



Department of  
**Education**

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Dear Peter

**TOGETHER: BUILDING A UNITED COMMUNITY - SHARED EDUCATION  
CAMPUSES PROTOCOL**

In advance of officials' evidence session on Wednesday 14 January, I attach for the Committee's information, the protocol and application document issued on 1 October 2014, for the Second Call for Expressions of Interest in the Shared Education Campuses Programme. This was previously copied to the Committee on the morning of 1 October 2014.

Yours sincerely

*Michele*

**MICHELE MATCHETT**  
Acting Departmental Assembly Liaison Officer

**The Shared Education Campuses Programme**

**Second Call for Expressions of Interest**

**Protocol Document**

**September 2014**

## SHARED EDUCATION CAMPUSES PROGRAMME 2014

### 1. Introduction and Background

- 1.1 On 9 May 2013, the First Minister and deputy First Minister made a statement to the Assembly on the '**Together: Building a United Community**' strategy, which contains a range of proposals including details on **Shared Education Campuses**. Work on 10 shared education campuses will be commenced within the next 5 years, building on the project proposals for the Lisanelly Shared Education Campus. These campuses will be the pathfinder projects leading to a wider programme of shared education capital projects. The campuses will also integrate community activities and resources and other services, including statutory provision where appropriate.
- 1.2 The specific aim of the Executive's **Together: Building a United Community** (T:BUC) strategy relating to education is *'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'*.
- 1.3 Included in the strategy is a commitment *'to create 10 Shared Education Campuses based on the Lisanelly Shared Education Campus model'*. We believe that building good relations, tackling intolerance and challenging prejudice can be embedded through the ethos of schools. It is already an integral part of the curriculum. In addition to the current work in this area, the strategy proposes that the Programme for Government (PfG) commitment to ensure all children have the opportunity to participate in shared education programmes by 2015, will reinforce opportunities to contribute to the shared vision of building a united community.
- 1.4 Creating more opportunities for socially-mixed, shared education, with a view to achieving a full shared education system in Northern Ireland, is a crucial part of breaking the cycle of inter-generational educational underachievement, unemployment and sectarianism; and improving good relations amongst and for our young people.
- 1.5 Lisanelly has been quoted as the template for these new 'Shared Education Campuses'. It is a shared campus in the truest sense of the term, bringing together six schools of different management types and phases, on a site in excess of 130 acres, with a forecast combined long term enrolment of over 4,200 pupils.
- 1.6 While Lisanelly Shared Education Campus is an example or pathfinder for shared education facilities here, it must be recognised that it is also unique. The availability of an extremely large site close to the centre of Omagh will not be readily replicated in other towns across the north. Implementation of the FM/dFM announcement will require a flexible approach to the identification of potential 'shared campuses'.
- 1.7 In progressing shared education, delivery of educational benefits to children and young people must be the overarching priority. It is important that any

proposal for a shared campus be consistent with the work currently being undertaken on area planning. Any models of sharing must fit within the relevant Area Plan, taking into account the full needs of an area, including the implications for other schools and recognising the importance of parental preference, which is protected in legislation.

- 1.8 Enhancing shared education provision provides a range of benefits including: raising educational standards, particularly for disadvantaged pupils; greater choice and greater opportunity; providing sustainable local provision; facilitating delivery of the Entitlement Framework; and providing wider choice for pupils in terms of leisure, cultural and sporting activities.
- 1.9 The purpose of this document is to set out the process and timetable to be used to identify and assess proposals submitted under this initiative. Applicants should note that this document has been revised and updated in light of the experience of the first call for Expressions of Interest and includes revisions to the criteria.

## 2. Definition and Scope

- 2.1 In July 2012, the Minister of Education announced the establishment of an independent Ministerial Advisory Group on Advancing Shared Education. The group published its findings on 22 April 2013. The issues arising from the findings on shared education cross many existing policy areas throughout education and the Department is already working on and will continue to develop shared education initiatives in schools.
- 2.2 It is important that there is a clear definition of what is meant by schools 'sharing' and the Department uses the definition of sharing provided to the Ministerial Advisory Group:  
  
***“Shared education involves two or more schools or other educational institutions from different sectors working in collaboration with the aim of delivering educational benefits to learners, promoting equality of opportunity, good relations, equality of identity, respect for diversity and community cohesion.”***
- 2.3 Specifically, **‘Shared Education’ means the provision of opportunities for children and young people from different community backgrounds to learn together.**
- 2.4 The ‘Shared Education Campuses’ initiative under T:BUC is seen as complementing the work already underway in schools and will be targeted towards infrastructure projects aimed at improving or facilitating educational sharing initiatives within local schools. It is intended therefore that the projects selected will build on a solid foundation of existing sharing.
- 2.5 The Shared Education Campuses Programme will provide capital funding for facilities at schools which will be used on a shared educational basis. The Programme will not provide for replication or duplication of existing or proposed facilities within the education sector, including that provided by the

Further Education sector. As this Programme is specifically targeted at the provision of shared education in schools, applications from youth and sporting organisations/groups will not be considered for support under the Programme at this time.

- 2.6 The Shared Education Campuses Programme will have the potential to bring together a range of schools for the delivery of education to children on a shared basis. There may be additional ancillary benefits which can arise from the establishment of these new facilities, including increased opportunities for the wider community to use school facilities for a range of educational, sporting, recreational, arts or cultural activities in line with the Department's *Community Use of School Premises: A Guidance Toolkit for Schools* which seeks to assist schools in opening their doors to the local community.
- 2.7 The programme will target schools that can demonstrate the following types of sharing:
- Shared educational facilities – where new facilities are built to allow for shared educational use by all schools within the model.
  - Enhanced educational facilities – where current facilities are improved to allow for shared educational use by all schools within the model.
  - Shared Educational Campuses – where schools are co-located and share infrastructure i.e. the Lisanelly model.
- 2.8 Shared facilities or Shared Campuses supported under this Programme must be located on a site that is, or will be, under the ownership or management of the Education sector.
- 2.9 The Shared Education Campuses Programme will not give consideration to the concept of a 'virtual campus' or to those schools that do not actually share facilities.

### **3. Programme Requirements**

#### **Gateway Checks**

- 3.1 Each project proposal will have to demonstrate that they meet all four Gateway checks below in order to be appraised under the Programme:

#### **Number, Management Type and Phase of Schools**

The proposal must involve a minimum of two schools from different management sectors (ie controlled, Catholic maintained, Irish medium, integrated, voluntary grammar). If any proposal involves schools from more than one educational phase (eg primary/post-primary) *at least two schools at each phase from different management sectors must be represented*, so that there can be educational sharing across similar age groups.

**a) Endorsement from respective Managing Authorities**

The respective Managing Authorities of the schools involved in the application must provide written endorsement of their agreement to the proposal. This is important as any investment at or on behalf of schools through the Programme has the potential to create ongoing liabilities as well as recurrent resource implications that the relevant Managing Authorities should be aware of and be prepared to support. Proposals under the Programme also need to be consistent with the Managing Authorities' strategic plans for the schools under their control.

**b) Planning Authority endorsement**

The Planning Authority (ie the relevant Education and Library Board) must provide assurance that the proposal meets the criteria in the Sustainable Schools policy for each school involved in the proposal or, where this is not the case, provide a rationale for their endorsement, including an explanation as to how the proposal will contribute to the delivery of sustainable provision in the area going forward.

**c) Evidence of Community, Parent and Pupil Support**

Community, parent and pupil support is required to ensure the success of these types of proposals. Evidence is therefore required to confirm support is in place.

**Essential Criteria**

3.2 If a project proposal clears the Gateway checks, it will then be assessed, scored and prioritised against the following essential criteria:

**a) Educational Benefits** – the proposal must demonstrate how it will benefit the education of all children involved. The overarching priority for any proposal brought forward under this Programme must be the delivery of educational benefits to children and young people through improving or facilitating sharing initiatives. Marks will be allocated on the basis that the proposal clearly demonstrates:

- The sharing of classes, subjects, sports and extra-curricular activities and how educational benefits can be delivered to the children and young people through the sharing of classes together;
- How educational benefits to the children and young people will be delivered through the sharing of classes together by developing future plans to increase the level of sharing between the schools involved;
- How the proposal can aid the sharing of teaching expertise amongst the schools;
- That the courses being delivered are not a duplication of existing provision (in particular Further Education courses);
- That consideration of the Bain report recommendations of not more than 2 composite year groups in a class and a school of a minimum of 4 teachers will be met.

**b) Evidence of Existing Sharing** – Schools applying to the Programme should already be working in collaboration on curricular and non-curricular

issues and/or be sharing facilities on an ongoing basis. The move to a Shared Education Campus should therefore build on a solid foundation of existing sharing that is already well embedded. Evidence must be provided detailing the existing educational sharing arrangements.

- c) **Societal Benefits** – the proposal must demonstrate how it will enhance/develop a shared future for the local community.
- The specific aim of the T:BUC strategy relating to education is *‘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’*.
  - Building good relations, tackling intolerance and challenging prejudice can be embedded through the ethos of schools and is already an integral part of the curriculum.
  - Creating more opportunities for socially-mixed, shared education, with a view to achieving a full shared education system in Northern Ireland, is a crucial part of breaking the cycle of inter-generational educational underachievement, unemployment, and sectarianism; and
  - improving good relations amongst and for our young people.

Proposals will be marked, based on the evidence provided, on how they will contribute to this overall objective.

- (d) **Religious Balance** - A minimum of **15%**, and preferably 30%, of the minority community (Protestant or Roman Catholic) should be represented within the combined total of the school population involved.

Where the proposal involves schools from more than one phase of education (eg primary and post primary), there should be a religious balance across individual phases so that educational sharing can take place between similar age groups.

### **Desirable Criteria**

3.3 In addition, priority will be given to project proposals that demonstrate they meet the following desirable criteria which will also be assessed and scored:

- a) **Location** – proposals should be for schools to be located within the same campus or in close proximity to each other. Any proposal that is for shared facilities rather than a shared campus should provide details on the distances between the schools involved and schools will have to demonstrate how they plan to minimise the impact on pupils’ education of travelling between the sites involved.
- b) **Disadvantaged Pupil Considerations** – proposals involving schools where pupils are more greatly impacted by social disadvantage, as indicated by the percentage of free school meal entitled (FSME) pupils

enrolled in the schools. This is in line with the recognition given in the T:BUC strategy that one of the benefits of a more shared education system is to raise educational standards, particularly for disadvantaged pupils.

- 3.4 Applications should demonstrate that all Gateway and essential criteria are met and that any evidence requested is provided. Proposals considered as having met all the Gateway and essential criteria will then be assessed with priority given to those proposals that best meet both the essential and desirable criteria. Those proposals which best meet the criteria will be submitted to the Minister for a final decision on which projects will be approved to proceed to the Economic Appraisal stage.

#### **4. Process**

- 4.1 The Shared Education Campuses Programme will be delivered by means of separate discrete calls for proposals. The first call was launched in January 2014. This is the second call.

#### **Indicative Timetable for Second Call for Expressions of Interest**

- 4.2 The indicative timetable for the Second Call under the Shared Education Campuses Programme is as follows:
- End September 2014 – Second Call for Expressions of Interest – the Department notifies Managing and Planning Authorities and all schools of the process, copying the approved protocol document, programme application form and confirming the programme timetable.
  - End of January 2015 – deadline for submission of proposals to the Department by School Planning Authorities.
  - June 2015 – Announcement of second tranche of Shared Education Campuses. Selected proposals advised to proceed in planning, including securing professional team as required.
- 4.3. In order to reduce the administrative and financial burden on individual schools and Managing Authorities, a two staged approach will be operated with regard to the application process. An application template is included at Annex 1 to this document and a flow chart for the process is attached at Annex 2.

#### **Stage 1 – Call for Expressions of Interest**

- 4.4. The first stage will take the form of an Expression of Interest (EOI) supported by an application form (see Annex 1) completed by the project applicant. The completed form will be the Strategic Outline Case (SOC) setting out the case for the shared education campus proposal. It will introduce the basic project concept, backed up with information on the cost, benefit and timing of the project.



- 4.5. The EOI must be endorsed by the relevant school Managing Authorities i.e. the relevant Education and Library Board on behalf of controlled schools in its area; the Council for Catholic Maintained Schools on behalf of Catholic maintained schools; or, in the case of Voluntary Grammar, Grant Maintained Integrated or Irish Medium Schools, the Board of Governors of the individual school(s) concerned.
- 4.6. All EOIs should be submitted through the relevant Education and Library Board (ie the Planning Authority) which will be responsible for submitting the EOIs to the Department of Education. EOIs which are not submitted via the appropriate Education and Library Board will not be accepted by the Department. Education and Library Boards will advise schools in their Board area of the date they require receipt of proposals in order to allow them time for consideration and endorsement by Board Members/Commissioners to meet the Department's deadline for responses of **30 January 2015**.
- 4.7. The Planning Authority will confirm in writing to the Department whether or not it endorses the EOIs it receives. If an application is not endorsed by the Planning Authority, the Planning Authority will inform the school(s) involved of the position but the proposal must still be submitted to the Department.

#### **Assessment of Project Proposals**

- 4.8. Following the closing date for applications, all project applications will be assessed under the relevant Gateway criteria as set out at 3.1 above. Those applications deemed to have met all the Gateway criteria will be further assessed, along with the supporting evidence provided, against the essential and desirable criteria as set out in 3.2 & 3.3 above. Projects will be sifted and selected on the basis of the information provided in the application forms.
- 4.9. A cross-Directorate panel has been established within the Department to consider proposed projects against the set criteria. This panel will report to the Director of Area Planning and will make recommendations to the Minister based on which projects best meet the criteria and, within the funding available, should be progressed to the Economic Appraisal stage.

#### **Approval of Applications to the Programme**

- 4.10. The Minister will make the final decisions on which projects should go forward to Stage 2, based on the recommendations of the assessment panel.
- 4.11. Planning Authorities will be informed of the projects approved by the Minister to proceed to the planning stage.
- 4.12. Projects not selected for advancement in the Second Call will be returned to the Planning Authority. The project may be submitted to any subsequent call for proposals.

## **5. Stage 2 – Economic Appraisal**

- 5.1 The projects selected by the Minister to proceed to the planning stage will be required to work up an Economic Appraisal for consideration and approval by the Department. The Economic Appraisals will be considered within the normal business approval processes and in line with NI Guide to Expenditure Appraisal and Evaluation (NIGEA) guidelines, including value for money and affordability. Only after approval of the Economic Appraisal, and subject to available capital funds, will a project be permitted to proceed to tender and construction.
- 5.2 The Department will provide support to the Managing Authorities in the development of Economic Appraisals for the selected projects.

## **6. Monitoring**

- 6.1 Programme governance and control structures will be established for the programme of shared education campuses emerging.
- 6.2 Project plans will be sought from the School Managing Authorities for all approved projects.

## **7. Procurement**

- 7.1 All professional appointments arising on approved projects must be carried out in full compliance with procurement guidelines and regulations. Where a professional team has already been appointed, the relevant Managing Authorities must provide evidence that the team has been procured in compliance with procurement guidelines and regulations, otherwise the Department will not support the appointment.

**Shared Education Campuses Programme  
Application Form  
Second Call**

## **Shared Education Campuses Programme – Application Form for Second Call**

The Shared Education Campuses Programme will be delivered through separate, discrete calls for proposals which must be endorsed by both the relevant school Managing Authorities and Planning Authorities.

All project proposals must be supported by a completed application form, to be completed by the project applicant, which will form the Strategic Outline Case (SOC) for the shared education campus proposal.

The application form will help the Department to assess whether it is worth committing resources to take the project forward to develop a more detailed design and Economic Appraisal.

**The completed application form must be returned through your Education and Library Board to reach the Department by Friday 30 January 2015.**

**Applications which are not submitted via the appropriate Education and Library Board will not be accepted by the Department.**

This form is designed to help applicants make an application using appropriate and proportionate effort. There is flexibility over the amount of information to be included under each heading below, but please note that the application form is intended to be a short document and should not exceed 10 pages.

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**Project Title:**

**Planning Authority:**

**Managing Authorities Involved:**

**Senior Responsible Officer:**

**Signed:**

**Date:**

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## **Section 1: Project Overview**

*Briefly describe the basic project concept.*

*Confirmation must be given that the application relates to schools which are viable and core to emerging area plans.*

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## **Section 2: Rationale, Aims and Need**

*State the rationale for shared education.*

*Identify the type of educational sharing being proposed (Shared educational facilities, enhanced educational facilities or shared education campus).*

*Identify the relevant aims and objectives of the proposed project.*

*Outline how the project meets the following criteria:*

- Number, Management Type and Phase of Schools;*
- Managing Authority Endorsement;*
- Planning Authority Endorsement;*
- Evidence of Community, Parent and Pupil Support;*
- Demonstration of the Educational Benefits that will be created;*
- Evidence of Existing Sharing;*
- Demonstration of the Societal Benefits that will be created;*
- Evidence of Religious Balance;*
- Location;*
- Evidence of Disadvantaged Pupil consideration.*

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### **Section 3: Constraints**

*Identify likely constraints e.g. land issues; legal constraints; planning approvals.*

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### **Section 4: Stakeholder Issues**

*Identify the key stakeholders and confirm their agreement to the project proceeding.*

*Indicate their level of commitment to the project as specifically as possible.*

*Describe any consultations held or still required.*

*Are there any outstanding stakeholder issues?*

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### **Section 5: Management and Implementation**

*Give a preliminary indication of the proposed project management arrangements.*

*Is any consultancy support likely to be required?*

*Describe any legal or contractual issues.*

*Are there any important outstanding management/implementation considerations?*

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### **Section 6: Costs, Benefits & Risks**

*Provide broad estimates of the capital and revenue costs of the project.*

*If savings are anticipated, for example of planned minor works or maintenance explain their nature and quantify them broadly.*

*Describe the non-monetary costs and benefits that are expected to arise.*

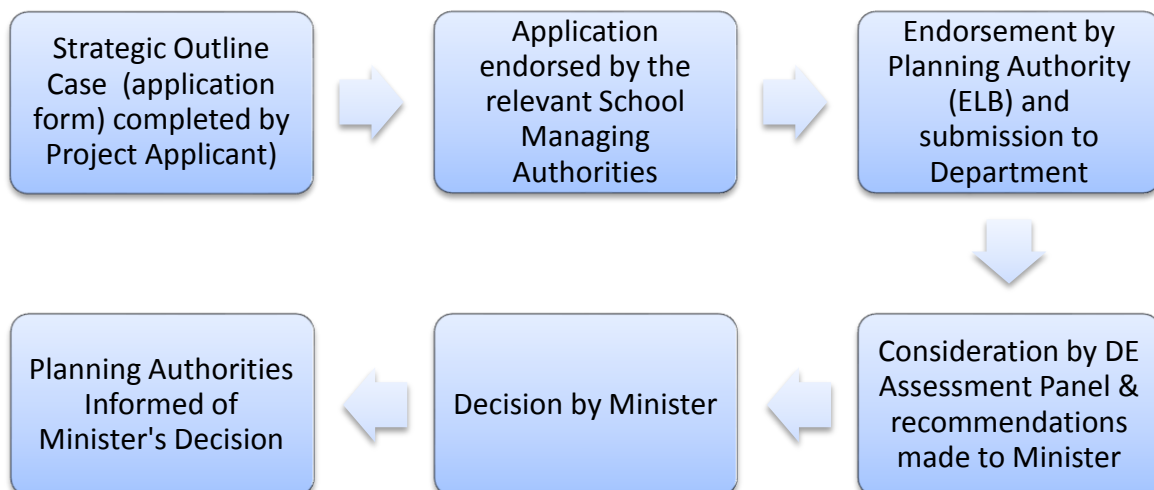
*Explain the key risks that the project is likely to face and any potential mitigation measures.*

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**Annex 2**

**SHARED EDUCATION CAMPUSES PROGRAMME  
FLOW CHART FOR PROCESS**

**Stage 1 – Call for Expressions of Interest**



**Stage 2 – Economic Appraisal (approved projects only)**

