



Independent Review
of Education

INVESTING IN A BETTER FUTURE:

THE INDEPENDENT REVIEW OF EDUCATION IN NORTHERN IRELAND

VOLUME 1

December 2023



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INTRODUCTION FROM PANEL

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

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

However, there are weaknesses. Many can, at least in part, be attributed to lack of funding. And too many young people, disadvantaged by poverty, emerge under skilled and underqualified after compulsory education.

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

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

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

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

Finally, we should like to thank our excellent secretariat. We have relied on their unfailing support at all stages. Without them, there could be no report.

HOW WE CONDUCTED THE REVIEW

Background

The Independent Review of Education (“the Review”) was established in response to commitments contained in New Decade New Approach¹ (**NDNA**). NDNA indicated that the Review should focus on “securing greater efficiency in delivery costs, raising standards, access to the curriculum for all pupils, and the prospects of moving towards a single education system”².

NDNA also made it clear that the Review would cover “education for children and young people in early years, primary, post-primary or further education settings”³. It should include all aspects of the system “including Sectoral Bodies, ETI, curriculum, area planning, 14–19 strategy, Entitlement Framework, teacher training and the interface between Higher Education and Further Education”⁴.

The Panel was appointed by the education Minister, Michelle McIlveen MLA, in September 2021 following an open recruitment process^{5,6}. The [Panel members](#) are⁷:

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

They have been working on a part-time basis since October 2021⁸, supported by a secretariat provided by the Department of Education (DE).

Key principles

We decided that our work would be guided by key principles. These are:

- **Learner-focused:** placing the needs of children and students ahead of all other considerations.
- **Independent:** determining the workplan and approach and writing the Report free from other influences.
- **Evidence-based:** formulating recommendations based on the evidence gathered and considered.

1 *New Decade, New Approach* (January 2020), [New Decade, New Approach](#)

2 *New Decade, New Approach* (January 2020), p.7.

3 *New Decade, New Approach* (January 2020), p.43.

4 *New Decade, New Approach* (January 2020), p.43.

5 The selection panel was responsible for ensuring the Code of Practice, issued by the Commissioner for Public Appointments Northern Ireland (CPANI), was adhered to.

6 The Selection Panel also included senior officials in DE and the Department for the Economy (DfE), as well as an independent member provided by CPANI.

7 In line with the CPANI code of practice, applicants identified potential conflicts of interests via the application process. The Selection Panel assessed these during the appointments process.

8 Posts were remunerated.

- **Consensus building:** making every effort to build consensus throughout the Review, and ensuring the recommendations reflect that desire.
- **Respectful of choice and diversity:** being cognisant of the 1948 Universal Declaration of Human Rights, which states that ‘parents have a prior right to choose the kind of education that shall be given to their children’.
- **Delegation:** working on the basis that decisions should be taken closest to where they will have their effect, in this instance education providers, with appropriate accountability.

Approach to our Report

In our [interim report](#)⁹, published in October 2022, the Panel set out key issues. This final report (“the Report”) provides greater insight into the Panel’s thinking and offers conclusions and recommendations in respect of each of these issues.

The Report consists of three separate (but linked) documents:

- **Volume 1** is an overview. It describes the task, the priority areas for reform and key recommendations.
- **Volume 2** provides greater detail. It describes the current strengths, weaknesses and modes of operation of the education system. It sets out the Panel’s rationale for the recommended courses of action. Each chapter of Volume 2 contains a full suite of recommendations, including the key recommendations within Volume 1.
- **Volume 3** includes a number of **Appendices** that provide further background information relevant to the Review.

Most of Volumes 1 and 2 are structured around ten key issues for reform.

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

At the end of each section, we outline “key recommendations” relating to that topic. At the end of Volume 1, all key recommendations are grouped and presented in a tabular format with indicative costs/savings and timescales.

⁹ *Excellent Education for all: Interim Report of the Independent Review* (October 2022) <https://www.independentreviewofeducation.org.uk/key-documents/excellent-education-all-interim-report-independent-review>

A list of all the organisations the Panel met with during the Review is provided at **Appendix 1** and a full list of written submissions at **Appendix 2**¹⁰.

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

¹⁰ All written submissions are available at the Independent Review website. The list does not include briefing papers provided by Departmental officials or responses to the public survey.

Our Vision of Excellent Education

Our Terms of Reference invited us to “agree a vision for what a high quality, innovative and inclusive education system would look like in Northern Ireland in the 21st century and how relevant partners might work together to realise that vision – making Northern Ireland a truly excellent system internationally”¹¹.

Investment in education can deliver a better future for all. We want to see that investment start now so that it can bring about transformation over the next 20 years through progressive reform.

For the learner it will provide a seamless lifelong education journey that inspires; that develops skills, abilities and talents; and that celebrates each success. Children will receive integrated care and education from their earliest years. Learners will be equipped to contribute fully to the economy, while there will be opportunities to reskill when necessary. There will be early and effective support for those who need it when they need it, avoiding the requirement for later costly longer-term interventions.

Investment in educators is at the heart of our vision – teachers, lecturers and all educators will continue to be a proud, highly skilled profession, committed to the highest standards and valued by the public.

We envisage a well-designed, efficient, adequately funded system of education that provides choice, is inclusive and encourages collaboration ahead of competition. The system will offer greater opportunity for learners from different communities to learn together. Such a system will both retain and attract talent and will ensure that Northern Ireland has the skilled workforce it requires to support a thriving economy.

Our recommendations, which are costed and achievable, are designed to make that vision a reality. We believe they will deliver an ‘excellent education’ for all.

Excellent education should:

- Ensure individuals are healthy and confident; morally aware; emotionally and socially skilled; and are able to use their intellect and physical abilities to greatest advantage for themselves and society.
- Inspire learners to be ambitious and capable, with a lifelong love of learning.
- Prepare citizens to aspire to a better future for themselves and others, to be ethical and informed, and to contribute to society and the economy.

An excellent education system should:

- Put the needs of learners first and ensure they are fully supported by a skilled and committed education workforce in well-resourced settings. It will protect and promote their wellbeing, respecting the reasonable rights of parents to ensure that children are

11 [Independent Review Terms of Reference, paragraph 15.](#)

educated in accordance with their religious and philosophical convictions¹². Individuals will be treated fairly and the system will promote equity in society.

- Promote community cohesion, respecting the cultures, identities, language and values of learners, families and communities. It will be transparent and accountable to learners, families and stakeholders. Educational decision-making will be largely delegated to those responsible for delivery, thus helping ensure that the system inspires public confidence.
- Equip learners at every stage of life with the knowledge, skills and attitudes to make a positive contribution to society and the economy. It will cultivate critical thinking, resilience, adaptability and the ability to thrive in times of change. At the same time, it will make efficient and effective use of resources.

12 “In the exercise and performance of all powers and duties conferred or imposed on them by the Education Orders, the Department and boards shall have regard to the general principle that, so far as is compatible with the provision of efficient instruction and training and the avoidance of unreasonable public expenditure, pupils shall be educated in accordance with the wishes of their parents.” From The Education and Libraries (Northern Ireland) Order 1986 (No. 594 (N.I. 3)), (1986), article 44. <https://www.legislation.gov.uk/nisi/1986/594/contents>

Case for Investment

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

Education in Northern Ireland is highly underfunded – this is largely a result of historical and systemic cuts in spending. The crisis is directly affecting both learners and the workforce. This increases the importance and urgency of delivering reform but also makes implementation much more challenging, especially where recommendations can only be delivered with additional monies, even in cases where they offer cost savings in the long term.

A detailed funding analysis is set out in Volume 2 (chapter 10). Headline figures include:

- Recurrent funding for DE reduced in real terms by **£145m** (6%) over the last 11 years while the pupil population increased by **7%**.
- During that time, per-pupil funding reduced in real-terms by around **11%**¹³.
- In 2012/13, 197 schools reported a deficit, and 856 schools reported a surplus. By 2022/23, the number of schools in deficit had risen to 478, while the number of schools in surplus had fallen to 515¹⁴.
- A major pressure on the education budget relates to Special Education Needs (SEN). The number of pupils with a SEN statement has increased by **66%** since 2012/13¹⁵.
- SEN expenditure now equates to half of the Education Authority (EA) block grant and close to a fifth of the total education budget.

The 2023/24 budget for DE, as announced by the Secretary of State (SoS) for Northern Ireland in April 2023, was **2.5% less** than the prior year budget¹⁶. This compares unfavourably to the 6.5% planned rise in the English schools budget¹⁷. DE estimates a funding pressure of over **£500m** in 2024/25. The constrained budget has a severe impact on outcomes with DE limited in its ability to deliver a balanced budget in 2023/24 even with cuts to valuable services¹⁸. There is an oft-cited myth that “only 60% of education funding goes to schools”, and that efficiencies could be achieved by delegating more funding to schools. However, when the school services funded via the Education Authority block grant¹⁹ are accounted for, 87% of the DE budget is shown to go directly to schools.

13 Based on GDP deflators as at 30 September 2022.

14 Data provided by DE Finance.

15 [School enrolments - overview | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk/school-enrolments-overview)

16 [Department of Finance 2023/24 Budget Factsheet \(finance-ni.gov.uk\)](https://www.finance-ni.gov.uk/department-of-finance-2023-24-budget-factsheet)

17 [School funding: Everything you need to know - The Education Hub \(blog.gov.uk\)](https://www.blog.gov.uk/school-funding-everything-you-need-to-know)

18 [Department of Education protects funding for vulnerable children and young people | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk/department-of-education-protects-funding-for-vulnerable-children-and-young-people)

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

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

- Since 2011/12, further education (FE) expenditure has declined by **6%** in real-terms with a **33%** decline in capital expenditure.
- While spend on higher education (HE) in 2020/21 saw a **25%** real-terms increase compared to 2019/20; there has been a **28%** real-terms fall in expenditure since 2010/11²⁰.

The case for increased funding has greater strength if efforts are made to reduce inefficiencies where they exist. While our Report has highlighted inefficiencies in the way the current education system is designed and services are delivered, the scale of the potential savings must not be exaggerated. Even if all the savings identified were realised, a significant funding gap would remain. The funding gap needs immediate attention but there is also the need for additional long-term investment in education.

20 Information provided by DfE.

CHAPTER 1 – EARLY YEARS

Investing in early years education

- 1.1 Early years services represent a critical chance to set the stage for lifelong learning and development while also driving positive outcomes in education, health, the economy, and society. High-quality early years education should be available from a very early age to all families. This will require a significant expansion of current services. Investing in these services can bring substantial rewards.
- 1.2 The early years encompass the period from before birth through the foundation stages of schooling. Services at this crucial stage should be comprehensive and promote all-round growth and development in children. Achieving this goal will require greater support for parents and caregivers, who serve as children's first educators, as well as the integration of health and education services and an expansion of high-quality early childhood programmes.
- 1.3 The Organisation for Economic Co-operation and Development (OECD) publication *Investing in high-quality early childhood education and care*²¹ identifies three broad rationales for investing in this area of provision.
 - There are significant economic and social payoffs.
 - It supports parents and boosts female employment.
 - It is part of society's responsibility to educate children, combat child poverty and help children overcome educational disadvantage.
- 1.4 There is a global trend towards greater investment in early years. Indeed, this has been highlighted by the recent *Fair Start*²² report. We agree with its recommendations relating to early years and we want to develop them still further.
- 1.5 Investing in high-quality early years provision can reduce school failure rates and alleviate problems such as economic inactivity, poverty, anti-social behaviour and crime. The Centre for Effective Services (CES) has noted that "Cost-benefit analyses conducted in the US of high-quality early care and education programmes have reported returns of \$2.50–\$16 for every \$1 invested. The National Economic and Social Forum (NESF) projected the benefits of investment in early care and education in Republic of Ireland to be between €4 and €7 for every €1 invested. These estimated returns were calculated from measured educational outcomes (such as improved educational attainment, reduced need for special education provision), declining juvenile crime rates, and projected savings due to future participation in the labour force, increased attendance at third-level education and reduced prosecution and victim costs relating to adult crime"²³.

Expanding provision

- 1.6 Plans were announced in September 2022²⁴ by the DE Minister to increase the hours of

21 <https://www.oecd.org/education/school/48980282.pdf>

22 <https://www.education-ni.gov.uk/publications/fair-start-final-report-action-plan>

23 [Prevention and early intervention in children and young people's services: Ten years of learning](#)

24 [McIlveen announces move towards 22.5 hours of funded pre-school for all children | Department of Education \(education-ni.gov.uk\)](#)

funded pre-school education to 22.5 offered to all children whose parents want it in the year before they commence compulsory education. We welcome these plans and acknowledge that implementation will require significant funding. At today's costs, it is estimated that this expansion of provision could cost up to an additional £35m per annum²⁵.

- 1.7 We also considered the early years offer in Northern Ireland in comparison to other UK jurisdictions and the Republic of Ireland (and took account of broader international developments). Even after we have taken account of the planned expansion of funded pre-school education, we believe there will still be significant gaps in provision in Northern Ireland. The most important of these relates to children aged between 2 and 3 years.
- 1.8 A long-term goal for Northern Ireland must be a regional programme for 2-year-olds where every child can receive up to 20 hours a week (for 38 weeks). Accompanied by the planned expansion of funded pre-school education this would represent a significant investment in early childhood development. It is estimated that a universal 2-year-old programme could cost up to £110m per annum²⁶.
- 1.9 In a constrained funding position, the priority should be to ensure equitable and effective provision for all learners while offering additional support to disadvantaged children and their families. We recommend that the immediate priority should be those in disadvantage, before moving to more universal provision.
- 1.10 Therefore, the programme could be phased as follows:

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

Improving quality

- 1.11 Research studies demonstrate that excellent early years services have an enduring positive impact on educational performance, particularly the performance of disadvantaged children²⁷. Average or sub-standard services have limited or no such impact²⁸. This has important implications for the composition, qualifications, professional development and leadership of the workforce. All early years staff, whether professional or para-professional, must have appropriate skills and qualifications at the point of entry. Staff should have access to continuing high-quality professional development thereafter.

25 Assumes full participation of all eligible children. Costs are estimates and subject to revision.

26 Assumes full participation of all eligible children. Costs are estimates and subject to revision.

27 [Tackling disadvantage in the early years - Education Committee - House of Commons \(parliament.uk\)](https://www.parliament.uk/business/committees/committees-a-z/commons-education/education-committee/2017-18/2017-18-early-years-report/)

28 [Melhuish, Edward. \(2004\). A literature review of the impact of early years provision on young children, with emphasis given to children from disadvantaged backgrounds.](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/201122/melhuish_2004.pdf)

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

Standardisation

- 1.13 Within the Pre-School Education Programme there is a mixed model of service delivery with statutory and non-statutory provision. The present mixed economy involving a range of different providers works well, with Education and Training Inspectorate (ETI) reports stating that quality is generally high. The model enables provision to be flexible in response to changing levels and patterns of demand, bearing in mind that pre-school provision is non-compulsory.
- 1.14 While this creates a flexible model of delivery it has given rise to inconsistencies in arrangements between the statutory and non-statutory sectors with the latter being disadvantaged in relation to funding, child:staff ratios and qualifications/entry requirements. The current arrangements relating to funding, staff ratios and qualifications in the public sector should be applied to private sector provision as soon as possible.

An integrated service

- 1.15 The recommended expansion of provision and increased investment presents a significant opportunity for Northern Ireland. It is important that such investment be used to best effect and the full benefits of a high-quality early childhood service realised. This can be best achieved through a collaborative approach across relevant departments and agencies.
- 1.16 The current arrangements reflect traditional departmental boundaries, rather than being designed with the end-user in mind. We have seen evidence of good joint working across health and education services. However, there are natural differences in objectives and priorities. There is also a risk that early years services can be unintentionally de-prioritised in both departments, with Department of Health (DoH) naturally focused on acute care and DE on school-age learning.
- 1.17 Such is the importance of early childhood development that it should become the responsibility of a single agency. This agency could take charge of health visiting services, support for families, regulation of childcare and a range of education and childcare provision but would not be responsible for medical services.
- 1.18 Concurrent with this Review, Professor Ray Jones carried out a [Review of Children's Social Care Services in Northern Ireland](#)²⁹, commissioned by the then Minister of Health. We were pleased to engage with Professor Jones on several occasions to consider potential synergy between our emerging findings. The theme of greater integration of children services, across education and health (as well as others) is one that we specifically discussed with Professor Jones. A major recommendation in his final report is the creation of a single region-wide organisation for statutory children and families social care services. There is potential synergy

29 [Report of the Independent Review of Children's Social Care Services in Northern Ireland | CSCS NI Review \(cscsreviewni.net\)](#)

in the implementation of that recommendation and our own thinking in relation to greater integration of early childhood services.

- 1.19 The service we envision cuts across DoH and DE. This may involve transferring staff across departments, contracting services between separate delivery bodies and a joint management arrangement across two departments. The potential benefits justify the effort to overcome difficulties. This may take some time to achieve.
- 1.20 In the short term, joined-up working between health and education is a prerequisite for any expansion in provision. Arrangements should be put in place to strengthen existing collaborative practices. We would envisage the establishment of an Early Years Partnership Board, chaired by the education and health Ministers. It would be responsible for managing a ringfenced fund for early years provision, delivering an expansion in services, improving quality through workforce development and ensuring a synergy in improving the health and cognitive development of children in the early years.
- 1.21 The end point should be a single, integrated service – even if this takes an extended period to establish. This also links to our wider thinking on long term reform of learner support services. In respect of early childhood services, the agency would have responsibility for:
 - The effective use of resources and investment in future provision.
 - Provision and commissioning of services.
 - Parental support and engagement.
 - Supporting families, including those who are ‘hard to reach’.
 - Promoting wellbeing and emotional health.
 - Identifying developmental problems and providing effective support.
 - Recording information and sharing as appropriate.
 - Identifying future training and staffing needs.

Supporting parents

- 1.22 Support for parents is crucial. Emphasis needs to be placed on the very early stages of learning by supporting parents in their role as first educator. This, of course, needs to continue throughout the learner’s education journey. Informed and engaged parents are best placed to support informed and engaged learners.
- 1.23 Health visiting is an absolute priority within early years services with its reach and impact extending well beyond health. An integrated service delivery model with health visitors working with other childhood professionals has the capacity to enable early diagnosis of emerging difficulties in learning or other areas of development. This strengthens the argument for closer working arrangements among health visitors, midwives, speech and language therapists, educational psychologists, occupational therapists and others. It also has implications for their training and subsequent professional development.
- 1.24 Of course, many parents need and/or want to return to work and therefore require access to affordable childcare. Parents need support in the early years to deal with rising childcare costs to allow them to return to the labour market. Ultimately, the provision of childcare for the purpose of accessing employment is an economic priority rather than an educational concern and, as such, a matter for DfE. This is an area that highlights the need for joined-up policy making and greater integration of services in the early years.

- 1.25 There are important economic benefits in enabling parents to return to the workforce. The benefits for the family are likely to be greater in the case of those experiencing poverty. However, they may require greater assistance (including state intervention) with childcare costs to allow a return to work. The state could assist such families by buying places from private providers or by creating extended day places in some state nurseries. In either case, the provision could be partly funded via a sliding scale of charges ranging from entirely free to full cost (dependent on means testing).
- 1.26 There are currently proposals in England to expand childcare for working families. From April 2024, all working parents of 2-year-olds can access 15 hours per week, from September 2024, all working parents of children aged 9 months up to 3-years-old can access 15 hours per week; and from September 2025, all working parents of children aged 9 months up to 3-years-old can access 30 hours free childcare per week. The eligibility would match the existing 30 hours offer for three to four-year-olds from working families. If delivered, this would represent a significant investment, estimated at more than £4bn by 2027/2028.
- 1.27 Should this go ahead as currently designed, Northern Ireland would be due to receive additional funding by way of Barnett consequentials³⁰. The Executive should take this opportunity and agree to allocate this funding to DE to invest in affordable childcare and expanded early years services, which will benefit Northern Ireland as a whole.
- 1.28 There is a need to consider a significant initiative to support parents back into work and better understand the potential costs and benefits of such a scheme. DE should work with other departments, particularly DfE, to prepare a plan that would support parents through affordable and high-quality childcare provision. Within these plans priority should be given to disadvantaged families seeking work.
- 1.29 Of course, such plans should be affordable and would need to demonstrate clear benefits for both the Northern Ireland economy and the learner. Funding options would need to be further considered.

30 A Barnett Consequential is the change to a devolved administration's assigned budget because of changes in spending in England.

Key recommendations: Early years

Expand early years education

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

There should be phased expansion of early years education. First steps should ensure that all 2-year-olds receive up to 20 hours per week and all 3-year-olds up to 22.5 hours per week. Priority should be given to 2-year-olds and those in disadvantage. The approach to expansion will be for the Department but could include extension of the scope of Sure Start and/or the provision of funded pre-school education for 2-year-olds.

Give additional support to allow parents to get into work

The Executive should apply additional funds received following the planned expansion of funded childcare in England to evidenced interventions that support affordable childcare and/or expanded early years services that will benefit Northern Ireland society as a whole.

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

CHAPTER 2 – DISADVANTAGE

Investing in tackling disadvantage

- 2.1 Investing in tackling disadvantage will reap significant educational, societal and economic benefits. The risk of young people engaging in harmful behaviours, such as substance misuse or offending, or being trapped in a cycle of poverty and disadvantage, can be mitigated through supportive and purposeful education.
- 2.2 All areas of public service stand to benefit from an ‘invest to save’ approach.
- The cost to the public sector of young people who are classed as Not in Employment, Education or Training (NEET) was estimated to be £134m.^{31, 32}
 - It is estimated that almost three-quarters of the prison population in Northern Ireland left school between the ages of 14 and 16 and at least half have no formal qualifications³³.
 - Figures for England show that, on entering custody, 47% of prisoners have no formal qualifications³⁴. The Ministry of Justice (MoJ) also reports that 42% have previously been expelled or permanently excluded from school³⁵.
 - Prisoners have much lower levels of literacy than the general population. The most recent data published by the MoJ shows that 57% of adult prisoners taking initial assessments had literacy levels below that expected of an 11-year-old³⁶.
 - In 2021/22, the cost per prisoner place in the Northern Ireland Prison Service, excluding exceptional payments and the cost of the Prisoner Escorting and Court Custody Services, was £44,868 per annum³⁷.
 - The annual cost of custody per young person in the Woodlands Juvenile Justice Centre was £189,635, based on the maximum number of places available, or £252,846 based on the number of places the centre is currently resourced to accommodate³⁸.
 - Northern Ireland spends a total of £536m per year on late interventions. This equates to £288 per head, or £1,166 per child³⁹.
- 2.3 These costs stand in stark contrast to the costs of educating a child. The immense cost to the public purse of “late interventions”, such as custodial sentences or job seeker’s allowance, highlights the critical importance of investing in education and tackling disadvantage before the impact gets so great and so costly.
- 2.4 Many countries, including Northern Ireland, have policies and programmes designed to combat educational disadvantage. These include Getting Ready to Learn (early years); the Extended Schools and Full Service programmes; Targeting Social Need Funding; the Pathway

31 [The cost of late intervention in Northern Ireland | Early Intervention Foundation \(eif.org.uk\)](https://www.eif.org.uk)

32 The estimates for NEET costs include spending on additional welfare support (tax credits and unemployment support) along with targeted support programmes, such as the educational maintenance allowance (EMA), Training for Success and Peace 4 United Youth.

33 [Prisons 25 by 25 - agendaNI](https://www.agendaNI.com)

34 [Written evidence by the Prisoner Learning Alliance, submitted to the Education Committee Inquiry on Adult Skills and Lifelong Learning, July 2020.](https://www.education-ni.gov.uk)

35 [Prisoners' childhood and family backgrounds - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

36 [Prison Education Statistics 2019 - 2020 - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

37 [Annual Report and Accounts 2021/22 \(justice-ni.gov.uk\)](https://www.justice-ni.gov.uk)

38 [Microsoft Word - Youth Justice Agency - Annual Report and Accounts – 2021/22 Final for Laying \(justice-ni.gov.uk\)](https://www.justice-ni.gov.uk)

39 [The cost of late intervention in Northern Ireland | Early Intervention Foundation \(eif.org.uk\)](https://www.eif.org.uk)

Fund and various initiatives arising out of the implementation of the recommendations in *A Fair Start*⁴⁰. Many of these are not core funded and are susceptible to cuts when budgets are tight. These cuts are devastating for our most vulnerable learners. It is essential that the recommendations outlined in “A Fair Start” are funded and implemented.

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

Understanding disadvantage

The different types of disadvantage

- 2.7 The key attainment gaps that we focus on are:
- the **socio-economic** attainment gap, including the attainment gap between pupils in **grammar and non-selective** schools;
 - the **gender** attainment gap; and
 - the attainment gap between **vulnerable learners** and other learners.
- 2.8 Of course, it is worth bearing in mind that many learners will be affected by two or more of these factors.

Socio-economic disadvantage

- 2.9 The evidence shows a close link between disadvantage and low educational achievement. A gap between poor and more affluent children opens up at an early stage and tends to expand over time. Indeed, evidence from other jurisdictions suggests that it is present even before the child first goes to school^{41,42,43,44}. Despite the best efforts of teachers, it is incredibly challenging to close the attainment gap. However, Northern Ireland already has

40 [A Fair Start – Final Report & Action Plan | Department of Education \(education-ni.gov.uk\)](#)

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

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

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

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

some schools with very high levels of disadvantage achieving excellent outcomes. There is much to be learned from them.

- 2.10 It is difficult to find a simple agreed measure of educational success. Performance information relating to primary schools in Northern Ireland is now sparse. The most widely used measure of overall attainment is the number achieving five+ GCSEs grades A* to C including English and mathematics. However, given the limited use of GCSE as an entry qualification to later stages of education or employment, this is not a very satisfactory measure.
- 2.11 Northern Ireland's learners perform favourably in comparison to many other nations. Achievement of five+ GCSEs grades A* to C including English and mathematics was roughly on a par with England up to 2012/13, and for the next three years Northern Ireland pupils performed better (2015/16 was the last year this metric was reported on in England). Northern Ireland pupils outperformed Welsh pupils on this metric throughout the period 2008/09 to 2018/19^{45,46,47}. However, due caution should be taken when making such comparisons.⁴⁸
- 2.12 Since 2005/06, achievement of these GCSE grades has improved in Northern Ireland and the poverty-related attainment gap has narrowed. However, it remains high and more can be done. In the most recent year the gap in attainment between free school meal entitled (FSME) and non-FSME school leavers amounted to 25.1 percentage points whereas 16 years earlier it had been 32.1 percentage points. The attainment gap at A Level stood at 15.9 percentage points in 2012/13. In 2018/19, 61.1% of Year 14 pupils with FSME achieved three or more A Levels at grades A* to C (or equivalents). However, 74.1% of pupils without FSME achieved this standard; a gap of 13.0 percentage points⁴⁹. These comparisons are not as up to date as we would wish however, we have used 2018/19 as subsequent years' assessments were disrupted by the Covid-19 pandemic.
- 2.13 In common with other countries, pupils from the most advantaged backgrounds in Northern Ireland had a higher level of reading achievement than those from less socio-economically advantaged homes, as measured in a 2018 Programme for International Student Assessment (PISA) study⁵⁰. However, this gap in achievement was significantly smaller in Northern Ireland than the OECD average disadvantage gap, partly because of better performance of the most disadvantaged pupils in Northern Ireland but also partly because of a narrower gap between the socio-economic status of the most and least disadvantaged pupils.

The socio-economic disadvantage attainment gap by type of school

- 2.14 Another factor to consider is the socio-economic gap between school types, specifically in the post-primary sector. The impact of socio-economic circumstances is reflected in the type of school a young person attends at post-primary level with disadvantaged pupils concentrated in non-selective schools. Ten years ago, 1 in 13 pupils in grammar schools

45 [School performance | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk/school-performance)

46 [Statistics: GCSEs \(Key Stage 4\) - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/gcse-key-stage-4)

47 [Examination results | GOV.WALES](https://www.gov.uk/government/statistics/examination-results)

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

49 [School performance | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk/school-performance)

50 [Achievement of 15-year-old pupils in Northern Ireland: PISA 2018 National report](https://www.education-ni.gov.uk/achievement-of-15-year-old-pupils-in-northern-ireland-pisa-2018-national-report)

were entitled to free school meals (FSM) compared to 1 in 4 in non-grammar schools. Now, the corresponding figures are about 1 in 8 in grammar schools compared to 1 in 3 in non-grammar schools⁵¹.

- 2.15 The difference in the size of the attainment gaps is affected by the unequal distribution of FSME pupils between the sectors. Grammar schools' attainment at five+ GCSEs grades A* to C including English and mathematics is consistently high and the attainment gap is much narrower than in non-grammar schools. In 2018/19, the attainment gap for grammar schools (between FSME and non-FSME pupils) was 8.4 percentage points, down slightly from 9.7 percentage points in 2012/13⁵².
- 2.16 Around 6% of grammar school learners do not achieve five+ GCSEs grades A* to C including English and mathematics. The corresponding figure for non-grammar school learners fell from 67.1% in 2008/09 to 45.2% in 2018/19. The attainment gap for school type was 60.9 percentage points in 2008/09; by 2018/19 it had reduced to 39.5 percentage points, due to the improved performance of the non-grammar school sector⁵³.
- 2.17 Meeting the needs of high concentrations of disadvantaged learners so they all can progress and succeed is extremely challenging. More investment is needed to reduce the difference between grammar and non-grammar schools, including providing greater support to schools with a high concentration of disadvantage.

The gender gap

- 2.18 Gender is another factor which cannot be overlooked. Of course, factors can be compounded. Those particularly disadvantaged are working-class boys.
- 2.19 The [Expert Panel on Educational Underachievement](#) was asked to look specifically at educational failure among Protestant boys. While this is unquestionably an extremely pressing issue, there are similar concerns about the performance of Catholic boys. Catholic boys do slightly better at school than Protestant boys, but both are significantly outperformed by girls, regardless of religious/community background. The reality is that there is a problem of male educational failure which is not receiving the attention it should.
- 2.20 Discounting religion and focusing solely on gender we can see the significance of the gender gap, which first emerges during Key Stage 1 and then continues through all stages of education⁵⁴. In 2018/19⁵⁵, the gaps between girls and boys were 6.7 percentage points overall and 9.8 percentage points in the case of pupils with FSME (five+ GCSEs) and 9.8 percentage points overall and 12.3 percentage points for pupils with FSME (five+ GCSEs

51 [School enrolments – overview | Department of Education \(education-ni.gov.uk\)](#)

52 [School performance | Department of Education \(education-ni.gov.uk\)](#)

53 [School performance | Department of Education \(education-ni.gov.uk\)](#)

54 [KSA 2018/19 Methodology Paper v 1.1.pdf \(education-ni.gov.uk\)](#)

55 2018/19 data was used as subsequent years' assessments were disrupted by the Covid-19 pandemic. Public examinations were cancelled in summer 2020 and summer 2021 with alternative arrangements being put in place to award grades to students; these were largely centre-determined, with an additional awarding organisation moderation process put in place in the 2021 series. In 2022, CCEA introduced a number of measures to support students such as optional unit omissions; reduction in coursework / controlled assessment requirements; and the provision of formulae and equations for GCSE mathematics. Source: [Qualification Insight Report 2022.pdf \(ccea.org.uk\)](#)

including English and mathematics)⁵⁶. The gender gaps were thus smaller than the gaps due to socio-economic circumstances, but still substantial.

Table 1. School leavers' GCSE attainment, Northern Ireland, 2018/19⁵⁷

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

2.21 The gender gap still exists at A Level⁵⁸ but is narrower than at GCSE level. In 2018/19, at A Level the gap between boys and girls overall was 3.8 percentage points and the gap between pupils with FSME and those without was 13.0 percentage points.

Table 2. Year 14 pupils achieving 3+ A Levels A*-C, Northern Ireland, 2018/19⁵⁹

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

56 [School leavers | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk)

57 [School leavers | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk)

58 [Revised - Year 12 and Year 14 Examination Performance at Post-Primary schools in Northern Ireland 2018 19 Revised.pdf \(education-ni.gov.uk\)](https://www.education-ni.gov.uk)

59 [Revised - Year 12 and Year 14 Examination Performance at Post-Primary schools in Northern Ireland 2018 19 Revised.pdf \(education-ni.gov.uk\)](https://www.education-ni.gov.uk)

2.22 It is worth noting here that in 2021/22 66.8% of all pupils with diagnosed special needs were male⁶⁰. This relates to those who have a SEN diagnosis and are therefore identified on their school's register. 61% of pupils at Stages 1 and 2 of the SEN Code of Practice were male and 39% were female⁶¹. The proportion increases when we consider learners with a SEN statement, with 73% of pupils male and 27% female. Furthermore, boys were in the majority in all 23 categories of special needs, in some cases to an overwhelming extent. 80% of pupils with social and behavioural difficulties and 77% of those with developmental language disorders were male⁶². 71% of pupils attending special schools were male and 29% were female⁶³. We therefore conclude that SEN constitutes a further manifestation of male disadvantage.

Vulnerable learners

2.23 There are specific minority groups of learners who experience educational disadvantage. We highlight Children Looked After (CLA), minority groups such as travellers, newcomers⁶⁴ and SEN learners. There are also serious concerns regarding those who leave education early or with low or no qualifications.

2.24 The state has a particular duty towards children in its care. Yet learners who have experienced time in care (including children and young people in care, those on the edge of care or those who have left care) experience significant challenges in education. These learners also often experience multiple deprivation.

2.25 The recent census⁶⁵ (2021) shows a growing and increasingly diverse population. There is evidence of relative poverty among minorities, including Irish Travellers. Rates of FSME are highest among Irish Traveller learners (65%), followed by black learners (37%) and 'other' minority learners (35%). All these learners are under-represented in grammar schools and almost half of Irish Travellers (49%) are recorded as having special educational needs⁶⁶.

2.26 We also see learners from the Roma community as disadvantaged. While data relating to these pupils is not published due to small numbers, literature⁶⁷ suggests that Roma families experience distinctive challenges in education that could lead to low attainment and poor attendance. The EA identifies Roma as a community for targeted support and employs a dedicated Roma Support Officer.

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

61 [Special Educational Needs 202122.pdf \(education-ni.gov.uk\)](#)

62 Data provided by DE's Analytical Services Unit.

63 [School enrolment - school level data 2021/22 | Department of Education \(education-ni.gov.uk\)](#)

64 A learner is described as newcomer if they do not have the language skills to participate fully in the curriculum.

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

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

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

- 2.27 Representatives of minority groups that we met advised that navigating the education system is extremely challenging. They highlighted difficulties in finding information in order to choose a suitable school/college as well as understanding the various education pathways. A number felt that some admissions policies have criteria that can discriminate against them.
- 2.28 The newcomer population of Northern Ireland is increasing rapidly. Experience elsewhere – particularly in London – is that young newcomers are often highly aspirational and play a significant role in raising standards of attainment in schools. However, a first step is obviously to ensure that proper provision is in place for them to learn English.
- 2.29 Outcomes for learners with SEN have historically been much lower than for learners who do not have SEN but there have been some positive trends more recently. If we are to continue to close the gap, it is important that robust, system-wide data is available over an extended period – starting from the earliest possible opportunity. This should not be confined to attainment data for examinations and assessments. Attendance, communication and interaction, engagement in learning, social skills, ability to self-regulate and be independent are important outcomes that should be recorded.

The Covid-19 legacy

- 2.30 Our Review commenced in the context of the pandemic. At this stage there is limited data available on the impact of the pandemic however we suggest that it is likely that it will have exacerbated poverty, isolation and social inequalities.
- 2.31 The short-term impact on children and young people varied. Some enjoyed being at home and coped well with home schooling while others struggled with isolation and coped less well or not at all with remote learning. While all learners were affected, disadvantaged learners were affected more, mainly due to digital poverty, poor access to online learning and low levels of digital literacy. Efforts were made by DE to address learning loss through initiatives such as the Engage Programme.
- 2.32 The effect of the pandemic is likely to be long term or even permanent in all too many instances. In the case of those attending school, a significant legacy has been left in the form of increased absenteeism. A comparison between attendance rates in the year before the pandemic and 2021/22 shows an increased rate of absence across primary, post-primary and special schools, both with respect to authorised and unauthorised absence. It is too early to say whether the impact of the pandemic on attendance will have long-term consequences.
- 2.33 This downturn in attendance rates is not unique to Northern Ireland but is concerning. At first glance, attendance figures around 90% may seem impressive but they imply an absence of one day every fortnight; a degree of interruption of the learning process with which many pupils will struggle to cope. When speaking with young people they have highlighted concerns regarding growing anxiety and other forms of mental health problem, including school refusal. A greater emphasis on promoting wellbeing as a vital characteristic of a good school or college is certainly a legacy of the pandemic but there are wider considerations regarding ensuring education takes place in a welcoming environment where all learners can thrive.

Combatting disadvantage

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

2.35 These include:

- Investing in early childhood education.
- Improving home/school links and supporting parents to support their children’s learning.
- Introducing vocational pathways from age 14.
- Removing requirements for “gatekeeper”⁶⁸ qualifications that prevent progression.
- Investing in wellbeing.
- Investing in excellent teaching through continuing professional development.
- Investing in alternative provision, including Education Other Than At School (EOTAS) and youth work.
- Introducing broader measurements of success.
- Raising the age of educational participation to 18 years.
- Developing a thriving college sector with valued vocational qualifications.
- Providing courses free of charge for under-qualified adults.

2.36 Combatting disadvantage will require investment. This must include investing in our educational workforce so they have the necessary skills to engage with learners at risk of disadvantage or exclusion and the time and opportunity to network with colleagues and share experience. This mutual learning requires the system to invest in collection and analysis of data.

2.37 Northern Ireland has many examples of schools that are achieving very good outcomes for disadvantaged learners.

2.38 The following graphs show that, in general, the higher the level of socio-economic disadvantage in a school (as measured by FSME) the lower the attainment. This correlation is common to education systems across the world. However, in Northern Ireland there are a number of schools with very high levels of FSME (greater than 50%), which sit at least 5 percentage points above the trendline. There are 13 such schools if performance is measured at GCSE and 10 schools at A Level. These are coloured green in the top right-hand corner of the graphs. These schools are demonstrating a remarkable ability to overcome the challenges posed by socio-economic disadvantage. The reasons for their success should be explored, understood and promoted.

2.39 The black oval (in the centre of the graphs) highlights the very significant difference in attainment between schools with similar levels of disadvantage (30%–40% FSME). The range of attainment (from the highest- to lowest-performing school) at GCSE is 71.9 percentage points and at A Level is 69.3 percentage points. Again, the reasons for this disparity are unknown and should be explored.

68 We use the term “gatekeeper” qualifications to describe those qualifications that, in our opinion, unnecessarily prevent learners from progressing. Examples include English and mathematics at GCSE where a significant number of learners make repeated unsuccessful attempts to pass.

Figure 3. Proportion of pupils achieving five+ GCSEs (or equivalent) A* to C (inc. English & mathematics) relative to proportion of FSME at school, Northern Ireland, 2018/19⁶⁹

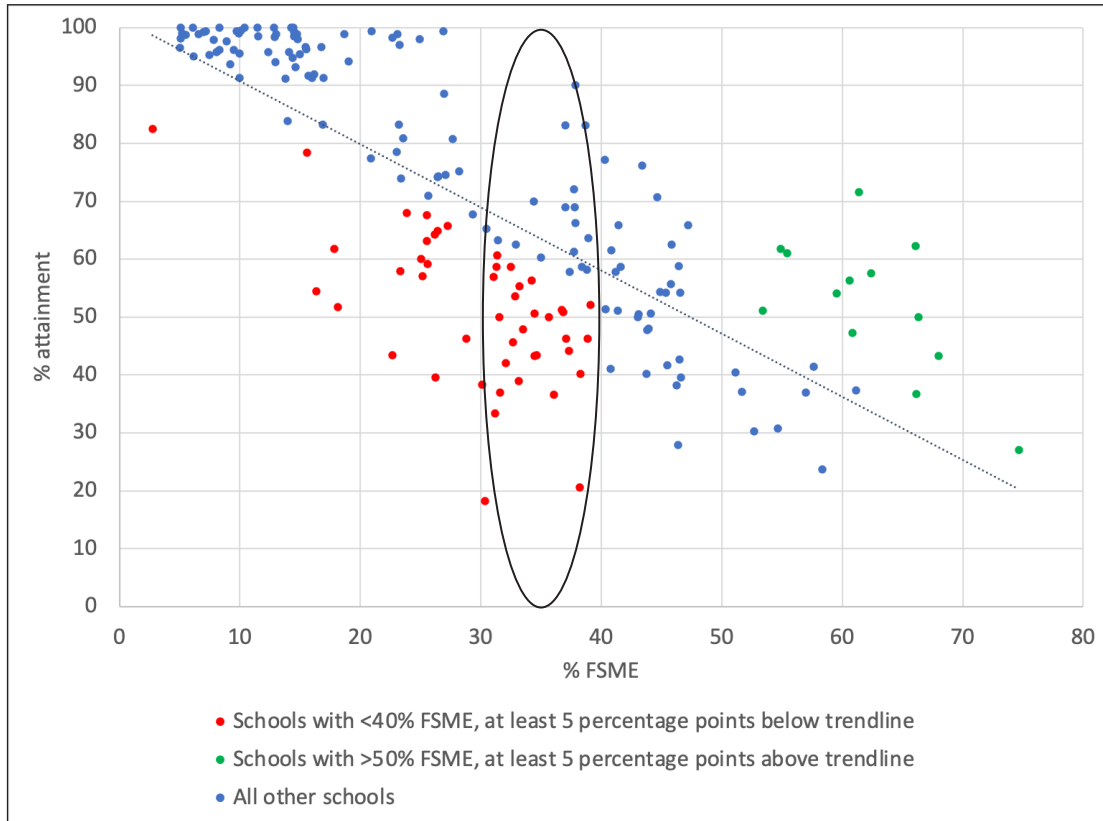
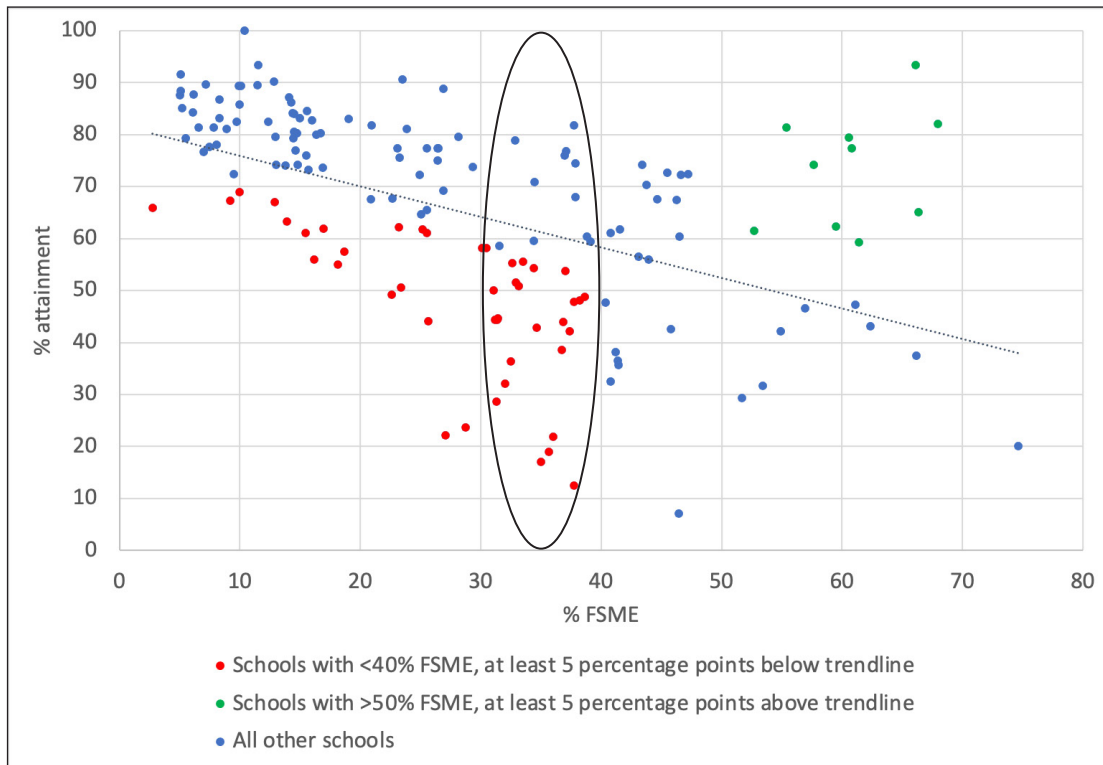


Figure 4. Proportion of pupils achieving three+ A Levels (or equivalent) A* to C relative to proportion of FSME at school, Northern Ireland, 2018/19⁷⁰



69 Analysis carried out by the Panel based on data provided by DE's Analytical Services Unit.

70 Analysis carried out by the Panel based on data provided by DE's Analytical Services Unit.

- 2.40 It is also clear from these graphs that underperformance is found across the full range of schools including selective schools for both GCSE and A Level performance. The biggest concentration of underperformance is in the 30%–40% FSME range, followed by schools in the 20%–30% range and the 10%–20% range, illustrated on the graph by “red dots”. These are schools with less than 40% FSME which sit at least 5 percentage points below the line of best fit.
- 2.41 Among the schools with the highest percentage of FSME more are located above the line of best fit than below. It is frequently said that Northern Ireland has ‘a long tail of underachievement’. The evidence suggests that this is not the case. Rather, Northern Ireland has a notably large number of schools with a high level of disadvantage performing well above expectations. Both excellence and underachievement are to be found in schools with intakes at all levels of socio-economic disadvantage. Research is needed to allow the system to learn from existing widely varying levels of performance.
- 2.42 At classroom level teachers can benefit from looking at levels of attainment in their own and other schools and seeking to learn from colleagues. The optimum method of sharing best practice is through collaborative networks where teachers, including school leaders, can meet and learn from each other. Such networks need structure and resources, especially time.
- 2.43 An essential element in any programme to combat disadvantage (of whatever kind) is good data. It is a matter of considerable concern that there are no system-wide data for outcomes at Key Stages 1, 2 and 3 apart from ‘best estimates’. This is due to the very limited number of schools which have submitted data in recent years. A system of assessment is required. In this way, emerging difficulties and the need for additional support can be identified as early as possible in a child’s educational journey.
- 2.44 While there is a wealth of data available for outcomes at Key Stages 4 and 5, it is also worth remembering that these outcomes (GCSE and A Level results) only represent those who sit the examinations and are deemed eligible by the school. Some learners are excluded from the examinations data that are submitted annually to DE. In 2018/19, 7.53% of the overall Year 12 cohort (over 1,600 learners) were deemed ineligible for inclusion in the Summary of Annual Examination Results returns. These returns should include all pupils, indicating clearly where an individual has not achieved success in any examination.
- 2.45 Partnership with parents is also crucially important. Not all parents feel comfortable in dealing with schools. For some parents, their own negative experience of school acts as a barrier to involvement with their children’s school. This tends to be less of a problem in primary schools than at later stages. There should be opportunities for parents/carers to come to school for social, recreational, sporting or celebratory events so that they build relationships and get to know staff.
- 2.46 As seen with the recently closed Engage Programme, small amounts of targeted investment can allow for specific interventions for learners who need it most. Funding that allows for targeted teaching time, in small groups, led by a trained professional, is an investment worth making. The Engage Programme should be evaluated and a business case developed to assess the widest potential benefits to Northern Ireland of mainstreaming such an approach to provide ongoing targeted support for learners at risk of disadvantage.

Key recommendations: Disadvantage

Combat disadvantage

It is essential that all learners be provided with the necessary support to thrive in education.

The Fair Start Programme should be funded and implemented.

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

In our Report we make numerous recommendations that would positively contribute to combatting disadvantage. These include:

- Investing in early childhood education.
- Introducing pre-vocational pathways from 14 years old.
- Removing qualification requirements that prevent progression.
- Prioritising wellbeing.
- Investing in continuing professional development.
- Measuring success other than attainment at 16 or 18 years.
- Raising the age of educational participation to 18 years old.
- Developing a thriving college sector with valued vocational qualifications.
- Providing educational opportunities for under-qualified adults.

CHAPTER 3 – LEARNER SUPPORT, INCLUSION AND WELLBEING

Investing in learner support, inclusion and wellbeing

- 3.1 Investing in wellbeing and learner support is crucial for Northern Ireland to adopt a more learner centred approach to education.
- 3.2 Pupil emotional health and wellbeing has been consistently highlighted to us as a chief area of concern by young people, parents and educators. Education has an important role to play as it is uniquely positioned due to its sustained engagement with children and young people over a very long period. There is an undeniable case for greater investment in health and wellbeing interventions and pastoral care. Every school should have direct access to counselling services and crisis workers, when needed.
- 3.3 Rapidly escalating SEN costs are a major contributing factor to the funding crisis in education. The existence of a demand-led source of expenditure reinforced by statutory provisions in the context of a fixed budget imperils not merely arrangements for supporting learners with special needs but the entire education system. It is imperative that SEN funding be used effectively so as to improve outcomes for learners. To help solve this crisis there is a pressing need to invest in earlier and more effective interventions for learners who need assistance.
- 3.4 Furthermore, we are clear that youth work represents good value for money. Its costs can be seen as preventive spend which can obviate later spending in other areas. Youth work contributes economic and social value by helping to reduce crime, improve health, promote community relations and increase employment, as well as increase participation in education. However, more could be done to both quantify and communicate the economic value and benefits of youth service delivery.

Inclusive education for a changing society

- 3.5 The emerging global context is of progress towards a more inclusive system of education within an overarching rights-based framework. *The United Nations Convention on the Rights of Persons with Disabilities*⁷¹ (UNCRPD) guarantees all disabled children and young people a right to participate in all forms of mainstream education with appropriate support. The European Agency for Special Needs and Inclusive Education⁷² has developed a vision for inclusive education systems that “all learners of any age are provided with meaningful, high-quality educational opportunities in their local community, alongside their friends and peers”.
- 3.6 We support this aspiration and believe that a more inclusive education system strengthens social cohesion. Successful models of inclusion are worth further scrutiny.
- 3.7 Inclusive education is commonly associated with SEN and disabilities. However, the notion of inclusivity should be broadened to encompass all learners who are susceptible to exclusion or at risk of achieving poorer educational outcomes in comparison to their peers. Education

71 [Convention on the Rights of Persons with Disabilities | OHCHR](#)

72 [European Agency for Special Needs and Inclusive Education](#)

must be accommodating and accessible for everyone, and resources must be used fairly, taking into account the wellbeing of all learners, including those who do not have special needs.

- 3.8 Within our Report, we outline how we would wish to see learners learning together in the classroom and the breaking down of areas of division. Divisions can occur on grounds of socio-economic status, community background, gender, etc. There is already growing emphasis within DE on this issue and it is important that this be sustained. Work is required to define “inclusive education” in a way suited to the circumstances of Northern Ireland and to develop a road map for delivery.
- 3.9 There is a view that all learners should be educated in mainstream schools as a way of modelling a more inclusive society. We question whether this is a practical approach. Special schools are a vital part of the educational landscape and are best placed to support learners with the most complex needs. We believe there will always be a role for such specialist provision, although the model of delivery may change over time in a more inclusive system. Their expertise should be seen as a resource for mainstream schools, which otherwise struggle to provide for some categories of need. There should also be flexibility in approach, ensuring learners can move between special school and mainstream to best meet their needs.
- 3.10 There is a pressing need to invest in the special school estate, so that there is sufficient supply of more specialist provision of a high standard. As special schools support highly vulnerable learners and are often located in sub-standard premises, they should be prioritised for capital investment.
- 3.11 DE has published draft Statutory Guidance on the Reduction and Management of Restrictive Practices in Educational Settings in Northern Ireland⁷³. The draft guidance makes clear that restrictive practices should only ever be used when it is necessary and proportionate to do so, in order to keep children, young people, and others from coming to harm and never as punishment. The draft guidance indicates that parents/carers must be informed of any instances of the use of restrictive practice. It should be noted that at the time of writing the guidance remains in draft form. The guidance will not become statutory until the final version is issued after the consideration of the responses to the public consultation on the draft guidance.
- 3.12 We welcome the guidance and the child-centred approach and recommend that the use of restrictive practices should be monitored by DE with a specific aim to reduce or eliminate the use of such practices wherever possible.

Improved emotional health and wellbeing

- 3.13 The [Children and Young People’s Emotional Health and Wellbeing Framework](#) (“the Framework”) uses the World Health Organisation’s definition of sound mental health:

a state of wellbeing that allows children to develop and become aware of their own unique personality, to build their own identity, to fulfil their own potential, to cope with the challenges of growing up; to feel loved, secure

⁷³ Draft [Statutory Guidance on the Reduction and Management of Restrictive Practices in Educational Settings in Northern Ireland: Understanding and responding to behaviour in crisis situations \(September 2023\)](#)

and accepted as unique individuals and to be able to be happy, play, learn and to participate and contribute to family and community.⁷⁴

- 3.14 In addition, relationships formed in school with staff and other learners have a significant influence on the mental health of individual learners. However, the workforce needs support to fulfil this function. Embedding the delivery of the Framework is a vital first step.
- 3.15 We have heard from practitioners and young people alike that stress arises from the emphasis on assessments at the end of Key Stages 4 and 5 (GCSEs and A Levels). They consider the system should give greater priority to promoting wellbeing and emotional intelligence. There are excellent programmes already used in schools which address metacognition, emotional intelligence and the components of resilience in a trauma-informed manner (e.g., Hopeful Minds, Roots of Empathy, Action Mental Health's [AMH] Healthy Me). These programmes, if part of a whole-school approach, can help develop coping skills and resilience.
- 3.16 There are already examples of schools employing trained staff (such as social workers) to respond to complex needs and support the wider school workforce in terms of training and guidance. We see this becoming more commonplace over the near future. All schools should be able to access specialist staff to support learner wellbeing. This may be through direct employment, resources shared between schools, or effective learner support services from a central organisation. New funding will be required, as well as collaboration with health and other services.

Transforming provision for special needs

- 3.17 Ensuring effective support for learners with special educational needs is a matter of widespread public concern and has been raised with us by parents, teachers and many others. There is universal agreement that the current approach is not working.
- 3.18 Some parents believe the system responds to their children's needs grudgingly and belatedly. They portray the process of gaining support as a continuous struggle. Their experience is that obtaining a statement is the necessary passport to resources. The number of assessments which extend beyond the statutory period and the very minimal levels of support given to children with special needs without a statement suggest they are right. At the same time, the number of children with statements is growing rapidly and expenditure on special needs is growing faster still.
- 3.19 The system is in a state of crisis and learners are being failed. There is a need for urgent action to deliver effective interventions for learners much earlier. Likewise, we cannot ignore the cost implications of SEN support and the risk they present to the education budget as a whole.
- 3.20 As SEN costs have risen in all recent years faster than the education budget as a whole, the share of the budget taken up by special needs is steadily growing. From 2017/18 to 2022/23, the proportion of the total education budget spent on SEN increased from 13.2% to 18.1%. During this period, there was an 88% increase in total SEN spend, rising from £255m in 2017/18 to £479m in 2022/23.

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

- 3.21 Of course, the increase in the reported incidence of SEN and related increase in expenditure is not unique to Northern Ireland. Other jurisdictions are experiencing similar trends. In England, SEN expenditure increased from £4.7bn in 2013/14 to £9.0bn in 2022/23, an increase of 91%⁷⁵. While direct comparisons are challenging given differences in how funding is spent and recorded, a crude analysis would suggest that, over the same time-period, Northern Ireland SEN expenditure increased by 143%.
- 3.22 In July 2019, the House of Commons Education Committee in Westminster published its report *A ten-year plan for school and college funding*⁷⁶, which described SEN and disability funding as “completely inadequate...[with] simply not enough money in the system to provide for the scale of demand”. The report also describes a “vicious cycle” whereby the neglect of lower-level interventions is a key underlying factor driving increasing system-wide costs. It notes that, “widespread perceptions and experiences of inadequate lower-level support in mainstream schools appeared...to be driving a crisis of confidence among parents” resulting in an increased pressure for education and health care (EHC) plans which could be seen as diverting resources away from early support programmes. These issues are similar in the Northern Ireland context.
- 3.23 If Northern Ireland experiences a similar increase in expenditure over the next 5-year period to what it experienced in the last 5-year period, SEN costs would reach £900m by 2027/28. Assuming a flat DE budget, this would mean that by 2027/28, SEN expenditure could account for some 34% of the total DE budget. If, as has been the case in recent years, the number of statemented learners continues to rise, this could easily be an underestimate.
- 3.24 These projections indicate an impending financial crisis for both education and the Northern Ireland Executive as a whole. This is unsustainable and risks the needs of all learners. Minor changes will not suffice. A complete overhaul of the current legislative and policy framework is needed.
- 3.25 A number of principles should guide the process of change:
- Legislation should not be excessively prescriptive, nor should it provide perverse incentives.
 - Processes for assessing needs should be manageable and capable of being completed in realistic timescales.
 - Support should be provided speedily and, in the great majority of cases, without the need for a statement.
 - Where possible, interventions for special needs should be aimed at enabling children and young people to learn effectively without ongoing additional support.
 - Practice should be regularly reviewed with the intention of establishing norms for the requirement of different levels of support. These revised norms should subsequently inform refreshed assessment processes.
 - Existing methods of supporting children and young people with special needs should be evaluated with a view to disseminating good practice and reducing the current over-reliance on classroom assistants.
 - Decisions regarding special needs should be informed by the need for equitable distribution of resources across the entire system.

75 [SN07020.pdf \(parliament.uk\)](#)

76 [A ten-year plan for school and college funding - Education Committee - House of Commons \(parliament.uk\)](#)

- Children and young people should be included in decisions about their support and what will help them progress.

3.26 The first step in improving SEN support is to invest in early interventions, ensuring they are available to learners who have special needs as quickly as possible, whether or not they have a statement. This must be achieved before any wider reforms take place to instil confidence in the system. Children with SEN are currently recorded under three stages of special educational provision, which can be summarised as follows:

- **Stage 1** is intended to ensure that the learner will be assisted using the resources and expertise of the school.
- **Stage 2** involves intervention using additional resources brought in from outside the school.
- **Stage 3** requires the drawing up of a legally enforceable document (a statement) stating what support the learner is entitled to receive⁷⁷.

3.27 The system is not working as intended. Many parents conclude that meaningful support is only available at Stage 3, so they simply circumvent Stages 1 and 2. The most pressing issue, therefore, is providing meaningful support at Stages 1 and 2.

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

- Increase the capacity of the school (or other setting) to cater for special needs, rather than attaching a resource to an individual learner.
- Better meet the needs of learners so they can progress, and that progress can be demonstrated.
- Provide access to specialist support, reducing reliance on allocating hours of classroom assistant time.
- Build in a requirement for review rather than allocating a permanent resource.

3.29 It is possible that changes to the approach of statementing may not remedy the problem we have outlined. In particular, it could be that decisions of appeal tribunals could make them impracticable. Were that to happen, there would be no alternative but to legislate in order to make reform possible. It is highly likely that such legislation would need to radically change the content and purpose of statementing in its current form.

Effective interventions and needs-based services

3.30 The support system for learners with SEN, as it currently operates, is under significant pressure. It is a cause of widespread discontent and division. Families experience extreme frustration in obtaining a service. Even when they succeed, the service is often ineffective. Of course, the EA is operating in the extremely challenging environment of increased demand and reduced funding.

⁷⁷ The three stages are part of the new SEN Framework and cannot be fully implemented until a new SEN Code is introduced which is contingent on new SEN Regulations being made by the Northern Ireland Assembly. Until such time as a new SEN Code is operational, schools must have regard to the 1998 SEN Code and its 2005 supplement in all respects with the exception of recording children with SEN under the new three stages. Further information can be found in DE's Circular 2021/06 available at: [DE Circular 2021/06 - Three Stages of Special Educational Provision | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk/DE-Circular-2021-06-Three-Stages-of-Special-Educational-Provision)

- 3.31 A new learner-centred delivery model is required, with financial and human resources used better to provide effective needs-based interventions at the earliest opportunity.
- 3.32 The following changes are needed to ensure an effective system:
- Effective screening of the development of the child from before birth up to the point of entry into primary school.
 - Increased support for the parents of very young children, including building on the “Getting Ready ...” and “Play Matters” programmes.
 - Early years provision from age two for all families who wish it, starting with disadvantaged families and others at risk.
 - Early diagnosis of difficulties followed by early and effective intervention.
 - Multi-disciplinary SEN capacity in early years settings.
 - Access for early years settings and primary schools to the Pupil Support Services (PSS).
 - A strengthening of the in-house SEN expertise of all schools in order to make support at Stage 1 and Stage 2 more effective. Including provision of in-house SEN expertise through Irish in Irish medium settings.
 - Increased understanding within schools regarding the use of ‘reasonable adjustments’.
 - More emphasis on SEN in all initial teacher education courses and a 1-year course for university graduates leading to the award of a Post-Graduate Certificate in Education (PGCE) in SEN.
 - An expansion of the Pupil Support Services to make intervention at Stage 2 more effective (including ensuring the availability of expertise to meet the needs of, inter alia, newcomers or the IM sector).
 - Removal of the gatekeeper function of the Educational Psychology Services (EPS) at Stage 2.
 - An expansion of the EPS, including the use of Psychology Assistants and Assistant Educational Psychologists.
 - Revision of the Code of Practice⁷⁸ to reflect these changes.
- 3.33 Northern Ireland employs a significant number of classroom assistants (CAs) specifically to support SEN learners in both mainstream and special schools. The number of CAs employed to support SEN pupils in mainstream schools has increased by 1,589 FTEs (44%) since 2017/18. The increase in special schools is 366 FTEs (31%)⁷⁹. While they play a vital role in supporting learners and teachers, it is apparent that CAs are becoming viewed as the only available support mechanism for learners with complex needs. This should not be the case.
- 3.34 Learners’ needs vary greatly and a blanket use of CAs is inappropriate. Interventions and support should be needs-based and focused on the individual learner. This requires more multi-disciplinary working within schools so that direct support is provided for learners.
- 3.35 Schools should have greater discretion in the use of the funding allocated for learners with SEN. Over time, we would expect to see the number of CAs reduce with increased specialist support in the form of specialist SEN teachers, speech and language therapists, educational psychologists, occupational therapists, dyslexia support, etc. This would also be accompanied by upskilled CAs. This model would be preferable and more effective than the almost automatic allocation of CA hours. This requires significant transformation

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

79 Data provided by EA.

of and investment in the learner support workforce but would ensure that schools have the resources in place to support learners sooner (well in advance of Stage 3), by providing greater access to specialist support and targeted interventions much earlier.

SEN transitions

- 3.36 Starting school, moving to another school or leaving to enter further/higher education, training or employment can be a stressful time for all learners. Learners with SEN face additional challenges during these transitions. The Independent Review of Special Educational Needs Services and Processes⁸⁰ highlights the delays SEN learners face when transitioning to a new learning environment particularly when transferring to P1 and Year 8. We would also wish to highlight the uncertainty and stress that arises when SEN learners transfer out of education.
- 3.37 Regarding transition at P1 and Year 8, there is a serious problem in confirming places for special needs. This, of course, reinforces the need for increased capital spend for a range of SEN provision to meet demand. In any event, the circumstances where some of our most vulnerable learners are unplaced only a few weeks before the new school session is unacceptable. We also recommend that statemented children should not be treated as supernumerary⁸¹ in admission and enrolment numbers. In this way, the institution receiving these learners can plan and have staff and resources in place to meet their needs.
- 3.38 Of course, there will be situations, such as when a special need is only identified late in a transition year, which do not fit with the framework outlined above. However, the general principle is that greater priority is given to the placement of SEN learners.
- 3.39 Many learners with special needs face particular difficulties at the point of leaving school and embarking upon adult life. They should receive continuing support in education, training and employment. In the case of people with complex and severe needs, more intensive and long-lasting, possibly permanent, support will be required.

Using youth services

- 3.40 Collaboration with youth services is also of great importance, as a means of enriching the experience and adding to the cultural capital of the young person, as well as developing positive attitudes. This support for personal development complements the more formal learning processes of the school or college. It embraces a very wide range of activities including open access to youth clubs, targeted provision for young people at risk, outdoor learning,

80 [Independent Review of Special Educational Needs Services and Processes | Department of Education \(education-ni.gov.uk\)](#)

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

the creative and performing arts, sport and many more. Often these activities engage young people in a way that formal learning does not. They build a trusting relationship between the young person and the youth worker. All this is a means to promote personal development.

- 3.41 It is difficult to draw direct comparisons with other jurisdictions given the different delivery and funding models. However, there is some evidence to suggest that statutory youth work in Northern Ireland is underfunded, especially in comparison with England. For instance, it is estimated that the expenditure in the youth sector in England is around £2bn. Pro rata spending in Northern Ireland would exceed £70m whereas the revenue budget in the EA is currently £34m. Further analysis is needed to establish the position definitively.
- 3.42 From discussion with voluntary groups and our own analysis, there appears to be some tension between statutory and non-statutory services, i.e., between voluntary groups and the EA. The contribution of the voluntary sector should not be undervalued and opportunities for them to work directly with schools or colleges should be facilitated. There is scope for improving working relationships and delivering a more joined-up approach that would be to the benefit of young people. The attachment of youth workers to schools should be promoted.

Key recommendations: Learner support, inclusion and wellbeing

Prioritise wellbeing

There is a need for greater investment in health and wellbeing interventions and pastoral care. To address complex needs and support the wider school workforce, schools should be enabled to employ specialist staff, such as social workers. This will require new funding and joint working with colleagues in health. Every school should have direct access to counselling services and crisis workers, either through dedicated posts within schools or resources shared between schools.

Emotional health and wellbeing should be prioritised in the curriculum, from early years right through to post-16. All learners should have the opportunity to acquire crucial life skills.

Transform SEN support to cater equitably for the needs of all learners

The current policies, practices, and legislation are failing to deliver support for learners with SEN. At the same time, expenditure is out of control in a way that threatens the quality of service for all learners. Thorough reform is urgently required. The use of resources should be based on equitable treatment of all pupils.

There must be greater access to specialist support within schools, with a particular focus on support at Stages 1 and 2. At Stage 3, the educational institution should have flexibility in the use of allocated resources. The practice of automatically allocating classroom assistant hours should cease. A comprehensive Learner Support Workforce Programme should be developed and implemented to increase the number of specialist provision professionals (such as trained SEN teachers, Speech and Language Therapists, Educational Psychologists etc.) whilst reducing the number of classroom assistants.

Learners with statements of SEN should not be considered as supernumerary to admission or enrolment figures. This approach should allow institutions to prepare to meet the needs of these learners. The goal should be to adopt a “SEN first” model that ensures that learners with a statement of SEN receive school placements in a timely manner.

DE should define what it sees as “inclusive education” taking account both of the local context and international best practice.

Facilitate learner-centred interventions

Learner support services delivered by the EA are not functioning as expected. To provide responsive developmental and educational services to learners, educators, and parents, a new early intervention and learner support body should be created. This could be accomplished by separating the management and educational functions of the EA.

The new body will be responsible for all the essential services a learner may require during their education journey. These services include parental support and engagement, Sure Start management and Pre-School Education Programme, learner support services (i.e., those for learners with SEN), pupil wellbeing and protection, youth services, emotional health and wellbeing, education improvement and professional development, and careers education.

As an interim measure, the EA should restructure internally to create a management services group (for transactional services) and an early intervention and learner support group (for educational support), each with a single senior responsible officer. Over time, the organisation would divide into a single authority (responsible for employment and other transactional support services) and a separate early intervention and learner support agency, responsible for all essential services a learner may require during their education journey.

CHAPTER 4 – CURRICULUM, ASSESSMENT AND QUALIFICATIONS

Investing in the curriculum and assessment

- 4.1 The curriculum should support and structure a coherent progressive learning journey. It should be based on a sound understanding of the learning process and instil a love of learning that lasts a lifetime.
- 4.2 However, curriculum review, advice and support has suffered from disinvestment. That must change. Significant resources must be invested to keep the curriculum under review, to take on board the concerns of practitioners and learners, and to ensure it keeps pace with social, economic and technological change.
- 4.3 Good assessment is a central part of all good education systems. It is vital to support the teaching and learning of students, to monitor progress of learners against agreed benchmarks and to evaluate performance at school and system level. There is a pressing need for a systematic approach to assessments, especially in primary schools.
- 4.4 Investing in curriculum and assessment will increase in importance as technology continues to shape the education process. For example, the rapidly increasing interest in, and use of, generative Artificial Intelligence (AI) will have significant implications for teaching, learning and assessment. However, the current education system can struggle to keep up with the fast-evolving world, and needs the capability to adapt quickly in terms of curriculum, teaching methods, and preparing learners for rapidly changing workplaces.
- 4.5 To address this challenge, there is a growing need to invest in an intelligence and horizon-scanning capability, which the education system currently lacks. Regular updates to the prescribed and taught curriculum are also needed to ensure learners understand the impact of new technologies on society and the economy. Additionally, pedagogical approaches should be reviewed regularly to determine how new technologies, such as AI, can assist learning.

How we learn

- 4.6 Knowledge forms the basis of the cultural capital on which learning depends. It is constructed by the child out of his/her experience of the world. Parental support in this process is crucial. In this sense, knowledge is not a matter of inert facts, or 'knowing that', but rather of 'knowing how' and 'knowing why'. It nevertheless rests on a foundation of information. Knowledge gives rise to understanding and thus to the capacity to apply knowledge. Learning is the process of adding to long-term memory. It is the stock of understanding in long-term memory which enables a person to learn more, to solve problems, and to be capable and effective.
- 4.7 Much is currently spoken about 21st-century skills. Terms such as problem-solving skills and interpersonal skills are widely used. These can be a useful shorthand but it is important to recognise their limitations. Problem solving in engineering is not the same as problem solving in human relations. It is essential that young people are equipped to function

effectively in society and in the economy and that they are persuaded of the relevance of what they learn in school to their later lives. This means that they need to steadily increase their understanding and their capacity to apply that understanding. This is as true of practical understanding and vocational education as it is of traditional academic subjects.

- 4.8 Sound learning takes account of the structure of knowledge. There is, however, an important place for interdisciplinary learning. This applies at all stages of education. Good interdisciplinary learning has to rest on strong disciplinary foundations.

A quality curriculum that supports learning

- 4.9 The quality of the curriculum, along with the quality of teaching, is the most influential factor in education. It must be informed by a sound understanding of how people learn. It must give learners the knowledge, understanding and skills they require, regardless of their stage of education. It must be up to date and relevant to the context in which it is operating.

- 4.10 The curriculum should:

- Be informed by an understanding of how people learn.
- Support the process of translating knowledge into understanding.
- Encourage the absorption of educationally useful knowledge into long-term memory.
- Set ambitious goals for the development of the individual.
- Understand the merits and limitations of constructivist approaches.
- Build interdisciplinary learning on sound disciplinary foundations.
- Offer learners a wide range of educational pathways – academic, creative, technical and vocational.

- 4.11 These characteristics should inform the design of the curriculum regardless of the stage of education, the purpose of the course(s) or the age of the learner.

- 4.12 The curriculum as designed is seldom identical to the curriculum as taught. These may both be very different from the curriculum as experienced by the learner. Viewing the curriculum as the aggregate of a number of subjects or topic syllabuses can easily lead to a notion of the curriculum as a list of content to be covered. This is to ignore the importance of the learning process.

- 4.13 In one important aspect, the curriculum during the period of compulsory schooling differs from other curricula, encountered later in life, which may serve different and more instrumental purposes. The former is intended to realise society's objectives in guiding the way in which children mature into adults. At later stages, the curriculum is often intended to meet very specific ends as determined by the learner.

- 4.14 The school curriculum serves a number of purposes. The aim of the Northern Ireland Curriculum, covering the period of compulsory education, is "to empower young people to achieve their potential and to make informed and responsible decisions throughout their lives". It sets out the intended objectives for young people, described as providing young people with learning opportunities to develop as:

- **an individual**, who can achieve personal fulfilment and individual wellbeing through living a successful life;

- **a contributor to society**, who is concerned for the wellbeing of others as well as themselves, in their own society and beyond it;
- **a contributor to the economy and the environment**, able to appreciate how employment will impact on the economic choices they make and how they, in turn, impact individually and collectively on the environment.

4.15 To these we propose adding a further objective:

- **to develop young people as lifelong learners**, who are able to participate successfully throughout their lives in a society undergoing rapid and accelerating change.

A coherent curriculum

- 4.16 Education has traditionally been divided into stages. However, labels such as primary or post-primary are merely a convenience. The learner should experience education as a continuous and seamless process. At all times, the interests of the learner should take priority over those of the institution.
- 4.17 The curriculum should open up opportunities. So far as possible, choices should not have the effect of closing future pathways. Learners who embark on a course should be able to complete it.
- 4.18 A curriculum which operates at a high level of generality is most effective at keeping open future possibilities. The advantage of generality has to be weighed against issues of understanding and motivation. For many learners there comes a point where more practical and/or vocational approaches may become preferable. Choice in the post-primary sector thus plays an important role.
- 4.19 Primary schooling covers an extended period during which the child develops fast. The primary school thus has to accommodate both play-based approaches in the early stages and considerably more formal styles of learning at a later point. Pupils acquire basic skills of literacy and numeracy on which most subsequent learning rests. They also begin to study a range of specialisms which continue into the post-primary stage. The transition to post-primary is abrupt and may pose difficulties for a large number of children. We recommend a more seamless transition with greater use of specialists in primary and a more consolidated approach in the early post-primary stages.
- 4.20 Post-primary schools use a subject-based curriculum and offer some choice. This means that pupils can discontinue the study of a subject. It is important that all courses are planned so as to offer a valid educational experience both to those who continue and those who do not. This essential point is too often ignored.

A living curriculum

- 4.21 The Northern Ireland curriculum provides a flexible framework which can be applied in different ways by schools. The autonomy of the school in relation to pedagogy is very extensive.

4.22 Schools, however, often value curricular advice and support. At present the Council for the Curriculum, Examinations and Assessment (CCEA), the body with curriculum responsibilities, has limited resources and very few curriculum specialists. Most of its staff are concerned with issues of assessment and qualifications. We must value the curriculum and invest in it. We recommend separate bodies for curriculum and assessment/qualifications. A dedicated Curriculum Council should take over CCEA's curriculum responsibilities but with sufficient resources. It should be staffed both to develop guidance and to provide support to schools and educators.

4.23 Its core functions should include:

- keeping the curriculum under continuous review;
- advising educational institutions on matters relating to curriculum and pedagogy; and
- acting as an intelligence and research agency for the education system.

4.24 In carrying out its function of curriculum review, early priorities for the new body may include:

- addressing the issue of excessive curriculum content;
- planning a more seamless curricular transition from primary to post-primary;
- developing pre-vocational courses from age 14;
- developing new approaches to teaching life skills (including digital skills and financial literacy), promoting creativity, and supporting wellbeing, mental health and resilience; and
- reviewing a number of specific topics including:
 - education for sustainability
 - modern languages
 - careers education
 - religious education.

4.25 We appreciate that this is an extensive list, and it will take considerable time and resource to fully address. The first point is perhaps the most critical and has an impact on the rest. There is an urgent need to manage the level of content within the curriculum. It has been put to us repeatedly that there are parts of the curriculum as experienced by school pupils that are unduly content heavy. The extent of the subject matter to be covered should not be so extensive that teachers are faced with the dilemma of either failing to deal with important topics in sufficient depth or sacrificing vital aspects of the learning process itself. There is an immediate and pressing need to reduce unnecessary content wherever possible.

4.26 Our other recommendations are not intended to add further content onto an already crowded field. There is a need to make space within the curriculum for reflection and creativity. Managing content is a critical issue and links directly to assessment and specification of qualifications.

4.27 The work on the curriculum cannot be delayed pending the creation of a new dedicated Curriculum Council. In the interim, an appropriately resourced Curriculum Taskforce should be established to take forward the work we have identified as priorities for curriculum reform. This body, in time, could transform into the new statutory Council.

4.28 The undertaking of this Curriculum Taskforce, and the statutory Council in the longer term, should not be underestimated – it is significant and it is challenging. It is vital that the value of the curriculum is recognised through the creation of a properly resourced review and support body. This requires significant investment. We envisage a 5-year programme of work to consider curriculum priorities, after which time a more regular and continuous programme of review and refreshment may be undertaken.

Assessment

4.29 Assessment is a central part of all good education systems. It serves several purposes:

- It supports learning by identifying the learner's strengths and weaknesses.
- It establishes whether learners are reaching important benchmarks.
- It enables evaluation of performance at the level of the school, college or other institution, or system as a whole.

4.30 There is a need for a more systematic approach to assessments in the primary stages. Although schools spend significant sums on good-quality commercial tests, they do not carry out the tests which are in theory required at Key Stages 1 and 2 and which should inform a collective picture of how well children are learning. An early task for the new assessment and qualifications body will be to design and implement a new system.

4.31 Assessment should not be burdensome, either to the teacher or the learner. We are concerned, however, at the amount of assessment undergone by 16–18-year-olds and the impact on the learners. In particular, we consider that many pupils study for an excessive number of GCSEs.

4.32 This is an area that will be affected by technological change. There are both challenges and opportunities for assessment with regard to the growth of technology and the use of AI. An early opportunity is the use of computer-assisted adaptive tests. We see these as acquiring an important role in the near future.

Qualifications

4.33 Qualifications also serve numerous purposes, including:

- recording and certifying achievement;
- enabling progression to further stages of education by meeting entry requirements or providing evidence of necessary knowledge and skills;
- monitoring the performance of institutions or the system as a whole in terms of important outcomes for learners.

4.34 We have considered what should be the overall approach to the selection of qualifications in Northern Ireland. There are broadly three possibilities:

- Northern Ireland could develop its own qualifications.
- It could link with one other UK jurisdiction and use its qualifications.
- It could adopt a mixed approach.

- 4.35 The first approach is impractical (if applied to all qualifications) and the second could compromise Northern Ireland's interests. Therefore, we recommend the third.
- 4.36 The main general qualifications used at school level include, but are not limited to, GCSE, AS Levels and A Levels. These are also widely offered by colleges. Applied qualifications are also used. We consider that all these should continue. However, given that, based on our recommendations, education will continue for all beyond the age of 16, assessment at 16 years old should be seen as much less significant than at present. We recommend that a limit be placed on the number of GCSEs that a pupil can take.
- 4.37 English and mathematics at GCSE Level act as "gatekeeper" qualifications with a pass at a prescribed grade required to proceed to further education or training. This results in a significant number of pupils making repeated unsuccessful attempts to gain those grades with very adverse consequences in terms of self-confidence and the use of educational time. We do not support GCSE grades being used as a determining criterion for closing down opportunities for learners – in our view, there should be mandatory limitations on the use of such academic qualifications as barriers to educational progression in schools. Of course, we expect that our recommendation regarding raising the compulsory age of education would impact on this practice.
- 4.38 Furthermore, we question how far these GCSE courses and assessments function as satisfactory proxies for the attainment of adequate basic levels of numeracy and literacy. There is considerable scope for assessment at 16 years to be developed in flexible forms that all students can relate to, and which enable them to continue to learn. That will be more important than strict comparability of GCSE outcomes.
- 4.39 We recommend that new level 1 and 2 qualifications in the areas of literacy and numeracy be developed. Subsequently, we suggest that a parallel qualification in digital skills be introduced. These qualifications should be developed in conjunction with business to ensure that the qualifications become accepted and recognised as demonstrating useful levels of numeracy, literacy and digital skills.
- 4.40 These new qualifications will remove an unnecessary obstacle and thus contribute to reducing the impact of disadvantage. These courses should also be available to all unqualified adults at no cost, as per our recommendation regarding a right to a basic level of education.
- 4.41 A Levels are among the most specialised general qualifications for school leavers on offer anywhere in the world. We recommend that Northern Ireland continue to use A Levels while making maximum use of the limited scope which exists to adapt the content and structure of A Levels for use in Northern Ireland.
- 4.42 Northern Ireland should have a full and respected place in the three-country arrangements that exist to oversee these qualifications in the UK. Over the next 20 years there should be a move to include other forms of assessment that alleviate the pressures on young people caused by the annual concerted periods of terminal examinations and allow for more varied forms of evidence to be included in the assessment. It is essential that assessments do not reduce the already limited teaching and learning time available to teachers and students.
- 4.43 During the time of our review, there were proposals or developments in other parts of the UK to review and reform a wide range of both general and vocational qualifications. Decisions

have been taken on a new curriculum in Wales and work is in train there to design new-style GCSEs with wider scope and less detailed content, with the expectation that 16-year-olds will take fewer such GCSEs than at present⁸². In England, new-style vocational qualifications are being rolled out and, as our Review was coming to a close, English Ministers announced their policy intent to develop an “Advanced British Standard” award, drawing together technical and academic studies and covering a wider range of study than A Levels.⁸³ The Scottish Government is also considering the recommendations of a major review of qualifications and assessment.⁸⁴

- 4.44 The new qualifications and assessment organisation for Northern Ireland will need to keep closely informed of such developments and their effect on qualifications offered in Northern Ireland. They will need to keep under review their advice to the Executive on the qualifications mix that will best meet the needs of Northern Ireland. This should include considering how to make it more possible for post-16 learners in Northern Ireland to study for a cross-disciplinary project-based qualification as well as qualifications confined to particular subjects. Although evidence of this kind of project work is highly valued by universities, schoolteachers in Northern Ireland told us that there was “no time” for their A Level students to study for such a qualification.
- 4.45 There are very large numbers of vocational qualifications in use, leading to widespread confusion. We recommend that the new assessment and qualifications body oversee the use of vocational qualifications in Northern Ireland, and its resourcing and structure should reflect this as an essential part of its core role. It should review the current position at an early date with the aim of simplifying the system. Some qualifications can be re-branded using the nomenclature of GCSE and A Level. Simplification and the use of familiar terminology will help public understanding of what is on offer in schools and colleges.

Adapting to Artificial Intelligence

- 4.46 AI will undoubtedly have a major impact on curriculum, assessment and qualifications during our 20-year timescale. Although it is impossible to predict what the impact might be, we are confident that the implications for education will include the following:
- Reconsideration of the kinds of knowledge and skills that learners will need for a world where AI has a central role.
 - A need for an intelligence and horizon-scanning capability, which the system currently does not possess.
 - Regular updating of the curriculum so that learners understand the nature of the new technology and its impact on society and the economy.
 - Regular reviewing of pedagogical approaches to determine whether there are new ways in which AI can assist learning.

82 [Qualified for the Future | Qualifications Wales](#)

83 [New qualifications to deliver world class education for all - GOV.UK \(www.gov.uk\)](#)

84 It's Our Future - Independent Review of Qualifications and Assessment ([It's Our Future - Independent Review of Qualifications and Assessment: report - gov.scot \(www.gov.scot\)](#))

Key recommendations: Curriculum, assessment and qualifications

Undertake major reform of the curriculum and keep it under continual review

The curriculum needs to be based on a clear understanding of how learning occurs. It should inspire lifelong learners capable of successfully participating in an ever-changing society. Both the content and the process of learning are crucial. Learners should advance smoothly from early childhood to lifelong learning without abrupt changes, such as currently exists most notably between the primary and post-primary stages. This will require major changes and significant investment.

The curriculum should be kept under continual review following radical reform involving a reduction in subject content, improvement of transitions and the development of pre-vocational learning from age 14.

In adult life, the main curricular consideration is meeting the learner's needs as the learner perceives them.

Provide expert curriculum advice

Considerable resources and attention need to be invested in curriculum development, review, and advice. CCEA's responsibilities should be divided between two separate organisations – one for curriculum and the other for assessment and qualifications.

An interim Curriculum Taskforce should lead on the identified areas of reform until the new Curriculum Council is created. The taskforce should prioritise addressing the issue of excessive curriculum content and also lead on other identified priorities.

Ensure assessment supports progression

Processes should be put in place to ensure statutory assessment takes place throughout a learner's time in primary and post-primary school. A unique learner profile should give teachers and parents the necessary information to work with learners to make informed decisions regarding their future pathways.

There should be mandatory limitations on the use of qualification outcomes, such as GCSE and AS Level performance, as *barriers* to educational progression in schools.

The new assessment and qualifications body should oversee vocational qualifications, ensuring that the qualifications used in Northern Ireland meet the needs of learners and employers and that the system is understood.

CHAPTER 5 – TRANSITIONS AND PROGRESSION

Investing in smooth and continual progression

- 5.1 Education should be viewed as a journey of value in itself and not just a route to a specific end or qualification. It should be about providing formative experiences and equipping learners for life. At the heart of education is the experience of the learner. Schooling needs to instil a love of learning that lasts a lifetime and investment is required to ensure everyone can continue their education journey.
- 5.2 Currently the structure and design of education give the impression of a series of separate stages with transition from one to the next being problematic for some learners. Education should be seen as one continuous process that continues beyond adolescence and into adulthood. This journey may have a number of transitions, but these should be smooth and seamless with all partners in education working closer together.
- 5.3 Investment in education sends a clear and unambiguous message regarding its importance.
- 5.4 Education continues later into life. This will be increasingly important with wider changes to the economy. Everyone will need the motivation, desire and ability to retrain and upskill. An important first step is investing in a system that provides new pathways for learners at 14 years old and ensures formal education or training continues to 18 years.

Everyone progressing

- 5.5 Education should be a continuous and progressive process, closely matched to the development of the individual learner. Throughout the education journey, our guiding principle is that the interests of learners come first. Whatever institutions learners attend, what matters is that the ethos, curriculum and pedagogy should be appropriate.
- 5.6 The education journey begins in the early years with each element of schooling adding further educational capital to allow learners to progress to further and/or higher education, employment or training. Education should continue into adulthood: options should exist for adult learners to return to education and the economy needs people to upskill and reskill throughout their adult lives. All this increases the importance of tracking educational progress.
- 5.7 A key feature of any well-organised journey is understanding where you have been and where you are going. The same is true of education. Our vision for education includes learners being on pathways that meet their needs, seamlessly transitioning through each stage and avoiding dead ends. A key element is the use of consistent information about learners to provide a holistic picture and to ensure they can make informed decisions on their educational journey.
- 5.8 We have concluded that to track educational progression there is a need for a consistent approach to recording and ethically sharing information about learners. A learner profile would record the progress of learners and would also be a key source of information when they transition between different stages of education or across institutions. Its usefulness would continue into adult learning.

- 5.9 In the early stages, the profile would be held and updated by the school. It would record a range of academic and non-academic information and provide an overview of the strengths of the learner and potential areas of improvement. It could be used to give parents information not only about academic performance but also about issues such as attendance, attitude, conduct, motivation, wider interests, communication skills, leadership potential and many others. On transfer to post-primary, the family would become the main custodian of the profile. While information about courses studied and levels of attainment would be retained in the profile, it would be open to the family to remove other information. From age 14, the learner would become – and remain – the chief custodian. The profile could be used either to build a more extensive CV or to retain a record of qualifications, achievements, etc.

Measuring what we value

- 5.10 Unfortunately, our education system tends to assess schools and learners based on narrow measures of achievement at specific age points. This approach creates an exaggerated focus on these assessments, making them appear more important than they should be. To prevent this, we need to move toward a more comprehensive system with broader measures of success in education, acknowledging that success takes many forms and will vary from learner to learner.
- 5.11 Currently, the emphasis is on measuring exam performance, which overlooks factors such as the individual's development, and progress over time, and the value added by the institution. This narrow approach creates many problems when assessing complex education journeys. Therefore, we need to adopt broader measures of success which include achievement beyond qualifications that are viewed as academic.
- 5.12 It is worth noting, however, that Northern Ireland performs very well on these measures. Sometimes it is stated that there is a “tail of underachievement” in Northern Ireland. However, data derived from international comparisons would suggest otherwise, although due caution should be taken when making such comparisons⁸⁵. The proportion of pupils not attaining the benchmark of 5+ GCSEs including English and mathematics has fallen steadily in Northern Ireland and in 2018/19 stood at 27.2%. In Wales the figure was 46.2%. This metric stopped being reported on in England in 2015/16, but at that time, the proportion of pupils not achieving this benchmark was 43.2%. At the same time it was 32.1% in Northern Ireland^{86,87,88}.
- 5.13 In the most recent PISA study⁸⁹, the mean reading score in Northern Ireland was significantly above the OECD average. Amongst all countries that participated in PISA 2018, the majority (46) had science scores significantly below Northern Ireland and 16 countries' mean scores

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

86 [School performance | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk/school-performance)

87 [Statistics: GCSEs \(key stage 4\) - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/gcse-key-stage-4)

88 [Examination results | GOV.WALES](https://www.gov.wales/examination-results)

89 PISA is a study of educational achievement organized by the Organisation for Economic Co-operation and Development (OECD). Every 3 years PISA tests 15-year-old pupils from all over the world in reading, mathematics and science. PISA enables governments to benchmark education policy and performance, to make evidence-based decisions and to learn from policies and practices from other countries. Over half a million 15-year-olds from 79 countries and economies took the PISA test in 2018, including all members of the OECD and all 4 countries of the United Kingdom. [PISA 2018 Northern Ireland Executive Summary.PDF \(education-ni.gov.uk\)](https://www.education-ni.gov.uk/pisa-2018-northern-ireland-executive-summary.pdf)

were significantly above Northern Ireland's. In mathematics, Northern Ireland significantly outperformed 45 countries, and was significantly outperformed by 17. Pupils in Northern Ireland significantly outperformed those in 52 of the 56 other PIRLS⁹⁰ participating countries and were outperformed to a statistically significant extent by pupils in only two countries: Singapore and the Republic of Ireland.

- 5.14 Pupils in Northern Ireland also performed well in the Trends in International Mathematics and Science Study⁹¹ (TIMSS) in 2019. The results show that mathematics and science attainment for 9- and 10-year-olds in Northern Ireland remained high. Pupils in Northern Ireland significantly outperformed 51 of the 58 participating countries and were significantly outperformed by only five countries. Reflecting the high performance in mathematics overall in Northern Ireland, just over a quarter of pupils reached the Advanced International Benchmark, the sixth highest percentage internationally. The average score for science was lower than for mathematics, although still above the TIMSS science International Average. Northern Ireland has not participated in TIMSS 2023.⁹²
- 5.15 This demonstrates that whilst there is always room for improvement and we should strive to support our learners to achieve the best possible outcomes, the performance of Northern Ireland's pupils at all ability levels compares favourably to that of the great majority of other nations.
- 5.16 At a system level, the evaluation of educational achievement should go beyond counting GCSE or AS/A Level grades. This fails to do justice to what is being accomplished and undervalues what educators and learners have achieved, especially if they are dealing with complex factors that have an impact on attainment, such as the consequences of disadvantage.
- 5.17 We believe in the need for a broad dashboard of measures to consider different aspects of success at all levels. DE is undertaking work on such a dashboard. We suggest that decisions be taken on its suitability as soon as possible, aided by the newly established Curriculum Taskforce. Such measurements should not appear as punitive but should promote accountability and high standards. Additionally, institutions must have access to effective improvement programmes and be able to learn from best practice.

Building blocks for future success

- 5.18 Elsewhere, we recommend partnership working across health and education on early childhood services and signal the longer-term goal of establishing a body specifically

90 PIRLS is an independent research study organized by the International Association for the Evaluation of Educational Achievement (IEA) which provides data about reading literacy. It takes place every five years and assesses the knowledge and skills of pupils aged 9 to 10 years old (P6 in Northern Ireland). In total, 57 countries along with eight benchmarking participants took part in PIRLS 2021. [PIRLS 2021 in Northern Ireland Full Report. pdf \(education-ni.gov.uk\)](https://education-ni.gov.uk/PIRLS-2021-in-Northern-Ireland-Full-Report.pdf)

91 TIMSS is a research project taking place every four years and providing data about trends in mathematics and science achievement over time. It assesses the knowledge and skills of pupils aged 9-10 (and aged 13-14, although Northern Ireland participated only at the younger age range) around the world and enables researchers to collect extensive background information about pupils' home and learning environments and the quantity, quality and content of teaching. [Trends in International Mathematics and Science Study \(TIMSS\) | Department of Education \(education-ni.gov.uk\)](https://education-ni.gov.uk/Trends-in-International-Mathematics-and-Science-Study-TIMSS-Department-of-Education)

92 As a result of industrial action by teachers, Northern Ireland was unable to gather enough data to participate in TIMSS 2023.

tasked with early intervention and learner support. This is to ensure the smooth progression for young children and their families from the health-focused provision around birth to a greater focus on learning. This transition is already helped by the fact that both early years settings and the Foundation Stage of primary school use a play-based pedagogy. The pedagogy is focused on structured play, pre-literacy skills, outdoor learning and other informal approaches.

- 5.19 High-quality early years education relies on promoting all-round child development through structured play. It also places an emphasis on nurture, particularly in the case of young children who may be experiencing difficulties in their home lives. Such an approach requires a distinctive set of skills within the workforce.
- 5.20 A continuity of approach between ages 2 and 6 years serves to smooth the pathway from nursery into primary. It does, however, require a transition to a more formal style of learning from age six onwards. This transition can be gradual and does not involve a change of school. Class teachers are able to ensure smooth progress in all but a very small number of cases.
- 5.21 The formal school starting age is of secondary importance to the experience of the learner. In the early years, whether it be in pre-school or Key Stage 1, in a nursery or a playgroup, the ethos, curriculum and pedagogy should be consistent, age-appropriate and focused on child development and nurture. The natural curiosity of very young children will help to instil a love of learning.

Smooth transition between primary and post-primary school

- 5.22 There are profound differences between the approach taken in the primary stage of education and in the post-primary stage in relation to curriculum, pedagogy and school organisation, and, as a result, in the nature of learner-teacher relationships.
- 5.23 Although there are variations from school to school, class teaching in primary schools is normally in the hands of a single teacher, sometimes with inputs from a small number of specialists or other colleagues; thus he/she is well placed to provide interdisciplinary as well as subject-based learning. As a result, the relationship between learner and teacher is very close. In post-primary, the learner will be in contact with numerous teachers. The subject-based curriculum requires more rigid timetabling and opportunities for interdisciplinary approaches can be organised only with some effort.
- 5.24 It is important to stress that the abruptness of the change from P7 to Year 8 is not inevitable. The notion that there are such things as primary and post-primary education and that the two are different is an artificial construct. School-based education should be smoothly continuous from beginning to end.
- 5.25 A learner-centred system should seek to reduce or mitigate cliff-edge transitions. We recommend that steps be taken to bring the pupil's experience of the later primary years and the early post-primary years much closer together. This will involve increased specialism in primary and a more consolidated curriculum in the early post-primary stages. This would address the single most disruptive transition in the current educational journey and make an important contribution to reducing the incidence of pupils disengaging shortly after the point of transfer.

Transfer at 11 years old

- 5.26 Transition at age 11 involves leaving primary school and transferring to post-primary schools. This transfer requires change in school, location, peer friendships, curriculum and methods of teaching. These are challenging, exciting and potentially stressful experiences. Many learners, some half of the age cohort^{93,94}, also undergo formal assessment to determine scores that may be used as admission criteria by some post-primary schools. This process is commonly referred to as academic selection or the transfer test⁹⁵.
- 5.27 While Northern Ireland and some parts of England are outliers in using academic selection at age 11, all education systems are, to some extent, selective, including for example, selection for higher education. In addition, even in schools that are non-selective or “partially selective” there may be streaming or setting by ability; this is held by some to help teaching although it is criticised by others. Of course, transferring learners across “streams” or between “sets” within the same school is far more easily achieved than transferring from one institution to another.
- 5.28 Academic selection, along with division along religious/community lines, is the most controversial educational issue in Northern Ireland. This is not the same as saying that it is the most important. However, it does mean that effective and lasting change requires consensus, and compromise on all sides. This should be built on an understanding of what is possible and in alignment with the best long-term interests of learners.
- 5.29 A wide range of considerations must be taken into account and to a degree they are in tension with each other. These include:
- The need to see learners’ interests as paramount.
 - Parental rights of choice and the limitations placed on those rights.
 - The importance of high academic standards and the need to ensure that these are not attained in ways which act against the interests of others.
 - The desirability of achieving parity of esteem between academic and vocational learning.
 - Social attitudes which are influential but beyond the control of the system.
- 5.30 The issue has been considered by previous education reviews. The 2001 Burns Report recommended that the state tests taken by all children should end as soon as possible. A subsequent public consultation demonstrated that “most respondents were unhappy with the existing system of selection at 11, but supportive of some differentiation in education provision. There was no consensus on the way forward, in either political or public discourse.”⁹⁶ The Burns Report⁹⁷ was followed by the Costello Report (2003)⁹⁸, which considered implementation of the Burns recommendations. These reports recommended a system of parent- and pupil-based choice that would be informed by a “pupil profile”.

93 Purdy et al. give these figures for 2022/23 – 8,400 sat AQE and 7,300 sat GL = 61% of cohort.

94 In November 2021, 8,280 children sat the AQE tests and 5,450 sat the PPTC tests (Meredith, 2021), out of a total Year 7 cohort of around 25,000. As a rough indication, we would estimate that around 50% of Year 7 children sit one or both of the tests. A more accurate estimate is not possible as there is no information available about how many children sit both tests. (Impacts of academic selection in Northern Ireland – literature review for Independent Review of Education 2022).

95 A different process of transfer operates in the Craigavon area, known as the “Dickson Model”, which does not include a test at age 11; rather learners move to junior highs via selection at 14.

96 [Impacts of academic selection in Northern Ireland – literature review for Independent Review of Education 2022](#)

97 [The Burns Report | Department of Education \(education-ni.gov.uk\)](#)

98 [The Costello Report in full | Department of Education \(education-ni.gov.uk\)](#)

5.31 Our remit is very broad, unlike those of Burns and Costello, which were focused on a single issue. Our other recommendations will change the overall educational context in ways which, we hope, will make the issue of academic selection less contentious. Among the most relevant are:

- Using quality standardised statutory assessment throughout the education journey, including in primary school.
- Smoothing the curricular experience of the learner between primary and post-primary.
- Introducing pre-vocational pathways and options earlier in the education journey.
- Rationalising sixth-form provision.
- Raising the age of education and training participation to 18 years.
- Ensuring a single department manages a single education journey.
- Prohibiting the use of certain qualifications as barriers to progression.

5.32 The case for change has been strongly expressed to us. The current process perpetuates a socio-economic division between selective and non-selective schools. This has an important impact on the teaching environment. Assessment also affects the curriculum at KS2, with teaching time devoted to test preparation. These factors affect children who do not sit the test as much as those who do. The test cannot be repeated and is taken at a very early age. Research has demonstrated that such tests are fallible as predictors of later performance. For these reasons, we believe that the current arrangements should not continue.

5.33 We have looked at a number of options for change. Some are impracticable for political and social reasons, or would cause significant educational upheaval.

5.34 We propose the following in relation to transition to post-primary school at age 11:

- We recommend that the transfer process move away from being based on a one-off test at age 11 towards use of a pupil profile informed by statutory assessment and enabled by computer adaptive testing, as this technology develops. The information provided for progression purposes should go beyond numeracy and literacy and be consistent with the aims of the curriculum.
- Education should value academic pathways, but these should not be to the detriment of other pathways. Therefore, we recommend a “cap” on the total number of learners in any transferring cohort who can be admitted to post-primary by way of academic selection. DE should develop the specific methodology to be applied. We recommend that the cap initially be set in the range 25–30% of any given Year 8 cohort.
- Schools that are selecting pupils using academic criteria must first give priority to FSM pupils. They should be required to ensure that the proportion of such children admitted is not less than the proportion of first preference applications received. Furthermore, DE should consider approaches to better equalise the distribution of newcomer⁹⁹ pupils across the grammar and non-grammar sectors.
- Flexibility should be introduced to allow learners at age 14 to choose to move to different institutions, to follow specialist pathways and/or take courses that may not be available in their current school. Of course, transfer at 14 years old will depend on the availability of

⁹⁹ A newcomer pupil is one who has enrolled in a school but who does not have the satisfactory language skills to participate fully in the school curriculum, and the wider environment, and does not have a language in common with the teacher, whether that is English or Irish. This has previously been referred to as English as An Additional Language. It does not refer to indigenous pupils who choose to attend an Irish-medium school.

places, but increased movement at this age should be encouraged and facilitated where possible.

- Learners with a statement of SEN should not be classified as supernumerary (as is currently the case). Instead, their Year 8 school place should be identified by the end of their Primary 6 year, in advance of the wider post-primary transfer arrangements¹⁰⁰.
- The requirement to operate the formal development proposal (DP) process to obtain approval for changes related to pupils transferred via academic selection should be removed to enable DE to operate this revised process. Schools should be free to operate a fully selective model, a bilateral model or a non-selective model, within the overall cap on the number of pupils selected based on academic criteria that would be set by DE.

5.35 Seven years after these changes have been implemented (i.e., at the point where all learners in all post-primaries have transferred on the basis of the revised process) DE should review the recommendations in light of their impact on the overall system.

New pathways for learners

5.36 Post-primary education should offer young people a wide range of educational pathways – academic, creative, technical and vocational – all of which should lead to satisfying options for education and training beyond school and good prospects of economically useful and well-rewarded employment thereafter. It is important that progression be straightforward. There should be few instances of learners having to backtrack in the event of wishing to change direction.

5.37 We suggest that age 14 is a key stage for many learners. By this age, learners will expect to be able to exercise some choice in their learning. At the same time, some pupils will be experiencing difficulty with the mainstream curriculum and/or will wish to pursue interests which are more directly vocational and involve more practical approaches to learning. It is essential that all schools take steps to accommodate these needs and preferences as well as providing all learners with first-hand opportunities to better understand the world of work, apprenticeships and college provision.

5.38 All post-primary schools should offer a broad range of academic and vocational options and should collaborate with other schools and with colleges in order to further extend the choices available. Vocational or technical courses need not be provided by the school itself but can be the subject of collaboration with other schools or a local college. These courses should not be narrowly linked to specific occupations but should introduce pupils to the world of work and its requirements. They should, however, involve a significant element of practical learning and are thus likely to focus on particular groups of occupations or areas of the economy.

5.39 The intention would be:

- to ensure that all learners have a greater breadth of experience earlier.
- to provide parity of esteem for different pathways.
- to ensure that learners are better informed to make decisions on their future education post-16.

¹⁰⁰ Volume 2 of the Report explains this as being a “SEN first” admissions policy, which would also operate at entrance into primary school.

- 5.40 Choice brings with it the need for guidance. Knowledge of the world of work should be a feature of the curriculum, at least from the later primary stages. The individual learner will want access to good advice from the point where subject choice becomes a feature of post-primary schooling. This need will be even more pronounced when the learner is beginning to consider options beyond schooling.
- 5.41 The purpose of careers education and guidance is to help people of whatever age to make good choices regarding their occupation and to understand the educational and training requirements that their choices will entail. It should help people reflect on their interests, ambitions, skills and talents. At the same time as helping individuals, careers guidance should serve the needs of the economy.
- 5.42 We need to strengthen the service provided by careers teachers using the expertise of Careers Service staff, some of whom should be attached to area learning communities (ALCs) for this purpose.
- 5.43 The main academic courses provided in schools for post-16 learners will continue to be A Levels. For reasons discussed in the previous section, it is not possible for Northern Ireland, as a small jurisdiction, to develop its own qualifications at this level. However, it should use its influence to try to meet the frequent criticisms of A Levels as content-heavy and inflexible.
- 5.44 Unfortunately, there is a practice in some Northern Ireland schools of preventing some learners progressing beyond Year 1 of their A Level course. This should cease.

Sustainable sixth forms, set up to succeed

- 5.45 For the great majority of young people, sixth form constitutes an important stage in the transition from school to other forms of learning, training and employment. It is, therefore, necessary to consider whether it fulfils that function effectively.
- 5.46 In 2022/23, 160 out of 192 post-primary schools operated a sixth form (83%). Of these, 40 were below the existing viability threshold of 100 pupils recommended in SSP, meaning that a quarter of sixth forms were unsustainable. Smaller sixth forms are unable to offer as wide a choice of courses as a young person would rightly expect and costs per pupil in non-viable sixth forms are unacceptably high. The Bain report suggested that a sixth form should be considered viable only if it had a roll of at least 100. Having examined the effect of size on choice and cost, we have concluded that a sixth form year group size of 120 pupils (i.e. a minimum enrolment of 240 pupils) should be the minimum enrolment.
- 5.47 Elsewhere in our Report we recommend a new and strengthened approach to area planning. This will involve a sustained effort to 'right size' the network of schools based on sustainable and efficient enrolment numbers. This would improve the quality of education, make better use of resources and enable more children and young people to be educated together. Ensuring that all sixth forms are viable in terms of our revised threshold is part of this exercise.
- 5.48 In many cases, the end result will be the establishment of a smaller number of larger sixth forms in existing schools. There are, however, other options which should be considered. These include:

- Establishing **sixth form colleges** by combining sixth forms from a number of post-primary schools within reasonable geographical proximity.
- Establishing **Community Sixth Forms, drawing learners from a number of schools**, within an existing school.
- Forming a **tertiary college** by combining all of the school sixth form provision in an area with a local college campus.

5.49 We do not recommend wholesale reorganisation, which would be both disruptive and unaffordable, but we do suggest that different models, including more innovative solutions, be adopted and pathway projects explored.

Collaboration amongst schools and colleges

5.50 The Entitlement Framework was devised in order to increase the breadth of curricular choice available to all young people attending post-primary schools. All post-primary schools are required to provide pupils with access to a minimum of 21 courses at Key Stage 4 and 21 courses at post-16; of which at least one third must be general and one third applied. It was intended that young people should access some vocational courses by attending a local college for part of the week. ALCs were set up to deliver the Entitlement Framework through collaboration, bringing schools and colleges together to plan local provision.

5.51 Unfortunately, we suggest that this worthy objective has not been fully realised. Different funding arrangements in schools¹⁰¹ and colleges have meant that schools are charged fees if their pupils make use of college courses, thus deterring collaboration. Some schools offer vocational courses in their setting. In some cases, such as health and social care which requires little specialist equipment, this is perfectly legitimate, but there are instances of schools creating facilities for motor vehicle maintenance or wet trades when much better facilities are available at a nearby college.

5.52 A key recommendation is that a unified department be established with the sole responsibility of overseeing the entire education journey. This would entail merging the existing responsibilities of DE with some of those within DfE, specifically with regard to education, learning and skills. Among the benefits of such an arrangement would be a more holistic approach to funding, which would remove the disincentive to collaboration mentioned above.

Leaving education equipped for the future

5.53 Throughout the world, more people are spending longer in education. This trend is evident also in Northern Ireland.

5.54 Over 85% of young people remain in education beyond the age of 16 and over 70% beyond the age of 17¹⁰². The great majority remain at school. University education is also expanding. The number of first degrees awarded each year by universities in the UK almost doubled over

101 All collaborating schools receive funding as a contribution to collaboration. This varies between importing and exporting pupils and also varies between rural and urban settings.

102 Northern Ireland School Census.

the past 25 years and reached almost 450,000 in 2020/21¹⁰³. At the same time, there has been a rapid growth in those studying for second degrees. The number of people embarked on apprenticeships in Northern Ireland grew by 75% in the decade to 2021/22¹⁰⁴. The position in formal FE is rather different. However, the overall trend has been for education and training to expand and for the great majority of young people to be involved in some way.

5.55 For the most part, in Northern Ireland, young people turning 16 years during the school year (between 1 September and 1 July) can leave school after 30 June. If they turn 16 years between 2 July and 31 August, they cannot leave school until 30 June the following year¹⁰⁵. In some deferred cases, the leaving age is 17¹⁰⁶. The school leaving age in the rest of the UK varies from country to country.

- In England, young people can leave school on the last Friday in June if they will be 16 years old by the end of the summer holidays. After this they must do one of the following until they are 18 years old:
 - stay in full-time education, for example at a college.
 - start an apprenticeship or traineeship.
 - spend 20 hours or more a week working or volunteering while in part-time education or training.
- In Scotland if a young person turns 16 years between 1 March and 30 September, they can leave school after 31 May of that year. If they turn 16 years between 1 October and end of February, they can leave at the start of the Christmas holidays in that school year.
- Young people in Wales can leave school on the last Friday in June, as long as they will be 16 years old by the end of that school year's summer holidays.

5.56 We have considered the issue of the education leaving age and have concluded that neither the interests of individuals nor society are well served by allowing young people to opt out of education and/or training at this stage. The key issue is to build a culture of lifelong learning. Accordingly, we recommend that the education participation age be raised to 18 years.

5.57 Raising the age of mandatory participation in education or training provides a clear and unambiguous message regarding the importance of education and that the education journey goes beyond formal schooling and should continue into adulthood. It is important to emphasise that this is not the same as raising the school leaving age. Young people will have the option of continuing their education in either the school or college sectors (or a combination of the two) and will also be able to begin an apprenticeship or some other form of vocational training.

103 [Statistical bulletins and first releases | HESA](#)

104 [ApprenticeshipsNI statistics from August 2013 to July 2022 | Department for the Economy \(economy-ni.gov.uk\)](#)

105 [School leaving age - GOV.UK \(www.gov.uk\)](#)

106 The School Age Act (Northern Ireland) 2022 amended Article 16 of the Education and Libraries (Northern Ireland) Order 1986 to make the leaving age 17 years in some deferred cases. Meaning a case in which a person who attains the age of four years on any date occurring in the period beginning on (and including) 1st April in any year and ending on (and including) 1st July in the same year does not begin to receive full-time education until the following year, having attained the age of five years.

Key recommendations: Transitions and progression

Use broad measures of success

A variety of measurement tools should be used to assess the performance of individuals, institutions and the entire system. These assessments should seek to place greater emphasis on a broader range of educational outcomes and on the value added by the institution.

Modify the transition process

In order to create a seamless transition, reduce differences between academically selective and non-selective schools, and move towards greater parity of esteem between different types of schools, the process should be reformed to:

- Limit the number of students transferring to post-primary schools based on academic criteria.
- Ensure that the percentage of students admitted through this method who are eligible for FSM reflects the proportion of applications received from FSM-eligible students.
- Consider approaches to better equalise the distribution of newcomer pupils across the grammar and non-grammar sectors.
- Offer increased flexibility at age 14 to allow students to transfer to different institutions if they wish.
- Provide learners with a right to remain in school to take their A Levels (or other post-16 qualifications offered by the school) should they wish, either by remaining in their “home” school (should there be sixth form provision) or having a right of entry to another local sixth form provision.
- Eliminate the formal DP process to obtain approval for changes related to pupils transferring via academic selection.
- As soon as is practicable, transition away from using a single test as a means of selection for transfer to post-primary school. Instead use a broader pupil profile.

Provide new curricular pathways for all at 14

All learners, starting from age 14, should explore a wider range of educational pathways including pre-vocational and technical education and learning about the world of work. To achieve this, schools need to collaborate more effectively while also working closely with the FE sector to provide increased choice and flexibility.

Reform the Careers Service to promote understanding of the world of work

The existing Careers Service should be reconfigured, re-invigorated and reskilled. Suitably trained, full-time careers officers should be embedded in ALCs to offer careers guidance and advice to young learners and to act as links to local employers.

A careers portal should be developed that is open to contributions from employers, professional bodies and educational institutions.

Raise the age of educational participation

All learners should, by law, remain in education or apprenticeship/training until age 18.

This could involve full-time education or training, or spending 20 hours or more a week working or volunteering while in part-time education or training.

CHAPTER 6 – FURTHER EDUCATION, HIGHER EDUCATION AND LIFELONG LEARNING

Investing in the future workforce

- 6.1 The goal of all excellent education systems is to ensure that every learner has the opportunity to progress and can access pathways which best suit their interests and abilities. There should be continual progression for all learners from early education to post-16 and into employment, with learners understanding the world of work from an early age.
- 6.2 Northern Ireland needs to invest in its future workforce. This means investing to enable local universities to retain talent as well as attract talent from elsewhere; and to support under-qualified adults to enter the labour market. All of this must be closely aligned with the needs of the economy.
- 6.3 There are aspects of FE in Northern Ireland which are excellent. Continuing high levels of investment in the FE sector's estate is ensuring that all students have easy access to learning resources that are generally cutting edge and underpin exceptionally well the delivery of a curriculum matched to the needs of the economy. In particular, there is well-thought-through investment in digital learning platforms used by staff and students to good effect to enhance and support high levels of achievement. These platforms are also encouraging the use of self-directed learning. There is ongoing investment in developing the capacity of lecturers to enhance their digital skillsets and make best use of digital learning resources.
- 6.4 However, a combination of falling rolls and rising costs indicates serious problems which need to be addressed to ensure value for money for the considerable investment, and best use of the state-of-the-art estate. The interfaces between colleges, schools and universities require attention to reduce duplication and unnecessary competition.
- 6.5 Our review is concerned with education as a whole, although schools are necessarily the main focus. Our vision for the future education system includes a thriving college sector, valuable and valued vocational pathways, higher education positioned to attract and retain talent, and opportunities for all to re-enter education at any age.

The need for a thriving and value for money college sector

Challenges

- 6.6 Colleges play an enormously important role in the education system. They have a two-fold mission. Firstly, they play a critical role in fostering a robust and dynamic economy by cultivating advanced professional and technical skills at increasingly higher levels and through facilitating innovation among employers. Secondly, they promote social inclusion by providing individuals who have limited or no educational qualifications, or those who face other learning obstacles, with the requisite abilities and certifications required to secure employment and participate actively in the economy. Access to learning throughout life, especially for adults with few or no qualifications, is an essential feature of an equitable society.

- 6.7 Its strategic objectives are described as being¹⁰⁷:
- to support regional economic development and, in particular, to provide the skills necessary for the knowledge-based economy;
 - to increase participation and widen access for those previously under-represented in the sector; and
 - to improve the quality of provision and enhance standards of performance.
- 6.8 FE is the sector most immediately linked to the needs of the employer and the economy. It seeks to strengthen and enhance the skills profile of Northern Ireland by addressing the skills deficit and underpinning the development of a successful regional economy. Colleges have vital responsibilities in ensuring that Northern Ireland has the mix of skills that it needs to prosper.
- 6.9 Despite the FE sector's curricular strengths and economic relevance, the sector is experiencing significant challenges. These include:
- competition from schools (from sixth form provision) and universities;
 - a confusing array of qualifications;
 - a weak culture of lifelong learning among adults (seen by a reduction in the number of adults attending regulated courses); and
 - a reduced number of non-regulated/hobby courses in colleges.
- 6.10 Our Report provides potential solutions to some of the challenges faced. By bringing together policy responsibility for the whole of the education journey to a single Executive department there should be a greater focus on eliminating unwelcome competition and duplication across different stages of the journey – with clearer lines of demarcation. Better articulation of vocational qualifications is also required. Furthermore, increasing the age of educational participation to 18 years and introducing a right to a basic level of education (no matter what age) should reinforce the importance of education and lifelong learning.
- 6.11 The extensive remit of the college sector is a source of strength. However, it also serves to spread confusion about its mission. The public is in no doubt about the purpose of schools. The role of universities is also generally understood although many people underestimate the importance of research. This is much less true of colleges. Furthermore, their role in relation to "second-chance" education probably contributes to an erroneous impression of low status. It is absolutely essential that such provision be available in any society which seeks to be equitable. There is an increasing need to retrain and upskill throughout adult life. There is thus a need to raise the profile of the sector and increase the esteem in which it is held.
- 6.12 FE sector costs have risen by more than £50m over a 6-year period. The recurrent funding requirement was £226m in 2022/23 (over a quarter of the DfE Resource DEL budget). Staff costs are projected to increase by a minimum of £5m per year. Colleges also face significant cost of living inflationary pressures – primarily energy and public finance initiative (PFI) costs – which resulted in an additional £6m resource requirement in 2022/23.
- 6.13 The FE sector is experiencing significant barriers to meeting the demand for skills at National

107 <https://www.economy-ni.gov.uk/topics/further-education/dfes-role-further-education>

Qualifications Framework (NQF) levels 3 – 5. FE activity data¹⁰⁸ shows that recruitment levels to FE have been steadily declining and colleges have been unable to attract enough learners to meet the skills demand. There was a 28.2% decline in the number of students enrolled over the period 2017/18 to 2020/21, albeit with signs of recovery in 2021/22 with an increase of 10.2%. Over this period, the number of students aged 19 and under enrolled on regulated courses declined by 22.2%.

- 6.14 Declining student numbers at FE colleges and increasing costs ultimately result in the costs per student rising. Such a trend is obviously unsustainable.

Strengths

- 6.15 FE has many strengths including the quality of its estate and access to first-class technical equipment. The FE workforce is also a strength, with many staff having valuable experience of working in industry.
- 6.16 FE's relationship with the economy including local businesses is another key strength and allows the sector to tailor its offering to respond to both strategic and local needs. The geographical spread of colleges across Northern Ireland makes them accessible to all. If fully utilised, this would be an ideal platform for a thriving adult learning programme.
- 6.17 During the academic year 2019/20, ETI was commissioned by DfE to evaluate the effectiveness of curriculum planning at level 3 across the six regional colleges. The resulting report noted a number of key strengths, including that the quality of the colleges' facilities and learning resources range from good to outstanding. Colleges are consistently welcoming, highly respected and valued by the students. They are well-maintained, with good investment planning helping to maintain the curriculum offer in line with the pace of change in industry.

The future of FE

- 6.18 Education providers need to see themselves as part of a larger system which exists for the benefit of learners. Collaboration rather than competition is essential.
- 6.19 If Northern Ireland is to retain a thriving college sector, urgent and effective action is required. There is already a framework to transform 14–19-year-old education and training¹⁰⁹ and this needs to be fully implemented as a first step. However, delivery across two departments is structurally challenging.
- 6.20 A single department with responsibility for the entirety of the education system – from early years to lifelong learning (and everything in between) – would help to deliver a single education policy framework that works for every aspect of education. This would, in turn, lead to greater consistency in the funding model and a move away from a scenario where one part of education (colleges) has to charge another (schools) to collaborate. We are, of course, concerned with the value for money of colleges and steps should be taken to reduce costs in the college sector to align with appropriate benchmarked costs in Great Britain and the Republic of Ireland.

108 [Further Education Sector Activity in Northern Ireland: 2017/18 to 2021/22 \(economy-ni.gov.uk\)](https://www.economy-ni.gov.uk)

109 [Developing A More Strategic Approach to 14–19 Education and Training. A Framework to Transform 14–19 Education and Training Provision. \(education-ni.gov.uk\)](https://www.education-ni.gov.uk)

- 6.21 FE also has a significant task to communicate its unique mission effectively to a wide group of potential customers. This is a more complex task than in the case of schools or HE. There needs to be a clearer understanding of the respective roles and responsibility of schooling, FE and HE. Collaboration among sectors is essential but there are places where clear lines of demarcation are required.
- 6.22 We suggest that colleges should be the main providers of specialist vocational and technical education at levels 1 to 5 with well-defined articulation routes into university thereafter. As generally very well-equipped locally based institutions, colleges have great advantages in being accessible to a wide client group, including many people in employment.
- 6.23 The provision of higher-level vocational courses including apprenticeships is often best carried out in close collaboration with the universities. College campuses can offer locally based tuition and support. Higher level courses should, however, be designed at a regional level with common content and assessment processes. Most should offer articulation into degree courses. We therefore recommend that the universities be closely involved in course design, and should validate course assessments. The system should thus offer a dispersed delivery system for a Northern Ireland-wide structure of vocational courses spanning the further/higher education boundary. Many students will be able to emerge holding degree-level qualifications awarded by one or other of the two Northern Ireland universities. The detailed design of this system should be an early priority for joint action by the colleges, the new department, the universities and the Curriculum Council.
- 6.24 Northern Ireland has made significant progress in establishing a range of apprenticeships. This kind of provision is likely to grow in importance over the coming 20 years. The brand has widespread recognition and does not suffer to the same extent as other vocational learning from the public perception of being second-best when compared with academic routes leading into higher education. The apprenticeship route offers the great advantage of training combined with employment. It also encourages the development of social and soft skills.
- 6.25 In the immediate future, we see the priorities for the expansion of provision as the creation of apprenticeships relevant to the public sector and the extension of availability beyond the age of 25 years. In effect, apprenticeships should become an all-age programme which can be accessed throughout adult life. Another issue requiring to be addressed at an early stage is the current gender imbalance.
- 6.26 It is important to engage a larger number of employers in apprenticeship schemes. Currently some employers do not participate but recruit young people who have completed apprenticeships provided through others. There are also difficulties in engaging with small and medium-sized enterprises. However, such businesses make up a large part of key sectors such as software design. The work experience which could be provided by such enterprises is likely to be more typical of the working environment of the future than that found in large-scale businesses. Although awareness of apprenticeships is high, there are employers who see them as invariably inferior to the academic route, leading to the employment of graduates. Work remains to be done in disseminating the benefits of this route.

- 6.27 The current system of college governance came into existence slightly more than a decade ago when 16 local colleges were amalgamated into six regional colleges¹¹⁰. This approach has reduced duplication in course provision and achieved some economies of scale for management costs (despite the absence of shared services). It has also created a capacity for more strategic management although adverse circumstances have meant that the positive impact of this on the sector is difficult to discern.
- 6.28 Despite its achievements, the current model can be seen as an uneasy compromise. Grouping 16 largely single-campus organisations into six regional colleges inevitably sacrificed some element of responsiveness to local circumstances and the needs of local business. Five of the six colleges cover large geographical areas. At the same time, the opportunity was not taken to maximise the benefits of economies of scale.
- 6.29 We believe that the best way forward would be a single college governance model with a Northern Ireland wide direction and close connections to economic development and skills strategies. This should, however, be combined with increased freedom of action at a more local level, which will generally be that of the individual campus. In any large, geographically dispersed organisation, a critical success factor is striking the right balance between centrally determined strategy and local responsiveness. The detailed design of the management structure of the single college is thus a matter of great importance.
- 6.30 An early priority for the new department should be to establish shared service arrangements for a range of college activities including HR, finance and legal advice. Over time, it should be possible for some services to be provided in common with the school sector.

Retaining and attracting talent in higher education

- 6.31 Our Terms of Reference do not include higher education (except in relation to the FE/HE interface). Furthermore, the role of universities extends well beyond issues of learning and teaching, which are the main focus of this Report. They are developers of new knowledge and important economic players in their own right. It would not be appropriate for us to look at the full range of university activities or even to make suggestions in relation to those taught courses which are most similar to the provision in other sectors. Instead, we have considered only two specific issues (apart from higher-level vocational courses, which are mentioned above): these are higher education funding and the need to retain talent in Northern Ireland.
- 6.32 Due to the significant level of public funding provided to the universities, DfE has to control spending to ensure it stays within its budget allocation. The Maximum Student Number (MaSN) is the control mechanism used to ensure this. Queen's University (QUB), Ulster University (UU) and the six FE colleges all receive an annual MaSN allocation from DfE. The MaSN applies primarily to full-time undergraduates who are domiciled in Northern Ireland or the Republic of Ireland and enrolled in Northern Ireland. It does not curtail the recruitment of part-time or post-graduate students, students from other parts of the UK, or international students, with the latter representing an important income stream for the universities. The main purpose of the MaSN is to control the two main costs associated with full-time undergraduate students: student support costs and teaching grant costs.

110 [Further Education Colleges in Northern Ireland \(inputyouth.co.uk\)](http://inputyouth.co.uk)

- 6.33 Historically, both UU and QUB have reported being significantly underfunded compared to their English and Scottish counterparts, with a funding gap in the order of £21.3m (£760 per student place) for the last ten years. The universities report that per-unit income for universities is less than English competitors enjoy and that this has implications for institutions' ability to invest and compete for students from Great Britain and international students (who sit outside the cap)¹¹¹. DfE's findings supported these claims in 2016. However, since then there have been several changes which have had an impact on the funding per student in both England and Scotland. Recent changes to the subject price bands and a shift in the types of subjects being studied have further reduced the funding gap with England.
- 6.34 We understand analysis indicates that any funding gap between the Northern Ireland HE sector and the HE sector in other parts of the UK is much less than would previously have been the case. The increase in tuition fees in 2022/23 for Northern Ireland will cause the reported gap to narrow further as tuition fees elsewhere in the UK have remained static for a number of years.
- 6.35 Each year, a significant number of young people leaves every region of the UK to attend a university in another part of the country. This is a matter of personal choice. Living away from home and in a different environment can be a very useful formative experience. In 2020/21, 75% of Northern Ireland students enrolled in UK Higher Education Institutions (HEIs) attended universities in Northern Ireland while 25% studied at institutions elsewhere in the UK.
- 6.36 The influence of the MaSN cap on learners' decisions on HE placement is contested. The March 2021 publication¹¹² by Pivotal suggested that such educational migration might have been partly influenced by the cap. However, this was followed by a further qualitative piece¹¹³, again by Pivotal, that highlighted factors such as poor community relations and political instability as having the greatest influence. Analysis of the number of "reluctant leavers"¹¹⁴ and its relationship with the relevant total MaSN allocation does not show a direct correlation, i.e., increases or decreases in the MaSN did not result in a corresponding increase or decrease in "reluctant leavers."
- 6.37 Across the UK regions, the movement of students in and out varies. In Scotland and Wales, the inflow of students is higher than its outflow; the position is reversed in England with a considerably higher outflow than inflow. In the case of Northern Ireland, the outflow is large and the inflow small¹¹⁵. Some have suggested that the difficulty is not the flow of students out of Northern Ireland but the lack of a corresponding inflow from elsewhere. But even if there were many more applicants to Northern Ireland HEIs from other parts of the UK than is the case, the lack of sufficient places for local students could still mean an annual loss of talent from Northern Ireland.
- 6.38 We believe that the current situation is deeply injurious to Northern Ireland's interests. A small economy at the western periphery of Europe with a legacy of recent conflict needs to attract inward investment and is most likely to do so on the basis of offering a highly

111 Information provided by QUB and UU.

112 [Pivotal Report March 2021 V4 \(pivotalppf.org\)](https://pivotalppf.org/Pivotal_Report_March_2021_V4)

113 [Stay-or-go-final.pdf \(pivotalppf.org\)](https://pivotalppf.org/Stay-or-go-final.pdf)

114 Defined as those Northern Ireland-domiciled students who had a firm choice for a Northern Ireland HEI but ended up accepting a place at a Great Britain HEI.

115 [Pivotal_Report_March_2021_V4 \(pivotalppf.org\)](https://pivotalppf.org/Pivotal_Report_March_2021_V4)

skilled workforce. The qualifications of school leavers, the quality of vocational education and the strength of apprenticeship schemes at every level are all factors that investors and employers will consider carefully. However, so too are the prospects of recruiting high-quality graduates with appropriate qualifications. These prospects are seriously weakened by the regular 'export' of talent. Investment to deal with this issue is required. The number of places at Northern Ireland's universities should be progressively increased until they are able to cater for a similar proportion of the population as elsewhere in the UK.

An open door back to education

- 6.39 The task for the education service as a whole is to equip people with the knowledge, skills and personal qualities that will allow them to secure employment which will sustain a fulfilling lifestyle with which they are content. This is becoming an increasingly challenging task for both schooling and further or higher education to accomplish. The changing economy and new technology are influencing what skills are required for the modern workforce. In turn, this means that an increasing share of education will need to take place post-18.
- 6.40 Adults require access to further training and education to an unprecedented extent. Over the next 20 years that trend will accelerate. Many existing areas of employment will disappear while others will expand or emerge for the first time. Even where a job continues to exist, its content and the skills required are likely to be transformed.
- 6.41 This is not to imply that every aspect of these developments requires the attention or funding of the state. The state is not the only source of funding. Employers have a major role to play. So far as employed people are concerned, work-related learning should largely be financed by them. There will, however, be many people who have no employer but whose need for additional learning and new skills is pressing. The state, therefore, needs to ensure that there are smooth pathways into education/training at all stages of adult life.
- 6.42 The state, aided by voluntary organisations, will be the main provider of adult basic education and education designed to facilitate entry/re-entry to the labour market.
- 6.43 Courses at Levels 1 and 2 in literacy, numeracy and digital skills and courses at the same levels in English for Speakers of Other Languages (ESOL) are currently available free of charge to a number of groups of adults who meet the eligibility criteria. We recommend that all adults with few or no qualifications should be able to access the literacy, numeracy and digital skills courses without charge and that the ESOL courses should be available to all newcomers to Northern Ireland who have a limited command of English.

Key recommendations: Further education, higher education and lifelong learning

Promote a cost effective, thriving and value for money college sector

Colleges are a vital part of the education system but there is insufficient understanding of their role. They are the main suppliers of vocational education and thus a crucial support for the economy. They also provide a route forward for adults with poor educational qualifications.

There is a need to simplify the system of qualifications, enhance collaboration with both schools and universities, secure closer involvement with business and industry, ensure greater cost-effectiveness in service delivery and reform governance structures.

A single college governance model with fully integrated shared services but operating via local campuses should replace the current regional colleges. In order to promote responsiveness to local economic circumstances and ensure value for money, increased decision-making powers should be delegated to campus level.

Retain local talent

The number of places available at Northern Ireland universities should be progressively increased until the ratio of undergraduate places (in Northern Ireland universities) to the age cohort matches that in the rest of the UK. To fund this growth, the fee level must be modified. The process should commence as soon as feasible with a progressive 10% rise. Fee parity with England should be accomplished within a decade.

The expansion in places should focus on courses which fill skills gaps, meet economic needs and enhance the opportunities available to students.

Give everybody the opportunity to access basic education throughout their lifetime free of charge

Courses that offer literacy, numeracy and digital skills development at levels 1 and 2 should be available free of charge to all unqualified adults, as these skills offer access to the labour market. Additionally, courses in English as an additional language should be offered at the same levels to assist newcomer adults.

CHAPTER 7 – SUPPORTING THE EDUCATION WORKFORCE

Investing in the education workforce

- 7.1 No education system can be better than the quality of its educators. Northern Ireland is fortunate in having a well-qualified and highly committed teaching profession. Throughout our review we have been impressed with the schools and colleges we have visited and the educators we have met. The workforce is the greatest strength of education in Northern Ireland.
- 7.2 For an education system to be excellent, it must prioritise investment in its educators – enabling and promoting a culture of continuous improvement and collaboration. This investment should include providing ample time, space and opportunity for professional development, recognising the changing role of educators, empowering them to thrive, and valuing education as a profession.
- 7.3 The purpose of schooling and the role of educators has changed dramatically since compulsory education was introduced over 100 years ago. Education goes beyond teaching and learning. It aims to develop young people as individuals, as contributors to society and as contributors to the economy and environment.
- 7.4 The expanding remit of education has a direct impact on the demands placed on the educator and underscores the need to invest in the workforce and its future leaders. These demands are likely to increase and become more varied in the coming years. Workload is a key concern.
- 7.5 It is important to recognise this and equip educators with the necessary skills. At the same time, it is essential to value the entire education workforce and open up the potential for increased multi-disciplinary working, drawing in other professional expertise as required. Schools, colleges and other institutions need access to a wider range of specialist staff as well as access to further training.
- 7.6 It is essential that there should be clear developmental pathways enabling educators to be prepared for their first leadership responsibilities, for middle leadership positions and for senior posts including principal. These pathways should include opportunities such as short-term secondments and work shadowing, and working with leaders in fields other than education. Leadership courses should encourage creative and divergent thinking and should cultivate a capacity for innovation.

A multi-disciplinary workforce

- 7.7 Teachers and lecturers are not the only members of staff who make a vital contribution. Many professionals and para-professionals, including educational psychologists, speech and language therapists, youth workers and classroom assistants, have vital roles. Governors give their effort and expertise on a voluntary basis.
- 7.8 There are numerous recommendations in our Report that rely on a multi-disciplinary workforce and learners having direct access to specialist services, whether provided directly

or brought in from outside. This is particularly true in relation to supporting learners with special educational needs and the provision of mental health and wellbeing interventions.

- 7.9 Our vision would be for it to be commonplace for schools, colleges and other educational institutions to have a truly multi-disciplinary team with classroom teachers directly supported by a range of other specialists. Early years settings and primary schools should have more direct access to play therapists, speech and language therapists and educational psychologists. This would improve the experience of learners and provide specialist skills to aid early intervention for learners who need additional help. These skills are also required in post-primary and post-16 provision. However, at these stages there is also a greater need for access to counselling services, welfare officers and youth workers, as well as others.
- 7.10 All schools, colleges and settings would benefit from increased involvement of local community and voluntary services. At all stages, the aim must be to offer learners a service that best uses all the expertise available to it in order to meet the full range of their educational needs.
- 7.11 Of course, this would require significant investment. It also requires institutions to have the flexibility to determine the size and composition of their staff and have the ability to share staff across a number of different institutions.

An equipped workforce

- 7.12 Initial Teacher Education (ITE) is of fundamental importance. Teachers entering the profession must have the skills and expertise to function effectively in the classroom from the outset. ITE should be relevant and up to date. It is essential that topics such as special educational needs and pastoral care be properly covered. Subject content needs to keep pace with developments in society and the economy. Student teachers need to have experience of more than one sector of education. Ideally, they should also have experience of a placement in a special school or unit.
- 7.13 Northern Ireland has a small but complex system of teacher education. Two universities and two university colleges (both attached to the same university) are involved. The entire training system is small although there is considerable scope for the greater involvement of the four institutions in the later professional development of teachers.
- 7.14 Given our recommendation regarding a single department, it will be for that new organisation to carry out a critical review of the current ITE provision both in terms of structures and delivery. The purpose of such a review should be to improve efficiency, remove duplication and improve effectiveness. We are of the view that a new delivery model may be required within our 20-year time frame and the end goal should be a unified model of delivery, a single core curriculum for ITE and a greater emphasis on continuing professional development. The future model should also exploit the research expertise within the colleges and HE as a whole.
- 7.15 ITE is a beginning, not an end. Those entering the profession need a well-organised period of induction. Furthermore, they need to update and extend their skills, knowledge and experience throughout working life. All teaching staff are under an obligation to undertake CPD on a regular basis. This development should be recorded. However, it is important to keep bureaucracy to a minimum.

- 7.16 DE's *Strategy for Teacher Professional Learning: Learning Leaders*¹¹⁶ remains relevant; however, it needs to be fully implemented and properly resourced.
- 7.17 During our Review we have sought to better understand how funding for continuous professional development is managed and what resource is available. The nature of the delivery of CPD has meant that these questions are difficult to answer. There is a range of organisations involved in CPD, both public and private. For example, the EA provides training, as do some of the sectoral bodies. Courses are also available from local HE providers, including the ITE colleges. There are also, of course, private operators. We recommend that a more formal structure be developed for professional development. This would involve:
- The new Education Workforce Council (see section on “A professional workforce”) setting down expectations both in relation to the period of induction into the profession and continuing professional development thereafter.
 - All educational institutions having in place a policy on CPD for their staff.
 - A centralised fund managed by the new department that could be allocated to schools with such a policy in place.
 - Educational institutions having delegated responsibility to source CPD via external providers, alongside sharing good practice within and across institutions.
 - Supporting collaborative networks of schools at all levels.
 - Monitoring the impact of such professional development by schools.
- 7.18 Effective professional development depends on systematic professional review. The details of this process should be determined by the Education Workforce Council but should be based on these principles, which we have set out in relation to teachers, but also apply to lecturers and other educational professionals:
- Reviews should normally take place annually or more frequently in cases of concern.
 - Review meetings should involve the teacher and his/her manager.
 - The meeting should consider strengths of the teacher's practice and areas for development, the teacher's interests and aspirations and any relevant implications of the institution's plans for its own future development.
 - The outcome of the meeting should be agreement about the teacher's professional development over the coming year, including the time to be made available and how any costs are to be met.
 - The agreement about CPD should take account of the needs of the institution and also the needs and interests of the teacher.
- 7.19 Professional development should not be equated with attendance at courses. Involvement in professional networks, taking part in mentoring, participating in exchanges and short secondments are all highly valid forms of development. The role of ALCs will be increasingly important as their functions are extended. They offer schools, colleges and others an opportunity to collaborate in meeting the development needs of their staff.
- 7.20 A very important element in professional development is preparation for leadership. This is not only about helping people to step up to a principalship. Leadership training must start at a much earlier stage. It involves encouraging divergent thinking and independence of mind as well as promoting a wide range of personal and interpersonal qualities.

116 [Strategy for Teacher Professional Learning: Learning Leaders](#)

A valued workforce

- 7.21 Our vision for education is that teachers, lecturers, carers and support workers in education should be valued and supported as skilled professionals and role models. The education system should invest significantly in the professional development of its workforce to deliver the best outcomes possible for learners. Educators should have the time, space and opportunity to upskill to improve themselves and best support their learners.
- 7.22 We have not seen it as part of our remit to comment on teachers' salaries or working conditions. However, we obviously consider it essential that these should reflect the value that society attaches to education and should be such as to ensure the recruitment and retention of highly motivated and capable teachers in all sectors and in all the specialisms required.
- 7.23 The Jordanstown Agreement sets out teachers' terms and conditions of employment. However, these are now almost 40 years old. The role of educators has changed dramatically in recent years and continues to do so – it is important that terms and conditions be regularly reviewed to reflect changes in education and teaching. A review of the Jordanstown Agreement is overdue. It needs to ensure that terms and conditions meet the needs of a modern education system and that due consideration is given to concerns over workload.
- 7.24 While Northern Ireland has over many years had a good supply of teachers – indeed historically, there has been a risk of general over-supply – specific shortages are emerging as well as concerns regarding the recruitment of future leaders. In terms of specific shortages, there is a need to address gaps in mathematics and other STEM subjects.
- 7.25 The Irish-medium sector is an integral and valuable part of the education landscape and provides an essential opportunity for Irish speakers and Irish speaking. It is a small sector, but it is growing with the number of pupils attending Irish-medium schools increasing steadily since 2015/16, with a 32.3% (to 2022/23) increase being observed over the last 8 years¹¹⁷. Such growth brings challenges in terms of accommodation, resources for learners and availability of teaching staff. Regarding the former, it is important that the accommodation needs of the sector are properly addressed, not least in circumstances where there is demonstrable demand. In terms of teaching staff, we believe that new entry routes are required for Irish speakers without teaching qualifications and for teachers with an interest in Irish language.
- 7.26 Furthermore, we have already highlighted the need for greater emphasis on SEN in all initial teacher education courses as well as the importance of a 1-year course for university graduates leading to the award of a Post-Graduate Certificate in Education (PGCE) in Special Educational Needs.
- 7.27 We are also concerned that the proportion of men in the teaching profession has been declining over many years and now stands at under 23%. Male role models could play a useful part in addressing the problem of underachievement among working-class boys. Steps should, therefore, be taken to encourage more men into teaching.
- 7.28 Educational institutions are complex organisations. The task of leading them is highly demanding. It is imperative that leaders are well supported, including via professional

¹¹⁷ Panel analysis based on school enrolments data. (School enrolments – Northern Ireland summary data | Department of Education (education-ni.gov.uk))

development, and that bureaucratic demands are minimised. There are signs of difficulty in recruitment to senior posts, possibly because of workload pressures and the desire for a better work-life balance. It has been put to us that school leadership is a less attractive occupation than it once was. This is a significant concern.

- 7.29 In tandem with the review of the Jordanstown Agreement, the new department should be developing a Workforce Strategy to bring forward innovative solutions to attract and retain teachers, improve professional development, target specific workforce shortages and ensure future leaders are empowered and supported.

A flexible workforce

- 7.30 The teaching workforce in Northern Ireland's schools is exceptionally stable. Many teachers spend very long periods in a single school. Some build their careers by being promoted to more senior positions within the same school. This stability has important advantages in terms of building relationships among staff and with learners. However, there are also downsides. The school does not benefit from fresh experience or contact with a changing range of practice. Teachers often have a very restricted personal experience. In particular, they often work only in one sector and have very limited knowledge of others.
- 7.31 It is unclear why movement within the profession is so limited. It has been suggested that the number of employers – the EA, Council for Catholic Maintained Schools (CCMS) and individual boards of governors – is an inhibiting factor. However, this is not the case in other UK jurisdictions where there are also multiple employers. Whatever the reason, steps should be taken to promote increased movement. Moving towards a single employer for schools would bring some improvement. There would be merit in discussion between the main employers (including the Governing Bodies Association as representing voluntary grammar schools) to explore ways of making movement easier.
- 7.32 Secondments and exchanges could be used to broaden the experience of individuals at the same time as contributing to the process of school improvement. The London Challenge¹¹⁸ provided a good example of how such mechanisms can be used to spread good practice or give practical support to schools or departments which are struggling.

A professional workforce

- 7.33 Teaching should be viewed as a valued, self-confident profession with high standards. The public needs to have confidence that practice and conduct are maintained at a high level. We conclude that this could best be achieved by re-establishing a General Teaching Council for Northern Ireland (GTCNI). It would be a requirement for teachers in schools to be registered with the Council.
- 7.34 The primary function of the Council should be to serve the public interest by guaranteeing standards and acting in cases of difficulty. Its membership should reflect this with the public interest being paramount at the same time as ensuring the presence of a strong teacher

118 The London Challenge was a school improvement programme launched in 2003. It was primarily aimed at secondary schools in London but was subsequently expanded to include primary schools and additional locations. It was intended to raise standards in poorly performing schools, narrow the attainment gap between pupils in London and create more "good" and "outstanding" schools. (<https://www.gov.uk/government/publications/evaluation-of-the-city-challenge-programme>)

voice. It should have a majority of lay members who are selected using skills-based criteria and a public appointments process. They should include members drawn from business and industry, academia and persons able to represent the views of parents and young people.

7.35 The functions of the Council should be as follows:

- Securing agreement on the professional standards to which teachers must adhere.
- Co-designing, with key stakeholders, an agreed common curriculum for ITE.
- Co-designing with stakeholders an induction phase covering a period of 2–3 years after first entry to employment in teaching.
- Managing a register of teachers. This involves initial registration of teachers, maintaining registration and removing teachers from the register on grounds of incompetence, unacceptable unprofessional behaviour, or any other disbarring activity such as conviction for serious criminal offences. There should be a mechanism to ensure that Courts refer cases of criminal conviction to the body. Employers should also be obliged to report cases involving serious concerns to the body.
- Ensuring regular professional review and continuing professional development. This should be monitored and should be a universal professional obligation.
- Setting out a code of conduct and competencies.
- Managing complaints (recording, investigating, actioning, etc.).
- Providing professional advice and support to schools/employers.

7.36 As soon as practicable, this requirement should be extended to cover all professionals and para-professionals employed within the publicly funded education service, other than in universities – with the GTCNI becoming an Education Workforce Council. The Council would continue to take responsibility for the registration of teachers in schools and early years establishments and for all college lecturers. However, it would also extend its functions to other categories of professional and para-professional staff in the education service. This extension of remit will take time and will be for the new department to manage. The first step will be to demonstrate effective working of the re-established Teaching Council.

Key Recommendations: Supporting the education workforce

Value the education workforce

A Workforce Strategy must be developed to address workforce shortages and workload issues, with the aim of attracting and retaining teachers. The strategy should focus on empowering and supporting future leaders. A review of the Jordanstown Agreement is overdue, with new terms and conditions required to reflect changes in the education landscape.

Education must invest in professional development of its entire workforce to ensure a culture of continuous improvement and sharing of best practice. This requires an increase in resource and ensuring teachers have the necessary time to undertake professional development. The centrally held resource should be increased and then allocated to schools. Within their overall resource as thus augmented, schools would have to determine the priority attached to professional development. All educational institutions must develop policies for professional review and development. The impact of CPD should be carefully monitored.

The GTCNI must be re-established to oversee adherence to professional standards and conduct. As soon as practicable, this requirement should be extended to cover all professionals and para-professionals employed within the publicly funded education service, other than in universities – with the GTCNI becoming an Education Workforce Council.

CHAPTER 8 – STRUCTURES AND SINGLE SYSTEM

Investing in an excellent system where learners learn together

- 8.1 A core principle is that the needs of the learner far outweigh the wants of an institution. This principle should permeate the whole education system. The structures supporting the delivery and administration of education should be designed primarily with the learner in mind. They should enable collaborative working between institutions.
- 8.2 There are legitimate arguments that the current design is complex and cumbersome and there are examples of duplicated provision that can lead to wasted resources (although the extent of this is often exaggerated). Equally important is the significant evidence of poor service delivery for learners and institutions and widespread frustration among practitioners. There is potential to simplify the structures of education, create greater consistency and ensure all learners and all institutions receive excellent and equitable services.
- 8.3 More should be done to ensure that learners from different backgrounds learn together in the classroom on a regular basis. There is significant appetite to do more to improve integration within our schools – for the benefit of the learner and society as a whole. This cannot be forced, nor can it be artificial but must occur with willingness and goodwill among all partners. Investing in learning together would benefit Northern Ireland.

A single system

- 8.4 Our review was set up as a result of commitments made in New Decade New Approach. NDNA makes reference to the feasibility of moving towards a ‘single system’ but does not define this term. It also places emphasis on promoting the quality and sustainability of the education system.
- 8.5 This has sparked debate. What constitutes a “single system” of education? Does Northern Ireland have one? Is it desirable to design and deliver one?
- 8.6 Some of those we engaged with have suggested Northern Ireland already has a single system. They have emphasised the existence of a common curriculum, a single funding model for schools, a single inspectorate and the absence of a significant private sector. Those who take the contrary view reference the multiplicity of school ‘sectors’ with different employment and governance arrangements, the fragmented administration of education and a pattern of school enrolments reflecting differences in religious/community backgrounds.
- 8.7 Some of the statements made to us proved to be false. Schools are not funded differently according to sector¹¹⁹. The additional costs incurred by the existence of the various bodies have often been exaggerated¹²⁰.

119 Funding is distributed to schools via the Common Funding Scheme (CFS). This allocates resources to schools according to the relative need of their pupils, and in a way that enables the effects of social disadvantage to be substantially reduced. One of the aims of the CFS is to fund schools on a consistent and fair basis, taking full account of the needs of pupils. As such, the sector that the school belongs to has very little bearing on the funding that the school receives.

120 The total funding provided to CCMS, NICIE, CnaG, CSTS, CSSC and the GBA in 2021/22 was £6.8m. This includes both Resource DEL and Annually Managed Expenditure.

- 8.8 On the other hand, the evidence on the division among learners on the basis of background is overwhelmingly strong. It is important to note that this is largely confined to the primary and post-primary stages of schooling. Early years provision shows only very limited division and it is entirely absent in further and higher education and in vocational training.
- 8.9 However, in a sense, this is a false debate. The issue of a “single system” should be of secondary importance to the need for an “excellent system”. The interests of the learner should take precedence over those of educational institutions and vested interests. Collaboration rather than competition should be a guiding principle. The system should promote excellent educational outcomes for all learners. Such an approach can accommodate choice. There is no need to insist on uniformity.
- 8.10 Northern Ireland could significantly benefit if unnecessary fragmentation or duplication, where they exist, were removed or rationalised.

Structures that meet the needs of the learner, society and the economy

- 8.11 The administration of schooling in Northern Ireland gives an impression of complexity. Numerous arms-length and sectoral bodies, boards of trustees and others seek to manage, support and advocate for a wide range of types of school. Schools may be distinguished from each other by religious faith, academic selection or its absence, pupil gender, language of instruction or any combination of these factors. This system is the product of history rather than design, with new varieties of school – Integrated and Irish-medium – being added in relatively recent times. There are also differing employment arrangements in the Controlled and Maintained sectors and in the sub-divisions in governance within the Integrated and Irish-medium sectors.
- 8.12 We do not accept the view that the current administrative arrangements impose large-scale unnecessary costs but we do believe that there is scope for rationalisation and simplification that would bring greater efficiency, assist public understanding and obviate unnecessary controversy. It is worth noting that the issue of over-complexity does not affect other parts of the overall education system in the same way as schooling.
- 8.13 There are places where we recommend structural re-organisation to better support learners and educators, promote collaboration and ensure value for money. These include:
- A single department to lead on policy making for all stages of education, learning and skills. This would include early years education, schooling, further and higher education, training, apprenticeships at all levels and lifelong learning. In time, the new department would also assume the role of single planning authority for education.
 - Separate agencies dealing with curriculum and assessment/qualifications, with an interim Curriculum Taskforce to lead on priorities for curriculum reform and refresh.
 - A strengthened Education and Training Inspectorate with a central role in relation to educational improvement and sharing of best practice.
 - A single professional body (initially the GTCNI and subsequently a broader Education Workforce Council) to establish, monitor and maintain professional standards.
- 8.14 There are other organisational changes that are required to create a more unified education system and ensure efficient management, support and planning for educational institutions.

There are two broad concerns: the appropriateness of the current arrangements and their effectiveness.

- 8.15 The EA has been the subject of a landscape review¹²¹ which drew attention to significant failings while referring to recent improvements. The findings of the review, such as a culture of silo-working, lack of clarity of role and poor customer service, echo comments made to us by many stakeholders.
- 8.16 The EA's responsibilities are as set out in the [Education Act \(Northern Ireland\) 2014](#). They are many but can be subdivided into three broad categories, although elements of some functions may be deemed to appear in more than one category:
- Managing authority for Controlled schools.
 - Support services for schools and pupils, for example, building maintenance and school transport.
 - Support services for school leaders, other staff and learners with additional needs, for example, HR, school improvement and special education.
- 8.17 The managing authority role has always been a challenge because the EA also provides a wide range of services to all other schools. This results in complicated systems for school management, which are, in particular, suboptimal for the Controlled sector. This has been compounded by the terms of the [Integrated Education Act \(Northern Ireland\) 2022](#), which imposes on the EA the duty to support integrated education.
- 8.18 The creation of the EA was a challenging process. It was subject to significant delay with wholesale changes at senior management level leading to a loss of important institutional memory. The EA has also been operating under extreme financial challenges. There are, of course, wider problems with the structure of the EA – with evidence that the varied support roles of the EA can be confusing for customers. We question whether its current form or functions are correct and whether the scope of the organisation is too large and varied to be effective.
- 8.19 We conclude that reform of EA structures could address some of these problems. As part of this, we must consider the management of education as a whole. Logic strongly suggests a need to restructure and split the EA to recognise these two distinct roles:
- A single authority responsible for employment and other transactional support services¹²².
 - An early intervention and learner support agency¹²³.
- 8.20 There is an immediate need to have a specific support function for the Controlled sector. This will involve, in the short term, a dedicated directorate within the EA to manage Controlled schools. This directorate should become the basis of a new statutory authority. The EA may wish to use the introduction of the new directorate as an opportunity to review other aspects of its organisational structure in anticipation of the splitting of its functions as indicated in the preceding paragraph.

121 [DE. Education Authority Landscape Review June 2022.pdf \(education-ni.gov.uk\)](#)

122 Including roles such as Infrastructure and Capital Development; Transport; Facilities Management; Financial Support and Procurement; ICT; Budgetary Control; and Legal Advice.

123 Including roles such as Children and Young People Services; SEND Support; Pupil Wellbeing and Protection; Youth Services; School Improvement and Professional Development.

- 8.21 This approach aligns with our thinking as outlined in the early years and inclusion and wellbeing chapters. We see the longer-term objective as being a single early intervention and learner support agency, for all schools and sectors, with functions including:
- Parental support and engagement (including contracting services with Health Visitors and Community Midwives to support cognitive development in early years).
 - Sure Start Management and Pre-School Education Programme.
 - Learner Support Services (i.e., Special Educational Need Support).
 - Pupil Wellbeing and Protection.
 - Youth Services.
 - Emotional Health.
 - Education improvement and professional development.
 - Careers education.
- 8.22 In terms of the management of schools, we see the longer-term objective as moving to a position where schools of all sectors enjoy the same support services, are treated equitably and provided with customer-focused, responsive and first-class support services. This would involve the establishment of a single authority (responsible for employment and other transactional support services) for all schools apart from those which are self-governing. This change would impact primarily on the current structure of the EA and CCMS but over time we would wish to see the opportunity for participation to be available to the Integrated and Irish-medium sectors.
- 8.23 This would not be a matter of absorbing one body into another but instead introducing a new approach to managing and supporting schools and providing the best services to institutions and learners.
- 8.24 We discuss area planning in detail in our next section. As things stand, there are a number of key contributors to the area planning process with differing statutory and nonstatutory roles. Currently, the DE, the EA and CCMS have statutory functions. Furthermore, the Integrated Education Act 2022 makes it difficult for the EA to properly represent the interests of Controlled schools in the area planning process, given its new obligation to support Integrated schooling.
- 8.25 The current arrangements are ineffective and would not be able to deliver on our recommendation to 'right size' the network of schools (detailed in the Funding chapter). For this task, there needs to be a single, independent, fixed-term planning commission for education with a remit of carrying out a complete review of the network of schools. This is a short-term measure to deliver a specific task. There also needs to be a longer-term solution in the form of a single strategic planning authority for all publicly funded schools and colleges. To achieve this, sole responsibility for planning could be given to the new unified department, to the single authority (responsible for employment and other transactional support services) or to a separate body concerned solely with planning. Our preference is that this function sits within the new department.
- 8.26 Our proposed changes to the management structure of the education system would also have an impact on the functions currently delivered by sectoral support bodies. Bodies that provide such sectoral support have important roles to play in providing specific support on ethos as well as advocating for their sectors. This would continue with all sectors supported in a consistent way via a common funding model.

- 8.27 The approach outlined in the preceding paragraphs would create a simple system consisting of:
- A single authority, responsible for employment and other transactional support services for schools.
 - A single body providing educational support to institutions and learners.
 - A single strategic authority for planning, in the form of a unified department.
 - Sectoral bodies providing advocacy and support for individual sectors.
- 8.28 Such a major reorganisation will require primary legislation and phased delivery, but significant progress can be made in the interim.

Collaboration not competition

- 8.29 Few countries have a single education system if the term is taken to imply a uniformity of types of institution and approaches to learning. The four UK jurisdictions are typical of many in having a variety of school types and a range of providers both in the early years and beyond the period of compulsory schooling. Indeed, choice is usually seen as a positive feature. Choice is, of course, always limited. Families cannot opt for types of schooling which are not available.
- 8.30 An argument is frequently put forward that the choices available in Northern Ireland and the way in which they are used reinforce divisions based on religious/community background. Instead of education helping to promote a peaceful society, the way in which it is organised has a negative effect.
- 8.31 We agree that education has a vital role to play in promoting cohesion in a post-conflict society. Much more needs to be done to educate young people together. Two further considerations need to be taken into account:
- Communities are often geographically divided. A school with a large majority of pupils from one background may reflect the community in which it is situated. At the same time, there are many schools with intakes that do not reflect their more diverse geographical circumstances.
 - Parental choice is enshrined in law, both in the 1986 Education Order¹²⁴ and in the European Convention on Human Rights¹²⁵.
- 8.32 Any movement in the direction of a more unified school system thus has to rest on two principles, which are to a degree in tension with each other:
- Families should have the right to choose among different kinds of school, and
 - Children should have experience of being educated together alongside others from a different background.
- 8.33 Many families have chosen to use Integrated schools. Integrated schools provide an opportunity for children and young people to learn together on a full-time basis and thus make a major contribution to promoting social cohesion. Currently this choice is not available everywhere.

124 The Education and Libraries (Northern Ireland) Order 1986 (Article 44).

125 Article 2 of the Protocol to the European Convention for the Protection of Human Rights and Fundamental Freedoms.

- 8.34 Our wider recommendations regarding the network of schools would see a significant growth in jointly managed community schools. These schools would promote social cohesion within a multi-sectoral context.
- 8.35 Therefore, we support the extension of the choice for parents and would wish to see the option of attending an Integrated school or a jointly managed community school within a realistic travelling distance available to all families as soon as possible.
- 8.36 Shared Education, as defined in the [Shared Education Act \(Northern Ireland\) 2016](#), has been an important mechanism for promoting social cohesion. The existing programme has been positively evaluated. However, we believe that it has to be substantially strengthened and re-imagined to be more ambitious. Using the authority of the 2016 Act, we propose the introduction of a more far-reaching approach under the title of *Learning Together*. Learning Together would not be a programme in which schools may choose or decline to participate. All schools would be under an obligation to contribute to realising its objectives.
- 8.37 We see such a programme as potentially involving elements of the following:
- **Shared Governance** – Efforts must be made to create a school estate that is fit for purpose by ensuring that all schools are educationally viable and that the resources available are used prudently and equitably. This requires amalgamations of schools from different sectors. We envisage that, in many cases, this will involve transformation to jointly managed community schools, where all sectors work together to provide a school that meets the needs of the local community.
 - **Shared Resources** – Schools should be free to share resources of all types, including staffing. This is particularly necessary for specialist posts. There are numerous potential benefits from these kinds of sharing; not least they will help to instil an ethos of collaboration rather than competition in the education service. More specifically, there will be instances where the effect is to draw schools from different sectors into a close and purposeful relationship.
 - **Shared Learning** – The intention is that all learners should engage in significant joint activity within the curriculum. While joint extra-curricular activities are to be welcomed, it is essential that Learning Together should focus on formal learning. As much as possible of the learning should be face to face but there is also obviously a place for joint online activity.
- 8.38 Most of the existing shared education funding should be delegated to schools. However, a small central reserve should be retained to assist schools where geography necessitates heavy spending on transport. All schools will be expected to enter a Learning Together partnership with one or more schools drawing most of their pupils from a different community background. ALCs could play a useful co-ordinating role; however, these are currently limited to post-primary schooling.
- 8.39 We would wish to see ALCs playing a more significant role in promoting collaboration and sharing; building on existing good practice. Furthermore, we see ALCs have an important role in the delivery of careers education.

8.40 However, ALCs are currently limited to post-primary schooling. Primary schools should be supported to establish separate ALCs and there should be regular interaction between primary and post-primary groupings. The new primary groupings would not be limited to supporting Learning Together but should develop similar roles to the existing ALCs in relation to curriculum and professional learning. Participation in ALCs should be deemed to be an essential element of Learning Together.

Schools serving their communities

8.41 Any evaluation of the current situation must conclude that schooling in Northern Ireland is strongly divided along religious/community lines. Our analysis shows that 85% of primary children attend schools in which the minority group constitutes less than 10% of the roll. 57% are in schools where the minority is less than 2%. In the post-primary sector, the equivalent figures are 76% and 48%.

8.42 A different way of looking at the demography is to consider total numbers by sector. Catholic pupils constitute 8% of the combined roll of all Controlled primary schools and 7% of post-primary rolls. For Protestant pupils in Maintained schools, the equivalent figures are 1% and 2%.

8.43 The proportion of pupils identifying as 'Other' is growing in all sectors. The sector with the greatest mix is, perhaps unsurprisingly, the Integrated sector. Furthermore, after a school becomes integrated the degree of mixing generally increases.

8.44 Schools should ask themselves, *"What can we do to make our school more welcoming while still retaining our founding ethos?"*

8.45 We recommend that the objective of having all young people learning together should be fulfilled by simultaneously pursuing the following courses of action:

- Increasing the number of Integrated schools or jointly managed community schools. The creation of new or reconfigured jointly managed community schools and sixth forms with expanded numbers of learners from different communities attending the same school and learning together will be a crucially important outcome of our recommended review of the school estate. All families should have such options within a realistic travelling distance as soon as possible.
- All schools should take steps to ensure a greater mix of religious background in their pupil population. These steps should include active encouragement of applications from any under-represented community, reviewing admissions criteria to eliminate any unintended barriers and ensuring that the ethos and workings of the school are genuinely welcoming to all.¹²⁶
- The new department should report annually on the community mix of learners at an individual school level and schools should report annually on the proactive steps they are taking to ensure a broader community mix in their pupil intake.

¹²⁶ We recognise that in some areas majority community post-primary schools seeking to attract pupils from the minority community could present problems. For example, if the majority school did succeed in increasing the number of minority community pupils this may be perceived as potentially undermining the sustainability of a nearby minority community post-primary school. Such a school could be an important part of community social infrastructure. Schools seeking to implement this recommendation should therefore take into account any wider community impact.

- A greater emphasis on area learning communities fostering joint learning opportunities will maximise opportunities for learners to be educated together in the same classroom.
- Where there is clearly an educational and value for money case shared education campuses could all be actively promoted as mechanisms to improve community cohesion in the longer term.

8.46 Within our Terms of Reference, we were asked to consider a number of outstanding recommendations¹²⁷ from the 2017 Independent Review of Integrated Education¹²⁸. One of them had already been overtaken by the decision to remove the exemption of teachers from the Fair Employment regulations. The Integrated Education Act¹²⁹ also changed the landscape.

8.47 The remainder of the recommendations would be superseded by the recommendations in our own Report. Our suggested review of the network of schools would result in numerous cross-sectoral amalgamations and the introduction of jointly managed community schools, which would represent a cross-sectoral approach to serving the needs of the local community. The review will also lead to a large-scale reorganisation of sixth form provision. Furthermore, the area planning process will be reformed in ways which will overtake the objectives of recommendations in the earlier Report.

8.48 Our Report reaches similar conclusions in relation to initial teacher education. ITE should equip new teachers to work in any publicly funded school by giving them experience of different sectors during training.

8.49 The pressures on the capital programme have intensified since 2017. Our Report makes recommendations which will have the effect of ensuring that Fresh Start capital funding is better used than is currently the case but that the amount available is sufficiently limited to render the Independent Review of Integrated Education report's suggestion of baseline designs inappropriate¹³⁰.

Key recommendations: Single system and structure

Establish a single department for the entire education journey

We recommend the formation of a unified department with the sole responsibility of overseeing the entirety of a learner's education journey. This would entail merging the existing responsibilities of DE with some of those within DfE, specifically with regard to education, learning and skills.

127 These are recommendations 1, 3, 4, 6, 7, 8, 9, 10, 11, 13, 14, 16, 33, 37 and 38 of the 2017 Report.

128 [The Report of the Independent Review of Integrated Education | Department of Education \(education-ni.gov.uk\)](https://www.education-ni.gov.uk)

129 Integrated Education Act (Northern Ireland) 2022.

130 Recommendation 33: "That DE considers the development of standardised baseline designs for nursery, primary and post-primary schools to ensure that as much of the Fresh Start Capital Funding as possible is spent on the ground to transform our education system."

Reform school management arrangements

A single authority should be created, in the first instance for Controlled and Maintained schools with the opportunity for other sectors to join¹³¹.

In parallel, a more customer-focused service delivery organisation should be established to provide educational support to institutions and learners.

A crucial first step towards achieving this goal would be to establish a dedicated Directorate within the EA with the specific responsibility of managing Controlled schools.

Promote learners learning together

As soon as is practicable, all learners at all stages should have the opportunity to learn alongside individuals from other communities and backgrounds in the same classroom. We have made a number of recommendations throughout the Report which will expand these opportunities:

- Increasing the number of integrated schools or jointly managed community schools. All families should have such options within a realistic travelling distance as soon as possible.
- The proposed reconfiguration of the network of schools offers the theoretical potential to create 177¹³² new or reconfigured jointly managed community schools and sixth forms with expanded numbers of learners from different communities attending the same school and learning together.
- All schools should take steps to ensure a greater mix of religious background in their pupil population. These steps should include active encouragement of applications from any under-represented community, reviewing admissions criteria to eliminate any unintended barriers and ensuring that the ethos and workings of the school are genuinely welcoming to all.
- The new single department should report annually on the community mix of learners at an individual school level and schools should report annually on the proactive steps they are taking to ensure a broader community mix in their pupil intake.
- Area learning communities should put greater emphasis on fostering joint learning opportunities. This involves learners being educated together in person in the same classroom but there is also merit in joint extra-curricular activities.
- Where there is clearly an educational and value-for-money case, shared education campuses should be actively promoted as mechanisms to improve community cohesion in the longer term.

These recommendations, implemented together and in full, will make a meaningful improvement in the level of community mixing in schools.

131 We envisage that this will be established on phased basis with the consent of the various parties.

132 Volume 2 details the theoretical potential to create 99 new primary schools, 22 post-primary schools and 56 sixth forms that would be managed on a cross-sectoral basis. This is based on a modelling exercise and “real world” delivery may result in different numbers.

CHAPTER 9 – INSTITUTIONAL GOVERNANCE AND ACCOUNTABILITY

Investing in governance, accountability and planning

- 9.1 Ensuring public confidence in the delivery of education requires effective governance and strong accountability measures. This cannot be left to chance but instead requires attention, focus and investment. The needs of the learner should always be prioritised over the needs of institutions.
- 9.2 A simplified governance model should be implemented. Boards of Governors play a crucial role in supporting the delivery of education, and building public trust. Governance arrangements should promote innovation and collaboration in education. All governors and board members should be provided with proper support to oversee their institutions effectively.
- 9.3 Governance arrangements should also be flexible enough to enable innovation and be capable of accommodating new types of institution – including those where different sectors work together for the good of the learner.
- 9.4 Accountability is crucial. Education is a public good and public confidence in its design and delivery is vital. Standards and inspections are essential but are most useful when accompanied by effective support and improvement mechanisms. All parts of the education service must collaborate to ensure the best outcomes for learners.
- 9.5 Many of our recommendations will require new legislation. Unwieldy and overly prescriptive legislation – such as often pertains in Northern Ireland – can be constraining, confusing and inhibiting of innovation. There is a need to invest effort to ensure the statutory framework enables a more responsive education system.

Simplified and effective school governance

- 9.6 Good governance is essential at every level of the service. This is not simply a matter of legal compliance and sound finances. Good governance demonstrates strategic foresight, a capacity for innovation and effective action, and the ability to promote a positive culture. Governance and management arrangements in the Northern Ireland school system are complex. Excessive complexity can impede good governance and is not in the best interests of learners.
- 9.7 A key concern of this Report is bringing greater coherence to the educational landscape. We recommend the establishment of a single department (with planning authority status), a single authority, a single learner support agency, a single Curriculum Council, a single Education Workforce Council, and a range of other measures to simplify structures and processes. The same approach is necessary in relation to institutional governance.
- 9.8 All schools are overseen by a Board of Governors (BoG) and managed by a principal, who may be head of a management team. The composition of the BoG will be laid down in a Scheme of Management. Different schemes apply in the Maintained and Controlled sectors.

Some schools, such as voluntary grammar schools or Grant Maintained Integrated schools, have schemes devised by their boards.

- 9.9 The size of boards varies very widely from as few as 8 members to as many as 36. All have parent and teacher governors. With the exception of only a very small number of schools receiving no capital funding, all have governors representing the public interest. At present these may be appointed by DE or the EA or both but, in future, all appointments should be made by DE alone. Many schools have foundation governors frequently appointed by the religious denomination responsible for the establishment of the school.
- 9.10 These arrangements need to be simplified and, to some extent, standardised to reflect best practice in organisational governance. However, the simplification of governance arrangements is secondary to ensuring their effectiveness. Boards should have a blend of skills. Governors should be trained for their roles and have the confidence to deliver their functions.
- 9.11 The following principles for school-level governance should be applied in all sectors apart from voluntary grammars, which are entitled to make their own arrangements. In doing so, they will have to have regard to any conditions surrounding their foundation but should also apply these principles as far as possible.
- Boards should be of a broadly similar size, which should not normally exceed 16.
 - Boards should contain a suitable blend of experience, expertise and skills relevant to education, child development or child-centred education, human resources, legal and financial expertise.
 - Boards should have limited powers of co-option to enable them to fill skills gaps in their membership.
 - All schools should have both parent and teacher governors.
 - The public interest should be represented on all boards via a single appointing authority on behalf of the state (the new department).
 - Where the conditions under which the school was established permit it, consideration should be given to limiting the number of foundation governors.
 - Governors should have access to high-quality training.
 - Boards should be reconstituted on a staged basis, rather than the whole membership or a large part of it being appointed at one time.
 - Boards should put in place processes to ensure that the voice of learners is heard and considered when decisions are taken.

Increased autonomy balanced with increased accountability

- 9.12 Good governance requires that decisions be taken at the lowest level consistent with efficiency. Therefore, substantial delegation of powers to individual schools, colleges and other institutions is an important principle. This needs to be balanced by proper accountability, demonstration of competence and effective support from the centre.
- 9.13 Schools have been surveyed regarding the desirability or otherwise of increased delegation of powers. Opinion was divided. Broadly speaking, larger schools felt confident about acquiring increased responsibilities and small schools were sceptical. Our proposals for reviewing and right-sizing the network of schools are designed, among other purposes, to ensure that all schools are of a scale sufficient to carry out all of the functions of running a

complex organisation. Furthermore, effective support from a single authority and improved professional development for school leaders would increase confidence and competence to manage increased autonomy.

- 9.14 There is a need for increased delegation, particularly in relation to some aspects of finance. In line with our proposal regarding improving school-based earlier stage SEN interventions, we suggest that all schools should have greater discretion in the use of their SEN budgets including flexibility in the use of resources allocated through statements. Furthermore, special schools should receive delegated budgets.
- 9.15 Schools should also receive some additional funding and be empowered to commission and carry out minor works and elements of maintenance. There should also be delegation of funding for professional development. Schools may augment this from their own funds.
- 9.16 Of course, delegation of funding is only effective when there is sufficient funding to be delegated. Hence the need to resolve the funding crisis, bridge the funding gap and invest in education for the long term.
- 9.17 ETI plays a very important role in relation to accountability. Both inspection of individual establishments and thematic inspections can contribute to this. Although the focus of the inspection process should be on improvement rather than judgement, ETI has a responsibility to make concerns known in its reports. It should also work positively with institutions to agree actions to address concerns, learning from best practice in other institutions as appropriate.
- 9.18 In recent years, many schools have been subject to “action short of strike”. This has had a direct impact on the experience of learners, in some cases for the full duration of their education. Persistent industrial relations problems have a corrosive effect on the system as a whole. It is essential that genuine concerns are tackled and unilateral action brought to a halt. Ultimately, it is for the Minister to take robust action to protect learners and bring confidence to the system.
- 9.19 One aspect of such industrial action is non-compliance with inspection. We consider this to be unsatisfactory and incompatible with necessary standards of accountability and the promotion of public confidence. In other UK jurisdictions, it is an offence to obstruct the process of inspection. The Education Act 2005, applicable to England and Wales, makes it an “offence intentionally to obstruct the Chief Inspector in relation to the inspection of a school”¹³³. Similarly, Section 66 of the Education (Scotland) Act 1980¹³⁴ makes it an offence “if any person wilfully obstructs any person authorised to make an inspection”. We recommend that similar provisions be enacted in Northern Ireland.
- 9.20 Of even greater importance than inspection is self-evaluation, which should be undertaken by all educational establishments on a regular basis. Self-evaluation should lead to the identification of priorities for improvement. BoGs should be involved in ratifying these priorities and should be kept regularly informed of progress being made. The process of self-evaluation should be as non-bureaucratic as possible with paperwork kept to a minimum. There is, of course, no reason why schools should not support each other through mutual evaluation arrangements.

133 [The Education Act 2005, Section 10\(2\)](#).

134 [Education \(Scotland\) Act 1980 Section 66](#).

Enabling innovation and flexibility to allow for new types of institution

- 9.21 The proposed right-sizing exercise is likely to result in a need for innovation in governance. It is very likely that amalgamations will take place involving schools from different sectors.
- 9.22 DE already has guidance in place regarding the operation of “jointly managed schools”¹³⁵. However, the current circular deals specifically with jointly managed church schools. This will be insufficient in the delivery of any right-sizing programme insofar as there may be instances where schools from three different sectors (Controlled, Maintained and Integrated) could be amalgamated. There is also legislation¹³⁶ regarding ‘community schools’.
- 9.23 The concepts of “jointly managed” and “community schools” are closely aligned and we envisage a solution whereby “jointly managed community schools” could be established through a truly multi-sectoral approach, serving learners and families of all faiths and none. All sectors would work collaboratively for the good of the local community. The formation of new jointly managed community schools would assist in making the process of area planning more effective and, at the same time, promote social cohesion.
- 9.24 The right-sizing exercise will create many circumstances where two or more small schools will be expected to come together to form a larger, more sustainable school which will meet the established roll thresholds. This may involve schools from the same sector amalgamating but it is more likely that such proposals will involve a number of different sectors. Such amalgamated schools will often be the sole school in a village or rural locality. It is likely that they can be used to deliver other services, thus also meeting the requirements in relation to a community school. The new department should, therefore, put in place procedures (including guidance and legislative provision) that facilitate and encourage two or more schools from different sectors to merge to become a jointly managed community school.
- 9.25 When these new schools are established as a result of the amalgamation of schools from different sectors, trustees from the sectors directly involved should have equal representation on the Board of Governors. Furthermore, the Board should have representation from the local community, e.g., local businesses, local voluntary sector, etc. Membership should also include education sectors not already represented on the Board, ensuring the governance is truly multi-sectoral. The new department should take these issues into account when making its appointments. Although there would be an assumption that the new school would be a jointly managed community school, the management type of the school would be determined by its Board.
- 9.26 Right-sizing will also bring about changes in sixth form provision. It is quite possible, for example, that a sixth form containing learners brought together from more than one sector will form part of a school in a particular sector. Governance arrangements will require to be modified to deal with such circumstances. This will require legislative change.
- 9.27 Although Northern Ireland has many types of school, few of the differences relate to curriculum or pedagogy, such as are practiced in Steiner or Montessori schools. Although there was a generally successful initiative relating to specialist schools, no schools are now designated as having particular specialisms. Elsewhere in the world, innovations

135 Circular 2015/5 (<https://www.education-ni.gov.uk/sites/default/files/publications/de/2015-15-jointly-managed-schools.pdf>)

136 [The Education Reform \(Northern Ireland\) Order 1989 \(legislation.gov.uk\)](#)

are taking place with technology-enabled learning. It seems likely that there will at some stage be a demand for similarly innovative establishments in Northern Ireland. We are not recommending that any of these types of school be set up immediately but we do think that legislation should facilitate such innovation in the future.

New approach to area planning

- 9.28 As demonstrated in the right-sizing exercise, we are of the view that Northern Ireland currently has too many non-viable small schools and too many small sixth forms, some in otherwise viable schools but others in schools which are themselves too small. To tackle this problem – which has both educational and financial dimensions – we need a new approach to area planning. This requires changes in how area planning is delivered – both in the short and the longer term.
- 9.29 The current area planning processes and structures inhibit innovative cross-sectoral solutions and hinder the pace at which transformation can occur. We recommend that the network of schools be reconfigured to adhere strictly to minimum enrolment thresholds (105/140 for rural/urban primary schools, 600 for post-primary schools (excluding sixth form) and 240 for sixth forms). This would maximise the number of schools with enrolments on efficient enrolment boundaries. The objective is to improve the educational experience of the learner and guarantee the educational viability of the school.
- 9.30 In the short term, we recommend the establishment of an Independent Planning Commission that would take the lead in developing a Northern Ireland-wide plan for a new network of schools based on our recommendations on sustainability as well as the new governance model (of jointly managed community schools). The programme to transform the network of schools is ambitious, far-reaching and challenging. Its potential impact on the existing network of schools is explained below in more detail.
- 9.31 The current development proposal process and (what is effectively a) sectoral-based area planning process are not appropriate for implementing the proposed changes. A large-scale, time-bound exercise managed on a non-sectoral basis will be required to achieve the step-change which is needed.
- 9.32 This reformed network of schools will bring benefits but will require significant capital and resource investment. Our expectation is that the implementation of the Commission's findings could take up to 10 years at a cost of over £1bn, with a maximum future net saving of c. £100m per annum.
- 9.33 Implementation of such a plan will ultimately be for the new department. While it would be the hope that implementation would be by consent, legislation may be required to ensure decisions can be taken in a timely manner. The current lack of pace within area planning caused by cumbersome processes and structures is not acceptable. The new department should have a duty to ensure an effective education experience for the learner and an efficient network of schools for the taxpayer.
- 9.34 The longer-term solution for area planning would see the establishment of a single strategic planning authority, to be responsible for the ongoing planning of the network of schools and colleges.

- 9.35 The intention of having a single strategic planning authority is to vest all planning responsibilities in one organisation charged with delivering a learning-centred approach. We would expect processes to be more streamlined, consistent and speedy. While there are a range of options for establishing such a body, we suggest that the new department would be the most appropriate single planning authority.
- 9.36 Other changes to the area planning policy framework and process should be taken forward at an early date. These include:
- Reviewing the DP process, including allowing schools to alter their approach to academic selection without the need for a formal proposal.
 - Amending the process for setting admissions and enrolment numbers to align with proposals on sustainability and efficient enrolments and to simplify the process.
 - Putting in place a process to no longer consider learners with a statement of SEN as supernumerary and to ensure SEN learners receive school placements well in advance of transition periods.
 - Reviewing the appropriateness of the small school funding factor, in the light of wider changes to sustainability thresholds.
 - Revising the Sustainable Schools Policy to develop new indicators for sustainability (that are measurable and can inform future planning needs).

A new legislative framework

- 9.37 The legislative framework in Northern Ireland is unduly complicated and can be overly prescriptive. This inhibits change, which is highly counter-productive given the need for education to be innovative and responsive in the light of rapid economic, technological and social change. Furthermore, many of our recommendations will require legislative changes, in some cases of a fundamental nature. However, in some cases, progress can be made in the interim within the existing legislative framework.
- 9.38 There would be great merit in consolidating the existing legislation; so far as possible bringing all provisions within a single statute and removing statutory requirements that have been superseded or no longer fulfil a useful purpose.
- 9.39 In drafting this consolidating legislation, it will be important to avoid excessive specificity. It is unwise to build into statute provisions containing a high level of detail that will often quickly become irrelevant or outdated. A Bill team should be established immediately with the aim of having a new Single Education Act in place within 5 years. The new Act would need to take into account any new legislation that comes into effect while the Bill is prepared.

Key recommendations: Institutional governance

Strengthen accountability

Proportionate accountability is in the interests of learners, the wider public and all providers of education.

A dashboard of measures, covering all important intended outcomes of education should be introduced. Standardised assessments from an early stage of schooling will assist evaluation of the system as a whole and self-evaluation by each school, as well as being used to help individual learners progress. Boards of governors play an essential role in reviewing critically performance data for their schools.

Inspection is an essential element of the system of accountability as well as helping schools with the process of continuous improvement. The current position where some staff and schools have not been engaging with the ETI inspection regime for an extended period cannot be allowed to continue. In other UK jurisdictions, it is an offence to obstruct the process of inspection. Similar provisions should be enacted in Northern Ireland.

Reconfigure the network of schools

A new approach to the area planning process is necessary to create a school network that meets the needs of all learners and promotes social cohesion, while also providing a comprehensive curriculum in a cost-effective manner.

An Area Planning Commission should carry out a review of the existing network of schools in Northern Ireland. This Commission should prepare a plan for a revised network of schools with more efficient and sustainable admission and enrolment numbers, capable of offering a complete curriculum experience to all learners. Proposed changes to the network of schools should be made on a 'sector-blind' basis prioritising the needs of learners and efficiency of delivery.

This process has the potential to create new jointly managed community schools by merging schools from different sectors. Maximum annual savings of approximately £100m could be generated for reinvestment in education.

In the longer term, a single strategic planning authority should be established to oversee the ongoing development of this revised network of schools.

Introduce a legislative framework that enables innovation

Existing legislation should be consolidated to create a Single Education Act that incorporates any new legislation required to implement the recommendations of this Report.

Regulations should give flexibility to meet changing circumstances.

CHAPTER 10 – FUNDING - SUFFICIENCY, EFFICIENCY AND IMPACT

Investing in education in the short term and the long term

- 10.1 Education in Northern Ireland should be seen as a vital investment for all of society and the economy. This point has been highlighted throughout the Report, particularly in relation to early childhood education and reducing disadvantage. Investing in education leads to improved outcomes, reduced underachievement, and fulfilled lives that make better use of human talent. As a result, less is spent on remedying social problems caused by educational failure.
- 10.2 It is imperative for the Northern Ireland Executive to acknowledge the many instances where increased investment in education could bring multiplier benefits to Northern Ireland. However, if we are to view education funding in this way, we need a more robust methodology for tracking outcomes, understanding benefits and demonstrating a return on that investment. The spend must be effective and be seen to be effective, with any identified inefficiencies promptly addressed.
- 10.3 There is a short-term need to address the financial crisis in education and ensure that education expenditure is both adequate and efficiently used.
- 10.4 While addressing the current financial crisis in education is crucial, it is essential to view it as just the first step. To unleash the full potential of education, a comprehensive investment strategy is necessary. The long-term objective should be to invest in education to deliver a transformed system which can make its full contribution to improving the lives and increasing the prosperity of all of Northern Ireland's people. This entails implementing radical changes and taking difficult decisions.
- 10.5 This requires long-term investment and the delivery of recommendations we make throughout the Report. There is thus a need for both short-term remedial action and long-term investment.

Adequacy of funding for education in Northern Ireland

- 10.6 Following a review of the work published to date on this issue and completion of our own analysis, we have concluded that education in Northern Ireland is in financial crisis. This will be no surprise to those working in the sector.
- 10.7 Education in Northern Ireland has suffered from significant real-terms cuts over the past 13 years. This is true across all stages of education including schooling, FE and HE. The growth in the number of schools operating in deficit is particularly concerning given the direct impact on learners. These cuts are having a lasting and detrimental impact on learners and need to be reversed.
- 10.8 DE and the wider public education system receives a significant proportion of the block grant. The 2023/24 non-ringfenced resource Departmental Expenditure Limit¹³⁷ (DEL)

¹³⁷ Non-ringfenced resource Department Expenditure Limit (DEL) reflects the ongoing cost of providing services (e.g., pay, operating costs and grants to other bodies).

budget for Northern Ireland, as announced by the Secretary of State (SoS) in April 2023¹³⁸, was £14,211.967m. Half of this budget (£7,300.895m) was allocated to DoH.

- 10.9 DE had the second largest allocation with 18% of the Executive budget (**£2,576.508m**). This was a **2.5% cash-terms reduction** on the prior year's budget¹³⁹ and resulted in an estimated funding gap of around **£300m**. Nearly 90% of the available resource is either delegated to schools or spent centrally on services of direct benefit to schools. DE estimates a funding pressure of over **£500m** in 2024/25. Since 2010/11, resource funding has been reduced in real-terms¹⁴⁰ by £145m (6%), and per-pupil funding in real-terms by c. 11%¹⁴¹.
- 10.10 Additionally, over 70% of DfE's budget of **£772m** supports skills, FE and HE. Savings achieved in 2022/23 totalling £75m must be replicated in 2023/24. DfE must also identify further savings of £55m. This means that, in effect, DfE's opening budget for 2023/24 will be £130m (16%) lower than expected under the draft budget of the previous Minister of Finance¹⁴².
- 10.11 While direct comparisons are difficult (particularly in recent years given the impact of Covid-19) there is sufficient evidence to demonstrate that, when comparing funding per learner, the Northern Ireland education system has been significantly underfunded over the last decade in comparison to those in England, Scotland and Wales. This puts learners in Northern Ireland at a disadvantage in comparison to their peers in other jurisdictions.
- 10.12 Per-pupil funding in England in 2023/24 is estimated at £7,460¹⁴³. This equates to a difference of £450 per pupil compared to the Northern Ireland estimate. When this is multiplied by the 2022/23 school population¹⁴⁴, it gives a funding gap of **£155m**.
- 10.13 It is also true that there are inefficiencies in the system and some of the current investment in education could be used more effectively. However, the scope for potential savings should not be exaggerated. Even if all the potential savings we have identified were realised, a significant funding gap would remain.

Key budget pressures

- 10.14 Our work in preparing this Report has involved interaction with a wide range of the education workforce catering for different age groups and working in different education sectors. We have concluded that Northern Ireland benefits from a committed and dedicated workforce that views their role as a true vocation. This, in turn, means that teachers tend to stay in roles for longer and do not leave the profession to the extent we see in other jurisdictions. This leads to many staff being paid at the top of their scale. Although this has an impact on schools' budgets, it is a necessary (and positive) trade-off for having an experienced and committed workforce.

138 [Department of Finance 2023/24 Budget Factsheet \(finance-ni.gov.uk\)](https://finance-ni.gov.uk)

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

140 "Real-terms" means after the effect of inflation has been removed.

141 Information provided by DE Finance, based on GDP deflators at 30 September 2022

142 Information provided by DfE's Skills and Education Group.

143 [School funding: Everything you need to know - The Education Hub \(blog.gov.uk\)](https://blog.gov.uk)

144 School population estimated at 344,925 based on part-time nursery pupils being counted as 0.5 FTE, in line with IFS methodology. Source: [Annual enrolments at schools and in funded pre-school education in Northern Ireland 2022/23 | Department of Education \(education-ni.gov.uk\)](https://education-ni.gov.uk)

- 10.15 The cost of the education workforce represents c. 80% of overall education spend (excluding capital). In recent years, two large pay awards were agreed that did not result in an equivalent uplift in the budget. These unfunded awards are just one of several factors that have contributed to the increasing pressure on the DE budget.
- 10.16 As outlined in a previous section, demand for interventions to address the needs of learners with special educational needs has been growing. The increasing demand on the DE budget has been masked slightly in recent years by DE's additional Covid funding but is projected to grow significantly in future years. These costs are becoming unaffordable and unsustainable. If they continue as projected, without a policy or funding change, they will disproportionately affect the entire education budget. Significant policy reform is required to ensure learners get the support they need within a framework that is affordable for the wider system.
- 10.17 The proportion of pupils with a statement in Northern Ireland¹⁴⁵ is considerably higher than the proportion of pupils with an EHC plan in England¹⁴⁶ (6.8% compared to 4.3%). The additional cost of having more pupils with statements in Northern Ireland, over and above the basic cost of educating a child in mainstream school, is estimated to be in the region of **£136m**¹⁴⁷.

System effectiveness and efficiency

The network of schools

- 10.18 We have examined the network of schools and concluded that the current configuration does create inefficiencies. These inefficiencies are not just the result of having multiple small schools but are exacerbated by schools having approved enrolments that do not fall on efficient enrolment boundaries. We have also found significant issues with the existence of too many small sixth forms. These not only result in too many learners having a restricted range of subjects available at A Level but also create inefficiencies.
- 10.19 Our analysis suggests that reconfiguration of the network of schools could result in meaningful amounts of funding being released that could be distributed across the newly configured schools' network. We commissioned a desktop modelling exercise to implement these rules across the Northern Ireland network of schools, assuming a "nearest school" and/or "efficient enrolment" approach to "right-sizing" that was "sector-blind". The methodology for this modelling is available at **Appendix 4**.
- 10.20 The analysis leads us to conclude that the reconfigured network of schools should be based on the following.
- There must be a strict adherence to **minimum enrolment numbers**¹⁴⁸ as follows:
 - Primary – 105 (rural) and 140 (urban).
 - Post-primary (excluding sixth form) – 600.
 - Sixth Forms – 240 (120 learners per year group).

145 [Annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020-21 \(education-ni.gov.uk\)](https://www.education-ni.gov.uk/annual-enrolments-at-schools-and-in-funded-pre-school-education-in-northern-ireland-2020-21)

146 [Special educational needs in England, Academic year 2022/23 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://www.gov.uk/explore-education-statistics)

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

148 There will always be exceptional circumstances where this may not be possible, but these occurrences should be extremely rare.

- There must be a greater focus on “**efficient**” approved enrolment numbers:
 - Primary – enrolment numbers should reflect multiples of c. 25–30.
 - Post-primary – Minimum of 600 and then at intervals of an additional c. 150 (meaning 150 across five-year groups i.e. 30 per year group).

10.21 Our modelling suggests that, theoretically, running costs for the network of schools could be reduced by £94m per annum – funding that could be redistributed across the remaining school network to the benefit of all learners. We estimate that successful implementation of such a plan would require in the order of £1bn of capital investment over an assumed 10-year implementation period. Allocation of additional time-bound resource funding to assist the schools involved to make the required transition to jointly managed community school status should also be considered. This is estimated at £135m over the implementation period.

10.22 We must be clear that the modelling process was a desktop exercise that did not take local issues into account and would not therefore represent the ‘real world’ plan that would ultimately be implemented. The figures produced are illustrative only. However, we believe the changes projected by the model in terms of school and sixth form numbers are representative of what is possible when viewed at a network level.

10.23 The model resulted in the theoretical creation of:

- 99 new jointly managed community primary schools;
- 22 new jointly managed community post-primary schools; and
- 56 new sixth forms located in existing schools but managed on a cross-sectoral basis.

10.24 A reconfiguration of this nature would need to be planned on a non-sectoral basis and as such would potentially constrain availability of places at a school in one sector but expand it in another in order to ensure efficient enrolment boundaries are adhered to where possible. As such, this may constrain parental choice at a local level to some degree.

10.25 A large-scale, time-bound exercise managed on a non-sectoral basis will be required to achieve the step-change proposed. As such, an Independent Area Planning Commission would be expected to deliver its plan to DE within 2 years of establishment. DE would then need to set out plans for implementation.

10.26 In advance of this, DE should move to implement a small number of pilot projects through cross-sectoral agreement.

Transport

10.27 We view the current home-to-school transport policy as being overly generous and, in the current financial climate, potentially unaffordable. Home-to-school transport is provided to approximately 88,000 children at a cost of c. £91.4m per annum (as at 2020/21). Costs rose by 19.8% between 2016/17 and 2020/21. The EA estimates that the spend for 2023/24 will be £122.3m, demonstrating a continued upward trend in costs.

10.28 We recommend the introduction of a charging model for home-to-school transport, with appropriate protections in accordance with three broad principles:

- There should be appropriate exemptions for FSM learners.
- Learners attending special schools should be exempt as should SEN learners with identified transport requirements.
- Learners should not be subsidised where they have chosen not to attend the closest school of their chosen type.

- 10.29 We estimate that the maximum savings that could be generated would be in the order of £10m to £20m per annum¹⁴⁹.
- 10.30 In the longer term, and to link with wider changes to the structures to manage and support schools, there would be merit in reviewing the existing model of delivery.

Administration of education – efficiency

- 10.31 There are merits to streamlining the administration of education and potential rationalisation of arm's length bodies. However, the savings that could be secured are limited, especially if it is assumed that the functions they currently deliver would remain and be delivered by another body.
- 10.32 The more important issue in respect of streamlining administration relates to the efficiency of managing, planning for and supporting our educational institutions. Hence, the recommendation of a separate single authority with responsibility for employment and other transactional support services and a separate single authority for planning. Such streamlining would reduce complexity, improve administration and lead to better support for educators.

The capital programme

- 10.33 The capital programme has faced considerable strain in recent years due to a fixed budget and the escalating costs of the construction market. This has occurred at a time of mounting demand, particularly for SEN-related places in special and mainstream schools which have absorbed most of the minor works budget. Additionally, the outdated ICT infrastructure across the schools estate requires a substantial investment of around £256m over the next 6 to 8 years under the EdIS programme.
- 10.34 Ministers have continued to announce new capital projects despite these existing and emerging pressures. Assuming an ongoing capital allocation to DE of similar magnitude to that allocated in recent years, it will take over 40 years for all announced capital projects to be constructed.
- 10.35 We have therefore concluded that the capital programme as currently configured is undeliverable. Projects that cannot clearly demonstrate value for money (VfM) should either be reconfigured to ensure they do or removed from the programme.
- 10.36 In Volume 2, we highlight the Strule shared-education campus as one such example of a project where the benefits do not come close to justifying the cost of the project. This has a disproportionate, damaging impact across other parts of the education estate that urgently require capital investment.

- 10.37 The Fresh Start programme, including Strule, requires £837m for completion. The UK

¹⁴⁹ Based on calculations provided to the Panel from the Education Authority.

Government contribution is projected to be £412m. Whilst no future capital budgets have been set, if we assumed a static budget (akin to 2023/24 levels) then, for all current planned projects to proceed, the Executive would have to provide an additional £60m in 2024/25, £79m in 2025/26 and run-off in future years of £256m. If Executive funds are not available, and current budget discussions suggest this is the most likely outcome, it would create a huge pressure on the DE capital budget. The Strule project alone is projected to require £170m of additional DE capital (non-Fresh Start) funding over a three-year period which, if allocated would likely impact the minor works budget thereby having a significant impact on many other schools.

- 10.38 We recommend the immediate ending of the Strule programme and the transfer of Fresh Start resources to other education projects that in current circumstances could not be funded from DE's inadequate capital budget.
- 10.39 Furthermore, an immediate re-prioritisation of the current DE capital investment programme is therefore required. This should involve the prioritisation of:
- SEN works – both in special and mainstream schools; and
 - the right-sizing programme articulated earlier in this chapter.
- 10.40 We suggest that an additional capital allocation of £25m per annum for each of the next 5 years is required to implement the works required to deal with the infrastructure needs of the increasing numbers of pupils with a statement of education need. As already stated, capital costs relating to the programme to “right-size” the network of schools are estimated at £1bn over a 10-year period.
- 10.41 Such a re-prioritisation will inevitably mean the cancellation or long-term postponement of capital projects that have been announced but not yet delivered.

Measuring impact

- 10.42 If education is to be valued as an investment for the wider society, it should be treated as such. This entails collecting better information on our expenditure and the impact of our investment. Therefore, we should focus on measuring the outcomes delivered by the investment, review and re-evaluate our spending to incorporate best practices, and put in place practical arrangements to enhance efficiency. This may also require the establishment of formal partnerships with academia to assess programmes, policies, and expenditure consistently.
- 10.43 DE should review all existing spending to ensure that it is aligned with policy objectives and delivering positive outcomes. Providing funding for schemes must be subject to the achievement of appropriate indicators of success. This review programme should be a regular, ongoing process that is relentlessly focused on guaranteeing value for money in investments.
- 10.44 There are also practical considerations on how the education budget is spent. At a strategic level, the education budget is characterised by being reliant on in-year allocations (by way of monitoring rounds). This uncertainty leads to difficulty in long-term planning. This is further exacerbated by the use of 12-month budget cycles, complicated by the conflict between the academic year versus financial year.

- 10.45 The last multi-year budget settlement was for the financial years 2011/12 to 2014/15. Since then, there have been 1-year budgets¹⁵⁰. Education needs greater certainty and the ability to plan over a multi-year future. This should help policy design and service delivery and aid long-term planning. A fully funded system is the key first step, but this should be supported by the return to multi-year budget cycles and longer-term investment. Such an approach would likely be of benefit to a range of government departments and services.
- 10.46 Beyond managing budgets and allocating resources, proper planning also involves ensuring education's responsiveness to changing societal and economic needs and technological advancements. This is particularly true when planning the curriculum and delivering services. Education can become more responsive in different ways, including through investing in its technical capacity and taking seriously the need for a horizon-scanning function, enabling it to plan and prepare for change. A central education "intelligence" function should have the ability to access research to make informed decisions, monitor programmes, and interrogate spending.

Key recommendations: Funding

Invest in education

Education is the single most important investment in the future of society and the economy. Increasing the current level of investment will generate future savings in areas such as health, welfare and criminal justice.

The Executive should immediately increase the annual education resource budget by £155m to address the per-pupil funding gap with England and Wales.

We have identified a further £136m shortfall related to higher levels of learners with a statement of educational need in Northern Ireland in comparison with England. Meeting these needs in an affordable manner is likely to require both restructuring of the current processes for intervention as well as an additional allocation to meet some portion of this funding gap.

Furthermore, we recommend an additional annual capital allocation of £25m (above current capital budget levels for an estimated period of 5 years) to address current needs in the provision of SEN facilities in both special and mainstream schools.

In addition to the funding outlined above, which is required to bridge the financial gap with other jurisdictions, there is a need to invest in education to implement the recommendations of this Report. This will require an Executive-led Education Investment Strategy. Additional funding should be made available progressively over future years by means of both additional budget allocations and through implementation of the recommendations in this Report which will generate efficiencies.

DE should invest in an education "intelligence" function, ensuring there is the technical capacity and appropriate access to research to make informed decisions, horizon scan, collect data, monitor programmes, interrogate spending and leverage emerging technologies.

The Executive should put in place multi-year budgets for education.

OVERVIEW OF RECOMMENDATIONS

The tables below set out each of the key recommendations and include the proposed lead delivery agent, potential costs (and accompanying assumptions) and expected timescales. Further information on the recommendations can be found in Volume 1 or the specific chapters referenced in Volume 2.

We have grouped the recommendations into three areas.

- Investing in the education journey.
- Investing in support for our learners, educators and parents.
- Investing in the education system and structures.

The ordering of the recommendations is not intended to suggest a priority. They are of equal importance. These tables only include “key recommendations”. As explained, Volume 2 (and **Appendix 6**) provides a fuller list of all recommendations, however these are not all costed.

In terms of lead delivery agent, on many occasions this is described as “Department” meaning the new unified department that would be responsible for all aspects of learning and skills.

We have attempted to provide indicative costs (or savings) and explain the underlying assumptions for these calculations. Of course, more information on our assumptions is provided in relevant sections in Volume 1 or Volume 2. All costings are estimates. There are many areas where costs are subject to review and will change depending on decisions regarding policy design or implementation. As stated, the tables do not include wider recommendations. Therefore, costs or savings attached to those wider recommendations are not reflected.

Similarly, timescales are indicative. Many recommendations will require legislation for full implementation and that the legislative timetable may be a significant constraint on delivery.

Investing in the education journey

No	Recommendation	Lead	Indicative Costs ¹⁵¹		Costing Assumptions	Timescales	Volume 2 reference
			Minimum	Maximum			
1	Raise the age of educational participation	Department	£15m	£15m	Assumes half of pupils who currently leave education after GCSE would stay in school and half would go to FE college.	Within 2 years	Chapter 4
2	Expand early years education	Department	£18m	£110m	Minimum: disadvantaged 2-year-olds receiving 12.5h per week. Maximum: all 2-year-olds receiving 20h per week.	Phased approach with full expansion within 10 years.	Chapter 1
3	Give everybody the opportunity to access basic education throughout their lifetime free of charge	Department	£6m	£10m	Difficult to determine exact demand. Assumes just over 8,000 eligible learners per annum with an uptake between 50% and 66%.	Within 5 years	Chapter 6
4	Undertake major reform of the curriculum and keep it under continual review	Department/ Curriculum Agency	-	-	Operational costs will depend on decisions on curriculum changes. No costs included. Development costs of between £5m-£7.5m identified in recommendation 13.	Within 3 years	Chapters 4 & 5

¹⁵¹ Per annum unless stated.

No	Recommendation	Lead	Indicative Costs ¹⁵¹		Costing Assumptions	Timescales	Volume 2 reference
			Minimum	Maximum			
5	Modify the transition process	Department	-	-	No additional costs identified.	Within 3 years	Chapter 5
6	Provide new curricular pathways for all at 14	Department/ Curriculum Agency / FE colleges	-	-	Decisions to change curriculum would be costed in their own right.	Within 5 years	Chapter 5
7	Ensure assessment supports progression	Department/ CCEA	£1.5m	£5m	Implementation of new statutory arrangements could have costs between £1m-£2m per annum. There is the potential to offset costs against current spend from school budgets (c£2m-£5m per annum).	Within 3 years	Chapters 4 & 5
8	Reform the Careers Service to promote understanding of the world of work	Department/ Careers Service	-	-	No additional costs identified.	Within 2 years	Chapters 2, 4, 5, 6 & 7
9	Retain local talent	Department	£18m	£18m	Assumed 10% uplift of MASN.	Within 10 years	Chapter 6

Investing in support for our learners, educators and parents

No	Recommendation	Lead	Indicative Costs ¹⁵²		Costing Assumptions		Timescales	Volume 2 reference
			Minimum	Maximum				
10	Invest in education	Northern Ireland Executive	£155m	£155m	The funding gap between Northern Ireland and England (per pupil basis) is c£155m.	Immediate	Chapter 10	
			-£20m	-£10m	Potential savings generated by a charging model for home to school transport.			
			£25m capital ¹⁵³	£25m capital ¹⁵⁴	Based on analysis of recent trends of spend on SEN minor works.			
11	Transform SEN support to cater equitably for the needs of all learners	Department/ EA	£136m	£136m	The estimated SEN gap between Northern Ireland and England is c£136m.	Work to commence immediately.	Chapter 3	
					Total Classroom Assistant (CA) cost currently £176m. Assumed transition to fewer CAs and more specialist teachers / professional support.	Workforce Programme design within 6 months		
12	Value the education workforce	Department	£5m	£10m	Additional professional development.	Immediate	Chapter 7	

¹⁵² Per annum unless stated.

¹⁵³ For a period of 5 years.

¹⁵⁴ For a period of 5 years.

No	Recommendation	Lead	Indicative Costs ¹⁵²		Costing Assumptions	Timescales	Volume 2 reference
			Minimum	Maximum			
13	Provide expert curriculum advice	Department/ Curriculum Taskforce / Curriculum Agency	£5m	£7.5m	Cost of staffing Curriculum Taskforce	Immediate start with initial 3-year work programme for Taskforce. Agency to come into effect during that period.	Chapter 4
14	Facilitate learner-centred interventions	Department	-	-	Reformed EA. May be one-off costs but no additional on-going costs anticipated.	Within 2 years	Chapter 8
15	Give additional support to allow parents to get into work	Executive	-	-	This links to the economy therefore additional costs not for the education budget.	Immediate	Chapter 1
16	Prioritise wellbeing	Department	£5m	£10m	Estimated cost of additional services.	Within 2 years	Chapter 3
17	Combat disadvantage	Department	£10m	£20m	Estimated cost of relevant Fair Start recommendations.	Within 3 years	Chapter 2

Investing in the education system and structures

No	Recommendation	Lead	Indicative Costs ¹⁵⁵		Costing Assumptions	Timescales	Volume 2 reference
			Minimum	Maximum			
18	Establish a single Department for the entire education journey	Northern Ireland Executive	-	-	No anticipated on-going additional costs or savings.	Within 6 months	Chapter 8
19	Reform school management arrangements	Department	-	-	No anticipated on-going additional costs or savings.	Controlled Sector Management – immediate. Single Authority – within 2 years	Chapter 8
20	Reconfigure the network of schools	Department/ Independent Planning Commission	-£48.7m per annum	-£33.6m per annum	Assumed between c. 50% and c. 66% of identified possible savings achieved at the end of the process. Note: one off cost of c£1bn capital and £135m resource related to full implementation of the plan assumed over 10-year period.	2-year planning period. 10-year delivery period.	Chapter 10

¹⁵⁵ Per annum unless stated.

No	Recommendation	Lead	Indicative Costs ¹⁵⁵		Costing Assumptions	Timescales	Volume 2 reference
			Minimum	Maximum			
21	Promote learners learning together	Department			No assumed additional costs or savings from current level of spend.	Immediate	Chapters 5, 8 & 9
22	Promote a cost effective, thriving and value for money college sector	Department	-£58m per annum	-£44m per annum	Theoretical possible saving calculated using reference to benchmark Great Britain college costs.	Within 3 years	Chapter 6
23	Use broad measures of success	Department/ ETI	-	-	No substantive additional on-going costs/savings.	Immediate	Chapter 5
24	Strengthen accountability	Department/ ETI	-	-	No substantive additional on-going costs/savings.	Immediate	Chapters 8 & 9
25	Introduce a legislative framework that enables innovation	Department	-	-	No substantive additional on-going costs/savings following introduction of legislation.	Within 5 years	Chapter 9

GLOSSARY OF TERMS

AEP	Assistant Educational Psychologist
AI	Artificial Intelligence
ALB	Arm's Length Body
ALC	Area Learning Community
AMH	Action Mental Health
AQE	Association of Quality Education
ASB	Aggregated Schools Budget
ASCL	Association of School and College Leaders
AWPU	Age Weighted Pupil Unit
BoG	Board of Governors
CA	Classroom assistant
CAFRE	College for Agriculture, Farming and Rural Education
CAMHS	Child and Adolescent Mental Health Services
CCEA	Council for the Curriculum, Examinations and Assessment
CCMS	Council for Catholic Maintained Schools
CDR	Consolidated data return
CEIAG	Careers Education, Information, Advice and Guidance
CES	Centre for Effective Services
CFF	Common Funding Formula
CFS	Common Funding Scheme
CLA	Children Looked After
CnaG	Comhairle na Gaelscolaíochta
CPD	Continuing professional development
CPTSD	Complex post-traumatic stress disorder
CREU	Centre for Research in Educational Underachievement
CSSC	Controlled Schools' Support Council
CSTS	Catholic Schools' Trustee Service
CYP	Children and Young People
DAERA	Department of Agriculture, Environment and Rural Affairs
DE	Department of Education
DEL	Departmental Expenditure Limit
DfC	Department for Communities

DfE	Department for the Economy
DoH	Department of Health
DoJ	Department of Justice
DP	Development Proposal
EA	Education Authority
Ed Psych	Educational Psychologist
EdIS	Education Information Solutions
EFTS	Equivalent full-time student
EHC	Education and Health Care
EILSA	Early Intervention and Learner Support Agency
EMA	Education Maintenance Allowance
EOTAS	Education Otherwise Than At School
EP	Educational Psychologists
EPS	Educational Psychology Services
ERAP	Economic Recovery Action Plan
ESF	European Social Fund
ESL	Early School Leaving
ESOL	English for Speakers of Other Languages
ESRI	Economic & Social Research Institute
ETB	Education and Training Board
ETI	Education and Training Inspectorate
EU	European Union
EWC	Education Workforce Council
EYFS	Early Years Foundation Stage
FBC	Full Business Case
FE	Further education
FEC	Further education college
FESR	Further Education Statistical Return
FM	Financial Memorandum
FSM	Free school meals
FSME	Free school meal entitlement
FTE	Full-Time Equivalent
GAA	Gaelic Athletic Association
GBANI	Governing Bodies Association Northern Ireland

GCSE	General Certificate in Secondary Education
GL	Granada Learning
GTCNI	General Teaching Council for Northern Ireland
HE	Higher Education
HEI	Higher Education Institution
HESA	Higher Education Statistics Agency
HM	His Majesty
HNC	Higher National Certificate
HND	Higher National Diploma
Hons	Honours
HQCE	High Quality, Cost Efficient
HR	Human Resources
HSC	Health and Social Care
ICT	Information and Communication Technology
IFA	Irish Football Association
IFS	Institute for Fiscal Studies
ILiAD	Investigating Links in Achievement and Deprivation
IM	Irish-Medium
IPSC	Integrated Primary School
IT	Information Technology
ITE	Initial Teacher Education
KS	Key Stage
LLW	Learning for life and work
LSA	Learning Support and Assessment service
MaSN	Maximum Student Number
MCA	Middletown Centre for Autism
MDM	Multiple Deprivation Measure
MIS	Management Information System
MLA	Member of Legislative Assembly
MoJ	Ministry of Justice
NCB	National Children’s Bureau
NDNA	New Decade, New Approach
NDPB	Non-Departmental Public Body
NEET	Not in Education, Employment or Training

NESF	The National Economic and Social Forum
NFER	National Foundation for Educational Research
NI	Northern Ireland
NIAO	Northern Ireland Audit Office
NICCY	Northern Ireland Commissioner for Children and Young People
NICIE	Northern Ireland Council for Integrated Education
NIECS	Northern Ireland Early Childhood Service
NIESC	Northern Indiana Educational Services Centre
NIO	Northern Ireland Office
NISRA	Northern Ireland Statistics and Research Agency
NQF	National Qualifications Framework
NQT	Newly Qualified Teacher
OECD	Organisation for Economic Co-operation and Development
OfQual	Office for Qualifications and Examinations Regulation
ONS	Office for National Statistics
OT	Occupational Therapist
PA	Psychology Assistant
PAC	Public Accounts Committee
PBL	Project Based Learning
PDMU	Personal Development and Mutual Understanding
PE	Physical Education
PFI	Private Finance Initiative
PGCE	Post-graduate Certificate in Education
PIAAC	Programme for the International Assessment of Adult Competencies
PIRLS	Progress in International Reading Literacy Study
PISA	Programme for International Student Assessment
PPTC	Post-Primary Test Consortium
PSEP	Pre-school education programme
PSS	Pupil Support Services
PTSD	Post-traumatic stress disorder
QUB	Queen's University Belfast
ROI	Republic Of Ireland
RPA	Review of Public Administration
RRI	Reinvestment and Reform Initiative

SEAG	Schools' Entrance Assessment Group
SEN	Special Educational Needs
SENAC	Special Educational Needs Advice Centre
SENCO	Special Educational Needs Co-ordinator
SEND	Special Educational Needs and Disability
SENDIST	Special Educational Needs and Disability Tribunal
SESP	Shared Education Schools Programme
SLC	Student Loan Company
SLCN	Speech, language and communication needs
SLT	Speech and language therapy
SoS	Secretary of State
SSEC	Strule Shared Education Campus
SSP	Sustainable Schools Policy
STEM	Science, technology, engineering and mathematics
TEO	The Executive Office
TFC	Tax-Free Childcare
TIA	Trauma Informed Approach
TIMSS	Trends in International Mathematics and Science Study
ToR	Terms of Reference
TRC	Transferor Representative Council
TSN	Targeting Social Needs
UC	Universal Credit
UCAS	Universities and Colleges Admissions Service
UK	United Kingdom
UN	United Nations
UNCRPD	United Nations Convention on the Rights of Persons with Disabilities
UNESCO	United Nations Educational, Scientific, and Cultural Organization
US	United States
UU	Ulster University
VES	Voluntary Exit Scheme
VET	Vocational Education and Training
VfM	Value for Money
VG	Voluntary Grammar
YCNI	Youth Council Northern Ireland

