Value at date measured**
88.2% of pupils achieving KS2 Communication in English;	Departmental Statistics	77.1%	88.2%	**Baseline**	31 January 2014	77.1% (2012/13) 78.5% |(" ") 72.2% |(" ") 73.9 %|(" ") 62.0% (2011/12)
88.4% of pupils achieving KS2 Using Maths;		78.5%	88.4%	**Actual(s)**	*(Revisited in light of application data by 31 December 2014)*	-
83.6% pupils achieving KS3 Communication in English;		72.2%	83.6%		31 March 2018	
83.1% of pupils achieving KS3 Using Maths; and		73.9%	83.1%			
68% of pupils achieving 5+ GCSE (or equivalent) A*-C including English & Maths.		62.0% *Note: Baseline & target value to be revisited in light of application data.*	68.0%			
Overall Benefit Ranking	**Benefit Category**	**Dependency on Other Benefits**	**Benefit Priority (1 very low to 5 very high)**	**Likelihood of Failure (1 very low to 5 very high)**	**Overall Risk Rating (Priority x Likelihood of Failure)**	
1	Satisfaction		5	2	10	

Relevant PfG Commitments		How does the benefit meet the target?			
Ensure all children have the opportunity to participate in shared education programmes by 2015; Building a strong and shared community		Encouraging schools to participate on a cross sectoral basis with other schools in the catchment area increase the number of opportunities which pupils can avail of. It also contributes to the PfG priority to build a strong and shared community by allowing pupils to engage with other communities			
Actions Required		Responsibility for actions	Expected Outcomes	Start Date	End Date
Proactive action by ELB Advisory & Support Team; On-going monitoring by ELB Support Team		ELB Delivery Manager	More schools collaborating on a cross community basis	1 April 2014	31 March 2018
Potential Risks	Likelihood 1 Low – 5 High	Impact on Benefit 1 Low – 5 High	Countermeasures		Responsibility for Countermeasures
Schools fail to achieve anticipated improvements in educational outcomes due to other factors outside the programme.	2	5	Targets to be revisited to re-assess being realistic/achievable in light of applications. On-going monitoring by ELB Support Team		**ELB Support Team**

No. A	Benefit Increase the number of schools participating in Shared Education		Senior Benefit Owner		Operational Benefit Owner		
			DE SRO		ELB CE(s)		

Benefit to be Measured	Method of Measurement	Baseline Value	Target Value	Measurement Dates	Measurement to be done by	Actual Value at date measured
What % of schools participates in Shared Education?	School Omnibus Survey	76% (2013)	85%	**Baseline**	31 January 2014	76%
				Actual(s)	31 March 2018	-

Overall Benefit Ranking	Benefit Category	Dependency on Other Benefits	Benefit Priority (1 very low to 5 very high)	Likelihood of Failure (1 very low to 5 very high)	Overall Risk Rating (Priority x Likelihood of Failure)
4	Satisfaction		4	1	5

Relevant PfG Commitments	How does the benefit meet the target?
Ensure all children have the opportunity to participate in shared education programmes by 2015	By providing funds for additional costs thereby increasing the number of schools that provide the opportunity

Actions Required	Responsibility for actions	Expected Outcomes	Start Date	End Date
Launch Shared Education funding programme; Establish & recruit ELB Advisory & Support Team; Process applications & allocate funding; On-going monitoring by ELB Support Team	Minister ELB CE(s)	Uptake in applications	April 2014	31 March 2018

Potential Risks	Likelihood 1 Low – 5 High	Impact on Benefit 1 Low – 5 High	Countermeasures	Responsibility for Countermeasures
Schools fail to engage with the programme	1	5	Communication with schools to raise awareness of programme & need to comply with PfG commitments Proactive engagement by ELB Support Staff Ongoing monitoring by Project Board	ELB Delivery Manager Project Board

No. B	Benefit	Senior Benefit Owner		Operational Benefit Owner		
	Increase the number of young people participating in Shared Education	DE SRO		ELB CE(s)		

Benefit to be Measured	Method of Measurement	Baseline Value	Target Value	Measurement Dates	Measurement to be done by	Actual Value at date measured
What increase in % of young people participating in Shared Education?	School Omnibus Survey	15% (whole school basis) 13% (only than one class)	20% (whole school basis) 80% (more than one class)	**Baseline** **Actual(s)**	31 January 2014 31 March 2018	15% -

Overall Benefit Ranking	Benefit Category	Dependency on Other Benefits	Benefit Priority (1 very low to 5 very high)	Likelihood of Failure (1 very low to 5 very high)	Overall Risk Rating (Priority x Likelihood of Failure)
3	Satisfaction	A	5	1	5

Relevant PfG Commitments	How does the benefit meet the target?
Ensure all children have the opportunity to participate in shared education programmes by 2015	Through increasing the number of schools that are providing shared education opportunities to more than one class and/or whole school basis

Actions Required	Responsibility for actions	Expected Outcomes	Start Date	End Date
Allocate funding to schools; Proactive action by ELB Advisory & Support Team; On-going monitoring by ELB Support Team	ELB Delivery Manager	Increase in degree of sharing taking place in schools	1 September 2014	31 March 2018

Potential Risks	Likelihood 1 Low – 5 High	Impact on Benefit 1 Low – 5 High	Countermeasures	Responsibility for Countermeasures
Lack of participation by schools	2	5	Increase educational benefits Proactive engagement by ELB Support Staff	ELB Delivery Manager Project Board

No. C	Benefit	Senior Benefit Owner		Operational Benefit Owner		
	To provide educators with professional development in using a range of learning strategies necessary for work in shared classes	ELB CE(s)		ELB Delivery Manager		

Benefit to be Measured	Method of Measurement	Baseline Value	Target Value	Measurement Dates	Measurement to be done by	Actual Value at date measured
What % of schools to provide teachers with relevant professional development?	School Omnibus Survey	-	95%	**Baseline**	31 March 2015	-
				Actual(s)	31 March 2018	-

Overall Benefit Ranking	Benefit Category	Dependency on Other Benefits	Benefit Priority (1 very low to 5 very high)	Likelihood of Failure (1 very low to 5 very high)	Overall Risk Rating (Priority x Likelihood of Failure)
5	Satisfaction		4	1	**4**

Relevant PfG Commitments	How does the benefit meet the target?
Ensure all children have the opportunity to participate in shared education programmes by 2015	By providing teachers with the enabling skills and confidence to engage in shared education programmes

Actions Required	Responsibility for actions	Expected Outcomes	Start Date	End Date
	ELB CE(s)	Skilled & confident teachers	1 September 2014	31 March 2018

Potential Risks	Likelihood 1 Low – 5 High	Impact on Benefit 1 Low – 5 High	Countermeasures	Responsibility for Countermeasures
Schools fail to release teachers for training	1	3	Letter of offer requirement Proactive engagement & monitoring by ELB Support Team	ELB Support Team

No. D	Benefit		Senior Benefit Owner		Operational Benefit Owner		
	Enable schools to implement a progressive approach to shared education		ELB CE(s)		ELB Delivery Manager		

Benefit to be Measured	Method of Measurement	Baseline Value	Target Value	Measurement Dates	Measurement to be done by	Actual Value at date measured
What % of participating schools that move at least one point against the continuum of shared education model?	Baseline self assessment at application stage compared to outturn position	TBC	50%	**Baseline**	Application closure date	0%
				Actual(s)	31 March 2018	-

Overall Benefit Ranking	Benefit Category	Dependency on Other Benefits	Benefit Priority (1 very low to 5 very high)	Likelihood of Failure (1 very low to 5 very high)	Overall Risk Rating (Priority x Likelihood of Failure)
6	Satisfaction	A & B	4	2	4

Relevant PfG Commitments	How does the benefit meet the target?
Ensure all children have the opportunity to participate in shared education programmes by 2015	By moving schools upwards against a continuum of shared education leads to more children having the opportunity to participate in a shared education programme.

Actions Required	Responsibility for actions	Expected Outcomes	Start Date	End Date
Launch application process & pilot continuum model; Refine continuum model & refine quality indicators	ELB CE(s) ETI	Shared Education continuum model	1 April 2014	31 December 2014

Potential Risks	Likelihood 1 Low – 5 High	Impact on Benefit 1 Low – 5 High	Countermeasures	Responsibility for Countermeasures
Insufficient support staff in ELBs; Schools fail to accurately self assess	2	3	Funding provided for support staff Use of Interchange Programme to recruit expertise ELB Support Team to assist schools in self-assessment (monitored by ETI)	ELB CEOs ELB Support Team

No. E	Benefit		Senior Benefit Owner		Operational Benefit Owner		
	Improve reconciliation outcomes through schools working collaboratively		ELB CE(s)		ELB Delivery Manager		

Benefit to be Measured	Method of Measurement	Baseline Value	Target Value	Measurement Dates	Measurement to be done by	Actual Value at date measured
Cross Group Friendship	QUB Research data	1.94	2.37	**Baseline**	2010/11	1.94 (2010/11) 2.71 (2010/11) 1.66 (2010/11)
Positive Action Tendencies		2.71	3.14	**Actual(s)**	31 March 2018	
Intergroup Anxieties		1.66	1.57			-

Overall Benefit Ranking	Benefit Category	Dependency on Other Benefits	Benefit Priority (1 very low to 5 very high)	Likelihood of Failure (1 very low to 5 very high)	Overall Risk Rating (Priority x Likelihood of Failure)	
2	Satisfaction		5	2	4	

Relevant PfG Commitments	How does the benefit meet the target?
Ensure all children have the opportunity to participate in shared education programmes by 2015; Building a strong and shared community	Encouraging schools to participate on a cross sectoral basis with other schools in the catchment area increase the number of opportunities which pupils can avail of. It also contributes to the PfG priority to build a strong and shared community by allowing pupils to engage with other communities

Actions Required	Responsibility for actions	Expected Outcomes	Start Date	End Date
Proactive action by ELB Advisory & Support Team; On-going monitoring by QUB Research team	ELB Delivery Manager	More schools collaborating on a cross community basis	1 April 2014	31 March 2018

Potential Risks	Likelihood 1 Low – 5 High	Impact on Benefit 1 Low – 5 High	Countermeasures	Responsibility for Countermeasures
QUB Research Data not available	1	3	Atlantic Philanthropies have committed to fund this research and make results available for on-going monitoring	DE SRO/Atlantic Country Director

EDUCATION & TRAINING INSPECTORATE EVALUATION REPORT: SHARING IN EDUCATION PROGRAMME

This report is based on a broad and in-depth evidence base across the participating schools/organisations visited by the ETI over the period 2010-2013 and which included over 374 meetings and discussions with project and school staff, children and young people, and at least 142 direct observations of learning sessions.

The projects were implemented across the formal and non-formal sectors including early years, primary, post-primary, special education, youth and community work, and teacher education, exploring the development of shared education in different contexts. The projects contributed to the four interrelated strategic aims of the SiEP. Often the work of each project contributed to more than one of the strategic aims. For ease of reference, however, the details of each individual project and key outcomes are provided in Appendix 5 linked to the aim that they most fulfilled.

The reality of making the projects practical and effective in demonstrating measurable outcomes for young people was complex given the multiple views and definitions of what constitutes shared education in NI, and the lack of a substantive body of research to guide evaluative processes. Developing the work of the projects required vision, energy, courage and resilience in taking risks, to discover how to educate young people better and tackle difficult issues.

Over the period 2010-13 the projects report that over 46,5005 children, young people, staff, parents/carers, grandparents, governors, youth and community workers and others involved in education across NI, including 428 schools, were involved directly or indirectly in the SiEP. Their experiences have enabled the ETI to identify how shared education can be instrumental in promoting better learning as we work collaboratively towards a better future. The significant funding by IFI for the SiEP has enabled those involved to engage with issues of reconciliation, diversity, community relations, respect and trust through moving shared education experiences from an aspiration to a reality.

The report identifies what lessons can be learnt from the experience of the projects in piloting how best to help young people from the two main communities and other backgrounds to explore their uniqueness, to recognise and value diversity in order to be able to engage better in life and work with increased confidence, self-esteem and respect for others. The report concludes with a series

of recommendations for consideration at policy and school/organisation level. It presents a work in progress and a challenge to all through shared responsibility and action to become better at shared education.

The SiEP Evaluation was carried out over the period 2010-2013. The ETI's approach to the evaluation centred on building capacity within the projects to reflect and evaluate progress alongside providing external and objective evaluations.

The inspectors evaluated the quality of the provision against a customised set of quality indicators which were shared with the project leaders to ensure transparency and openness. Inspectors encouraged the individual projects to use these indicators to help schools/organisations involved in reconciliation work evaluate the quality of the provision beyond the life of the programme.

Throughout the work, particular emphasis was given to developing a common language and understanding between projects and schools/organisations with regard to the potential impact of the work on curriculum and school/organisation development planning.

Project Outcomes and Achievements
In almost all of the projects the participants:
- developed good personal and social skills through their engagement with others in exploring controversial, sensitive, complex and relevant issues to their lives.
- increased their awareness of t he impact of their attitudes and actions on other individuals and communities.
- were able to evaluate their own learning through, for example, reflective journals/diaries, questionnaires and discussions.

The majority of the projects provided them with the opportunity to achieve an accredited qualification or an award designed with set criteria.

The Evaluation report identified in going forward, there is a need:

- for schools/organisations to evaluate consistently the impact of the work of reconciliation on the young people's attitudes, behaviours, understanding and skills to be able to demonstrate clearly the progress of young people and to inform future planning;

- for schools/organisations to focus on the development of the young people's maturity and higher-level skills of negotiation, compromise, collaborative problem-solving, managing disagreement, conflict and confrontation through innovative, inspiring and experiential learning strategies; and

- for all stakeholders to recognise, value and reward shared learning through accreditation and assessment arrangements across phases.

Quality of provision for learning
The SiEP brought a fresh impetus to collaborative learning to motivate and engage young people. It complemented curriculum planning and stimulated a variety of innovative learning and teaching strategies focused on consolidating the participants' understanding of diversity and of the part each can play in the process of reconciliation.

Almost all of the projects planned and developed the shared education work, crucially, through the NIC including PDMU, World Around Us, Local and Global Citizenship, history, language and sport. These projects provided continuing professional development to support teachers, youth workers and other educational providers in being confident in the use of a range of skills and methodologies to facilitate shared learning, including addressing controversial issues.

Participating staff responded willingly to the challenges of facilitating shared education. In the best practice, the staff planned effectively to meet the needs and interests of the participants in a safe and respectful environment.

The Evaluation report identified in going forward, there is a need to:

- support staff across all phases in developing further their confidence and
  competence in using a wide range of learning strategies necessary for work in shared classes to provide progressively challenging experiences for young people in tackling controversial and sensitive issues.

Leadership and Management of the Projects
The IFI Liaison Team within DE managed effectively the selection of the projects and monitored and reviewed rigorously the projects' work to ensure that progress was assured and focused entirely on the impact on shared learning and associated skills. As

the SiEP progressed there were obvious links between projects which the team encouraged and facilitated. In particular, the team linked the work to the Community Relations, Equality and Diversity (CRED) policy of DE.

Through regular monitoring reports and accountability meetings, the IFI
Liaison Team within DE worked flexibly and open-mindedly with the leaders of the projects to achieve an acceptable balance between being creative and taking risks to maximise the learning about shared education with appropriate systems for accountability.

Project leaders and participants across the projects were creative in piloting a range of shared education models to promote reconciliation across religious, cultural, economic and social divides.

The leaders of the projects were effective in supporting participating schools/organisations to develop shared education. Their clear vision for, and commitment to, shared education impacted positively on schools/organisations and helped to develop enhanced self-evaluation and improvement.

There were examples of the excellent use of the voice of the learner to improve the quality of the provision and to inform further planning. This process brought a sense of realism about what worked and what remains to be done in order to plan better for going forward.

An important element of success was the recruitment, deployment, support and development of staff to promote the SiEP. This ensured that most of the project staff brought high levels of expertise and experience in community relations, reconciliation and diversity, including the skilful facilitation of learning to handle controversial and sensitive issues.

The project staff recognised the importance of working in partnership to build effectively the capacity and expertise across the projects the SiEP provided participating teachers and staff with opportunities to develop their pedagogical skills at a time of restricted access to continuing professional development. This included access to appropriate resources which supported better partnership working.

Almost all of the projects addressed effectively the areas for improvement identified in the interim report in June 2012.

<u>Building on the lessons learned and going forward</u>
IFI, DE and other funders need to continue streamlining the planning and accountability processes for project-driven work of this nature aiming for clarity in planning and effective reporting on quality and finance, while not distracting teams unnecessarily from the practical delivery of the projects.

Schools/organisations need to work with external facilitators as appropriate to identify where they currently are in respect of shared education to enable them to set realistic aims and objectives and ensure planning links with, and builds upon, other initiatives within the schools/organisations.

Schools/organisations need to use their improvement process to develop shared education through staff development, the appointment of key people to lead and co-ordinate the work, a system to evaluate the quality of the provision and outcomes and engage with parents/carers and the community.

<u>Sustainability</u>
In terms of sustainability, at the time of the final evaluation, almost all of the projects had plans to sustain the learning.
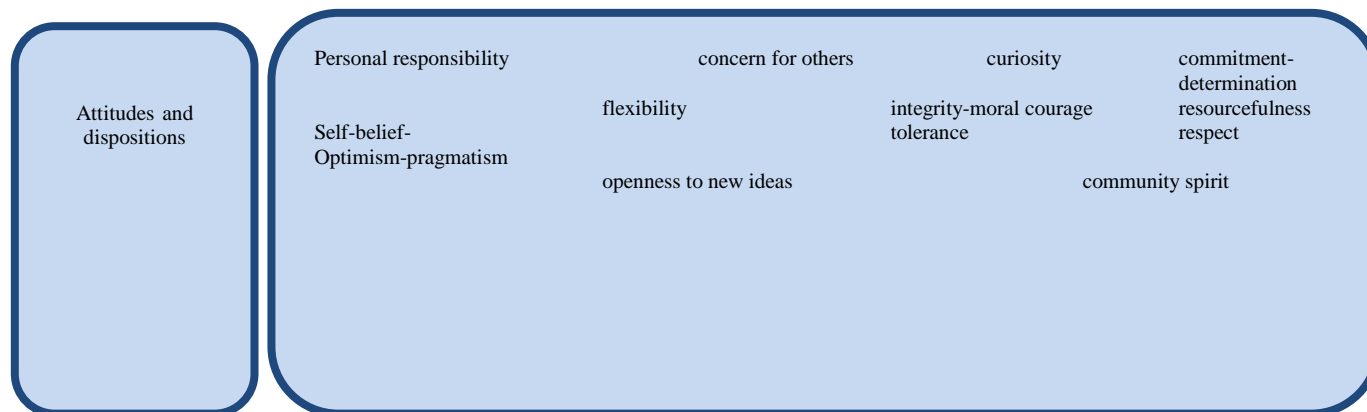
The following nine recommendations are ETI's professional view of how schools can be supported in practical ways: for some; to begin their journey on a continuum which builds true understanding rather than compliance, and for others; to keep pushing the boundaries moving ever closer towards the longer term aim.

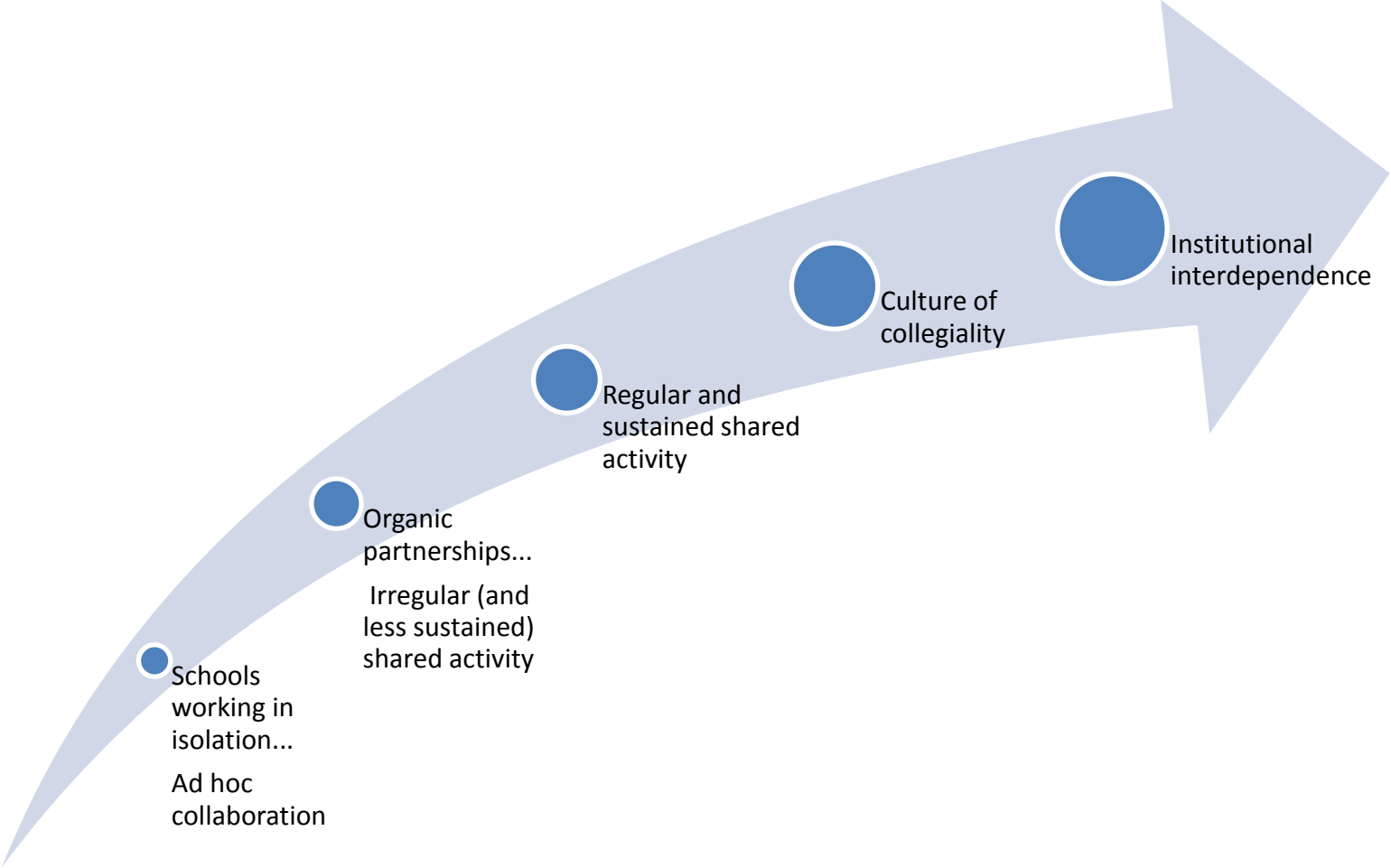| For DE	**1.** To ensure that school improvement policies signpost connections to, and opportunities for, shared education;
For DE in conjunction with other stakeholders including the Education Skills Authority/ Education and Library Boards; General Teaching Council for Northern Ireland;	**2.** To build on the effective collaborative work of DE and IFI in future education programmes, through strategic planning which focuses on maximising the number of young people involved and the quality of the practical work, through for example, providing professional support to refine good ideas within bids, identifying specific target groups across schools, and streamlining and combining reporting mechanisms to fulfil the requirements of a range of funders; **3.** To commission the development of a continuum of shared education which outlines the key milestones in moving from shared education as additional to the work of a school to being embedded in its ethos, thereby realising the aims of the NIC in a more holistic way;

Youth Service; Institutes of Higher Education; IFI and other funding bodies.	**4.** To reflect the importance of shared education in policy and planning for teacher education, in particular to draw on the emerging shared education continuum in how teachers and youth workers are educated; **5** To work collaboratively to provide those who work in the formal and non-formal sectors with high quality resources and professional development, and to develop their confidence and competence in using a range of learning strategies necessary for work in shared classes to provide progressively challenging experiences for young people in tackling controversial and sensitive issues; **6.** To recognise, value and reward shared learning through accreditation and assessment arrangements which promote the development of young people's higher-level skills of negotiation, compromise, collaborative problem-solving, and managing disagreement, conflict and confrontation with maturity;
For schools/ organisations	**7.** To identify with external facilitation as appropriate, their starting point and set realistic aims and objectives within the broader education plan/school development plan and in the plans for the wider area learning community; **8.** To use the improvement process of the school/organisation to develop shared education through staff development; the appointment of key people to lead and co-ordinate the work; the evaluation of the impact of the quality of the provision on the young people's attitudes, behaviours, understanding and skills; and engage with parents, carers and the wider community; and
For ETI	**9.** To develop further, the quality indicators for the identification of effective practice in shared education and identify and disseminate effective practice.

Figure 1

Curriculum Objectives	Developing Young People as Individuals	Developing Young People as contributors to society	Developing Young People as contributors to the economy and society
• Key elements	• Personal understanding • Mutual understanding • Personal Health • Moral Character • Spiritual awareness	• Citizenship • Cultural Understanding • Media Awareness • Ethical Awareness	• Employability • Economic Awareness • Education for Sustainable Development

Attitudes and dispositions	Personal responsibility concern for others curiosity commitment-determination
	
	          flexibility integrity-moral courage resourcefulness
	Self-belief-
	Optimism-pragmatism tolerance respect
	
	     openness to new ideas community spirit

CONTINUUM OF SHARED EDUCATION

Institutional
interdependence

Culture of
collegiality

Regular and
sustained shared
activity

Organic
partnerships...

Irregular (and
less sustained)
shared activity

Schools
working in
isolation...

Ad hoc
collaboration

The shared education (collaboration) spectrum[1]	
Schools in isolation	This end of the spectrum represents those schools who are in isolation of one another, where there is little to no collaboration with other schools. This may apply in a number of contexts particularly in rural settings but not exclusively, it may also apply in urban settings where schools chose not to work with other schools. It may also apply in contexts where schools are part of network schools such as an Area Learning Community but their actual levels of engagement with other schools in the learning community is minimal or non-existent.
Ad hoc collaboration	Involves schools where there is limited contact or collaboration with another school. This type of engagement is ad hoc, with infrequent contact between schools. An example of such activity could be an annual joint sports day.
Organic partnerships	Organic arrangements may be more significant in terms of the extent of the collaboration, compared to ad hoc arrangements and crucially are motivated by a school's desire to connect with another school for a myriad of reasons. However, collaborative arrangements are not as a consequence of enactment and are independent of any formal structures or the remit of external funders. This type of collaborative arrangement which is, in effect, a grass roots model may actually amount to a significant model of collaboration given that the schools may be motivated by common needs as opposed to enacting a model of collaboration imposed by external funder requirements.
Irregular (and less sustained) shared activity	Models such as these are characterised by collaboration between schools, which may be meaningful and impactful but which are limited in terms of sustainable practice and the frequency of contact between schools. Models such as these are often funded externally or centrally funded from DE e.g. EMU- type programmes or CRED projects. Models may range from shared pupil learning initiatives through to teacher initiatives or located at senior management level. Often activity between pupils may complement the curriculum or address specific curricular elements but are unlikely to be entire curricular subjects.
Regular and sustained shared activity	Models where the collaboration between schools is more regular – where contact between pupils and staff is more frequent and, crucially, where the collaborative activity occurs over a sustained period of time. In some cases this may mean over a period of years and contact/shared learning between pupils is regular, timetabled and embedded within the curriculum. Such models are likely to encourage schools to develop mature and effective partnerships. In such cases the relationship between schools is more likely to develop whereby collaboration between institutions is not limited to shared pupils' activity but involves collaboration between teachers, leaders and in some cases

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[1] This framework has been developed by the QUB Shared Education Team: Dr Gavin Duffy, Alistair Stewart and Mark Baker.

	Governors. Regular and sustained models of collaboration are most likely to be funded by external agencies or Government initiatives.
Culture of Collegiality	Schools that have been involved in sustained collaborative activities then develop strong institutional relationships. Schools will continue to be involved in shared, regular and sustained learning between pupils but collaboration has become unbound in that the remit of the relationship between the schools is not restricted to shared learning between pupils. Instead, while shared learning opportunities increase, the extent of the relationships between teachers, managers and leaders is much more pronounced and, crucially, links between Governors develop. Collegiality is often characterised by collaboration where practice, including shared learning, becomes normalised in each school. Schools come to value the institutional relationships that have developed and explore where else they could collaborate. In much the same way as organic partnerships, schools recognise that collaboration allows them to address common needs. Collegial partners come to value partnership and seek ways to sustain partnership activities that need not rely on funds from external agencies. Schools begin to generate shared knowledge and shared resources.
Institutional Interdependence	Schools that have reached this point in terms of their relationship have developed an organisational symbiosis in that collaboration has normalised, is based on common need, involves significant shared learning and where staff, leaders and governorship recognise the value of collaboration. At this level, partnerships will have developed a high degree of collaborative infra-structures, including: governance, curriculum and planning, teaching and learning, management and pupils.

For the purpose of this programme, the following definitions will apply:

Primary

Minimum of:
- Class(es) from one key stage group for one session per week over a 6 week period at level 2 (*typically at KS1 this might involve the entire P3 cohort from School A being taken over to School B and then the entire P4 cohort from School B being taken back to School A*).
- Class(es) from one key stage group for one session per week over a 12 week period at level 3;
- Classes from two key stage groups for one session per week over twelve weeks at level 4;
- Classes from two key stage groups for one session per week over 24 weeks at level 5.

Post Primary Level

Minimum of:
- One subject in one year group involving the same cohorts of pupils coming together at least 6 times during the year at level 2
- Two subjects across two year groups with half of the classes being physically shared at level 3 (or equivalent to 18 shared classes across the year). *It is accepted that there may be a skewing effect here, where for example the 2014/15 5th year pupils are already halfway through their GCSE studies, so it may only be possible to bring 4th year pupils onto the shared subjects in Yr1. Then in Yr2 that cohort would move through and the second year group would follow on. That skewing may then have to be reversed in the final year of the programme (depending on whether the partnership in question intends to continue delivery of that shared subject beyond the programme).*
- Four subjects across two year groups involving all classes being physically shared (*skewing comment above applies*) at level 4: and
- Six subjects across two year groups involving all classes being physically shared (*skewing comment above applies*) at level 5.

Groups and Projects Involved in IFI Sharing in Education Programme

Group Name	Project Name
Belfast Community Sports Development Network	Belfast Old firm Alliance
Cinemagic	Reel Frontiers
Comhairle na Gaelscolaiochta	Together Through Culture
Corrymeela Community	Facing Our History
DE - Youth Council for NI	Youth Works
Fermanagh Trust	Fermanagh Shared Education Programme
Headliners	Distinctive Voices Collective Choices
Junior Achievement Ireland	Hand of Friendship
NICE/ Belfast YMCA/ CRIS	Change Makers
North Eastern Education and Library Board	Primary Integrating Enriching Education(PIEE)
North Eastern Education and Library Board	Partnership Inclusion Reconciliation Citizenship and History (PIRCH)
Northern Ireland Council for Integrated Education	Sharing Classrooms Deepening Learning
Queens University Belfast	Sharing Education Programme 2 (SEP 2)
REACH Across	Cultural Learning and Social Skills (CLASS)
South Eastern Education and Library Board	Learning to Live Together
South Eastern Education and Library Board	Building New Communities through Positive Parenting and Reconciliation
Southern Education and Library Board	Welcoming Schools
Southern Education and Library Board	Primary Curriculum Partnership Programme
Spirit of Enniskillen Trust	Sharing Education Together
Stranmillis & St Mary's University College's	Classrooms Re-imagined: Education in Diversity and Inclusion for Teachers (CREDIT)
University of Ulster	Creative Change
Western Education and Library Board	Promoting Reconciliation Through a Shared Curriculum Experience

The aims of the SIEP were to:	What did the work of the 19 projects do?*	Key outcome of the project
promote shared education by linking schools	The Change Makers Project worked with 10 schools in partnership in the Lisburn and greater Belfast area to equip young people to be agents of positive change within and between school communities.	Young people benefited from learning how to tackle controversial and difficult topics in shared classes through the high-quality facilitation of learning. Quantitative and qualitative research was used well to inform ongoing planning of sessions in order to meet better the needs of the young people.
representative of the two communities;	The Creative Change Project worked with 10 schools in 5 shared education partnerships in the North Coast area with children, teachers, classroom assistants and parents/carers on the creative delivery of Personal Development and Mutual Understanding (PDMU).	Effective partnership between an institute of higher education, schools and parents resulted in young children from different traditions learning together through the creative delivery of PDMU. The partnership arrangements resulted in high-quality learning experiences for teachers, classroom assistants, parents, carers and children to help them understand the complex nature of the reconciliation process and how to be at ease with difference.
	The Learning to Live Together Project worked with 12 schools in 6 partnerships across South-Eastern Education and Library Board to promote positive community relations through using methodologies from the formal and non-formal sectors.	Staff contributed positively to shared education through working across the formal and non-formal sectors. These links brought freshness to teaching and learning approaches which engaged and motivated young people, particularly the more reluctant young people. The project showed that shared education can facilitate, and support, an understanding of difference in a respectful, cooperative and interdependent way for the benefit of all pupils.
	The Partnership, Inclusion, Reconciliation, Citizenship and History Project worked with 12 schools in 6 shared education partnerships in the North-Eastern Education and Library Board area to promote inclusion and reconciliation through Local and Global Citizenship and history.	By developing meaningful shared curricular learning opportunities, pupils engaged well together in a common purpose, promoting a greater acceptance of one another's views and opinions.
	The Primary Curriculum Partnership Project targeted 20 schools with experience in community relations to form 10 partnerships across the Southern Education and Library Board to develop the mutual understanding strand of PDMU through shared classes.	By children learning in shared classes and teachers working in shared partnerships using the PDMU curriculum with considered expertise, the children and staff handled controversial and sensitive issues more effectively. This resulted in raising the standards of learning in PDMU for the children and participating schools.
build on community relations within and between schools;	The Classrooms Re-imagined: Education in Diversity and Inclusion for Teachers Project provided 134 teachers with training in and through shared education to deal with issues of diversity, inclusion and community cohesion within the classroom and on a whole-school basis.	Shared teacher education at all phases is crucial to bring about change through: effective support, challenge and extending perceptions within the school setting in the community. Key to these programmes was the opportunity for teachers to work alongside others from different phases to become more aware of the continuum of education which all young people experience.
	The Facing Our History: Shaping the Future Project worked with 178 teachers, 101 student teachers and 855 pupils to explore the shared history of the two main communities in Northern Ireland in dealing with sensitive and contentious issues through transformative learning experiences in order to contribute to reconciliation.	Effective history education can be a transformative experience and can make a significant contribution to the process of reconciliation; it is crucial that all history teachers are equipped with the skills for handling sensitive and controversial issues in the classroom and that all young people have shared experiences to consolidate their learning.
	The Promoting Reconciliation through a Shared Curriculum: worked with 24 primary and 16 post-primary schools across the Western Education and Library Board to develop shared learning classes through PDMU and Local and Global Citizenship.	A key strength was the professional development of teachers and the provision of resources to support the statutory aspects of the curriculum for PDMU and Local and Global Citizenship. The training of teachers was crucial to develop their confidence and skills in handling sensitive and contentious issues, especially with young people in shared classrooms.
	The Sharing Classrooms: Deepening Learning Project trained 414 teachers working in shared classrooms across the 29 ALCs.	Most young people adapt positively to learning within shared classrooms; where concerns arise they relate to issues of integration regarding gender, socio-economic background and school type. In establishing a genuinely inclusive ethos of shared education, school leaders, teachers and staff need to be supported in developing appropriate strategies to address these challenges.

* Much of the work of each project met more than one of the key aims of the SIEP. For the ease of reference the projects are sorted according to the aim they most fulfilled.

	The Welcoming Schools Project worked with 18 schools across the Southern Education and Library Board to take proactive steps to make them a more welcoming place for all young people regardless of religion, race or creed and for schools to engage more effectively with the community.	By children learning in schools that developed innovatively a welcoming ethos for all, the children and staff showed greater respect for themselves and others. This resulted in a much greater understanding of a truly welcoming ethos and how to engage more effectively with the community through a climate of reassurance and acceptance fostered within and beyond the school gates.
support cultural outreach amongst young people representative of the differing communities/ traditions; and	**The Belfast Old Firm Alliance Project** worked with 2,167 children and young people to develop good relations through sport in interface and divided communities across the greater Belfast area.	The medium of soccer was an accessible way to engage children, young people, parents, teachers and community workers in promoting reconciliation. It offered an opportunity for those involved, in a neutral and safe environment, to begin to understand diversity and how to promote tolerance.
	The Cultural Learning and Social Skills Project worked with 671 young people from diverse backgrounds, isolated locations and vulnerable social situations to engage in community relations programmes to develop their social skills and to provide positive alternatives to the various anti-social circumstances and self-harm influences in the North-West region.	When community relations activities are under-pinned with meticulous planning and preparation, pupils of all ages can benefit from a rewarding and enjoyable experience through engaging with others from diverse backgrounds.
	The Distinctive Voices: Collective Choices Project worked with 530 young people across 22 schools to explore their own story and the stories of others from differing backgrounds in shared learning experiences.	By giving young people the opportunity to explore their own story and the stories of others from differing backgrounds in shared learning experiences, they can make a difference in their current communities and for the future.
	The Reel Frontiers Project worked with 533 pupils across 20 schools to explore themes of division and conflict through the medium of film and through engagement with associated workshop activities to creating their own original films about contentious issues that affect the people of Northern Ireland.	By exploring themes of division and conflict through the medium of film and through engagement with associated workshop activities and creating their own original films, pupils can gain a deeper understanding of a range of contentious issues that affect the people of Northern Ireland.
	The Sharing Education Together Project facilitated the learning of over 7,348 young people in reconciliation programmes through training by 336 young volunteers.	Young people in post-primary schools responded well to the approaches modelled by the young volunteers and facilitators when discussing contentious and sensitive issues. The local area learning communities were a useful starting point from which to promote shared education.
	The Together through Culture Project worked in 38 schools with pupils from both traditions to promote a greater understanding of the Irish language and culture through linking primary schools with post-primary schools.	Through a study of interests in names, place names, song, dance and traditions and the Irish language in shared classes, the young people gained a greater understanding of language and culture. Through shared classes between primary and post-primary schools, the children and young people were given better opportunities to be prepared for transition.
address strategic gaps in achieving reconciliation through a cross-community, cross-border approach through education and the related services sector.	**The Building New Communities through Positive Parenting and Reconciliation Project** worked with 484 parents and staff to use a parenting programme as a vehicle for reconciliation.	The pre-school stage of education provided a key window of opportunity to influence parental attitudes and behaviours in promoting reconciliation and having a positive effect on their children in their formative years. The commonality of being a parent helped the parents involved to dialogue and overcome barriers to engagement across traditional community divisions.
	The Hand of Friendship Project: 22 schools worked in cross-border, cross-community clusters to explore issues of identity and friendship, diversity, sectarianism and peace and reconciliation.	By adults modelling good relations and leading by example, at whole-school level, children got to know, empathise with, and respect one another in neighbouring schools, and from schools across the border. This helped to create a culture of respect and tolerance among primary school children by facilitating contact and opportunities for discussion of sensitive issues such as identity, friendship, diversity, sectarianism and peace and reconciliation.
	The Youth Works Project worked with 288 young people who were not currently engaged in education, employment or training, to gain recognised qualifications, and to develop the skills and self-esteem necessary to improve their future training and employability choices.	The youth work approach used to support and progress the young people was highly successful in raising their aspirations, and preparing them to engage in education, training or employment.

Appendix 6

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Memorandum of Understanding

Office of the First Minister and deputy First Minister (OFMDFM), Department of Education (DE), and The Atlantic Philanthropies (AP) Operation of the co-funded Delivering Social Change Shared Education Signature Programme (SESP)

</div>

1. **Introduction**

   The purpose of this Memorandum, which complements the AP commitment letter of XXX (see Annex xx) is to set out, in terms of accountability, operations and reporting, the roles responsibilities and relationship between OFMDFM, DE, and AP on the operation of the co-funded Shared Education Signature Programme (SESP). All parties reserve the right to review the general outline of this understanding and to propose amendments.

2. **Purpose of the Programme**

   The overall co-funded Atlantic Philanthropies / Delivering Social Change programme is a signature project within the Delivering Social Change framework which is led by Ministers through the **Executive Ministerial Sub-Committee (MSC)** on Children and Young People and the Sub-Committee on Poverty and Social Inclusion. It aims at achieving transformative change in the commissioning, design and delivery of services for the most venerable members of society and encompasses:

   a. A Dementia Services Programme

   b. A Prevention and Early Intervention Programme

   c. A Shared Education Signature Programme.

   The specific outcomes sought by the SESP are outlined in the Business Plan (See Annex xx). The SESP aims to incentivise Shared Education partnerships

(statutory early years, primary and post primary level) with the aim of improving educational and reconciliation outcomes through schools working together. The joint fund will promote peer learning amongst schools, and will include teacher exchanges, joint development and delivery of shared classes.

3. Governance Arrangements for the Programme

a) AP, OFMDFM and DE will work together to support the implementation of the SESP. They are agreed that generally, communication about the SESP should be coordinated and shared between the parties to ensure full co-ordination of guidance, advice and direction to the programme, notwithstanding the individual requirements of either party from time to time.

b) The governance arrangements for the SESP will be consistent with the Governance arrangements in place for the Delivering Social Change Signature Programmes. Governance arrangements are summarised in the diagram and sub-paragraphs below.

Executive Ministerial Sub Committee for Children and Young People

Delivering Social Change Programme Board

OFMDFM	Junior Ministers [Chair]
OFMDFM	Denis McMahon [Programme Director]
OFMDFM	Special Advisers
DE	Deputy Secretary
DE	Deputy Secretary
DSD	Deputy Secretary
DEL	Deputy Secretary
DOJ	Deputy Secretary
DARD	Deputy Secretary
DOE	Deputy Secretary
OFMDFM:	Henry Johnston (Programme Support)

Joint AP/DSC Programme Board

OFDMFM (Chair)
The Atlantic Philanthropies
DHSSPS
DE
OFMDFM Special Advisers

SESP Board

DE (SRO) (Chair)
The Atlantic Philanthropies
OFMDFM
- - - - - - - - - - - - - - - - - - -
- -
ELBs

SEP EAC

Membership nominated
by:
DE
OFMDFM
The Atlantic Philanthropies

4. **Ministerial Sub Committee**

The MSC is supported by the **Delivering Social Change Programme Board** which meets every 8 weeks. The role of the DSC Programme Board is to oversee the delivery of the DSC delivery framework, and to ensure that key milestones and targets are achieved. The Board oversees a family of initiatives (including the Atlantic Philanthropies/Delivering Social Change programme), monitoring in particular project formation and delivery. Each initiative has its own Board which includes representatives from key Departments and organisations. OFMDFM Special Advisers are invited on to the DSC Programme Board and all of the individual initiative Boards.

5. **DSC/AP Programme Board**

(a) The DSC/AP Programme Board will oversee the joint AP/DSC initiative. The Joint DSC/AP Programme Board will be chaired by OFMDFM and will be comprised of representatives from The Atlantic Philanthropies, DHSSPS, DE and OFMDFM, including OFMDFM Special Advisers.

(b) The role of the DSC/AP Programme Board will be to provide the SESP Programme Board with the necessary authorisation for the project to proceed and to overcome any problems. The DSC/AP Programme Board will approve the overall Budget parameters for the Project, conditional on achievement of objectives and will report progress to the Executive Ministerial Sub-Committee (MSC).

6. **SESP Programme Board**

(a) The direct management and oversight of the SESP will be provided by the SESP Programme Board, established by DE in consultation with AP, which will report to the DSC/ AP Programme Board.

(b) The SESP Programme Board will be chaired by DE and comprise representatives from The Atlantic Philanthropies, OFMDFM, and ELBs.

(c) The SESP Programme Board Chair will develop detailed proposals for membership of the Programme Board within these parameters for agreement by the Joint DSC/AP Programme Board.

(d) The role of the SESP Programme Board will be to

- Develop plans to deliver the overall vision, objectives and outcomes for the Programme including overarching evaluation framework

- Oversee the development of the Project Brief and Business Case

- Authorise expenditure levels, set stage tolerances (agreed by DSC/AP Programme Board) and ensure funding for agreed expenditure is available within delegated limits.

- Authorise or reject proposed changes to cost or timescale beyond tolerance levels and all proposed changes to scope, checking for possible effects on the Business Case

- Report to DSC/AP Programme Board (through the SRO)where variances are beyond the authority of the SESP Programme Board

- Ensure Risks and Issues are being tracked and mitigated/resolved

- Ensure outcomes are met

(e) The SESP Programme Board, with the agreement of the DSC/AP Programme Board, may invite input from other key stakeholders at key decision points, including from the Expert Advisory Committee.

(f) Day to administration for the programme will be managed by the SESP Programme Management Team.

(g) The SESP Programme Management Team will prepare all the appropriate documentation (based on PRINCE2 methodology) including a Project Initiation Document (PID) setting out its plan for implementation of the Project, for agreement by the SESP Programme Board. The PID will set out key activities, timelines, decision points and spending profiles and will be updated throughout the project as detailed plans for each stage are developed. Review points will be established at key points in the project to oversee implementation and progress.

(h) On agreement of the PID by the SESP Programme Board, the Programme Management Team will have authority to deliver the Project within the terms of the PID, including such decision points and tolerances as are agreed by the SESP Programme Board.

7. **Expert Advisory Committee**

An independent **Expert Advisory Committee** will be established to provide advice on service design and implementation to the SESP Programme Board. The EAC will also provide advice on evaluation and performance measurement. OFMDFM, DE and Atlantic Philanthropies will nominate members to this Committee. The EAC will report to the DSC/AP Programme Board, through the SESP Programme Board.

8. **Schedule of Governance meetings**

Period	Board	Meeting date
Q1 2014/15	SESP Programme Board	
	AP/DSC Programme Board	TBC May 2014
	DSC Programme Board	4 June 2014
	Ministerial Sub-Committee	25 June 2014
Q2 2014/15	SESP Programme Board	
	AP/DSC Programme Board	TBC SESPtember 2014
	DSC Programme Board	TBC SESPtember 2014
	Ministerial Sub-Committee	24 SESPtember 2014
Q3 2014/15	SESP Programme Board	
	AP/DSC Programme Board	TBC November 2014
	DSC Programme Board	19 November 2014
	Ministerial Sub-Committee	10 December 2014
Q4 2014/15	SESP Programme Board	
	AP/DSC Programme Board	TBC February 2015
	DSC Programme Board	TBC February 2015
	Ministerial Sub-Committee	TBC March 2015
Q1 2015/16	SESP Programme Board	
	AP/DSC Programme Board	TBC May 2015
	DSC Programme Board	TBC May 2015
	Ministerial Sub-Committee	TBC June 2015
Q2 2015/16	SESP Programme Board	
	AP/DSC Programme Board	TBC August 2015
	DSC Programme Board	TBC August 2015

	Ministerial Sub-Committee	TBC SESPtember 2015
Q3 2015/16	SESP Programme Board	
	AP/DSC Programme Board	TBC November 2015
	DSC Programme Board	TBC November 2015
	Ministerial Sub-Committee	TBC December 2015
Q4 2015/16	SESP Programme Board	
	AP/DSC Programme Board	TBC February 2015
	DSC Programme Board	TBC February 2015
	Ministerial Sub-Committee	TBC March 2015

9. **Roles and Responsibilities**

   a) **Senior Responsible Officer**

   Mrs Faustina Graham in the Department of Education is the Senior Responsible Officer for the project.

   b) **Department of Education**

   DE has been appointed as the lead NICS department in relation to this programme and will:

   - Participate in the Joint DSC/AP Programme board.

   - Be formally accountable for all project expenditure and project reporting

   - Establish (and chair) the SESP Programme Board comprising representatives from OFMDFM, DE and AP and ELBs. The SESP Programme Board will receive regular reports on progress and will be responsible for management and oversight of the governance arrangements.

   - Establish a programme management office, appoint a programme manager and change managers and support implementation of the programme

   - Engage with and participate in the agreed monitoring and evaluation processes.

   c) **Office of the First Minister and Deputy First Minister**

   OFMDFM will;

- Nominate an official as a point of contact for the project and establish and chair the Joint AP/DSC Programme Board

- collate reports on progress against project plans, monitor budget profiles and as necessary, report to DFP

- Participate in the SESP Programme Board as appropriate

- Facilitate the operation of and participate in the Joint DSC/AP Programme board and report as appropriate to the Executive Ministerial Sub-Committee (MSC).

- Engage with and participate in the agreed monitoring and evaluation processes.

d) **Atlantic Philanthropies**

AP will;

- Participate in the Joint DSC/AP Programme board

- Account to AP board's for delivering against commitment letter and agreed outcomes

- Monitor compliance with AP reporting requirements

- Participate in the SESP Programme Board

- Engage with and participate in the agreed monitoring and evaluation processes

- Fund Queens University longitudinal research study and provide relevant data for the measurement of reconciliation outcomes, including 2012/13 baselines and annual updates as requested.

10. Committed Investment

Funding for the SESP will be committed as follows, over a three year period beginning in 2014.

SESP	
Delivering Social Change Central Funds	£10m
Atlantic Philanthropies	£10m
DE	£5m
Total	£25m

11. Conditions of Investment

For Atlantic conditions of investment, see commitment letter (annex xx)

a) Any other conditions agreed by the SESP Programme Board

TBC

12. Funding

(a) The SESP Programme Board will prepare a detailed Budget Profile for the duration of the SESP for approval by the DSC/AP Programme Board.

(b) In advance of each financial year, the SESP Programme Board will agree the annual requirement and budget profile to be submitted to the DSC/AP Programme Board for approval.

(c) The DSC/AP Programme Board will determine the respective contributions from Departmental, DSC and AP funds.

(d) In advance of each financial year and following DSC/AP Programme Board consideration, OFMDFM will advise DFP in relation to funding arrangements.

(e) The SESP Programme Board, as part of its monitoring process, will provide the DSC/AP Programme Board with regular reports on budget profiles.

(f) The DSC/AP Programme Board will manage additional pressures/reduced requirements and as part of the monitoring round process in June, SESPtember and November, OFMDFM will advise DFP of any in-year adjustments agreed by the DSC/AP Programme Board

13. Systemic Change and Mainstreaming

OFMDFM and DE in endorsing the SESP signal their commitment that that this new approach to Shared Education will be embedded in future provision.

14. Disputes Resolution

Where consensus cannot be reached on an issue by the SESP Programme Board the issue should be referred to the AP/DSC Programme Board for consideration. The Programme Board may invite the Permanent Secretary of

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OFMDFM, the Permanent Secretary from DE and the Country Director of AP to make a determination. If at this stage no resolution is found, the Ministers in OFMDFM (and/or their nominees) will seek to achieve finality with the President and CEO of AP (and/or their nominees).

15. Public Communication

a) All press releases or similar announcements issued by any of the parties to this Memorandum will be circulated for consideration and advice before publication. All documentation in relation to the SESP will state that it is funded by the participating Departments, Delivering Social Change and AP. This may include incorporation of the official logos of the relevant Departments and AP.

b) All of the participating Departments and AP reserve a right to use any information, data, research or materials supplied to it as a result of work supported by the Fund.

16. Monitoring and Evaluation

The SESP Programme Board will be responsible for ensuring that appropriate baseline, monitoring and formative evaluation data is collected throughout the lifespan of the project to allow all NIGEAE requirements and standards to be met. A specific budget line has been included within the project to ensure that all necessary operational data is being collected. The SESP Programme Board will also determine how on-going outcome and impact-level assessments will be made. In addition to these strands of monitoring and evaluation, AP intends to independently fund a range of complementary studies which will apply thematic analytical lenses to the overall project (and indeed the overall programme). A detailed project monitoring and evaluation framework will be drawn up over the course of Year 1 to detail how all these strands will be rolled out, and all participating Departments and AP will agree to participate fully in the implementation of that framework.

High Level Project Plan – Key Milestones

Key Milestones	May 14	Jun 14	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	2015/16 Q1	Q2	Q3	Q4	2016/17 Q1	Q2	Q3	Q4	2017/18 Q1	Q2	Q3	Q4
Programme Launch (OFMDFM/DE/AP)		■																					
Establish Regional Support Team (ELBs)	■	■	■	■																			
Process Development (ELBs)	■	■	■	■																			
Application Launch: First Call (DE/ELBs)		■	■	■																			
Assess Applications & award funding (ELBs)			■	■																			
First Phase Rollout					■	■	■	■	■	■	■	■	■	■	■								
Evaluation of First Phase Projects															■								
Application – 2nd Call (DE/ELBs)												■											
Assess Applications & award funding (ELBs)													■										
Second Phase Rollout														■	■	■	■	■	■	■	■	■	■
Evaluation of Second Phase Projects																						■	
ETI Evaluation					■	■	■	■	■	■	■	■	■	■	■	■	■	■					
ETI Mid-term & final Evaluation Reports																			■				■

Note: PPE will be undertaken within 3-6 months of programme completion in line with Departmental guidance

Committee for Education

Veronica Bintley
Departmental Assembly Liaison Officer
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12 December 2014

Our Ref: PMcC/KM/1869

Dear Veronica

Shared Education Business Plan
At its meeting on Wednesday 10 December 2014, the Chairperson referred Members to a recent press article attributed to Professor Smith, University of Ulster referring to a Department of Education Shared Education Business Plan.

The Committee agreed to write to the Department seeking sight of the Shared Education Business Plan in question.

A response by 12 January 2015 would be greatly appreciated.

Yours sincerely

Signed Peter McCallion

Peter McCallion
Clerk
Committee for Education