

Commission on School Accommodation



Amalgamation of First
Level Schools

September 2001

Contents

	<i>Page</i>
Foreword	5
Introduction and definition	7
Section A Historical perspective	11
Section B Analysis of issues	17
• Reasons for amalgamation	17
• Patronage of first level schools	17
• Characteristic spirit	19
• All Irish schools	19
• School size	21
• Impediments to amalgamation	22
• Benefits of and incentives for amalgamation	23
• Buildings and facilities	23
• Capital funding	24
• Staffing arrangements	25
• Appointment of the new board of management	26
Section C Framework for a model	31
Section D Model for the amalgamation process	35
Section E Recommendations	47
Diagram Areas of responsibility	49
Attachment A Agreement between CPSMA and INTO on the amalgamation of primary schools	51
Attachment B Recommendations for staffing arrangements	53
Appendix A Membership of the Steering Group	57

Foreword

Dr. Michael Woods T.D.,
Minister for Education and Science.

Dear Minister,

I hereby present the Commission's report on the Amalgamation of First Level Schools. The Steering Group of the Commission, consisting of representatives of the partners in education and representatives of the Department of Education and Science and the Department of Finance, worked on the report during the past twelve months.

The report is a genuine product of the experience and aspirations of all members of the Steering Group — this has been a collegial project with long discussions and close attention to detail. The final outcome carries an endorsement from each member of the Group. I wish to acknowledge the diligence, perseverance and benevolence of each member of the Group.

It is the Commission's hope that this report will be a support to patrons in arriving at a decision for amalgamation and a support to all groups involved in the implementation of an amalgamation. As first level schools are so close to their local communities, any consideration of amalgamation must address all the nuances of a local situation. The detailed model for the amalgamation process that is offered in this report is adaptable to any local situation. The growth in diversity of first level schools requires that the model is also adaptable to any sector.

Amalgamations have been helped in recent years by the major increase in the level of capital funding for school buildings and school sites and by the reduction in local contributions.

On behalf of the Commission I acknowledge the work of Denise Burns whose drafting skills empowered the Steering Group to complete its task. We sincerely appreciate the contribution of Eimer Lynch who supported the Group with great professionalism and we thank Yvonne Lennon for her considerable contribution to the task.

Frank Murray
Executive Chairperson.

September 2001.

Introduction and Definition

Amalgamation of schools has major implications for the school communities concerned. The objective of an amalgamation is to provide an enhanced educational environment for the pupils with an efficient supply of resources.

Experience over the past thirty years clearly indicates the need for a comprehensive process for amalgamation and the investment of a range of resources for the outcome of an amalgamation to be successful.

The desired outcome of an amalgamation is a school that serves all its pupils well and that receives full support from staff, parents and the wider community.

This paper briefly surveys the historical experience of amalgamation and addresses issues that have arisen during this experience. The paper draws on contributions from the members of the Steering Group of the Commission. Finally, the paper presents a framework of key issues, a model for the process and recommendations for the future.

All the statistical information in this paper has been obtained from the Department of Education and Science. Figures for 1999/00 and for 2000/01 are subject to verification.

The term *amalgamation* is used in this paper to indicate the formation of one school from two or more existing schools. This involves the closure of the existing schools and the opening of one new school that will have, substantially, the staff members and the pupils of the previously existing schools. The location of the new school may be the site of one of the existing schools or it may be an entirely new site.

Section A

Historical perspective

Section A

Historical perspective

Introduction

This brief review of the history of amalgamations draws on contributions from members of the Commission and from a number of sources listed at the end of this section.

Statistical evidence of amalgamations

At the foundation of the state there were approximately 5,700 national schools, 80 per cent of which were one- or two-teacher schools.¹ 1924/25 was the first year of the Department of Education Annual Report. In that year the total number of pupils was 493,382 though the average attendance was 362,588. In 1999/00 there was a total enrolment of 437,082* in 3,172 national schools, 24 per cent of which were one- or two-teacher schools. This information can be summarised in the following table:

Year	No. of pupils	No. of schools (a)	No. of one/two teacher schools (b)	(b) as percentage of (a)	Average size of school
1924/25	493,382	5,700	4,560	80	86.6
1999/00	437,082*	3,172	764	24	135

* includes 8,743 pupils in special classes.

The first year for which there are statistics related to the number of schools by sex category is 1974/75. In the following table, the number of single sex schools includes the schools that have a mixed infants section.

Year	No. of single sex schools (a)	No. of mixed schools	Total no. of schools (b)	(a) as a percentage of (b)
1974/75	937	2,600	3,537	26%
1999/00	586	2,586	3,172	18%

The number of single sex schools has decreased by 8% in relation to the total number of schools at the time.

¹ Coolahan J.: *Irish Education, history and structure*. 1981. IPA, Dublin. page 46.

In 1999/2000 there were ten amalgamations of first level schools, in the following distribution:

Location	Number of amalgamations
Dublin city	2
Co. Longford	1
Co. Tipperary	1
Co. Mayo	2
Co. Limerick	2
Co. Cork	2

1920s, 1930s, 1940s

Though political events had overtaken its implementation, the Killanin report of 1918 stated:

There cannot but be a large number of small schools in Ireland on account of our scattered population But there are, we believe, many small schools that might with advantage to educational and to communal interests be amalgamated, and we hope that the Commissioners' policy in that direction will be continued with determination.²

The report then recommended conditions under which amalgamations should occur.

During the 1920s and 1930s many of the early national schools were badly in need of replacement or considerable renovation.

The annual report of the Department of Education for 1927/28 (pages 10 – 11) states that the rules provide for amalgamation of schools when either or both neighbouring schools have an average daily attendance of under 30 pupils *so that both staff and accommodation may be put to the most economical use*. The report for 1928/29 indicates that the number for average daily attendance was raised to 40 pupils.

The plans of successive Ministers fell to the economic priorities of the time. An Office of Public Works survey of 1944 found the condition of national schools to be serious and critical.

1960s, 1970s, 1980s

The *Investment in Education* report published in 1966 accepted that the size and distribution of national schools were the results of political, social and demographic circumstances of the nineteenth century. However, the report also analysed the wide variation in pupil/teacher ratios, overcrowding in classrooms, the cost of erecting and operating small (one- and two-teacher) schools and the dire condition of many of the small schools. Meanwhile, there did not appear to be “greater educational benefits” from the small schools.³ The Investment report stated:

A re-organizations of school size would of course make it easier to supply all schools with the necessary physical facilities and educational aids, as well as making it easier to give remedial attention to ‘delayed’ pupils.⁴

² Hyland Á. and Milne K. (eds.): *Irish Educational Documents*, Vol. 1 1987. CICE Dublin. page 183.

³ *ibid.* page 167.

⁴ *Investment in Education*. 1966. page 337.

The Minister for Education in the 1960s, George Colley, made a commitment to address the matter of small schools. Consequently, many closures and amalgamations occurred in the late 60s and early 70s, often with local disquiet regarding lack of consultation and explanation.⁵ While the closure of some small schools “may have been necessary and beneficial, insufficient attention was paid to the wrench which the closure betokened for many communities.”⁶ Between “1966 and 1973 the number of one- and two-teacher schools had been reduced by about 1,100.”⁷

During the 1980s, the reasons for amalgamations changed slightly. The Conference of Major Religious Superiors report on rationalisation (1986) stated:

A changed society has come to accept and at times demand co-education, especially when it is so publicly and persistently advocated by the Department of Education as well as being perceived as a positive factor for preparation for life.⁸

It was usually small schools that amalgamated but during the late 1980s, amalgamations occurred among larger schools than had previously been the case.

During the late 1980s discussions among the Catholic Primary School Managers Association, the Irish National Teachers’ Organisation and the Department of Education resulted in an agreement covering elements of procedure and staffing for amalgamation. That agreement remains in place (see attachment A).

Amalgamations of the 60s, 70s and 80s highlighted several issues that were being addressed, such as:

- improvement in teacher/pupil ratios
- improvement in school transport
- improvement in accommodation
- reform of the national school curriculum
- reserved places for religious on the staff
- preservation of schools of a minority ethos
- limited retention of staff who are surplus to quota in the amalgamated school.

1990s

Amalgamations continued throughout the 1990s often as a result of the need for premises to be refurbished. The Department of Education and Science encouraged amalgamation on the basis of a preference for co-education.

In the late 1990s, the decline in first level enrolments impacted on some schools more than on others. At the same time the demand for specialist facilities in some curriculum areas such as physical education, art, music, sport, technology increased. Amalgamation continues to be a way of providing enhanced facilities for pupils. In 1999/00 there were ten amalgamations.

⁵ Mulcahy D.G. and O’Sullivan D. (eds.): *Irish Educational Policy, Process and Substance*. 1989. IPA Dublin. page 41.

⁶ *ibid.* page 68.

⁷ *ibid.* page 42.

⁸ CMRS Education Commission: *Report on Rationalisation*. 1986.

Commentary

During the past seventy-five years amalgamations have occurred at varying pace and for varying reasons. Prior to the 1980s, the main reasons for amalgamations were the dilapidated condition of buildings and the need for economic use of resources. Amalgamations are still occurring at the rate of several per year in all parts of the country. In addition, amalgamation is often raised as a possibility in a local situation but not implemented, because at least one of the local partners expresses misgivings. There is need for the support of a thorough process and clarity regarding areas of responsibility.

Amalgamations that have occurred to date have been of schools with the same patron, that is, the local Bishop. However, it is possible that amalgamations of schools with different patrons may be considered in future.

Throughout the history of first level schools, amalgamation has sometimes been a highly emotive issue, owing to the strong sense of identity with local communities.

Section B draws on the history of amalgamations to consider issues of patronage, size, impediments to and benefits of amalgamation.

Sources

Conference of Major Religious Superiors of Ireland, Education Commission: *Report on Rationalisation*. 1986.

Conference of Major Religious Superiors of Ireland, Education Commission: *Rationalisation of Schools — Issues, Opportunities, Goals, Procedures*. Conference Education Assembly. 1987.

Coolahan J.: *Irish Education, history and structure*. 1981. IPA, Dublin.

Department of Education: *Investment in Education*. 1966. Dublin.

Hyland Á. and Milne K. (eds.): *Irish Educational Documents*, Vol. 1 1987. CICE Dublin.

Keegan F.: *The Role of Amalgamation within the National Primary Education System 1831 — 1994*. Thesis submitted to University College Dublin. 1994.

Mulcahy D.G. and O’Sullivan D. (eds.): *Irish Educational Policy, Process and Substance*. 1989. IPA Dublin.

Organisation for Economic Co-operation and Development: *Reviews of National Policies for Education — Ireland*. 1991.

The National Education Convention Secretariat: *Report on the National Education Convention*. 1994. Dublin.

Section B

Analysis of issues

Section B

Analysis of issues

Reasons for amalgamation

As noted in the previous section, the reasons for amalgamations varied but were often related to the poor condition of buildings. Other reasons included:

- demography — decline in enrolments
- desire for co-education
- financial concerns
- parental and/or teacher demand.

These reasons are not exhaustive and had varying emphasis at different times and places in the past eighty or so years.

The initiative for an amalgamation can arise from any source — patron, board of management, staff, parents or the Department of Education and Science. At times the catalyst for the Department to take the initiative is an application for major capital funding.

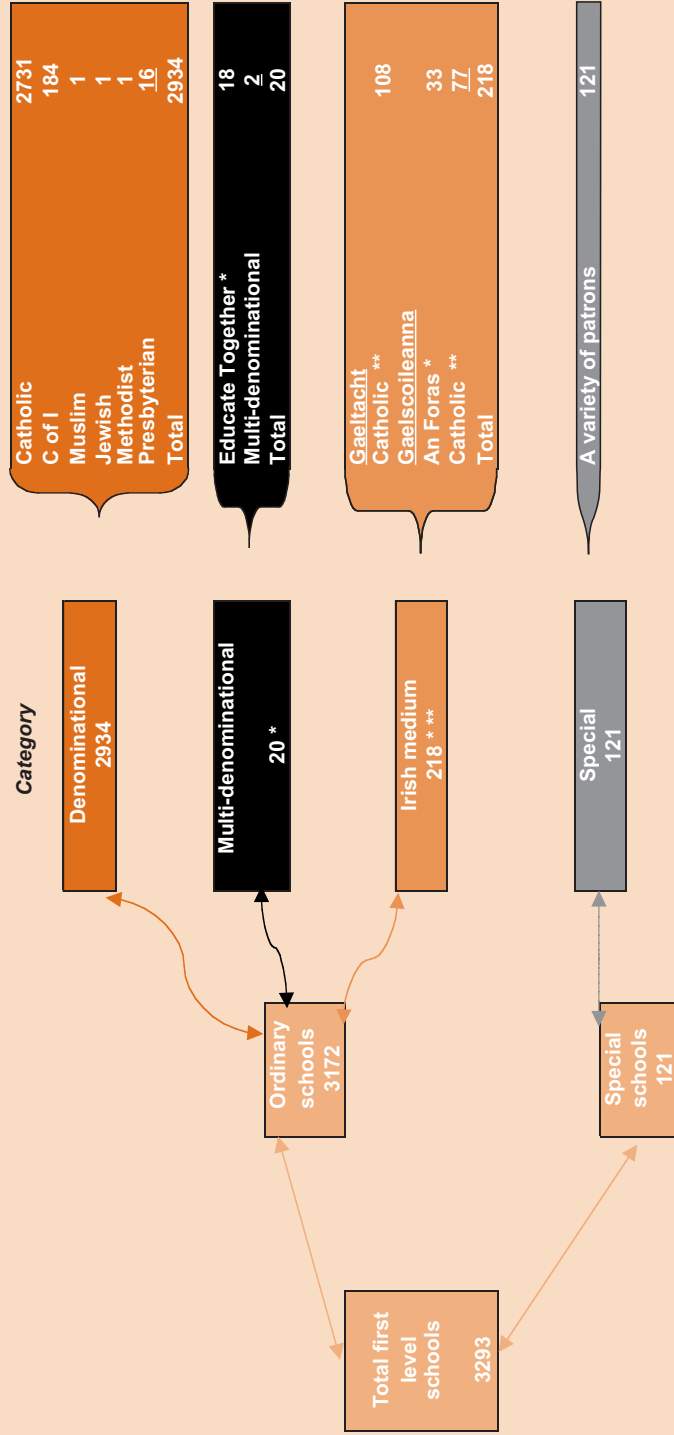
It is to be hoped that the main driving force in the initiative for an amalgamation is the delivery of an enhanced educational service to pupils with an efficient supply of resources.

Patronage of first level schools

The Stanley Letter of 1831 established the structures for the system of national schools with ecclesiastical patronage as a cornerstone of the system. A different model of patronage developed in the 1970s for some special schools and for the Educate Together schools, and in the 1990s for some of the Irish medium schools. The distribution of the usual categories of national schools for the year 1999/2000 is as in the following table:

First level schools in four categories indicating the school type

1999/2000



Note:

* A Gaelscoil under An Foras that is an Educate Together school is counted with the Educate Together schools to avoid double counting.

** A Catholic Gaelscoil that is located in the Gaeltacht is counted with the Gaeltacht schools to avoid double counting.

It should be noted that the Department of Education and Science records are not kept according to the above categories. While every effort has been made to establish the accuracy of the figures, it is not possible to take responsibility for the exact numbers.

The report of the Commission's Technical Working Group entitled *Criteria and procedures for the recognition of new primary schools* (January 1998) describes the function of the patron on pages 57 and 58. The section concludes that the patron retains ultimate responsibility for:

- (a) the school purpose (or "characteristic spirit")
- (b) the appointment and support of the board of management
- (c) financial and legal matters
- (d) the upkeep of assets
- (e) the supervision of staff appointments in accordance with department regulations.

Sometimes a patron may perform the role of adjudicator in the event of dispute with staff, parents or pupils or in issues affecting a number of schools in an area. The patron retains the main responsibility for decisions regarding the future of the school.

The patron has the decision-making authority in the case of an amalgamation. This was tested in a case brought by the staff of a school in Rush in 1979. The plaintiffs were staff from the girls' school that was amalgamating with the boys' school. The plaintiffs claimed that the amalgamation *cannot lawfully be carried into effect by the Defendants otherwise than with the consent of the Plaintiffs*. The defendants were the parish priest and other members of the two boards of management and the Minister for Education. The finding of Judge Hamilton of the High Court was:

I have however failed to find or be given any legal basis for the contention made by the Plaintiffs that an amalgamation of two schools cannot be made save with the consent of the staff of both schools.⁹

Characteristic spirit

The Education Act, (1998) section 15 (2) (b) states that the board of management of a school shall:

uphold, and be accountable to the patron for so upholding, the characteristic spirit of the school as determined by the cultural, educational, moral, religious, social, linguistic and spiritual values and traditions which inform and are characteristic of the objectives and conduct of the school

The amalgamations that have occurred to date have been of schools of the same patron, usually the local bishop. However, where two or more schools with different patrons are amalgamating, the characteristic spirit for the new school is the subject of patron agreement.

All Irish schools

Gaeltacht schools

In 1999/00 there were 108 gaeltacht schools teaching through the medium of Irish. As these schools have a unique role in the promotion and vibrancy of the Irish language, their specific issues should be considered in relation to amalgamation.

⁹ The High Court 1979 No. 3728P. Judgment of Mr. Justice Hamilton delivered the 10th day of August 1983.

Firstly, gaeltacht areas differ in the strength of the Irish language as a spoken and living language, within various economic and geographic contexts. In addition, differences occur from mile to mile within gaeltacht areas. Relevant to the issue of amalgamation is the fact that gaeltacht areas differ in:

- the size of the geographic area with its dispersion of schools
- the number of small schools on the gaeltacht borders.

The gaeltacht school plays an important role in the gaeltacht community. It is one of the few supports that Irish-speaking parents have and it is also an important way in which children whose home language is not Irish acquire the language as a living language. Consequently, the language of instruction is not the only language consideration if an amalgamation is being considered, as the social language of the school must also be taken into account. The impact of closing or amalgamating a school in a small gaeltacht community could in some cases be the demise of the Irish language in that community. The consequences of closing a gaeltacht school, therefore, can impact on the future of the Irish language in general.

Where an amalgamation is being considered for a gaeltacht school, the socio-linguistic factors of the local community of each school should be considered in depth. The probable impact of an amalgamation should be examined in terms of the impact on the language of the community. An amalgamation of gaeltacht schools should be considered only in situations where the amalgamation is unlikely to have a negative socio-linguistic impact and where the resources can be made available to ensure that the new school will be in a position to provide adequate linguistic support to pupils, teachers and parents. An amalgamation of gaeltacht schools should be sufficiently resourced to provide an improved quality of education which meets the socio-linguistic needs of the particular gaeltacht area.

All Irish schools in non-gaeltacht areas

The amalgamation of all Irish schools outside of the gaeltacht with non Irish medium schools should be considered only in extreme circumstances where all other avenues have been considered.

School size

The location and size of first level schools are integrated with the history of parishes, gaeltacht areas, and the dispersion of minority groups. Of necessity small schools will continue to serve small communities both urban and rural, including island communities and gaeltacht communities. The following table gives the 1999/00 distribution of schools according to teacher size.

Number of pupils, schools and teachers by total teacher size of school (ordinary classes only) 1999/00

Total teacher size of school	Schools	Pupils	Teaching teachers	Non-teaching teachers	Other full-time teachers	Total teachers
1	41	460	41	0	0	41
2	723	24,308	1,446	0	0	1,446
3	527	33,599	1,529	1	51	1,581
4	395	35,555	1,472	0	108	1,580
5	284	30,589	1,242	3	175	1,420
6	201	26,352	1,037	4	165	1,206
7	135	20,705	815	11	119	945
8	118	20,366	801	12	131	944
9	75	14,373	561	25	89	675
10	79	17,079	639	66	85	790
11	89	20,821	762	85	132	979
12	88	21,799	832	86	138	1,056
13	66	17,574	682	65	111	858
14	54	16,298	609	54	93	756
15	44	13,672	539	44	77	660
16	43	13,843	554	43	91	688
17	39	14,576	547	39	77	663
18	23	9,841	352	23	39	414
19	29	12,099	446	29	76	551
20 and over	119	64,430	2,346	118	358	2,822
Total	3,172	428,339	17,252	708	2,115	20,075

The table presents the fact that in 1999/00, 24% of all ordinary national schools were one- or two-teacher schools. On 30th September 1999 there were 125 schools with 20 or fewer pupils and 21 of these schools had fewer than 10 pupils.

The formation of one larger school from smaller schools can help to enhance the learning environment for pupils. In some instances, amalgamation has made the school large enough for facilities and resources for curriculum areas such as physical education, drama and computer-assisted learning. Some amalgamations have been of two single sex schools to form one co-educational school; and some amalgamations have been of a junior and senior school.

The report of the Technical Working Group on the study of school accommodation needs in north Dublin city and north Fingal county presents a case for research to be conducted on the issue of school size as it relates to schools in Ireland as research from other countries is largely inapplicable. Research on first level schools should consider the revised primary curriculum, and associated issues of staffing, resourcing, ways of grouping pupils, implications of the use of computer technology in learning, teaching methodology and the location of the school in an urban or rural area.

Impediments to amalgamation

In some instances when amalgamation has been mooted as desirable in a particular situation, reservations have been voiced by teachers or by parents based on such aspects as:

- cultural differences, such as difference in condition of the school, expectations of pupils and families, custom and practice, regulations regarding uniforms etc.
- tradition
- convenience, access and transport
- professional working relationships of teachers
- length of service/seniority of teachers.

The familiarity of a school is often an implied reservation, as the school has usually been a reliable constant in the everyday lives of local people. When local communities are familiar with the local school's standards, expectations and personnel over a long period, they can be reluctant to consider an intervention. Preserving the school in its known form often seems to be closely linked with the preservation of the local community.

At times in the past transport of pupils has been a serious impediment to amalgamation. If there are impediments or problems related to pupil access to a school, this issue must be researched thoroughly. Methods of transport to/from school, duration of travel and the safety of travel must be addressed as this issue is very important to parents and children. If a mooted amalgamation implies change to the existing transport arrangements, then this issue must be addressed satisfactorily during the feasibility stage of the process.

Schools can differ considerably in terms of the amount of professional exchange of ideas and expertise, team planning of programmes, and evaluation of courses. Staffs that have engaged in much in-servicing of their skills and much professional exchange can be reluctant to work with teachers who have not engaged in nearly as much renewal. Schools can also differ in their decision-making processes, so that teachers in one school may have the expectation of being consulted in administrative decisions, while their colleagues in another school may have quite a different experience.

A specific concern of teachers at times is that when staffs are amalgamated, their ranking in order of seniority in terms of length of service can be affected for the purposes of appointment to posts of responsibility.

Impediments to amalgamation range from the reluctance of local communities to interfere with the familiar, to the issue of seniority/length of service and career opportunities for teachers. The process of amalgamation must, therefore, consider the benefits for pupils very carefully in order to assess that the benefits weigh more heavily than the impediments. The process must address the range of issues from the fear of change to the specific issues of teachers; the process must be both robust and flexible. The process requires that the emotive content is addressed with sensitivity and care, with emphasis on facts. The sensitivity of issues also requires clarity regarding roles, tasks and areas of authority.

The process for amalgamation recommended in this paper follows from the conviction that all fears and issues of each group must be addressed in order that a newly amalgamated school will have a good start with positive support from the local community.

Benefits of and incentives for amalgamation

In 1999/00 the number of schools that had twenty or fewer pupils was 125 and the number of schools with fewer than ten pupils was 21.

In schools with more than twenty pupils, opportunities and stimulus for group learning activity, group music, team games and social interaction are greater than in schools with a very small number of pupils. This is not to deny that there are other benefits in the very small school such as the potential for teachers to give individual attention to pupils.

The revised primary curriculum emphasises the range of key skills that children in primary school should be enabled to develop. The amalgamation of smaller schools should result in the availability of additional personnel and of facilities that would support and facilitate the delivery of a broad-based curriculum to the pupils.

Expectations regarding the provision of facilities and resources for different areas of the curriculum have increased. Many old school buildings do not have space or other necessary requirements such as adequate electrical wiring in order to provide the resources implied in the revised primary curriculum. The new school planning data now provides new schools with space and facilities to enhance the learning and social environment of the pupils.

Additional personnel and up-graded facilities, provided by amalgamation, are key elements in an enhanced learning environment for the pupils and therefore should be the main incentives for amalgamations. Furthermore, the formation of one larger school from smaller schools can maintain staff positions and ensure that the operation of the school is more cost-effective.

The following two sections address the issues of facilities and staffing arrangements and infer the provision of incentives for a newly amalgamated school.

Buildings and facilities

A significant element in the decision to amalgamate may be the poor condition of school buildings. As some schools, particularly small schools, have been poorly resourced over many years, the quality and quantity of accommodation can be well below expectations of today. Many schools do not have, for example, the space for physical education or for computer-assisted learning. The need for major capital input can be the catalyst for consideration of amalgamation.

The possibility of significantly improved accommodation and facilities can be a major benefit for pupils. Amalgamation of small schools into a larger unit can be a way of providing vastly improved facilities for a larger number of pupils.

The early explorations of feasibility conducted between patrons and the Department of Education and Science should establish what needs to be replaced and what capital or grant can be provided. This early exploration of feasibility should explore and establish:

- suitable location for the newly amalgamated school, whether on site of one of the existing schools or on a new site
- implications for land, buildings etc.
- facilities that can be provided
- availability of and timeframe for funding
- timeframe for the completion of buildings/facilities.

The implementation of a decision to amalgamate can be hindered for years if the necessary funding is not forthcoming. Such a hindrance causes much instability and low morale in schools. Thorough exploration of feasibility between patrons and the Department of Education and Science should prevent such long delays. The maximum period from the announcement of the amalgamation to the opening of the newly amalgamated school should be three academic years. If there is no major building project involved, the period from the announcement of the amalgamation to the opening of the new school should be two academic years.

If the newly amalgamated school is to be located on a new site, feasibility regarding availability and cost of the site and the necessary funding should be established before the decision to amalgamate is taken.

If the newly amalgamated school is to be located on the site of an existing school and there is need for extension and/or refurbishment, the necessary funding and commitment to the works should be established before a decision to amalgamate is taken. Such an agreement should take cognisance of the current accommodation needs of the existing schools and the possible need for interim measures.

In arriving at a decision to amalgamate, the patrons should seek assurance from the Department of Education and Science that capital funding will be made available to enable any necessary building project to be completed within three academic years of the announcement of the amalgamation.

Capital funding

The expenditure in capital funding for first level school accommodation has increased considerably in recent years:

Year	IR£
1997	34,170,000
1998	47,353,000
1999	60,340,000
2000	81,104,000

The budget allocation for 2001 is £92,600,000.

Despite the increase in provision of funding, the demand for new and improved accommodation continues to be greater than the supply of capital funds. In nearly all amalgamations, new or additional accommodation is required to accommodate the new school on a single site. The design, tendering and construction phases typically require three years.

Capital funds are allocated to the Department on an annual basis; there is no certainty regarding the level of allocation from one year to the next. This makes it very difficult for the Department to allocate funds to projects over a period longer than one year.

In order to enable the Department to negotiate with patrons regarding capital allocations for amalgamations, the capital budget for Education should be allocated on a multi-annual basis and within the budget there should be funding dedicated to amalgamations.

Applications for capital funding can be the catalyst for amalgamation and the Department should be proactive in examining applications to ensure the best provision possible for the pupils in the area.

Staffing arrangements

Negotiated agreements and practice related to staffing arrangements in amalgamation have accumulated over the years.

Negotiations for staffing arrangements

To date, amalgamations have been of schools under the auspices of the Catholic Primary School Managers' Association. An agreement between the Catholic Primary School Managers' Association and the Irish National Teachers' Organisation, dating from 1993, includes aspects of staffing arrangements for:

- the appointment of the principal
- privileged assistants
- determination of seniority.

There is need for an agreement that includes all sectors. In order that all sectors may have in place an agreed set of staffing arrangements for an amalgamation, the Commission proposes (recommendation 3 in section E) that negotiations should take place among all the patron/management bodies with the teachers' union and the Department.

The subject of these negotiations should be the recommendations for staffing arrangements in attachment B. These recommendations are based on:

- the agreed practice of the past in amalgamations
- the Department's Circular 17/00: *Appointments to Posts of Responsibility* (October 2000)
- the Department's booklet: *Panel Rights for Teachers* (2000) (It should be noted that teachers under the auspices of the patron body Foras Pátrúnachta na Scoileanna lán-Ghaeilge do not have panel rights)
- deliberations by the Commission on best practice for the future.

Principles of staffing arrangements

Principles underlying staffing arrangements are inferred from the practice of the past and from the documents listed as sources in the above paragraph. The basic principles underlying the recommended specific provisions for staffing arrangements are:

- the post-amalgamation conditions of teachers should not be less favourable than their pre-amalgamation situation
- all teachers who have an allowance pertaining to a specific function will retain that allowance in the newly amalgamated school
- if existing post-holders of a position do not wish to apply, then normal procedures apply in an open competition
- staffing arrangements should be both fair to teachers and beneficial for the newly amalgamated school.

Recommendations for staffing arrangements

Twenty recommendations for staffing arrangements, which should be the subject of negotiations among all the patron/management bodies, teacher union and the Department, are included in attachment B under the following headings:

- appointment of the principal including provision for privileged assistants
- appointment of the deputy principal
- posts of responsibility
- determination of length of service and seniority
- enhanced staffing provision — concessionary post
- redeployment and addendum to the panel (where no scheme exists)
- early retirement.

These recommendations are formulated on the basis that the newly amalgamated school should have the opportunity to start well and also that the working conditions of teachers should be approached with justice and fairness.

Convent and monastery schools

Attachment A entitled *Agreement between the Catholic Primary School Managers' Association and the Irish National Teachers' Organisation on the amalgamation of primary schools* includes a section providing for the amalgamation of a *lay* (ordinary national school) with a *religious* (convent or monastery) school where the newly amalgamated school is on the site of the previous convent or monastery school. In that event, *the newly amalgamated school remains classified as a religious school* and appointments are made according to appendix D (7) of the Rules and Constitution of Boards of Management. There is also provision for the reserved posts for religious in a newly amalgamated convent or monastery school.

Appointment of the new board of management

The membership of the board of management, except for schools with a recognised staff of one teacher, is:

- (i) two direct nominees of the patron
- (ii) two parents of children enrolled in the school, elected by the general body of parents of children enrolled in the school
- (iii) the principal teacher (or acting principal)
- (iv) one other teacher on the staff, elected by vote of the teaching staff
- (v) two extra members proposed by those nominees described in (i) – (iv) in accordance with the regulated process.

Ideally, the new board of management should be established in time to perform the function of appointing the principal and staff of the new school. However, in some situations where

small schools are involved, it may be difficult to establish a new board of management before the staffing of the new school is finalised. In this situation:

- the patron should appoint, in writing, an interim manager to perform the tasks of the board until the board is established
- the new board should be established not later than the 30th November after the opening of the new school.

Staff appointments

The new board of management/interim manager should be informed of all existing agreements and regulations influencing the appointments of staff in an amalgamation. The new board/interim manager should conduct the important function of the appointment of the principal of the new school, in order that the principal may be released from the current post for the month of June before the intended opening of the new school. Details of recommendations regarding the appointment of the principal are contained in attachment B.

The new board of management/interim manager is also responsible for the appointment of the deputy principal (details in attachment B) and the posts of responsibility (details in section D *Model for the amalgamation process* under the heading of “Arrangements.”)

Section C

Framework for a model

Section C

Framework for a model

Key issues

The following list of key issues forms a framework for the development of a model for amalgamation. The over-arching principle that should permeate all considerations is the educational needs and benefits for children.

Other issues that should function as a framework include:

- the objective of an amalgamation is to provide an enhanced educational environment for the pupils with an efficient supply of resources
- the catalyst for an amalgamation may be, inter alia:
 - a decline in enrolments
 - curriculum developments and the possibility that a school may be “too small” to offer an adequate educational provision
 - the need for improvement in site, building and/or resources
 - an application for major capital funding
- the initiative for an amalgamation may come from a variety of sources, such as parents, staff, board of management, patron, Department of Education and Science. However, the patron has the key role in the initial stage of establishing feasibility
- good process and effective management of the process of amalgamation are crucial to a good outcome of an amalgamation
- the amalgamation process should be designated in three stages:
 - stage one: preliminary to decision
 - stage two: the decision
 - stage three: implementation of the decision
- it is essential to the process of the amalgamation that there be clarity regarding the distinctive roles and responsibilities of:
 - patrons
 - boards of management
 - staffs of schools
 - Department of Education and Science
 - parents
- the decision-making authority for amalgamation belongs to the patron/s subject to the approval of the Minister for Education and Science
- openness with information helps to create a climate of understanding and acceptance of an amalgamation

- the patrons should consult with the Minister for Education and Science, other patrons and other education partners before making a decision to amalgamate. Such a consultation should take care not to create instability in the relevant schools
- it is important for school stability that the stage preliminary to a decision by the patron has a clear timeframe
- a clear statement of the resource implications, both human and material, should form part of a specific decision for amalgamation
- the patron/s' decision to amalgamate should be publicly communicated with correct protocol and sensitivity for all those affected by the amalgamation
- the implementation of an amalgamation should be well-structured, well-designed and well-managed. The implementation requires:
 - a timeframe
 - the new patron to ensure the necessary appointments and the establishment of a steering committee (see details in *stage three: implementation of the decision*) so that planning for the new school will proceed well before its opening
 - a structure that facilitates the ordered participation of parents and teachers
 - clarity regarding the areas of authority of the patrons, boards of management, principals and staffs of the existing schools and the patron, board of management, principal and staff of the new school
 - understanding of the distinction between recommendations and decisions
 - a protocol of communication
 - adherence to agreements between the teacher trade union, management bodies and the Department of Education and Science, particularly in relation to staffing and supports
 - board of management of the new school being informed of all agreements and regulations that impinge on the appointment of staff to the new school
 - appropriate preparation (information, team-building) for the staff of the new school
- to enhance the educational environment of a newly amalgamated school, some incentives for staffing should be provided
- closure of existing schools to establish a new school should include ritualising of the history and significance of the existing schools.

Section D

Model for the amalgamation process

Section D

Model for the amalgamation process

Stage one: preliminary to decision

Feasibility discussions

At the beginning of the process, the patron may find it appropriate to appoint a person to be the local representative of the patron for the purpose of the amalgamation project. If such an appointment is made, it should be in writing. This representative performs the role of the patron in tasks related to the amalgamation process.

Whatever catalyst may cause amalgamation of two or more existing schools to be considered, the initial conferring should explore feasibility so that a local school community consultation can be informed of real possibilities for the future of the schools.

Initial interactions that explore feasibility and capital implications should occur between the patrons of the existing schools and the Department of Education and Science.

Where a patron seeks to amalgamate a school with another that is under different patronage, the patron should explore feasibility with the patron in question in order to establish possibilities in the areas that are the sole responsibility of the patrons — the characteristic spirit, assets, finance and staffing. The patrons should also initially confer with the Minister for Education and Science to obtain approval for any potentially new arrangement in patronage.

At the end of the feasibility discussions, the patrons should know whether an amalgamation is a possibility.

School community consultation

Patron/s of the existing schools (or their local representative/s) conduct the gathering of information and the consultation with the local school community.

It should be acknowledged from the outset that:

- whilst the decision will be informed by consultation, consultation is distinctly different from decision-making authority which belongs to the patron. To all those consulted, it should be clearly stated that:
 - the status of the consultation is one of exploring feasibility only
 - the consultation does not guarantee implementation
 - the consultation is concerned with neither a voting process nor a majority position
- raising the issue of school status in a public forum often raises highly emotive issues
- the information and the attendant issues are very complex, so careful reflection on the information is essential.

Local consultation should consist of:

- the collection and dissemination of factual information
- the time/opportunity to consider the information
- the opportunity to respond to the information.

Relevant factual information should be collected by the representatives of the patrons of the schools and disseminated to the local partners who are concerned with any change of status in a school:

- staffs
- parents
- wider local school community.

It is very important that staffs are thoroughly informed at this early stage of the policy/practice on the arrangements for staffing for a newly amalgamated school. Staff should be given information on the provision for:

- appointment of principal including provision for privileged assistants
- appointment of the deputy principal
- posts of responsibility
- determination of length of service and seniority
- enhanced staffing provision
- redeployment and panels
- early retirement.

Representatives of the patrons should collect information on all staff members, including part-time and ancillary, with the knowledge of the staff members. The collected information should be:

- name and employment status
- length and details of service with current employer
- length and details of total service
- length and details of service for any teachers participating in career break, job-sharing, study leave or secondment programme
- holders of posts of responsibility with details of assigned duties.

Relevant factual information for dissemination to parents and the local partners will depend on the local situation, particularly the number, size and complexity of the schools being considered for amalgamation. Factual information should include all that is relevant from the following:

- history and culture of the school
- the future of relevant local public/parish/community services
- socio-linguistic issues of the local community
- patterns of local employment

- demography and enrolments for the past ten years or so and the projected enrolments for the next five years
- school attendance and retention rates
- school transport in the area
- neighbouring schools' enrolments
- issues specific to Irish medium schools, island schools or other minorities
- provision for children with special needs
- condition of property and buildings; repairs and maintenance
- possible future use of buildings
- terms of any existing lease
- occupancy of rooms
- school types
- facilities and resources
- staffing implications
- state-wide trends in education
- available teaching skills/specialities
- pupil needs
- possible future for the school.

The breadth and depth of a consultation will depend on the complexity of some of these issues in the local situation. The basic consideration in the deliberations should be the quality of the educational provision for the pupils. In some instances the information and the consultation can be relatively straightforward. For a local school community to absorb the information, consider the implications and give a considered response requires care and attention to the structuring of meetings and communications during the consultation phase.

Stage two: the decision

The patron/s, subject to the approval of the Minister for Education and Science, makes the decision, informed by consultation, on an amalgamation. The dissemination of factual information and the consultation may mean that the decision of the patron/s can be made with relative ease, in the knowledge that the decision has the support of the local school community. On the other hand, conflicting opinions and interests may cause the decision-making process to be difficult.

If the decision relates to amalgamation of a school with a neighbouring school under the same patronage, the main issues to be addressed in the decision are:

- educational needs of pupils
- pupil access (including transport) to an amalgamated school
- teacher placements
- cultural issues of school identity, history and insertion within the community.

The patrons must be sure that transport arrangements can support a decision for an amalgamation, as this issue has much practical significance for families. If a decision for an

amalgamation implies changes to the existing free transport arrangement, details of future arrangements for free transport must be obtained in writing at this stage of the process.

If the decision relates to amalgamation of a school with a school under different patronage, issues to be addressed, as well as those listed above are:

- characteristic spirit of the new school (as defined by the Education Act, 1998, section 15 (2) (b)).

The decision to amalgamate should be communicated with sensitivity to the issues listed above. Public announcement of the decision should include the reasons, if possible, for the decision in terms of these issues.

Stage three: implementation of the decision

The implementation of the decision to amalgamate two or more schools should proceed along clear lines.

An amalgamation should be described as the closing of the existing schools and the opening of a completely new school.

The desired outcome of an amalgamation is a school that serves all its pupils well and that receives full support from parents, staff and the wider community. For this eventuality there must be:

- informed understanding of the reasons for the intervention in school identity and culture
- the opportunity to acknowledge the loss of past identity and culture
- the opportunity to participate in building a new identity and culture.

This requires an open process of preparation for the new school that is well-conceptualised, well-designed and well-managed.

Timeframe

The first important element of the implementation of the amalgamation is the timeframe. In order that the newly amalgamated school should have a good beginning, adequate time must be allocated to the preparation.

If major capital works need to be completed, the maximum period from the announcement of the amalgamation to the opening of the newly amalgamated school should be three academic years. If the new school does not require major capital works, then the period of planning for the new school should be no longer than two academic years.

The steering committee (see below) which drives the planning for the new school should be appointed two years before the opening of the new school. The steering committee reports to the representative of the new patron until the new board of management or the interim manager is appointed. Once a board of management/interim manager is appointed, the steering committee reports to them. The board of management/interim manager decides when the planning work of the steering committee is complete and the committee disbands.

If it is not feasible to appoint the new board of management before the opening of the new school, then the new board should be established not later than the 30th November after the opening of the new school. The board of management/interim manager should be informed of all the implications of staffing arrangements — the agreements and regulations influencing all aspects of staffing in an amalgamation.

This should occur at a time that enables the new board of management/interim manager to appoint the principal of the new school who should have release from the current post to perform duties in preparation for the new school. The release should occur for the month of June before the opening of the new school.

Steering committee

The planning structure for an amalgamation should support the closing of existing schools and the opening of a new school. This helps to maintain distinctiveness in the areas of responsibility of the patron/s, staffs and boards of management of existing schools and of the patron, staff and board of management of the new school.

For the quality of the planning and support for the new school, it is important to establish a steering committee which co-ordinates the preparation for the new school. This steering committee requires skill and availability balanced with representativeness. Calls for expressions of interest and availability should be made to parents, teachers and the wider school community. The steering committee:

- is appointed by the patron of the new school
- is given clearly-stated terms of reference
- has a chairperson, appointed by the patron of the new school, who initiates meetings and oversees the task of the steering committee
- has members whose availability and expertise match the tasks involved
- includes the principals of existing schools
- documents all meetings
- makes recommendations in planning for the new school to the patron
- informs the existing schools on developments
- respects the responsibility of the patrons in dealing with characteristic spirit, assets, finances and staff appointments
- keeps a clear protocol of communication between new patron, old patrons, boards of management and staffs of existing schools
- is terminated once the new board of management or the interim manager decides that the planning work is complete.

Appointed at least two years before the opening of the new school, the steering committee acts as the leading agent for the planning, maintaining the momentum for the planning, ensuring that appropriate people and protocols are involved in the planning. The steering committee is accountable to the new patron and, when the new board of management/interim manager is appointed, the steering committee ceases to exist, unless the board decides that the work of the steering committee should continue for a specified period to complete specified tasks. In that case, the board of management/interim manager decides when the work of the steering committee is complete.

Areas that the steering committee should address in the planning for the new school include:

- educational programme — staff and parents
- resources, facilities and transport arrangements — staff and parents
- the transfer of pupil and staff records — staff
- preparation of staff (for example, development of the School Plan, co-education, building working relationships) — staff
- cultural areas such as school name, motto, symbol, uniform, communication, rituals — parents, pupils and staff.

The steering committee operates on the basic principles that:

- involvement in the planning for the new school will enhance support for and commitment to the new school
- the steering committee is a planning mechanism that co-ordinates the transition to a new school
- the steering committee is accountable to the new patron or to the new board of management/interim manager once appointed.

The steering committee should co-ordinate meetings, discussions and suggestions among the groups of staff, parents and pupils in order to involve people in the planning for the new school. When necessary in the event of non-agreement, the patron of the new school (or the board of management/interim manager) should be referred to for decisions. The steering committee should have a clear task and a clear timeframe. Methods and frequency of reporting to the new patron or to the board of management/interim manager should be established. Reports of the steering committee should be in the format of agreed statements of the group.

Information on staff collected by the steering committee should be with the knowledge and co-operation of each staff member. Details related to the service of each staff member should be transferred to the new school.

Information on pupil educational potential, achievement and needs should be transferred to the new school. Formal documented information could include:

- enrolment information
- results of tests
- attendance record.

The work of the steering committee will contribute towards the development of the School Plan for the new school.

Areas of authority

The importance of the clarity regarding areas of authority depends on the size and complexity of the schools that are amalgamating. For two very small schools, the tasks and lines of communication may operate with relative ease. Where a situation is complex and sensitive, it is very important to maintain clarity regarding areas of authority.

The diagram at the end of section E provides a summary of the areas of authority described below:

- the patrons of the existing schools and of the new school must be involved in the areas for which they have responsibility — characteristic spirit, assets and finance
- from the early stage of the consideration of an amalgamation, it is desirable for the patrons of the existing schools, particularly if the patrons have many schools under their patronage, to appoint a person in writing as the representative of the patron to perform tasks of the patron related to the amalgamation process
- the patron/s of the existing schools conduct the initial feasibility discussions, the data gathering and the local school community consultation
- patrons of the existing schools make the announcement of a decision to amalgamate. The announcement should include the reasons for the decision and address the concerns of interested groups
- the boards of management of existing schools should provide specific information and support to staff on the regulations influencing staffing in an amalgamation
- the patron of the new school has responsibility for all aspects of the new school until the patron has appointed a board of management or an interim manager for the new school
- the patron/s of the new school should appoint a steering committee and chairperson to conduct the planning for the new school two years before the intended opening of the new school
- the patron/s of the new school receives the planning recommendations from the steering committee until the new board of management/interim manager is appointed
- the new patron should ensure that the new board of management/interim manager is appointed and informed, within the appropriate timeframe, of existing agreements and regulations influencing appointments of staff in an amalgamation
- the new board of management/interim manager must ensure that staff appointments are made according to correct procedure and honouring management/union agreements on staffing in an amalgamation
- the new board of management/interim manager has responsibility for the preparation of the staff of the new school
- the existing boards of management take responsibility for the retention and transfer of school records, consider/approve any applications for early retirement in consultation with the new board of management, and all other responsibilities in closing the existing schools.

Protocol of communication

At crucial times in the planning process, the communication of decisions should be authorised only by the patron of the new school. Attention to protocol will, again, depend on the size, sensitivity and complexity of the amalgamation.

The steering committee should communicate regularly on the progress of the planning for the new school with bulletins that are agreed statements of the committee. The steering committee should also make use of established means of communication such as staff notices, parent associations, board of management meetings, as methods and frequency of communication are very important for the public relations aspect of the planning.

All communication related to the planning task of the steering committee should reflect and support clarity in and sensitivities for roles and responsibilities of the different groups involved.

Arrangements

If changes to transport arrangements are involved, agreement with the relevant authority should have been obtained in writing by the patron at the time of the decision for the amalgamation.

Staff appointments to the new school are the responsibility of the new board of management/interim manager, and in the absence of either of these, it is the responsibility of the patron of the new school. Staff appointments, especially the appointment to posts of responsibility, must honour existing agreements and follow appropriate procedures. In accordance with existing agreement, arrangements for staffing should be in writing.

The new board of management/interim manager has responsibility for the appointment of the principal and the deputy principal and the posts of responsibility. Details of recommendations for staff provision in attachment B address the appointment of the principal and the deputy principal.

In order to make appointments for posts of responsibility, the new board of management/interim manager needs a list of the staff of the new school in order of length of service. For any necessary redeployment, the new board of management/interim manager needs a list of the staff of the new school in order of seniority. The board/interim manager should therefore receive staff information (with the knowledge of the teachers concerned) from the existing boards of management in order to perform the following functions:

- the preparation of a list of all teachers in the amalgamating schools, including:
 - name and employment status
 - length and details of teaching service in current school
 - length of total teaching service, including periods of leave of absence, maternity leave, adoptive leave, temporary or substitute service, job-sharing
 - names of teachers participating in career break, job-sharing, study leave or secondment programmes
 - names and categorisation of all holders of posts of responsibility including details of duties
- from the above information, the preparation of two lists of teachers, one in order of length of service and one in order of seniority
- the determining of the entitlement of the new school to posts of responsibility (section 6, pages 3 and 4 of circular 17/00)
- the design of the management structure with the schedule of post of responsibility duties, according to section 4, page 2 of circular 17/00
- taking cognisance of section 12, pages 9 and 10 of circular 17/00 in the filling of posts of responsibility
- the appointment of any assistant principal posts and special duties posts with the assigned duties.

When all agreements and regulations concerning staffing have been applied, then assessments for redeployment can occur.

Closure of existing schools

In the closure of the existing schools the responsibility of patrons and boards of management must be kept clear and distinct from the tasks of the new patron and new board of management of the new school.

The existing boards of management should take responsibility for ensuring that appropriate staff and pupil records are transferred to the new board.

As well as the many practical tasks involved in closing an existing school, the patron and existing board of management should plan a programme of closure to acknowledge the loss of the culture and identity of the existing schools.

Rituals

Rituals that honour the past free people to accept the new situation.

As the closing of existing schools can be a loss for the whole community of pupils, staff, past pupils, wider community, it is important to provide the opportunities in appropriate ritual to honour the past and present of the closing schools. This can be done in various ways such as:

- compiling and publishing the school history
- inviting past pupils to well-advertised and well-planned reunions
- acknowledging individuals, families and groups that have served the school over generations
- ritualising the last bell-ringing etc.
- celebrating a well-planned final school liturgy etc.

Correspondingly, it is very important to appreciate that a new school culture requires specific planning and implementation. The leadership of the new school will need to give attention to matters of identity and ritual for three to five years after the establishment of the new school.

Section E

Recommendations

Section E

Recommendations

The Steering Group of the Commission makes the following recommendations as a group of interdependent recommendations that should be considered as a total unit.

1. The model for the process described in Section D aims to:
 - (a) ensure the best outcome for the pupils
 - (b) respect the authority and interests of all the partners
 - (c) promote harmony and support for the educational endeavour.

The model, including its timeframe for the process, should be implemented for all amalgamations.

2.
 - (a) If the amalgamation does not require major funding for capital works, then the maximum period from the announcement of the amalgamation to the opening of the new school should be two academic years.
 - (b) In arriving at a decision to amalgamate, the patrons should seek assurance from the Department of Education and Science that capital funding will be made available to enable any necessary building project to be completed within three academic years of the announcement of the amalgamation.
 - (c) The capital budget for Education should be allocated on a multi-annual basis, of at least three years.
 - (d) Within the capital allocation of the Education budget, there should be funding dedicated to amalgamations.
3. Aspects of staffing arrangements for schools in process of amalgamating and for the newly amalgamated school should be the subject of negotiation among all the patron and management bodies, the Irish National Teachers' Organisation and the Department of Education and Science.

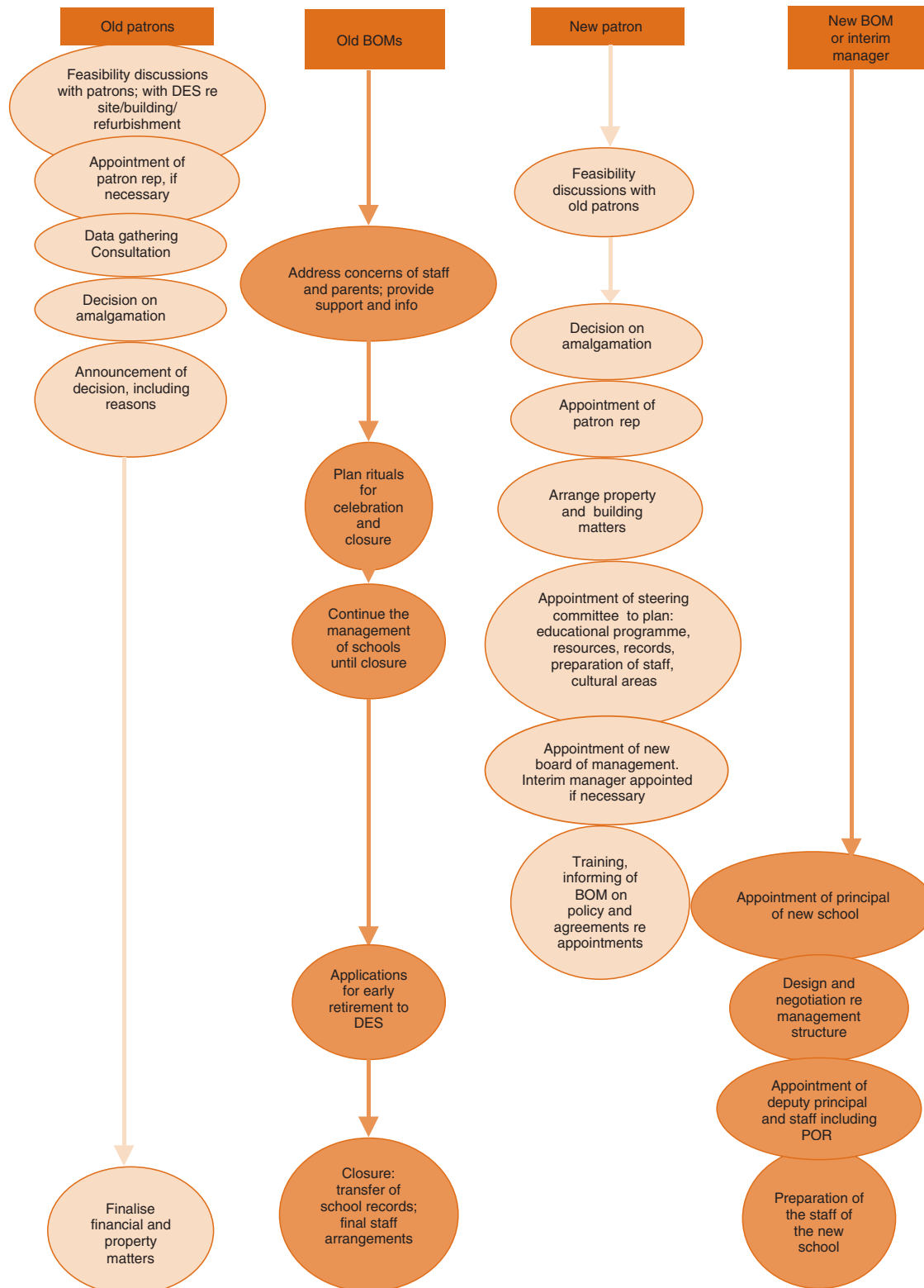
The subject for these negotiations should be the recommendations detailed in attachment B of this document under the headings:

- (a) appointment of the principal including provision for privileged assistants
- (b) appointment of the deputy principal
- (c) posts of responsibility
- (d) determination of length of service and seniority

- (e) enhanced staffing provision (concessionary post)
 - (f) redeployment and addendum to the panel (where no scheme exists)
 - (g) early retirement.
4. The In-Career Development Unit of the Department of Education and Science should arrange for:
- the training of the new board of management
 - the preparation of teachers for an amalgamation through professional development courses in areas such as school organisation, school policy development, methodology, curriculum.
5. Proactive planning of school provision requires research on school size in order to facilitate decisions on school amalgamations. The Commission on School Accommodation should conduct research on school size at first level that considers:
- adequate educational provision, given the particular needs of disadvantaged pupils
 - geographic location
 - socialisation needs of pupils
 - pastoral care of pupils
 - school organisation
 - staffing allocation
 - implications for staff
 - teaching/learning methodology
 - school effectiveness
 - developments in the educational use of technology
 - schools in areas of high/low population density
 - characteristic spirit of the school
 - level of financial support
 - resourcing
 - costs.
6. In the event of an amalgamation of a *lay* (ordinary national school) with a *religious* (convent or monastery) school when the newly amalgamated school is on the site of the previous convent or monastery school, the newly amalgamated school is classified as a religious school. Consequently, appointments are made according to appendix D (7) of the Rules and Constitution of Boards of Management.

In this event, the religious community involved has the right, when a vacancy arises, within six years of the date of the amalgamation, to nominate a member of the community to that vacancy so that the number of religious involved at the time of the amalgamation may be maintained.

Areas of responsibility



Attachment A

AGREEMENT BETWEEN CPSMA AND INTO on THE AMALGAMATION OF PRIMARY SCHOOLS

1. The initiative for an amalgamation may come from the schools' Patron/Trustees or from the Department of Education.
2. On receipt of a proposal from the Patron/Trustees, the Department of Education will notify the INTO and CPSMA, and give the information (a) to (d) insofar as it is available at the time:—
 - (a) Numbers and distribution of school population;
 - (b) Future demographic projections for the area;
 - (c) Deployment of teaching staff involved; and
 - (d) The condition of the schools.
3. The Patron/Trustees or the Boards of Management will notify the parents and teachers, and arrange a process of consultation with both.
4. Before an amalgamation takes place, teachers and parents involved in the amalgamation will be consulted and the Department of Education will satisfy itself in each case that such consultation has taken place. Arrangements regarding staffing and, where applicable, free transport, must be recorded in writing.

The following arrangements will apply:

- (i) The Principal of the amalgamated school will be appointed from among the principals of the schools being amalgamated.
- (ii) Privileged assistants will retain for the remainder of their teaching career the level of a principal's allowance appropriate to their former school unless they are appointed to a post of responsibility carrying a higher allowance.
- (iii) Where a teacher has given continuous unbroken permanent service in one or more of the schools being amalgamated, the aggregate of that service will be reckoned in determining seniority.
- (iv) Amalgamation of Lay and Religious Schools
 - (a) Where a lay school amalgamated into a religious school the new school remains classified as a religious school and appointments are made according to paragraph 23(d) Rules and Constitution of Boards of Management.
 - (b) Where a religious school amalgamates into a central or lay school the religious community involved has the right, when a vacancy arises, within six years of the date of the amalgamation, to nominate a member of the community to that

vacancy so that the number of religious involved at the time of the amalgamation may be maintained.

- (c) Nothing in paragraphs (a) or (b) shall preclude members of a Religious Congregation from being applicants for appointments to a vacancy in the school under the terms of Rule 23 (a) and (b)
 - (v) Amalgamated schools will be allowed to replace teachers who leave with one year of an amalgamation, subject to the average enrolment at the time being sufficient to maintain the post on the concession retention figures.
 - (vi) Where a teaching post is suppressed in an amalgamated school, the teacher most junior in their order of seniority, whether lay or religious, (as established in paragraph (iii) above) will, on becoming redundant, be entitled to have his/her name placed on the addendum to the appropriate panel.
 - (vii) Those teachers who are required to move to another school under the terms of the addendum to the panel will retain their addendum panel rights in the school in which they are placed from the panel. Addendum panel rights are relinquished in the event of a teacher resigning/retiring from the staff of the school.
 - (viii) The conditions governing the eligibility of pupils for free transport from the amalgamating school area to the school of amalgamation must be clearly defined.
5. When a decision to amalgamate has been made, applicants for teaching posts at the school concerned will be informed at appointment interviews of the pending amalgamation.

The appointment of teachers to schools which are designated “Pending Amalgamation” will be on a permanent basis except where there is a likelihood of the amalgamation being effected within twelve months of the date of the appointment.

Note: The contract of employment between the teacher and the Board of Management constitutes recognised service under clause 4(iii).

Attachment B

Recommendations for staffing arrangements

The following are the details for recommendation number 3 in section E on staffing arrangements. Recommendation 3 proposes that the following detailed staffing arrangements should be the subject of negotiation among all the patron and management bodies, the Irish National Teachers' Organisation and the Department of Education and Science.

Recommendations are in italics.

Appointment of the principal

- (1) *The existing practice of appointing the principal of the amalgamated school from among the principals of the schools being amalgamated should be continued, except in the case of (3) below.*
- (2) *The interim manager/new board of management should invite in writing the principals of the two or more schools that are amalgamating to apply for the post of principal of the new school. If more than one principal declares interest in the post, then the composition of the selection board should be based on that provided for in appendix D 3 A in Boards of Management of National Schools — Constitution of Boards and Rules of Procedure, 1997.*
- (3) *If each of the principals of the schools that are amalgamating decline to apply for the post, then the post of principal of the newly amalgamated school should be advertised and appointed in accordance with the procedures for the appointment of a principal teacher (Appendix D of the Boards of Management of National Schools — Constitution of Boards and Rules of Procedure, 1997).*
- (4) *The timing of the appointment process should be such that it provides for the appointee to be released from the current post for the month of June before the intended opening of the new school. Substitution funds should be utilised to enable the release for the month of June.*
- (5) *If each of the principals of the schools that are amalgamating decline to apply for the post of principal, then each attains the status of a privileged assistant.*
- (6) *A principal of either/any of the existing schools who does not become principal of the amalgamated school attains the status of privileged assistant.*

Privileged assistants

Former principals who do not become principal of the amalgamated school are categorised as privileged assistants. It is possible to have two or more privileged assistants on the staff of the newly amalgamated school.

Provisions pertaining to privileged assistants:

- (7) *a privileged assistant is retained in the newly amalgamated school, irrespective of enrolment, unless the privileged assistant chooses otherwise*
- (8) *privileged assistants retain, for the remainder of their teaching career, the level of principal's allowance appropriate to their former school. A privileged assistant can take her/his allowance with him/her into as many schools as he/she moves to, as long as he/she does not accept a post to which a higher allowance is attached (section 11, page 9 of circular 17/00)*
- (9) *a privileged assistant must undertake post of responsibility duties. Such duties should be broadly in line with duties assigned to special duties teachers (section 11, page 9 of circular 17/00)*
- (10) *a privileged assistant should not affect the filling of posts of responsibility in any school to which he/she may be appointed (contrary to section 12, page 9 of circular 17/00).*

Appointment of the Deputy principal

The Commission makes the following recommendations regarding the appointment of the deputy principal of the newly amalgamated school, notwithstanding the provision of circular 17/00 section 12 (b) which states:

A deputy principal (Personal Basis)/Vice Principal (Personal Basis) on the staff of a school will prevent the filling of the Deputy Principal's post provided that the rate of allowance payable to the personal basis post holder is equal to or greater than the allowance due to the Deputy Principal.

- (11) *The deputy principal of the amalgamated school will be appointed from among the principals and deputy principals of the schools being amalgamated.*
- (12) *The interim manager/board of management should invite in writing the principals and deputy principals of the two or more schools that are amalgamating to apply for the post of deputy principal of the new school. If more than one principal and/or deputy principal declares interest in the post, then composition of the selection board should be based on that provided for in section 9 (a) and (b), page 6 of circular 17/00.*
- (13) *If each of the principals and deputy principals of the schools that are amalgamating decline to apply for the post, then the post of deputy principal should be advertised and appointed in accordance with the procedures for the appointment of posts of responsibility in sections 7, 8, 9 and 10 of circular 17/00.*
- (14) *If each of the deputy principals of the schools that are amalgamating decline to apply for the post of deputy principal, then each retains the deputy principal allowance appropriate to their former school on a personal basis, just as long as the person remains in the amalgamated school. Such a person must undertake post of responsibility duties which should be broadly in line with duties assigned to special duties teachers.*
- (15) *A deputy principal (personal basis) on the staff of a school will not prevent the filling of the deputy principal's post (contrary to section 12, page 9 of circular 17/00).*

Posts of responsibility in an amalgamated school

The Schedule of posts effective from 1st September 1998 (appendix B in Circular 17/00) is based on the number of authorised posts including the principal. The basic principle in this distribution of posts is that at least 50% of staff would be in a promoted post.

In an amalgamation, the allocation of posts of responsibility will largely be the assigning of posts to current holders of posts (see section 12, pages 9 – 10 of circular 17/00).

- (16) A permanent teacher who holds a post of responsibility allowance prior to an amalgamation, retains the allowance on a personal basis even if the post is subsequently not warranted by reference to the Schedule of posts in existence at the time of the amalgamation.*
- (17) In the event that the post holder voluntarily leaves the amalgamated school, he/she loses the allowance.*
- (18) If the post holder is compulsorily redeployed at the time of the amalgamation by means of the panel, he/she retains the allowance.*

Determination of length of service and seniority

- (19) For the purpose of appointment to posts of responsibility the board of management/interim manager of the newly amalgamated school shall compile a list of the teachers involved in the amalgamation, by reconciling the lists from the existing schools in the order of the calculation of length of service (section 9, page 7 of circular 17/00).*
- (20) The board of management/interim manager should compile a list of the seniority of teachers involved in the amalgamation, by reconciling the lists from the existing schools. This compilation, based on the date of appointment to a permanent post in the schools amalgamating, should take cognisance of provision 4 (iii) in attachment A and is used for any necessary redeployment.*
- (21) These two lists should be compiled during the planning for the new school and posted within the amalgamating schools.*

Enhanced staffing provision — concessionary post

Generally, a newly amalgamated school has one additional class teacher over the number warranted by the schedule.

As well as the development of pupils in all spheres that is appropriate to the aims of the school as expressed in the School Plan, teachers in a newly amalgamated school need to give more than usual attention to:

- pastoral care of pupils
- matters of ritual
- participation of parents and the wider community in the school.

Consequently, to enable the teachers to build the new school culture, the following provisions should apply:

(22) *For a newly amalgamated school, there should be a minimum of one additional class teacher over the number warranted by the schedule for five years after an amalgamation.*

Redeployment and addendum to the panel

Section 5 of the Department's booklet entitled *Panel Rights for Teachers* (page 11) states:

When a teacher's post is suppressed in an amalgamated school, the most junior teacher is entitled to have his/her name placed on the addendum to the panel, provided that s/he was serving in one of the schools at the time of the amalgamation. The difference between the addendum to the panel and the main panel is that the teacher is obliged to accept an offer of a post in a school which does not exceed 24 km (15 miles) from his/her existing school.

In addition, the teacher carries addendum panel rights with him/her to the new school and will retain these rights until s/he leaves that school voluntarily.

At present panels exist for:

- teachers employed in schools which are under the patronage of the Catholic Church
- teachers employed in schools which are under the patronage of the Church of Ireland
- members of religious orders
- certain teachers in special schools
- teachers in multi-denominational schools which are affiliated to Educate Together.

(23) *Provision should be made for teachers in schools under patronage other than those listed above to have panel rights, including addendum panel rights.*

Early retirement

Circular 2/2000 details the *Early retirement scheme for teachers under Strand 3*.

Section 2.2 indicates that applications from principals and deputy principals for early retirement under Strand 3 will be considered where the school is being amalgamated.

(24) *Principals and deputy principals of schools entering an amalgamation may apply for early retirement under Strand 3. Each application should be favourably considered.*

Appendix A

Membership of the Steering Group

Mr. John Carr
Irish National Teachers' Organisation.

Mícheál Uas. Ó Cinnéide
National Parents Council (Primary).

Mr. Joe Cullen
Department of Finance.

Mr. Tony Deffely
Teachers' Union of Ireland.

Jacqueline Ní Fhearghusa
Gaelscoileanna.

Fr. Nicholas Flavin
Secretariat of Secondary Schools.

Mr. Tommy Francis
Association of Secondary Teachers,
Ireland.

Mr. Pat Gilmore
Association of Community and
Comprehensive Schools.

Mr. Declan Glynn
Teachers' Union of Ireland.

Mr. Seán Grehan
National Parents Council (Postprimary).

Mr. Brendan Griffin
Irish Vocational Education Association.

Dr. John Harris
Protestant Managers/Governors
(Second Level).

Mr. Liam Hughes
Department of Education and Science.

Very Rev. Frank Kelly, P.P.
Catholic Primary School Managers'
Association.

Mr. Joe Kennedy
National Parents Council (Postprimary).

Mr. Charlie Lennon
Association of Secondary Teachers,
Ireland.

Ms. Marian Lyon
National Parents Council (Primary).

Lorcán Uas. Mac Gabhann
Foras Pátrúnachta na Scoileanna
Ián-Ghaeilge.

Mr. Seán McCann
Association of Community and
Comprehensive Schools.

Mr. Sam McClure
Protestant Managers/Governors
(Second Level).

Sr. Teresa McCormack
Conference of Religious of Ireland.

Mr. John McCullough
Church of Ireland Board of Education.

Br. Kevin Mullan
Conference of Religious of Ireland.

Ms. Sheila Nunan
Irish National Teachers' Organisation.

Mr. George O'Callaghan
Joint Managerial Body.

Fr. Dan O'Connor
Bishops' Education Commission.

Ms. Deirdre O'Donoghue
Educate Together.

Mr. Maurice O'Kane
People with Disabilities in Ireland.

Sr. Eileen Randles
Catholic Primary School Managers'
Association.

Mr. Pat Ryan
Irish Vocational Education Association.

Ms. Jacinta Stewart
Association of Chief Executive Officers of
Vocational Education Committees.

Mr. Frank Murray
Chairperson
Commission on School Accommodation.

Ms. Denise Burns
Commission on School Accommodation.

Ms. Eimer Lynch
Commission on School Accommodation.

Ms. Yvonne Lennon
Commission on School Accommodation.