

AG TEACHT LE CHÉILE



A Consultative White Paper on the Development of the Le Chéile Trust

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FOREWORD

Welcome to the second phase of a consultation process in the setting up of the Le Chéile Trust. The Trust is the way a number of congregations will renew and reformulate their responsibility for schools. At present, twelve congregations are involved in the dialogue (Appendix 1).

The fundamental question in the consultation process is “What type of trusteeship is necessary for the future of Catholic education in Ireland?” This question embraces a wide spectrum of current involvement by the congregations in education - primary schools, voluntary secondary schools, some community schools and third level institutions.

The congregations have been meeting for over three years now, sharing perspectives on their role as Trustees. In embracing a policy of consultation with the school communities, they were asked to develop documentation to help focus attention, and to guide responses. The congregations decided on a political model of a Green Paper, a White Paper, a Bill and an Act. Each of these stages outlines the development of the Trust and allows different stakeholders respond and influence the final decision. This White Paper is the second stage of the process. It builds on feedback received on the Green Paper published in January, 2005. It incorporates concerns raised by Boards of Management, principals, parents and teachers, as well as the continued reflection by the current Trustees on their responsibilities to the schools.

The White Paper is written in four sections. Section 1 examines the context of Catholic schools in Ireland and states a vision of Catholic education which inspires the organisational responses in the next three sections. Section 2 examines the role of Trusteeship and proposes structures for the new Trust and a vision of the service it will offer. Section 3 proposes guidelines for the administrative operation of the Trust, with particular focus on the relationship between the Trust and the Board of Management. Section 4 outlines options related to the transfer of legal (civil and canonical) responsibilities for land and finance to the Trust.

This White Paper marks a considerable advance on the Green Paper. Yet, much remains to be done in defining the constitution of the new Trust. We have benefited greatly from previous feedback, and we look forward to continuing that process with meetings in individual schools and in clusters of schools. We have set out a number of key questions in Appendix 3 that will be of great help to us. You are free to add other comments and areas as well, especially if some areas have been missed out. To aid the process, we will launch a website www.lecheiletrust.ie on December 1st, 2006, which will incorporate a forum to allow you give feedback on issues raised in the White Paper. You are also free to give feedback through the current trustees. We look forward to hearing from you.

DAVID TUOHY S.J.
Advisor to the Trust.

October, 2006



PART 1

A Context for Trusteeship: Developing a Vision for Catholic Education





CATHOLIC EDUCATION: Some Underlying Principles

The Le Chéile Trust is concerned for the future of Catholic education. This concern is exercised in running Catholic schools at both primary and post-primary level, and also promoting values consistent with a Catholic vision of education in Community Schools. Catholic education refers to the general way in which an individual comes to grow and develop in their relationship with God in the Church. This is an ongoing, life-long process and therefore the Trust will provide a service to all members of the school community - students, parents, teachers and other staff members.

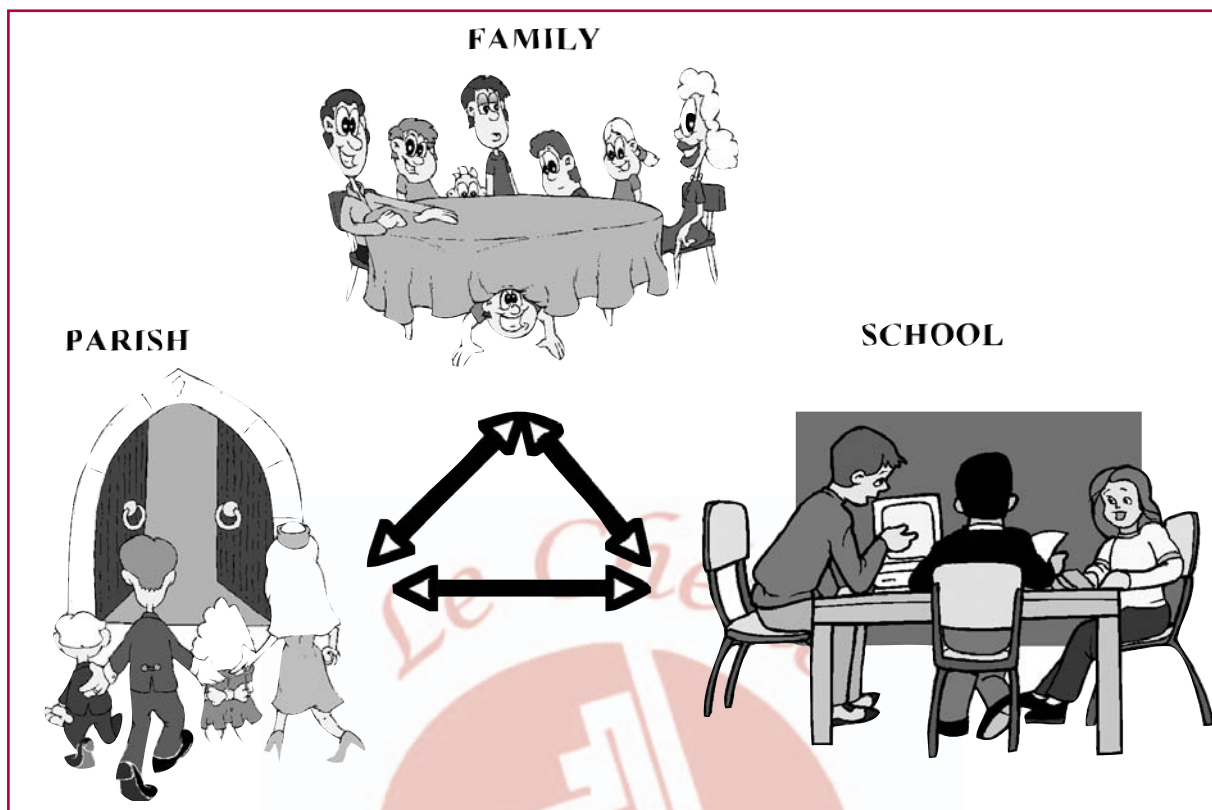


Figure 1. Three key dimensions of Catholic Education: Family, Parish and School

The primary source of spiritual formation for young people is the home. This is affirmed in the documents of the Church, and is the cornerstone of the rights of parents enshrined in the Irish constitution. Two institutions support parents in their mission of passing on the faith to their children - the Parish and the School.

Catholic education therefore is a threefold partnership between Home, School and Parish.

The Home. The home is the basic experience of community for a young person. It is hoped that the home provides the positive atmosphere that allows the young person to experience the unconditional love of others, and so come to appreciate the essential values of self-esteem and respect for others. The family socialises children to the framework of relationships within which they grow as adults. A key element in this socialisation is developing the sense of the sacred. Parents are the first teachers about the role of God's love in the lives of their life, and they help develop in them habits of prayer and reflection.

The Parish. The Parish is where people experience the community of the Church at a local level. They get to know their neighbours in the fullest sense of the Christian term, rather than simply knowing their friends. The local parish is where people celebrate the Eucharist and the other sacraments, and hear the word of God preached. The parish nurtures the devotional life of the Church. Many parishes also give opportunities for building community, through development activities such as Youth Clubs and through opportunities to give service to others in organisations such as the St. Vincent de Paul Society.

The School. The school builds on the religious formation of the home and the parish. It provides opportunities for children to explore different elements of the Christian message with their peers, at a level appropriate to their age. The school can nurture experiences of worship and prayer, help young people explore the intellectual dimension of their faith, and provide access to opportunities for service to others through extra-curricular activities. The Catholic school can be an intense experience of a vibrant Christian community that invites young people to a deeper commitment to their faith.

In the future, this partnership will need to be developed and strengthened as part of a general pastoral policy in the Church. Changes in society and in the way we communicate with one another demand new ways of working together, and new structures of organising that partnership. Family life is not the stable institution it once seemed to be, and many young people experience the trauma and confusion of broken homes. Often, young people find the experience of parish alienating. The forms of worship are adult forms, and there is little experience of participation. The experience of religion at school can sometimes be confused with elements of compulsion that go with the discipline system of a school. Yet, when young people have a good experience of the community of faith in the school, it is important that there is some link made with the parish structure. Young people need to make the transition between the world of school and that of the parish, as they grow in independence. Providing this link between self, home, school and parish is an urgent issue in the pastoral strategy of the Church.

CATHOLIC SCHOOLS

Irish Context

Historically in Ireland the responsibility for schooling has been a partnership between the State, Private Providers (mainly the Churches) and the Local Community.

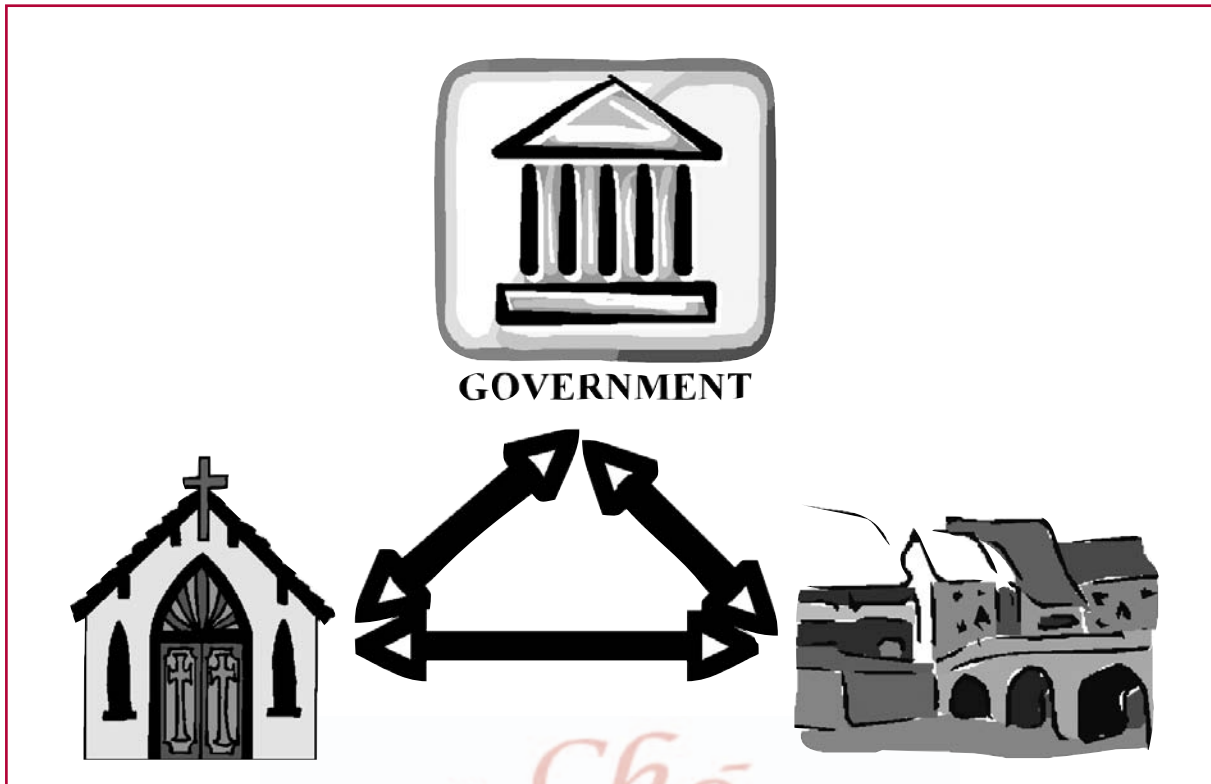


Figure 2. Key stakeholders in the provision of Catholic Schools

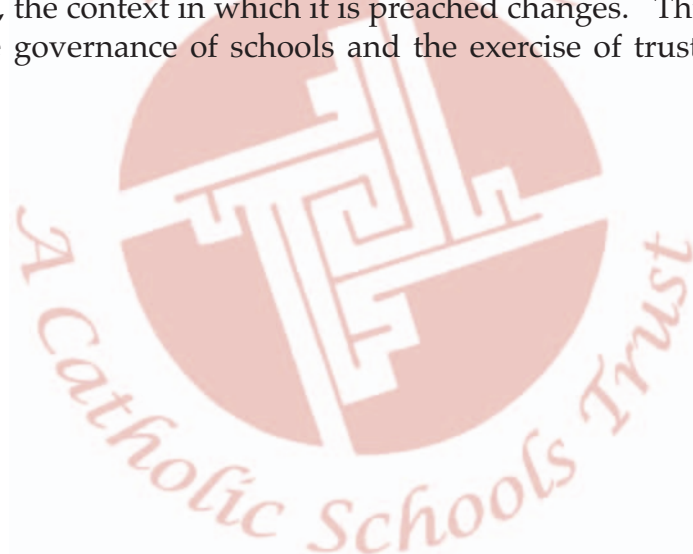
The State has a responsibility to provide for the common good of its citizens. This means that it provides a basic education to enable each person to play a full part in society. Internationally, there is a debate as to how much education the State should support, and how much is the responsibility of the individual. In Ireland, the State provided free primary education up to 1967. Although it supported post-primary education by giving grants to the schools, education beyond that was the responsibility of the individual. From 1967 the State became more involved in post-primary education, making it available for all citizens by removing fees and offering capital grants for the building of new schools. In more recent years, the State has tried to increase access to third-level education by removing fees.

Private providers (Patrons) have played a major role in the establishment of schools in Ireland. The State has depended on such patrons or on local communities to provide the infra-structure for schools. In general, the land for the building of the school had to be provided by someone other than the State. To this day, the State has very little “ownership” of school land. In response to State support, patrons agreed to run their schools according to rules and regulations set down by the State through the Department of Education.

The local community supports the schools by sending children as pupils. Parents can choose the type of school their child attends. In the past, parents did not have much choice. In recent years, groups of parents have come together to set up alternative types of schools - non-denominational Project Schools, or multi-denominational Educate Together schools at primary level.

The history of Irish education shows a changing relationship in the pattern of partnership between these stakeholders. In the establishment of the system, the State was very dependent on the Church for the provision of schools. The secondary education system depended almost entirely on private patrons - mainly the Church - for the infra-structure and the teachers. The primary sector was also dependent on Church sources for the training of teachers and for the local governance of schools. To-day, there is much greater reliance on State funding and support in all areas of education - capital development, salaries, general funding, curriculum development, etc. In the middle of the 1900s, the link between the local community and the Catholic Church was very strong. To-day, a growing proportion of the population have no affiliation to the Catholic Church, and even among Catholics there is less of a demand for an institutional presence in schools.

The changing culture, and the landscape of educational provision, provides the backdrop for developments in Trusteeship. The need to preach the gospel message remains an ever-present call to the Church. Despite problems within the Church itself, and opposition from an increasingly secular world, the gospel invitation to “live life to the full” by following Jesus remains the core mission of the Church. A key element of that preaching is the work of education. Whereas that message remains constant, the context in which it is preached changes. This gives rise to new challenges in the governance of schools and the exercise of trusteeship in Catholic education.



CATHOLIC SCHOOLS

Historical Perspective

At different stages in the history of the country, the balance of responsibility between the different partners has changed. The partnership has also taken different forms depending on the level of school. In this White Paper the focus is mainly on the relationships that existed where the private provider is the Catholic Church, through the Bishops or through religious congregations. In giving a short historical perspective, the focus is of necessity on popular images of educational provision. Individual congregations and individual schools will relate to particular developments in different ways. Particularly where hindsight portrays the general Catholic schooling in a negative light, many congregations and schools provided a creative, caring and nurturing environment. This should not be forgotten in the generalisation that follows.

FOUNDATION:

19th Century until Founding of State

The Catholic Emancipation Act was a welcome relief to the educational aspirations of the Catholic community where the sole source of schooling had been the illegal Hedge Schools. The legacy of the oppressive relationship with the government, and an association between schooling and proselytising influenced the establishment of the primary education system. It was dogged with sectarian arguments and suspicion of government intentions. At a practical level, local demographics also ensured that most of the primary schools were, de facto, Catholic.

The Churches played a major role in providing land for local primary schools and became responsible for collecting a local contribution for capital expenditure. As a result, the management of the vast majority of these schools was in the hands of local parish clergy. Parents were expected to support the local denominational school, and to entrust their children to its care.

Secondary education was confined to a small proportion of the population. The endowment of the schools came mainly from the philanthropy of a wealthy Catholic merchant class, who had found new political power. This philanthropy was exercised through the religious congregations, especially the newly founded native congregations. They attracted membership from the merchant class, and these members brought considerable wealth or "dowries", which was invested in the work of the congregations. Membership grew at a phenomenal rate and many congregations founded missionary outlets following Irish migration to Australia, England and the United States, as well as more traditional missionary activity in Africa. Many congregations established schools, where their aim was to provide

educational opportunities for Catholics in their own country, and to extend the opportunity for education to the less well off. The Irish schools survived on the founding endowments, the free labour of the congregational members and by charging nominal fees to the students.

ESTABLISHMENT: 1922-1967

With the founding of the state in 1922, there was no major change to the way the education system was organised, although there was a shift in emphasis in the curriculum, with a greater emphasis on Irish culture. It is worth noting some aspects of the culture of the secondary schools in that period.

The vast majority of schools were single-sex, and they were small. In 1960, 65% of secondary schools had less than 150 students. In many small towns, there were separate boys, girls and vocational (mixed) schools. Secondary school buildings varied hugely, from fine boarding schools in splendid parkland settings of old estates to converted dwelling houses. In 1965, 237 of the 580 secondary schools catered for boarders and one third of all secondary pupils attended as boarders. Students went through routines of classroom tuition, study, prayer and recreation - routines that often reflected those of a religious community. Many boarding schools were isolated from the life of the wider community. For some schools, there was a strong emphasis on academic achievement. The curriculum was book oriented, requiring a minimum of overheads or teaching aids. If science was taught, it was often taught without laboratories. Language study was mainly written with little emphasis on oral skills. In line with university matriculation requirements, most studied Latin. The main career opportunities were in the Civil Service, the Church, business, teaching, nursing or farming.

The dominant view of the Church was that of a closed institution. In education there was a clear focus on providing an education for Catholics, with a strong emphasis on Catholic doctrines and the sacraments. The marks of the institutional church of the time were clerical, juristic and triumphalist. There was a clear distinction between the Church sanctified and sanctifying, the Church taught and teaching. Although the rhetoric was that parents were the prime educators, it was assumed, and even demanded, that they entrust their children to the legitimate teaching authorities. Catholic schools lived out of this authoritarian model and incorporated the nationalist aspirations of re-establishing a strong Gaelic culture through the school system.

Many commentators have reflected critically on the type of education offered at the time. They claim that the curriculum, the code of discipline practiced and the didactic style of pedagogy, signified a resolute censorship of the imagination by school authorities. This was achieved by a segregation of the sexes, an emphasis on sexual morality, a Spartan approach to games and corporal punishment and censorship of what was to be read and studied. This was balanced by individual

experiences. Autobiographical descriptions of school at the time show that schools varied hugely in the relationship that existed between teachers and pupils. Some found the system highly oppressive and were stifled by it. Some people clearly thrived on the education provided. Others thrived despite it.

The emphasis on congregational ownership of schools had added significance for lay teachers, who were often not regarded as full partners. They were not consulted on any decisions and had little involvement in the regular running of the school. The teaching career was also coloured by the fact that they could not aspire to promoted positions such as principal.

The late 1960's and early 1970's saw major changes in Irish society. These embraced cultural, political and economic issues. In particular, the role of the Catholic Church began to change significantly. This was due partly to external pressures and partly due to major changes within the Church, where there was a new understanding of what it was to be a Catholic arising from the Second Vatican Council.

EXPANSION: 1967 - 1991

Throughout the 1960's the economic climate of Ireland changed. With the Investment in Education Report (1965), education policy moved from a focus on cultural issues, particularly the Irish language, to a human capital or a mercantile (market-driven) focus. The government aimed to raise the participation rates in secondary education and to develop a new curriculum that prepared students for an industrial and scientific age, rather than an agricultural economy. The national response was immediate and positive. Within a decade, the numbers in secondary schools had doubled, from 77,000 in 1961 to 157,000 in 1971, although the number of schools remained the same. There was a similar increase in numbers in vocational schools.

As the number of students in secondary schools increased, the membership of religious congregations was declining. There was a major increase in the number of lay teachers within the system. The changed proportion of religious working in secondary schools affected the perception of ownership of the enterprise. This was also reinforced by increased government investment in schools in terms of both capital development and also at the operational level. To cope with the expansion of numbers, the government offered capital grants of 90 per cent for new and refurbished buildings. Part of the consequence of this was the setting up of Boards of Management, which gave a decision-making role to teachers and parents in the running of the schools.

It is generally accepted that the period immediately after Vatican II was a period of confusion in the Church. In the wake of doubts cast on the institutional certainties of the past, there was a rejection of confessional apologetics in religious education syllabi. The operative model of Church in this period was that of building community. There was a much greater focus on the personal development of the

individual. The approach emphasised a spirituality that proclaimed solidarity with humankind and promoted images of a friendly (immanent) God rather than a distant (transcendent) one. In classrooms, there was a greater emphasis on discussing moral issues than on learning formal doctrine. This focus on the individual was paralleled in the abandonment of traditional orthodox practice and the rejection of Church authority by many adults.

Where demographic distributions required new schools and no religious congregation could provide the site, the government set up a new type of Community School, which was fully financed by the state. Where these schools have been formed as an amalgamation of existing schools, the religious congregations who were involved originally were often invited to act as trustees. In new “green-field” situations congregations were also invited to act as trustees. It seems that parents wanted some link with the value dimension of the Catholic tradition, while availing of the improved financial benefits of the new Community School structures. This fitted in with a growing understanding in the Congregations of providing a “Catholic education for all”, where there was a greater emphasis on the value dimension of education rather than the control aspect of running the school.

CURRENT ISSUES

With the second OECD report (1991) there was an increased emphasis on a more equitable distribution of education benefits. This has led to a new “social welfare” focus in education provision and legislation. The aim is to ensure that the system is responsive to those who live in disadvantaged conditions due to poverty and to those who have special educational needs.

At a national level, there is now an increased investment in third level education, and performance in secondary school is a means of selection to third level courses. This means that second level education is often regarded in utilitarian terms - as a means of entry to prestigious career pathways. This puts extra pressure on secondary schools in terms of academic results, and places a disproportionate emphasis on the Points System as a measure of educational success.

The government has also promoted the market concept of parents as consumers, and promoted their involvement in the system. In line with this consumer approach, there has been a growing demand for data on school performance “to help parents make appropriate educational choices”. Normally, the demands are for crude measures of examination success rather than performance on personal development.

The social welfare paradigm sits uneasily alongside the human capital and mercantile paradigm that has a strong grip on the education system. Schools struggle with the demand to produce high academic achievement and also to welcome pupils who find it hard to adapt socially and behaviourally to a schooling culture foreign to their experience.

From a religious perspective, Ireland has also been affected by global trends of secularisation and materialism. There is a growing sense that we are living in a multi-cultural society where the role of institutional religious identity is not at all central to people's choices. This raises major questions about the role of Catholic schools, especially where students have such limited choice as to the school they attend, or teachers have very limited options as to the type of school in which they pursue their careers.

The question arises for Catholic schools - are they "Schools for Catholics", or are they "Catholic schools for all". The shift in thinking here is from a tribal or community concept of the Catholic school to a concept based on gospel-values. Authorities in Catholic schools experience this question as a tension. At one pole of the tension there is the call to maintain a traditional Catholic school, where there is a strong emphasis on traditional Catholic values and practices. At the other pole, through formal programmes and also through the witness of the lives and practices of school personnel, students, parents and staff are invited to reflect on Christian values and commit themselves to these values. The school becomes, at the same time, a means of evangelisation and support for the Catholic ethos. These poles are not mutually exclusive. Through dialogue and practical decision-making, schools attempt to make a "faith-full" response to the challenges facing them.





DEVELOPING VISION

One outcome of the history of schooling in Ireland over the past two centuries or so is that the special identity of the Catholic School has not always been well articulated. Much of what is important in Catholic schools was taken for granted as being a normal part of the values of the community. In schools that were not specifically Catholic in character (vocational schools and community schools), most of the teachers were, in practice, Catholic. They had grown up in a Catholic culture and shared many of the values of those teaching in specifically Catholic schools. As a result, there can be strong similarities between the different schools in terms of approaches to education and to values.

Stating a vision for Catholic education in the Irish context therefore presents a particular challenge. The vision seeks to state the core values that animate the Catholic school. The vision must also recognise the particular historical context in which Irish education has developed, and the entanglement with the emerging nationalist culture of the time. It will seek to place in context the highly institutional approach that dominated the Church's engagement with the politics of the state, and particularly the governance of education. The vision will promote the Catholic school through the authenticity of the humanitarian and spiritual values it espouses rather than from the rhetoric of power and control. In stating such a vision, the Trust seeks to proclaim its understanding of Catholic education. It invites school communities to strive to implement this vision, and it invites parents and students to reflect on the world view it presents with an open mind.

A Catholic school is first of all a school. As such, it must provide a comparable service to that of any other school. In particular, the school should satisfy all the criteria of a good school, in line with national education policy. It may also offer a "value-added" dimension, arising from its particular ethos. In that context, the Trust's vision for Catholic schools in the early 21st century incorporates four perspectives:

- a school
- a Catholic school
- a Catholic school in a specific congregational tradition
- a Catholic school in Ireland

Where congregations are involved as Trustees in non-denominational schools, their aim will be to promote opportunities for Catholic students to experience elements of this vision in an appropriate way. They also seek to provide appropriate experiences in the area of the sacred for those of other Christian denominations, and for those of other faiths.

SCHOOLS

The Department of Education and Science Strategic Plan (2005-2007) gives the mission statement of the Department:

The mission of this Department is to provide high-quality education which will (a) enable individuals to achieve their full potential and to participate fully as members of society; and (b) contribute to Ireland's social, cultural and economic development.

There is a dual focus - on the individual and on the system. To a large extent, the mission of the new Trust will be similar, in empowering the schools to have this dual impact. In particular, this vision recognises the personal, social, cultural and economic role of schools.

Personal. There is an increased emphasis on individuals having a wide range of competencies and personal qualities, particularly flexibility. The focus is more on life-long learning. The goal of education is to become a learner, rather than to acquire a particular body of knowledge.

Social: Education plays a major role in promoting values of tolerance, civic participation and social cohesion. This is particularly important in an increasingly multi-cultural society, where there is a growing awareness of equality and inclusion issues, and the effects of educational disadvantage are better understood.

Cultural: There is a greater awareness of the complexity of history and language in promoting national identity in the accepted cultural diversity of a European and international context. Irish people have greater mobility in visiting and working in diverse cultures. Ireland also has a substantial immigrant population and an increase in returning migrants, which both gives a richness to the education process and also challenges it to meet the requirements of these groups.

Economic: Preparing students for a knowledge and innovation based society is increasingly seen as essential to continued economic competitiveness and prosperity. Schools provide opportunities to learn through developments in information technology and promote such learning skills in students.

There is also an increased awareness of individual rights and responsibilities in education. This has led to a greater focus on the legal obligations of schools. The role of the teacher also changes in the face of the changing technology of learning and also the changing value system in society. There is need for specific support in this area.

CATHOLIC

What distinguishes the Catholic School is the relationship between the school and the Church, and the commitment within the school to explore and promote Catholic identity as a core, central aspect of the school rather than as an option within the school. As such, the Catholic school will seek to integrate the values espoused in Church documents on education, especially since the Second Vatican Council.

The way in which the Catholic Church thinks of itself has changed dramatically since the Second Vatican Council. The Church no longer sees itself solely in terms of an Institution - that perfect society that sets itself against secular society. Rather, it affirms that God is at work in human culture, bringing creation to perfection. We find God's revelation of self through the developments of culture, and especially in the deep experience of community. The Church witnesses to that revelation and helps people understand the signs of the times, encouraging them to respond to God's invitation to work with him, to build up the Kingdom.

The Catholic school plays a vital role in that mission. It works in two ways - as a witness and as a support. The school invites its members to deeper reflection in five different areas, and supports individuals and groups who respond to that reflection.

- **Intellectual.** The Catholic school builds on the secular academic disciplines which introduce students to a critical appreciation of the world they live in, and develop in them skills that enable them to participate fully in that world.
- **Moral.** The Catholic school invites students to reflect on key moral issues and to examine their responsibility to themselves, to others, to society and to the environment. This reflection takes place within the Christian tradition.
- **Mystical.** Developing a relationship with God means entering into the world of mystery. Students are introduced to this through such areas as nature, art, poetry and music. The spiritual dimension is developed through different experiences of prayer, where they come to appreciate God as creator of the universe, and also the mysterious oneness and inter-relatedness of creation.
- **Sacramental.** A key mark of Catholic belief is that we meet God through signs that have an enduring reality. The Catholic school helps students experience God through a deeper appreciation of the sacramental life of the Church as well as through participation in other rituals.

- **Apostolic.** A key mark of Christian commitment is a concern for others. The school offers opportunities to develop and practice such concern. It invites students to reflect on the contribution they can make to others, particularly in the use they make of their talents and in their career choices.

It is hoped by the time a student finishes in a Catholic school, elements of a Catholic culture will have been internalised in the student's values, attitudes and behaviours and that culture will continue to be a formative element in a life-long commitment to spiritual growth. The student's Catholic identity will be informed by:

- A search for a personal belief in God
- Being inspired by the person and message of Jesus
- Integrating spiritual and moral values into decisions in daily life
- Having a sense of the sacred.
- Having a hope of eternal life
- Knowing and understanding the basic teachings of the Catholic faith.
- Being familiar with and at ease with Catholic symbols and rituals.
- Being aware of the sacramental nature of the Church.
- Appreciating the Eucharist at the heart of the Christian community.
- Understanding and appreciating the essentials of common Catholic liturgies.
- Being familiar with some of the heroes and heroines of the Catholic Church
- Having some understanding of the history of the Catholic Church and a familiarity with changes in its discipline and practice.

This identity develops in a number of different ways. Firstly, the experience of being in a Catholic school is meant to be a positive human experience. People are treated with respect and dignity. The organisation of the school aims to give witness to such human dignity in all its operations. In that atmosphere, each individual has the freedom to grow and develop. They are also invited to reflect on that experience and to question the source of their own dignity and that of others. They are helped to understand their dignity as coming from God.

The Catholic school also offers opportunities to reflect on different aspects of the Christian message. This is done in formal curricular programmes and in structured non-curricular experiences. These include various ceremonies that integrate a spiritual dimension; formal practice of Catholic rituals such as school masses and other opportunities for prayer and sacraments; opportunities for personal growth and development in retreats, service outreach programmes and immersion experiences that promote solidarity with those who are less well off. Such opportunities are available to all members of the school community - students, parents and staff.

The Catholic school therefore acts at three different levels.

- **Pre-evangelisation.** This refers to promoting key human development which is the basic requirement for spiritual sensibility and growth.
- **Evangelisation.** Members of the school community reflect on their human experience in the light of Christian revelation and are invited to respond to God who continues to reveal himself in human experience.
- **Support.** The school gives special support to those who have made responded positively to this invitation and who wish to explore, in a deeper way, the spiritual dimension of their lives.

All three levels of activity are important. The balance depends on the prior experience of those who come to the school. The school aims to develop the capacity to respond fully to each of these three dimensions as an appropriate response to all members of the community - teachers, staff, parents and students.

CONGREGATIONS

The ethos of individual schools is aligned with that of the founding congregation. Over time, the congregation brought its own charism to bear on its choice of the ministry of education, and also on the educational philosophy that informed the running of the school.

A charism is understood as a gift from God to the Church. St. Paul tells us of the individual charisms that helped build up the early Church (1Cor). These gifts became permanent and essential features of the Church and appeared in different ways throughout history to inspire and challenge. One way in which the church experiences these gifts is through the different congregations and their ways of following the gospel message. The Second Vatican Council called all congregations to rediscover their founding charism and to realign their ministries to it.

A charism involves a particular call to faith. It is a way of reading and responding to the Christian message. In religious congregations it manifests itself in the choice of ministry and also in the way members of the congregation engage in that ministry. It involves a particular gift to the members, but the effect of their witness is also a gift to the Church. This gift is nurtured by the community life and spirituality of the Congregation. As Congregations decrease in membership, a question they ask is how the charism they have been given can be nurtured into the future. Two approaches have been evident among Irish congregations:

- A greater degree of sharing and collaboration between congregations
- Inviting lay people to engage with that charism and to promote it.

The Le Chéile Trust is an example of collaboration between congregations. In the year 2003, twelve congregations came together and shared their approaches to education. Although each congregation professed a unique charism, they found they shared common ground in their understanding of the gospel values that translated into the ministry of education. This sharing has led to a commitment to work out a common approach to governance in the future. The hope is to build on this common ground as a core vision, while respecting the unique values associated with the individual congregations.

Catholic education in Ireland, particularly at second-level, has operated within the charism of different congregations. However, there is a more fundamental charism at work that every Christian shares in. That is the charism of baptism. At baptism, every Christian has been anointed Priest, Prophet and King, and therefore shares in a special way in the ministry of the Church. These three roles are not associated with special functions in the running of a school. They belong to each person as a Christian - leaders, teachers, parents and students. Part of our spiritual formation is to reflect on what these roles may mean in our living out the gospel message.

A key challenge for the future therefore is to develop a vision of how the charism of baptism and the charism associated with the founding congregations can be integrated in a future that will be based predominantly on a lay spirituality.

IRISH CULTURE

Catholic schools in Ireland are in a special position. The historical context of their development means they have a privileged place in a local community. In many cases, the Catholic school is the only school available to non-Catholics. Their relationship with government brings opportunities and also responsibilities with regard to national policy.

The rate of change in Irish culture in recent decades has been rapid. Economic development has brought a new wealth and freedom. It also brings challenges with regard to materialism and ensuring a fair distribution of wealth. Ireland's alignment with and place in the European Community has opened up new cultural experiences both for Irish people travelling and working in other countries, and for other nationalities to come to Ireland.

In contributing to this new Ireland, the Catholic school will have an impact on two dimensions of life - the psychological, where the focus is on the individual and the sociological, where the focus is on the system. Therefore, as well as considering the impact the school has on individual students, parents and teachers, the vision for Catholic education must reflect on the impact and contribution it wants to make on national culture. This vision will state who the schools want to serve, and also what the schools hope to achieve for those they serve.

In promoting Catholic schools, the Le Chéile Trust wishes to contribute to the cultural life of the country. By affirming the values of the dignity of the human person, developing a positive critique of culture and promoting a positive attitude to the building up of society, the schools will contribute to the “quality of life” of future generations. At times, they will stand as a counter-cultural witness to the “standard of living” approach that is based on the accumulation of material wealth. In setting up this Trust, the Congregations are affirming past contributions to these values, celebrating their continued importance in Irish society and committing resources to ensuring their survival in the future.

The schools will continue to offer a service to the local communities in which they are based. The Le Chéile Trust is fully supportive of national policies that promote inclusive schools and wants to ensure that the education the schools offer will be available to all who wish to avail of it.

The Trust is committed to a continuing dialogue of how that service might develop - in both the content of the education offered and in the structure of educational provision and governance. It seeks to integrate its particular vision of education with the needs of the local and national community. The Trust recognises the special vision of Catholic education and wishes to ensure that it is a viable option in a growing national education system.



VISION STATEMENT FOR CATHOLIC EDUCATION

Catholic education is based on a vision of the human person:

A human being has a dignity and a greatness exceeding that of all other creatures; a work of God that has been elevated to the supernatural order as a child of God, and therefore having both a divine origin and an eternal destiny which transcend this physical universe. (The Religious Dimension of Education in a Catholic School, 56)

It acknowledges the personal development of each individual in the school community (ancillary staff, members of Board of Management, parents, principal, students, teachers) and the cultural context in which they live.

The Catholic school finds its true justification in the mission of the Church; it is based on an educational philosophy in which faith, culture and life are brought into harmony. (The Religious Dimension of Education in a Catholic School, 34)

Therefore, Catholic education and Catholic schools embody the following values in a way appropriate to the culture of the time:

- An inclusive school that welcomes all who wish to benefit from the values of the school. It seeks to integrate all students into the life of the school. It celebrates different traditions and cultures and believes that it learns about God's work in the world through dialogue with, and understanding of, different cultures.
- A focus on the holistic development of the student. The education promoted helps young people to develop their human qualities; to explore the meaning of their development within the context of the gospel message and to be supported and nurtured in that development. The school promotes excellence in achievement but also helps people appreciate their own weakness and vulnerability.
- The school has a staff where teachers work from a deeply Christian motive in their role as teachers and this motivation informs their approach to students, parents and one another. The school provides opportunities for teachers to grow both professionally and personally.
- Parents (the primary educators), and the school work in partnership. Parents find support for their own roles in the development of the young person, especially in promoting their spiritual formation. This includes opportunities for involvement in school life, and for growth opportunities for them as individuals in their roles as parents.

- The school develops a caring community that responds to the curricular and pastoral needs of each person, giving an atmosphere of peace and security in which they can explore, without fear, their emerging identity as young adults.
- The school has a special responsibility for the development of excellence in the Faith Formation Programme in the school. This includes the Religious Education Programme; the general pastoral care of the student within the school and extra-curricular activities that promote service to others and a sense of solidarity with those who are less well off. It also helps students to celebrate the different aspects of their lives through liturgy and ritual.
- The school is also in partnership with the local parish and diocese and promotes the link between the faith life of the school and the faith life of the wider church community.





PART 2

DEVELOPING THE NEW TRUST





THE FOUNDATIONS OF TRUSTEESHIP

The term Trustee is relatively new in Irish education. The concept has been understood in different ways during the evolution of the education system.

PROPRIETORS

Traditionally, the notion of Trusteeship has been based on the concept of ownership. In primary and voluntary secondary schools, the land was owned by the Diocese, the Parish or the Religious Congregation. Especially in the case of religious congregations prior to 1967, they also provided the buildings. Money for land was raised from the resources of the diocese or congregations. In some congregations, members put their family inheritance at the disposal of the works of the congregation. Land was sometimes donated by local communities or benefactors for educational purposes. Other monies were raised through local charitable donations, and schools were maintained through the reinvestment of the salaries of members of the Congregation, fees from students and the unpaid work of members of the Congregation.

In the early days of secondary education, religious congregations not only supplied the land and buildings, they also supplied the majority of teachers in the schools. This gave the sense of the congregations running a “family firm”. They maintained control over key management functions and reserved authority positions of manager and principal for their own members.

STATE INVESTMENT

The introduction of free education in 1967 heralded major changes in secondary schools. The number of students increased dramatically, yet the number of schools remained more or less the same. The State invested in the expansion of the post-primary service by giving capital grants for buildings - both new buildings and also extensions to existing premises.

The expansion of student numbers meant a major change in the profile of the teaching profession at post-primary level. At one level, the number of members of religious congregations teaching in schools decreased significantly as some congregations changed direction in their apostolates as a response to the Second Vatican Council. At another level, the increase in lay teachers meant that members of religious congregations were a significant minority in the schools that they had founded. This had implications for industrial relations and management development in schools. A symbol of the changed context was the introduction of Boards of Management which gave formal involvement to parents and teachers as well as the Trustees of the school.

The congregations still invested in the provision of buildings, and especially in their maintenance. However, the investment of public money in capital development made the concept of ownership more complex. The State now had considerable interest in the property, although this was not formalised at a legal level. Most of the schools also entered the Free Education Scheme. They received a “Grant in Lieu of Fees” from the government, which further increased their dependence on the public purse.

The grant received from government is inadequate to maintain the service that most schools would wish to offer. Especially in the voluntary sector of secondary education, there are still aspects of school life that are not supported by government. Individual schools rely on Trustee contributions and also on the voluntary contributions of parents and other fundraising activities, in order to carry out the enterprise of the school.

NEW GOVERNANCE STRUCTURES

The Trustee relationship that exists between the Church (diocese, parish or religious congregation) as the owner of the property and the school is not the only model of trusteeship in Irish education. The Vocational Schools are under the management of the local Vocational Education Committee, which is constituted as part of elected local government.

With the introduction of the Free Education Scheme, the government also introduced new types of schools - comprehensive and community schools. Especially where new schools were formed as a result of an amalgamation, the diocese and religious congregations contributed to the capital expenses of establishment - especially by providing land. There is a special Deed of Trust established between the land owner and the government in relation to the use of the buildings. In other cases, the government purchased the land for the building of the school. These schools are non-denominational in their charter. However, in many of these schools religious congregations act as trustees, and they nominate people to the Board of Management. In some cases, the role of trusteeship is shared between one or two congregations and the local VEC.

The growth of the multi-denominational schools (Educate Together), non-denominational schools (Project Schools) and a number of all-Irish schools (Foras Patrúnachas) has given rise to new structures for governance, where the role of the Patron or the Trustee is exercised by a formal organisation. Also, in the provision of capital funding, the government has recently entered into Public Private Partnerships. This has also involved new elements of Governance as the participating partners work together for the future of the school.

THE ROLE OF THE TRUST

The Education Act (1998) enshrined the private ownership of schools as the norm for Irish education, with the Minister for Education having the responsibility of approving these schools for the purpose of quality assurance and assistance in funding from the State. The Minister also coordinates education policy for the common good.

The Education Act (1998) established the role of the Patron or Trustee on a legal basis. The Act outlines the rights and responsibilities of the Trustee. In essence, these can be classified under two headings:

- **Inspirational.** The Trustee determines the “characteristic spirit” of the school. It is often referred to as the ethos of the school.
- **Legal and administrative.** The Trustee is responsible for the physical assets (property) of the school, and also for the financial management of the school’s operation. As the legal “owners” of the school, they must ensure that the school is compliant to all statutory requirements.

In looking at new approaches to Trusteeship in Catholic education, the current Trustees hope to set up collaborative structures between congregations. In this approach, a new Trust will undertake the legal role of the individual congregations and it will also contribute to the inspirational role by helping schools develop their Catholic ethos within the historical tradition they inherited from the congregation. Le Chéile is one of these new Trusts. Three factors contribute to the need to evaluate the current structures for trusteeship.

Governance in education has become a highly complex issue. Despite the growth in the budget provision for schools, obtaining funding for Catholic schools has become highly competitive. Already there is a major gap between the funding available to secondary schools in the voluntary education sector and the funding available to other schools. Undoubtedly, a contributing factor to this dilemma has been the fragmented approach to Trusteeship in the past. It is hoped that a more collaborative approach to Trusteeship will enable Trusts to secure better funding for their schools. Also, the increase in general legislation as applied to all institutions and businesses, and specific legislation applied to schools, requires Trustees to have highly developed skills in responding to individual rights, in employment law and in providing due process for grievance procedures. It makes great sense for individual congregations to combine their resources to provide this expertise to a large number of schools. This avoids each congregation duplicating expensive resources for a small number of schools.

A second factor that contributes to the changed approach to governance is the growing realisation of the need for teamwork. This arises from an increased reflection on the charism of baptism and the role that each person plays in building up the Church. There is a definite movement away from an overly “clerical” past and a realisation of the rights of all Christians to share in the responsibility for the mission of education in the Church. It also reflects a growing awareness, from management and leadership studies in all types of organisation, of the role of participation and responsibility in personal motivation and ownership of the mission of the organisation.

A third factor in the establishment of the Trust structure is the need for the congregations themselves to rationalise their contribution to the future. The membership of most congregations is decreasing. Within the next 20 years, some congregations will not be able to support the schools with personnel. In looking to the future, they wish to celebrate the contribution they have made up to now to educational provision in Ireland and also to plan for a future where the values they stand for can continue to contribute to Irish society.

The aim of the Le Chéile Trust is:

- To provide a service to the congregations who are the current Trustees in the exercise of their legal roles. In some instances, the Trust may take over the role of a congregation. Therefore, the Trust should be able to carry out any responsibility currently exercised by a congregation.
- To provide a service to the schools that develops the current relationship the schools have with the founding congregations. At first, this role will be carried on in partnership with the congregations. The Trust will also be designed to allow the congregations to withdraw from direct involvement over time.
- To offer to others who might be interested in participating in the governance of Catholic schools, the opportunity to do so.

The goals of the Trust will be:

- to safeguard the future of Catholic Education as an option within the Irish education system
- to help the schools attached to the Trust to develop the highest level of service to the students in the schools, and by extension to their parents, the local and national community.
- To be an advocate for the schools both in terms of the general vision for which the schools stand, and for the individual good of each school.

A POSSIBLE STRUCTURE FOR THE NEW TRUST

The general way in which congregations have exercised trusteeship in the recent past is through an Education Office. It is through the Education Office that the Trustee receives information about the schools under the Trust of the congregation, and in general, it is through the Education Office that the congregation communicates decisions about the schools. The new context, of different congregations and over fifty schools (Appendix 1), requires a more formal arrangement in linking the schools and the Trust.

An important element in the new structure is to recognise the historical origins of individual schools, and to promote their identity. It is also important that the structures promote an active participation and sense of community among the different schools, somewhat akin to the bond that might have existed between schools under the one congregation.

In setting up new structures, the Le Chéile Trust recognises two levels of membership. The first level refers to the congregations who are the current trustees of the schools. The second level of membership refers to the individual schools. It is proposed that the structures should recognise these two levels of membership. The Trust also recognises different types of responsibilities:

- Inspirational:** As the congregations held responsibility for the ethos of their schools, the new Trust will also hold responsibility for promoting the vision and ethos of the schools in the future. This responsibility will incorporate faithfulness to the insights of the past and responsiveness to the challenges of the present and the future. It will empower the school communities to reflect on their Christian mission and to evaluate its effectiveness.
- Legal:** This legal responsibility will arise from the way in which congregations set up the Trust and transfer property to it. There will be a legal obligation to ensure that the wishes of those who set up the Trust are being respected.
- Administrative:** This responsibility refers to the obligations that are binding on all Trustees in Irish schools, arising out of their responsibilities under the Education Act (1998) and any subsequent legislation. This includes responsibility for the financial viability of the schools and for the schools' compliance with their legal responsibilities. In general, the scope of these responsibilities has been elaborated on in the Handbook for Trustees published by CORI.

MODEL 1. A BUSINESS MODEL

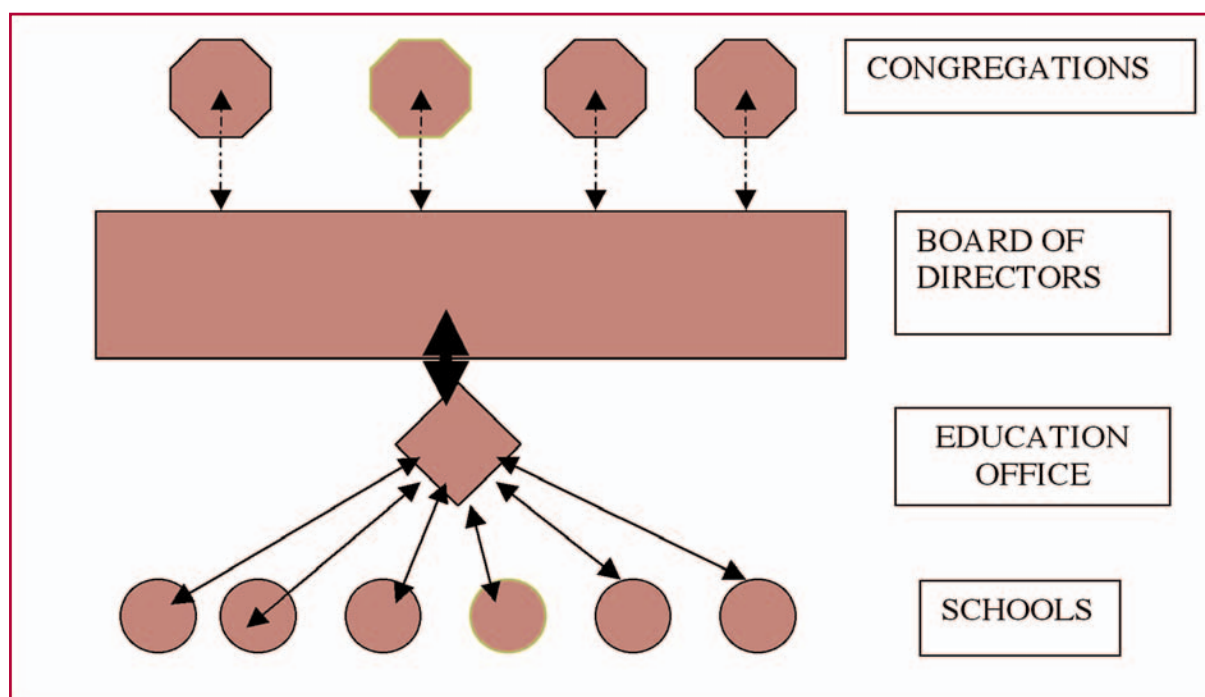


Figure 3. A Business Model Option for the Structure of the Trust

One option for the new Trust is to appoint a Board of Directors, who would be responsible for all functions of the Trust. This Board would be appointed by the Congregations either from among their own members or from a group of competent people who are willing to exercise this function. This Board would, in turn, set up an Education Office structure to deal directly with the schools.

In this model, there are different options for the relationship between the founding congregations and the Board of Directors. This depends in part on how the congregations transfer property to the Trust - by donation or licence.

Option A: The Board can be an independent body, capable of acting on its own initiative as prescribed by a constitution. Initially at least the founding congregations would maintain some link with the Board by either having direct membership of the Board or by having power to appoint to the Board. Alternatively, the congregations might allow the Board develop its own membership and rights of succession. After an initial period of time, the Board of Directors would develop a succession mechanism, either by co-option, appointment or election.

Option B: The Board acts in relation to the Trust in much the same way as a Board of Management acts with regard to a school. In cases where the property is licensed by a congregation, there will be some element of the Board reporting to the Congregation with regards to development.

The Board will appoint personnel to the Education Office which will act as the executive arm of the Board in dealing with the schools. The Board will communicate with the schools through the Education Office and will consult with the schools on emerging policy as they see fit.

Although this business model is widely used, the congregations preferred a model that incorporated a democratic element that ensured the voice of individual schools could always be heard. They sought to incorporate a consultative approach into the structures and constitution of the new Trust. The collaborate model is the preferred model for the future.

MODEL 2: A COLLABORATIVE MODEL

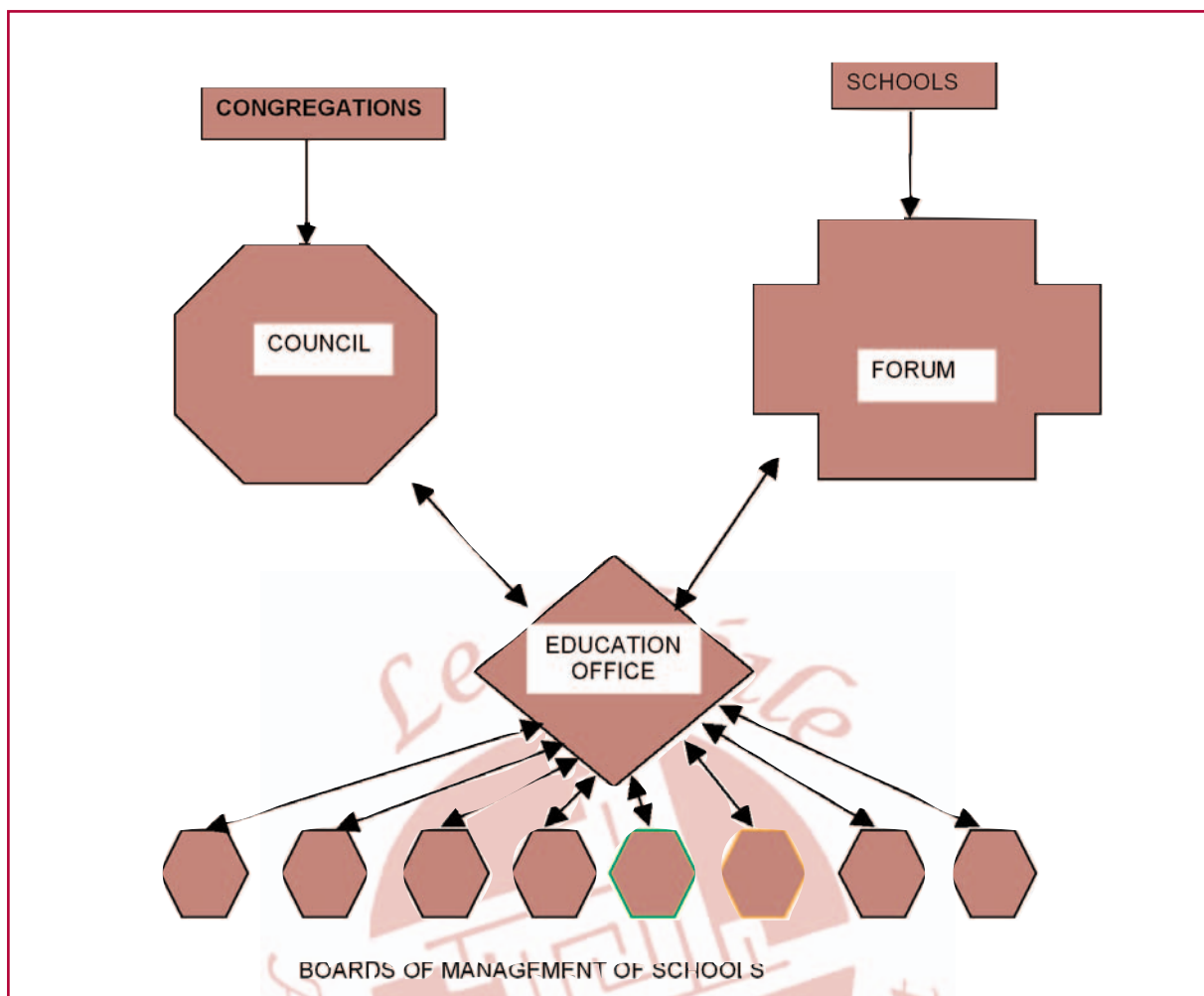


Figure 4. A Political Model Option for the Structure of the Trust.

A second option for the structure of the Trust is to base it on a collaborative model that includes a level of representation. The structure outlined in Figure 4 follows the structure of the European Union where there is a comparison between the three main structures (Council of Ministers, Parliament and Commission) with the proposed structures of the Trust (Figure 5).

Trust Council Forum Education Office	European Union Council of Ministers European Parliament Commission
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Figure 5. A comparison of the proposed structures of the Le Chéile Trust and those of the European Union.

THE COUNCIL

The Council will consist initially of representation from the Congregations. After an initial transition period, it will develop a mechanism of succession, either by co-opting, appointing or electing new members. The Council will exercise sole responsibility for some areas of the Trust and will share responsibility for other areas with the Forum. It will delegate executive functions to the Education Office. The responsibilities of the Council include:

- Legal:** The legal responsibility for the Trust will be reserved to the Council. It will have direct responsibility in civil and canon law as stewards of the Trust, ensuring that the property entrusted by the congregations is used for the stated purposes.
- Administrative:** With regard to the Trust, the Council will be responsible for the appointment of key personnel in the Education Office. It will also set a budget for the work of the Trust. With regard to the schools, the Council will have responsibility for the administrative functions required of a Trustee by the Education Act (1998). It will take the responsibility that all schools work within a defined budget and remain viable. It will make appointments where necessary to Boards of Management and approve the proposals of selection boards and Boards of Management to key positions in the schools. It will act as a first court of appeal by any person in the case of a decision by a Board of Management. These duties are outlined in the Articles of Management. Many of these functions may be delegated to the Education Office.
- Inspirational:** The inspirational work of the Trust has a wide scope. At one level, it involves representation and advocacy with other agencies - including government, other educational Trusts and others who are stakeholders in Catholic education. The aim of this work is to ensure that the educational vision of the Trust is promoted. However,

that vision is not seen as something static. It develops and responds to challenges at local and national level. Therefore, the working out of the implications of the vision is a dynamic process. There is a process of dialogue between the ideals that are entrusted for stewardship and the pragmatic demands experienced at individual school level and by schools in the system. It seems appropriate that responsibility for decision-making would be shared with the Forum, which would represent the interests of the individual schools.

THE FORUM

The Forum represents a democratic voice within the Trust. Membership of the Forum will be drawn from the schools. As the main representation of the Trustees in the school is the Board of Management, it is proposed that membership of the Forum be drawn from the individual Boards of Management.

The focus of the Forum is mainly on the inspirational aspect of the Trust - developing an educational vision that responds faithfully and realistically to both the tradition entrusted to the schools and to the emerging needs of the schools. The main aim of this dialogue between the tradition and the present concerns is integration and development. The responsibility for this is shared between the Forum and the Council. The Forum will work in three ways:

Decision-Making. By discussing key issues that impact on the challenges schools face in promoting their Catholic ethos, the Trust will develop realistic policies and processes that empower the schools to continue to deliver an excellent service. Some decisions may be binding on all schools; other decisions may take the form of recommendations that individual schools adapt to suit their own circumstances; still other decisions may simply be reflections on desirable outcomes that schools are free to accept or reject.

Advisory. The Forum provides an opportunity for schools to voice their concerns about developments in education policy and to focus the attention of the Council on issues that will impact on the Trust - either by making demands on the resources of the Trust or that the Trust will need to anticipate by committing resources to training and in-service.

Responding. The decisions of the Council in areas reserved to them embody the key values of the Trust. As a process of

checks and balances, the Forum gives the opportunity to comment on the impact of these decisions at local level. It is an opportunity for the Council to explain developments in the Trust to the Forum, and an opportunity for the Forum to give constructive feedback to the Council.

THE EDUCATION OFFICE

The Education Office is the executive of both the Council and Trust. It has three basic functions:

- Resource.** The Education Office acts as a resource for both the Council and the Forum. It provides expert research, analysis and consultation for the decision-making discussion of both bodies.
- Expertise.** The Office is the first line of contact for individual schools on Trustee issues. It therefore provides expert help to the schools in preparing questions for decision by the Council and in interpreting key areas of policy for the schools.
- Implementation.** The Office plays a key role in the quality assurance on Catholic education by visiting the schools and discussing key areas related to their experience of promoting a Catholic ethos. Office personnel will undertake to manage key projects for the Council or the Forum.

In setting up the Education Office, the new Trust will be aware of other bodies that provide advisory services to schools. In particular, the Trust will have a special relationship with the Joint Managerial Body (JMB) and the Association of Managers of Catholic Secondary Schools (AMCSS) in the voluntary secondary sector. It will liaise with the Catholic Primary Schools Managers Association (CPSMA) and also with the Association of Community and Comprehensive Schools (ACCS) as appropriate. The Trust will endeavour to set up collaborative structures with these bodies, and others, to ensure that resources are not duplicated. It is envisaged that the Education Office will, initially at least, pay special attention to four main areas:

- Legal Issues.** This refers to advising the Council and the Boards of Management of individual schools on issues relating to the development of capital resources.
- Administrative.** The main focus here will be on ensuring the financial viability of the schools. This will be done in collaboration with the financial reporting system

developed at AMCSS level. There will also be a need to support Boards of Management through selection and training processes.

Inspirational. A key value-added dimension of Catholic schools is the commitment to faith-formation. This is seen as a key function that the new Trust will support. This will involve in-service support for Boards of Management, Principals, catechists, other teachers and perhaps programmes for parents. Such programmes may be initiated by the Trust, or may be linked to development work initiated elsewhere.

Network. The Education Office will develop a communication strategy that promotes communications between the Trust and the Schools, and allows the Schools to communicate with the Trust. It will promote the Trust to external agencies and will promote a strong network of schools within the Trust. (See Part 3 on the Administrative Role of the Trust).

SOME PRACTICAL ISSUES.

Membership Options - Council

In planning for membership, two periods must be taken into account - the transition period and the final arrangement. The congregations will commit to providing personnel to the Council for a transition period to ensure continuity with the past and to provide assistance in dealing with unanticipated issues.

Option A. Each congregation will have one representative on the Council. The initial term of office will be for 3 to 6 years. After that period, the Council will have a succession protocol in place.

Option B. Each congregation will have two representatives on the Council. In the transition period, at least one of these members will be drawn from the congregation. After the transition period, the number of people serving on the Council may be changed according to a succession protocol that will be developed.

Membership Options - Forum.

The stakeholder in decision-making at this level is the Board of Management. Therefore, membership will be drawn from the Boards of Management. This is seen as preferable to trying to set up constituencies between the different schools - e.g. parent representatives, teacher representatives. It is hoped that there will be a strong sense of partnership with these groups at local school level.

- Option A.** Membership of the Forum will be drawn from formal positions on the Board of Management - the Chairperson and the Principal. Each school might have one or two representatives.
- Option B.** Membership of the Forum will be drawn from the general body of the Board of Management. One suggestion made was that each school would have three representatives, drawn from different constituencies.
- Group 1.* This would consist of the Chairperson and the Principal. At least one of these would represent the school in the Forum. This person would be designated for a specified term of office - e.g. three years - the duration of the term of office of a Board.
- Group 2.* All members of the Board. This member would serve for a specified term of office and would be eligible for appointment to different committees.
- Group 3.* All members of the Board, but on a rotating basis. This means that the Board could appoint one person not already attending the Forum to attend a specific session.

Operational Issues

The work of both the Council and the Forum will be facilitated by a committee structure. In particular, it is proposed that the Forum might work with different types of committees:

Divisional Committees; These committees are constituted to keep a watching brief on key areas of interest within the Trust. Examples might be primary schools, community schools; Scoileanna Lán Gaelach. Membership of these committees might be drawn from both the Council and the Forum.

Standing Committees; These committees would exist mainly at the Council level and would deal with making proposal on regular functions of the Trust. Examples might include Property, Finance, Appointments and legal appeals.

Special Task Committees: These committees would be charged with evaluating key proposals for discussion at the Council and the Forum and would be responsible for organising debates, discussions and dialogues. A committee would be formed related to different proposals coming before the Council or the Forum.

Time Issues.

It is recognised that the organisation of the Forum will require a time commitment from school personnel. This can be seen partly as a form of professional development, where individuals have an opportunity to become involved in the wider policy arena of an organisation. Such a commitment would be akin to involvement in AMCSS, NAPD or a Trade Union movement.

The Trust also recognises that there may be other demands made of key personnel as part of their duty - Principal or Chairperson. The Trust is committed to finding an equitable way of supporting the involvement of these officials in the work of the Forum. The mechanism of such support is part of this consultative process.





VISION STATEMENT FOR THE WORK OF THE TRUST

In setting up schools, the founding congregations were responding to the Gospel call to “Go forth and teach all nations”. The Le Chéile Trust seeks to be faithful to that gospel mandate in promoting the work of each individual school within the Trust.

In essence, the Trust wishes to provide a service similar to the service provided by the Congregations who will eventually set up the Trust. This includes:

To fulfil the legal obligations of Trustees with regard to schools, the Trust shall

- Monitor that the use of capital resources (especially Land and capital endowments) are maintained and used for the purpose for which they were entrusted.
- Appoint and support Boards of Management in the schools that have the capacity to develop the schools to the highest level.
- Ensure the proper management of the schools in terms of the development and implementation of policies consistent with the Catholic character of the school; and ensure the financial viability of each school, as well as other duties and responsibilities legally required of Trustees and appropriate to their role as Trustees.

To support the development of Catholic Education in the schools committed to the Trust, and in non-denominational schools where the Trust plays a role, to support the integration of human and spiritual values that permit Catholic values to develop

- Monitor key issues related to the values of Catholic Education in the schools.
- Help schools develop the Catholic aspect of the schools by linking the schools with opportunities for those in leadership positions, teachers, parents and students to reflect on the Catholic Ethos of the school and the implications for development.
- Ensure that schools have access to help in developing policies that embody the Catholic character of the school in an appropriate way.
- Encourage individual schools to preserve key aspects of the heritage they have received from the founding congregation.

To promote a spirit of partnership in the operation of the Trust that ensures:

- Faithfulness to the values heritage of Catholic Education.
- Excellence in the development of the schools.
- A sense of community and Church among all who belong to the Trust.



PART 3

THE ADMINISTRATIVE ROLE OF THE TRUST





SUPPORTING THE VISION

In order to support the vision of the Trust, the initial charter of the Trust will focus on five key responsibilities.

DEVELOPING CAPACITY

In setting up the new Trust, the congregations acknowledge the high level of commitment to the ideals of Catholic education that has been shown by lay colleagues over the past years. It also recognises that the changing cultural environment in Ireland will bring future challenges for which there are no precedents, and which the congregations did not have to face in the past. Finding appropriate responses to these challenges will demand new knowledge and new skills. These will involve individuals in general leadership and managerial development. Equally important in the context of Catholic education will be skills in theological reflection and spiritual leadership.

A key concern for the Trust will be to ensure that there is a capacity for such leadership among teachers, among school leadership and among school governors. The Trust sees developing and supporting this capacity as a necessity to guarantee the future of Catholic education.

The Trust will be involved in developing this capacity at two levels.

In-service. This means providing opportunities for professional reflection on Catholic education to those who are already in position. Therefore, the Trust will seek opportunities to promote professional and personal development for Boards of Management, Principals, Middle Management, Catechists and Teachers.

Developmental. The Trust will also seek ways of collaborating with other groups to promote opportunities for those who wish to further their personal and professional development by exploring their commitment to Catholic education, values and philosophy of education. Such opportunities might include personal retreats, courses in theology or theological reflection. These courses would have a balance of academic and practical components. Some of these courses might be accredited by academic institutions.

In setting up the new Trust, a lot of attention will be paid to structures and procedures. However, it is clear that the future of Catholic education will depend

mainly on the quality of those who govern, lead and teach in the schools for the future. The structures, no matter how well-intended, will have little impact if the people running them do not understand the key values behind them, and are not committed to developing these values. Commitment to people will be the key feature of the success of Le Chéile.

CONGREGATIONAL NETWORKS

A number of congregations involved in Le Chéile are international congregations. They have educational institutions in different countries. They have formed networks of their schools and at times have provided opportunities for Irish school personnel to be involved in these networks. The effect of such involvement is to deepen the appreciation of the specific ethos of these congregations.

Le Chéile will continue to encourage the involvement of schools in such international networks. This will be a key resource for schools in maintaining a link with the founding congregation and in reflecting on how to respond to local challenges from within that ethos. This process will enrich the discussions with the Le Chéile network, and bring an international perspective to the dialogue with the network.

For those schools that are not linked to such an international network by virtue of their foundation, it is hoped that Le Chéile may provide some parallel experience that will promote a deeper level of reflection and give opportunities for wider support to key personnel within the schools.

QUALITY ASSURANCE

As a trust for Catholic schools, Le Chéile is linked with a wider concern for Catholic education. It will seek to give assurance to different bodies on the quality of education that it offers. Part of this assurance will be offered through the link the schools have with the Department of Education and Science's Inspectorate. The process of Whole School Evaluation and Subject Inspection will report on the quality of the education process, from the perspective of the Government. The Trust is committed to celebrating the positive outcomes of these reports, and also to helping schools respond to any challenges that these reports highlight.

The Trust will have parallel concerns for assuring the quality of the Catholic dimension of the school. It will seek to give assurances to other Church interests and to parents, that the schools are in fact implementing the values they espouse. There are three dimensions to the quality assurance process:

Self-Evaluation: An important element of quality assurance is the commitment of the Trust, and of each school, to engage in serious evaluation of how well they are performing. An important element of such evaluation is on-going self-

evaluation. The Trust is committed to working out, in collaboration with key stakeholders, a set of indicators that clarify for the school the key elements of Catholic education. (An example of such indicators, as used by the Catholic Education Office in New Zealand, is included in the appendices). This will allow the school reflect on its own performance, and to plan for the future. In reporting the outcome of any such exercise, the school will contribute to a growing understanding of the issues facing Catholic education. Hopefully, the Trust will be able to respond with concrete support and resources to implement plans for the future.

Monitoring.

In the spirit of stewardship, the Trust may also promote external visitations to the schools with a view to helping in the process of reflection on and implementation of the vision of Catholic education. Monitoring refers to awareness of how developments such as government policy, Church teaching or other demographic changes on a local level might impact on the Catholic school. The Trust would aim to develop support structures for the schools in the light of any developments. In particular, this awareness would clarify the advocacy role of the Trust on behalf of the schools.

Reflection.

In setting up the Trust, the congregations recognise a high level of good practice within the schools. The Trust will seek ways of celebrating the successes of the schools and sharing good practice within the Trust and with other Catholic schools in Ireland and abroad.

The Trust will commit itself to finding meaningful and effective ways of implementing its quality assurance process.

COMMUNICATIONS.

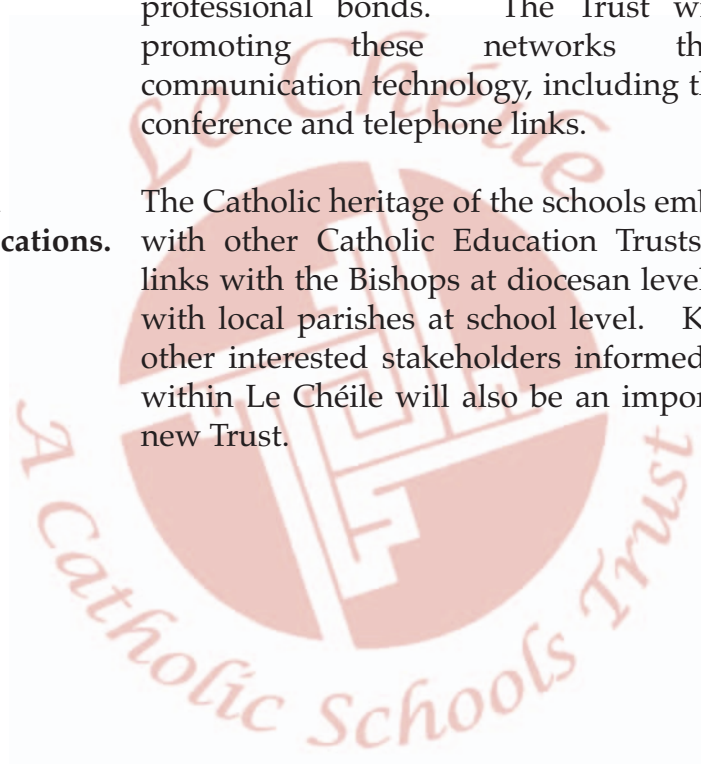
Many congregations attached to the Trust have a small number of schools. They have exercised their trusteeship in a close, family-style relationship. They have had personnel present in the schools. In many cases, issues relating to the “ethos” of the school have been handled on an intuitive basis. In the new Trust, there is a need to develop a more formal approach to this role. This formality has advantages, as it will make a clear distinction between the central Trustee role and the responsibility of the Board of Management at local level. There are also dangers in any formal system that it demands a level of bureaucratic compliance and becomes an empty exercise. The Trust therefore needs to prioritise positive modes of communication in four areas:

Trust to Schools. This form of communication involves keeping all members of the Trust informed about developments relevant to the Trust. This will include research and developments relating to Catholic education in Ireland and abroad; decisions of the Trust in response to policy developments in Ireland and information on opportunities for personal and professional development. Common approaches to this form of communication involve Newsletters, web-sites, annual reports and conferences.

Schools to Trust. The communication flow from schools to the Trust will normally take place through regular reports. These might include minutes of Board of Management meetings, regular financial statements (especially budgets and end of year accounts), the school plan and interim evaluations on progress. The aim of such communication is to promote knowledge and allow the Trust to identify where resources are needed. The Trust recognises that there is a growing requirement for external reporting at all levels of schools. The Trust is committed to using, in so far as is possible, the existing reporting mechanisms so as not to add extra burdens to the work of the Board of Management.

Schools to Schools. The Trust recognises the importance of developing strong networks for schools within the Trust, so that schools can share good practice and support one another through professional bonds. The Trust will seek ways of promoting these networks through modern communication technology, including the internet, video-conference and telephone links.

• External Communications. The Catholic heritage of the schools embraces partnership with other Catholic Education Trusts (through CORI), links with the Bishops at diocesan level and partnerships with local parishes at school level. Keeping these, and other interested stakeholders informed of developments within Le Chéile will also be an important aspect of the new Trust.



RESOURCES

In order to realise the vision of the Trust, there is a need to put resources in place for the use of the Trust. The key focus on resources will be on expert service. In setting up the Trust, the congregations are agreeing to set up a Trust Fund to resource the Education Office for a lengthy period of time. This Trust Fund will be part of the property (assets) of the Trust. The aim of this Trust Fund is to ensure the capacity of the Trust to provide this expert service. The acquisition of physical resources will take place mainly in individual schools. This reflects the financial situation of most congregations, where available assets are decreasing with smaller numbers. However, the Trust will be empowered to raise funds which may be directed towards the acquisition of physical resources.



THE RELATIONSHIP BETWEEN THE TRUST AND THE BOARD OF MANAGEMENT

The relationship between Trustees and a Board of Management is outlined in the Education Act (1998). Formal agreements on procedures are in place in documents that outline rules for Boards of Management. In voluntary secondary schools, Articles of Management are in place, agreed by management and teacher trade unions. This chapter aims to build on these statements by considering four main areas:

- The spirit of the relationship
- The appointment of Trustee representatives
- Reporting and monitoring mechanisms.
- Procedures in the event of a disagreement.

THE SPIRIT OF THE RELATIONSHIP BETWEEN TRUST AND BOARDS

From a legal perspective, the Board of Management manages the school on behalf of the Trustees. The responsibilities delegated to the Board include:

- The management and maintenance of the property¹
- The financial management of the school
- Maintaining and promoting the characteristic spirit (ethos) of the school.

This section of the White Paper reflects on the desired relationship between the Trust and the Board of Management with regard to maintaining and promoting the ethos of the school. This relationship is developed on three levels:

- The Board as a whole
- The Chairperson of the Board
- The Principal, as the executive of the Board

In general, it will be through the Board that the Trust has contact with the school, although there may be occasions when the Trust deals directly with the teaching staff, the parents and even the students. However, this will normally be done in consultation with the Board.

The Trust seeks to develop a relationship with the Board that is based on a partnership in mission. The hope is that the Board maintains and promotes the ethos of the school out of a deep appreciation of the values inherent in the vision rather than out of a ritualistic compliance or a sense of mere legal duty. The Trust

¹ Although the Board manages the property, it acquires no title with respect to the property (Articles of Management). All issues relating to capital must be referred back to the Trustees.

hopes to exercise its influence through the authenticity of the values it espouses rather than through a power relationship. The use of the legitimate power of the Trust over the Board should be a rare necessity.

The aim of the Trust is to develop a relationship with the individual Boards in a spirit of dialogue and mutual service. The aim of the dialogue is:

- To provide and support the implementation of a clear vision and values
- Promote collaboration and a sense of partnership
- Develop supports for the Catholic faith dimension and its expression
- Facilitate networking and communication between the schools in the Trust
- Find ways of supporting individual Boards in:
 - Δ An awareness and appreciation of the local circumstances of the Board
 - Δ Maintaining the unique spirit of each school and its historic link with the founding congregation
 - Δ Promoting interaction with the local community of the school
 - Δ Ensuring that a spirit of pastoral care underlies the different decisions of the Board.

Dialogue is seen as a core activity between the Trust and the Boards. It is in dialogue that the abstract spiritual and educational aspirations espoused in the Vision Statement meet the practical exigencies of local circumstances. Decisions taken at Board level must:

- Remain faithful to the values of the Trust by protecting and consolidating the vision as inherited
- Ensure the integrity of the values by developing new policies in response to changing local and national contexts.

In this way, the decisions of the Board determine the reality of the Catholic dimension of the school.

The spirit of dialogue is built into the structures of the Trust at a number of different levels:

- (a) The Forum Structure, where all schools are represented in the Le Chéile network.
- (b) The Regional level, where all members of a Board can contribute to the Network.
- (c) The individual Boards attached to each school, where, through a structure of reporting and response, the dialogue is developed related to the unique aspects of each school.

This structure of dialogue represents a more formal approach to the relationship between trustees and Boards than may have been the practice in the past. When individual congregations acted directly as trustees, there was often a family relationship. The congregation had responsibility for maybe one or two schools, or at least a small number. The local circumstances were well known and often members of the congregation were directly involved with the Boards. Also, the relationship allowed for both formal and informal supports in decision-making and implementation. The downside of this arrangement was that often the roles of trusteeship and of management were not clearly distinguished. They co-existed in what was usually a supportive and familiar arrangement. Within the congregations attached to Le Chéile there has been quite a variation in how this relationship has developed. The schools therefore have very different experiences of the past relationship between trustee and school. Therefore, in the development of the Trust, attention must be paid to:

- Maintaining a level of family-like involvement in the more formal structures that are necessary with a larger number of schools, as well as the formality that is required in the growing demand for transparency and accountability.
- Clearly delineating the responsibilities that
 - (a) belong solely to the Trust
 - (b) belong to the Trust but are delegated to the Board
 - (c) belong properly and solely to the Board

The key issue for the Trust is to promote a balanced approach to Trust control and local autonomy of the Board. The aim is to develop a high degree of supported autonomy. The Trust recognises the particular responsibilities proper to the management of the school that belong entirely to the Board in line with the principle of subsidiarity underlying the social teaching of the Church. The Trust also seeks to exercise its own responsibility by delegating its proper responsibilities to the Board and reserving necessary issues to itself. In delegating responsibilities, the Trust recognises the need to adequately support the Boards in the execution of this function. This requires that the Trust devise structures that:

- Support the members of the Boards, both individually and collectively.
- Give guidance on particular policy issues
- Provide resources to Boards for specific developments as priority areas in the Mission and Vision of the Trust.

The Trust sees its role as working with the Board on the “what” rather than the “how” of managing the school. The Trust recognises other bodies that will provide expert assistance to the Board on the “how” issues. In particular, the JMB and the AMCSS are bodies strongly linked with the promotion of Catholic education and are focused on practical approaches to implementation.

The distinction between “what” (trusteeship) and “how” (management) issues is not always easy to make. In some cases, the “how” of implementation is the real issue of ethos. It is in the “how” that people experience the witness to gospel values. Also, the Trust may be involved in “how” issues as part of an agreed appeal process (Education Act, Articles of Management) on how a Board has dealt with a particular issue.

APPOINTMENT OF PERSONNEL

Trustees have well defined responsibilities with regard to the Board of Management. In this section, we discuss issues related to the appointment of personnel. The section develops the responsibility of Trustees for appointing personnel in the different sectors. It outlines the qualities that are desirable in Board representatives, ways in which personnel may be identified, and mechanisms for selection and appointment. The section also examines ways in which the Trust may provide on-going support for the Board.

1. Responsibility for Appointment

The Trustee’s legal role in the appointment and delegation of roles to a Board of Management varies in the different sectors. A common feature for all sectors is the power and responsibility of the Trustee to nominate representatives to the Board. The Trustees, by agreement, has a right to representation on some sub-committees of the Board. In particular, Trustees should be represented on selection Boards for a principal or deputy principal.

1.1. Primary Schools.

In Primary schools, Trusteeship by congregations is normally operated in partnership with the Bishop of the Diocese. The Trustee nominates Trustee representatives and is responsible for the legal appointment of other nominees to the Board. The Board is responsible to the Trustees.

1.2. Community Schools.

In Community Schools, the Trustees have the right of nominating an agreed number of representatives to the Board. They have right of representation on Selection Boards. They do not exercise rights in the same way as Trustees do in the voluntary secondary sector.

1.3. Secondary Schools

In Voluntary Secondary Schools, the Trust is responsible for the appointment of all members of the Board of Management. There are formal ways in which representatives of the teaching staff and the parent body are recommended to the trustees for appointment. The Trust has direct responsibility for the appointment of four representatives. From among the members of the Board, the Trust also appoints the Chairperson of the Board.

1.4. *Special Cases*

In some schools, the Trust may act as joint trustees, either with another Trust or with an individual congregation. In that situation, there will be an agreed protocol for the Le Chéile Trust to nominate representatives.

1.5. *Reserving places on sub-committees.*

When it is entitled or obliged to do so, the Trust will nominate individuals to represent it in positions on permanent sub-committees on the Board as the Board is appointed. In cases where committees or selection boards are appointed on an “ad hoc” basis (e.g. a selection Board for appointments), the Trust will need to be informed well in advance of the said committee, so that it can exercise its right to appointment.

The Trust may at any time, forego its right to appoint a named individual to such a committee. In that case, the Board shall appoint the committee either from its own members or by co-opting individuals with necessary expertise. If the Trust decides to forego an appointment, it will do so on an individual case basis. It shall not cede its right to appointment “in perpetuity”.

2. Identifying Personnel

The Le Chéile group is conscious of the current difficulties in appointing representatives to Boards of Management. In the context of appointing Trust representatives to the Boards of a large number of schools, it is important to find a procedure that

- (a) affirms the Board as the legal decision-making body in the school.
- (b) Where appropriate, allows the Trust to fulfil its legal responsibility for the schools and also for maintaining and developing the ethos of the school,
- (c) empowers the historical link with the founding congregation, in so far as that is possible
- (d) recognises the role of the school in the local community.

Special attention needs to be paid to the appointment of the Chairperson of the Board.

2.1. *Qualities of Appointees*

Individuals appointed to a Board of Management must of good standing within the local community and within the Church. From a civil perspective, those appointed should at least have the qualities that apply to a director of a company, as defined by the Companies Act 1963 and any further amendments that may be made to this definition. From an ecclesiastical perspective, those appointed should not be in a position contrary to canonical requirements for involvement in Catholic institutions.

These same qualities may be required of people properly nominated to the Board (e.g. teachers, parents). The Trust may refuse to ratify their nomination

for reason of unsuitability as above. In such a case, an agreed procedure will be put in place to communicate that decision to the group concerned, with the reasons for the decision. The procedure will include a right of appeal.

In appointing the Board, particularly in appointing the four trustee representatives, the Trust will endeavour to ensure that:

- The individuals have a genuine interest in the values of Catholic education, and also have an interest in and loyalty to the individual school. (In Community Schools, the Trustee representatives will be committed to ensuring Catholic values are promoted within the non-denominational charter of the school).
- The Board represents a wide range of interests, both in terms of areas of expertise and of the local community.
- The Board has the capacity to manage the business of the school in an effective and efficient way. To this end, the members of the Board should have:
 - (a) a range of management skills among the members
 - (b) an assurance of expert assistance in areas not immediately available on the Board
 - (c) a capacity to manage issues, particularly dealing with personnel, according to an ethos of compassion.

Particular stress is to be placed on this latter point.

2.2. *Maintaining a Register*

To this end, it is proposed that the Trust develop a register of those who are willing to serve on Boards of Management. This register could comprise names of interested and qualified personnel for (a) the general body of schools and (b) individual schools. It is envisaged that the register be developed from the following constituencies.

- (i) members of the founding congregations
- (ii) past pupils or past teachers of individual schools
- (iii) Those who have served on Boards of Management before (either as Teacher, Parent or Trustee Representative)
- (iv) Those who might be nominated by a congregation in relation to an individual school or perhaps by a current Board of Management or a principal.
- (v) A list of volunteers (where the Trust might advertise for a list of those interested in serving the schools in a governance role).

3. Appointing Personnel

3.1. Board Members

The names of the Trustee nominations should be chosen from the Register, ensuring the quality of the individual nominees and also the balance that is needed in the Board as a corporate entity.

The names might be filled giving priority to certain constituencies. For instance, if the founding congregation had claimed a reserved place on the Board, then the congregation would be asked to nominate an individual for that position. A congregation might not be in a position to fill such a place. This would not mean that the congregation would forfeit its right to a reserved place for future terms of office of the Board.

A process might be developed in which an outgoing Board may be consulted on the composition of the in-coming Board. This could mean that the names of proposed Trustee representatives be forwarded to the Board in advance, and in confidence. The Board would have the opportunity to make representations about any of the individuals proposed, which would keep the Trust informed on the local implications of any appointment. It would have to be clear that any such procedure would be consultative only.

3.2. Chairperson of the Board

The Chairperson of the Board will have to work closely with the principal, who is also secretary to the Board. The respective duties are outlined in the rules for Boards of Management - convening meetings, drawing up agendas, decision-making procedures, etc. Matters may arise between Board meetings where the chairperson and the principal need to consult with one another. Therefore, ensuring a good working relationship between the chairperson and the principal is an important issue in appointing a chairperson.

However, it should also be clear that the role of the chairperson and the principal are different. The chairperson exercises a particular responsibility on behalf of the trustees, and there should be a direct communication between the Trust and the chairperson with regard to the specific responsibilities of the Board.

The distinct roles of the Trustees and the Board need to be recognised. It is important that the Trust does not burden the Board with its responsibilities, but act in a spirit of partnership.

4. Ongoing support of the Board

Once appointed, the Trust will endeavour to ensure that those who serve on the Boards have a deep and positive experience of the mission of governance within the Church. This will be done through training, on-going support, consultation and feedback.

4.1. Training.

The Trust will be responsible for the pre-service training and induction of Board members. This may be done on a regional basis within the Trust, or in collaboration with other Trustees (e.g. through the JMB, AMCSS or by agreement). The training will consist of specific issues relating to the work of Boards of Management, as well as training in the Catholic dimension of the school, with particular reference to the educational philosophy of founding congregations.

Boards may be asked to identify training needs to meet the current requirements. Where feasible, the Trust will endeavour to empower Boards through the provision of such training.

4.2. On-going support

This support takes place at both a formal and an informal level. It is hoped that there will be opportunities for Board members to meet with members of the Trust on a regular basis. These meetings might also involve regional support meetings, where Board members will have an opportunity to network with other Board members within the Trust. Such meetings might be organised around specific topics related to governance, and should also contain a social element.

Formal mechanisms of support will exist through the Forum, where individual schools will be represented.

The main support will be through a process of dialogue. This will be developed in the reporting and monitoring mechanisms that exist between the Trust and the Board.

REPORTING AND MONITORING MECHANISMS

Communication between the Trust and the Board will take place around:

- Reports submitted by the Board to the Trust.
- Visits by Trust representatives to the school.
- Meetings between school stakeholders and the Trust
- A newsletter or other formal communication between the Trust and the schools
- The Forum, as well as networks of principals, Board members and other stakeholders in Le Chéile schools.

1. Reports.

It is envisaged that the Board will forward regular reports to the Trust regarding its operation. The intention here is to develop good communication to enable proactive trusteeship and support of the Board. The aim is not to create a huge burden of extra tasks. It is hoped that the type of information forwarded to the Trustees will be readily available to the Board as part of its normal operation. It will signal good management practice and good communications.

1.1. School Plan

Each school is required by the Education Act to have a school plan, which is developed in consultation with the different stakeholders. The aim of the school plan is provide an agenda for action whereby the ethos and values of the school are translated into reality. Normally, the school plan will have a long-term perspective (5 years). The work programme of each Board of Management should relate to the school plan.

The Board should develop a work programme for itself which will cover (a) its three year term and (b) each specific year. These latter programmes will depend on how much has been achieved to date.

1.2. Annual Report.

The Board should forward, annually, to the Trust a report of activities in the school. This report should follow an agreed outline and cover the main areas of concern for Trustees.

1.3. Reports of Meetings.

Boards should forward the Agreed Statement at the end of each meeting to the Trust. Each Board should be conscious of alerting the Trust well in advance to any issues that might have further repercussions for the Trust - capital expenditure, appeals, legal action.

1.4. Financial Reports

These will include forward budgets, regular reports on income and expenditure, and an annual account report. It is envisaged that there will be a template for such submissions, that will be nationally agreed (e.g. the current templates promoted by the AMCSS). It is not envisaged that the report to the Trustees will be more onerous than the reports to other agencies (e.g. Department of Education and Science). The aim of the report is to ensure that Trustees can exercise their function in an informed and proactive manner.

2. Policy Development

In terms of the “general supervision and control” of schools, the Trust wishes to promote a high level of autonomy at local level, without abdicating its own responsibility to ensure that the school runs according to the values enshrined in its charter. The Trust therefore will reserve a “right of approval” for some key areas of school life, and will then issue guidelines on a variety of other areas. The Boards of Management would then implement policies out of these guidelines, taking into account the local circumstances of the school.

2.1. Right of Approval.

A “right of approval” to any change in policy may be reserved by the Trust for all schools, or in relation to specific policies for certain schools. For instance, a congregation may determine that a school will remain (a) a single-gender school, or (b) be a fee-paying school which the Board, or the Trust, will not easily change. Any change in such a policy proposed at local level will need written approval from the Trust.

Congregations will be in a position to determine some “non-negotiable” or “reserved” policies for their schools in advance.

It should be noted that the right of Trustees in relation to the policies of the Board vary in the different sectors. The “right of approval” may be limited by other relationships of the Board (e.g. to the Bishop as Patron in primary schools, or to the Department of Education and Science in a community school).

2.2. Evaluation

The Board shall engage in periodic reviews and evaluation in the school. These may be externally guided (e.g. Whole School Evaluations or Subject Inspections with the Department of Education and Science) or self-evaluation exercises. Every five years, the school will undertake a self-evaluation of issues relating to the Catholic ethos of the school, and report to the Trust. The aim of this review is developmental, and should seek to assure the different stakeholders of the quality of the education offered in the school, and the conformity of the school to the values it espouses. It should also seek to identify priority areas for development and possible trustee support and intervention. The spirit of the evaluation is “formative” rather than judgmental.

To this end, the Trust will develop, in consultation with the schools, a set of indicators that will help the Board in developing a consciousness of key areas of the Catholic school, in developing standards as to the quality of service offered in these areas and in the process of self-evaluation to ensure that these standards are reached, or that resources are allocated to allow the standards to be attained.

PROBLEMS BETWEEN TRUST AND BOARD

The Education Act makes direct provision for the dissolution of the Board by the Trustees in the event that the Board does not manage the school within guidelines set by the Trustees. In some cases, such mismanagement will be obviously - misuse of capital or overspend of finances. However, there are other areas which may be less clear, in terms of running the school according to its ethos. This may be particularly difficult in the case of the new Trust, where expectations of ethos may be different because of historical experiences. It is important therefore that a clear procedure be put in place to deal with such events.

The Education Act allows Trustees to disband a Board of Management and undertake direct management of the school until such time as another Board is appointed. In doing so, it must inform the Minister of the reasons behind the dissolution. Clearly, there is some protection for the Board here against any capricious action by the Trust, in that the Minister may query the action of the Trust, and has the ultimate responsibility for approving the school.

Any action to suspend or disband a Board would be very serious. It would only take place after negotiation and dialogue, where clear expectations were set out and agreed.



THE RELATIONSHIP OF THE TRUST TO KEY PERSONNEL

The main relationship between the Trust and the school will be through the Board of Management. Two key people are identified here because of their formal roles on the Board - the Chairperson and the Principal.

CHAIRPERSON

The Chairperson of the Board of Management will have direct responsibility to the Trust for the operation of the Board and the school. Every support, as outlined in the section on the Board of Management, will be given to empowering the Board to exercise its responsibility. This will involve support in the initial training of the Board and in its ongoing support. The Trust will aim to keep regular contact with the Chairpersons to determine their needs.

PRINCIPAL

The congregations recognise the key role played by the principal both in the leadership of the Catholic school and also in the effective working of the Board of Management. In proposing developments for the Trust, the congregations are aware that this has the potential for adding the already heavy workload of the principal. As part of the set-up procedure, the congregations would wish to support the principal and rationalise the workload as much as possible.

In the consultation process, the congregations are seeking ways of identifying the key roles that principals need to play in the relationship between the Trust and the school, whether that is through the Board of Management or in their leadership role in the day-to-day running of the school. They are committed to supporting the principal in exercising that role and finding ways of supporting the principal in duties that are not as central to the role.

It had been hoped to engage in deeper consultation directly with principals prior to the publication of this White Paper. However, that has not proved possible. However, the congregations are committed to working closely with the principals to ensure the best possible procedures within the Trust.

OTHERS

The main role for the Trust will be with the Board of Management. The Trust would hope to empower the Board in its work of developing a partnership between teachers, parents, students and the local community. Normally, it will be the Board that will initiate and direct the work of that partnership. However, there may be times when it is appropriate that these stakeholders have direct contact with the Trust. This may happen through different projects, in-service courses and information sessions. At the very least the Trust will encourage the development of networks among the schools and share information of what is happening in different schools. Part of the consultation at this stage will involve developing a perspective on how this relationship can be fostered.



PART 4

THE LEGAL RESPONSIBILITY OF THE TRUST





THE PROPERTY OF THE TRUST

LAND AND BUILDINGS

The basis of Trusteeship in Irish education is the ownership of land and buildings. This gives rise to the private ownership of the schools, and therefore gives rise to the rights which Trustees have in relation to the schools.

The Congregations and Land

The ownership of land is clear at one level. It is complex at another, as the government has invested from public monies for the developments of many schools. This was not always the case. In some cases, the general public has also contributed to the land and buildings through fundraising activities.

In looking to the future, where they will not be directly involved, the current trustees have the following main options with regard to land.

1. Close down the schools and sell the land for their own benefit and redirection of their apostolic work.
2. Enter into negotiations with the government on the purchase of the land and buildings with a view to the school continuing, but as a public enterprise. The likely outcome of this is VEC involvement, should the government be interested.
3. Negotiate with other bodies to take over the school.
4. Set up some structure to ensure the continuation of the current situation, to the best of their ability.

In taking option 4, the Trustees wish to ensure the continuation of Catholic education, and a Catholic school. The structure and design of the new Trust is to ensure this.

The Transfer of Property

In transferring the land and buildings of a school to the Le Chéile Trust, the congregation has three options:

1. **Donate** the land to the new Trust. In this scenario, the Le Chéile Trust would take over all the obligations of the Congregation. The Le Chéile Trust would then become legally and canonically liable for the land and buildings.

2. **Lease** the land, for a rent. This rent could be commercial or nominal. The Congregation remains the legal owner of the land and buildings and may benefit from the agreement with the Trust. As tenant, the Le Chéile Trust uses the land and buildings in accordance with an agreement signed between the Trust and the congregation. As well as defining the responsibility of the tenant, this process confers legal rights on the tenant, which may compromise the rights of the congregation in the future.
3. **Licence.** Under this arrangement, the Le Chéile Trust manages the land and buildings on behalf of the Congregation, and reports on its stewardship to the congregation. In this agreement, the congregation may reserve particular decisions to itself. The congregation remains the owner of the land and buildings and has the power to review the licence agreement from time to time.

No matter which transfer option is used, a congregation may impose conditions on the use of the land and buildings. They are, in effect, entrusting the land for a particular use. The conditions placed will be legally binding on the Trust.

Typical examples of conditions that might be placed are:

- That the school shall always belong to the Free Education Scheme.
- That the land and buildings be used to promote an all-girls (boys) school.
- That the land and buildings be used to promote an Irish speaking school (Scoil Lán Ghaeilge).

In the case of a licence agreement, a congregation may delegate different levels of authority to the Trust in terms of the development of the land and buildings. Examples of different levels of authority for the Trust are:

- No refurbishment may take place without permission from the Congregation.
- The Trust may undertake all minor refurbishments without seeking permission from the Congregation, provided such refurbishments are internal and do not change the current “footprint” of the land.
- The Trust may undertake any developments under an agreed amount (say €100,000) without written permission. All major developments need written permission.
- The Trust may undertake any developments that it deems necessary, merely to inform the congregation of such developments in a regular report.

The role of the Trust in relation to property is a role of stewardship, whereby it preserves the resources for the purpose of which they were entrusted, and ensures that the resources are applied as they were intended. However, it is also recognised that property can be used as a tool for the development of the school. This requires that there be guidelines for the Trust in the management of property.

Defining Property

The land and buildings being transferred to the Trust for the benefit of each individual school shall be defined by a separate SCHEDULE A for each school. This SCHEDULE will define all boundaries, etc.

In addition to the transfer of the land and buildings, the Congregation will ensure that the said land and buildings so transferred is in good condition and free of the need for major structural work or repair. As the Trust will undertake all responsibilities for the land and buildings once transferred, it is important that the Trust be indemnified against conditions that exist under current trusteeship. Examples of such indemnity might be:

- Against expense that is incurred with regard to necessary major structural repairs to the premises. In the first five years from the transfer of the premises, this indemnity might cover 100% of costs. In the next three years, it might cover 50% of the costs. After that time, the responsibility for capital refurbishment would rest totally with the Trust.
- Against any legal claim that arises from an action or condition that existed prior to the handing over of the premises to the Trust, where the settlement might involve compensation to be paid by the Trust (e.g. insurance claim)
- Against any claim made against the property transferred that arises from an action of someone employed by the Congregation as Trustee, when such action takes place subsequent to the handing over of the premises and where it is found that the person so employed was found responsible for reasons that should have been discovered prior to the approval of their appointment by the then Trustees.

The Trust in turn will indemnify the Congregation against any claim, whether personal or otherwise, arising from the use of the premises once they have been handed over.

The Management of Property

Once the transfer of property is made, the Le Chéile Trust manages the property entrusted to it and takes over all responsibilities for the property notwithstanding the reservations made in the previous paragraph. In general, each property committed under the Trust will be treated as a wholly owned subsidiary of the Trust. Therefore each property will be managed in such a way that it does not make demands on or endanger any other property committed to the Trust, nor can it make claims against any of these other properties.

At least in the medium term future, it is not envisaged that the Le Chéile Trust will have funds to invest in major capital development. These may come available in the future, but in the meantime capital projects must be funded within the capacity of individual schools - the schools must have the capacity to fund the capital project itself.

The Le Chéile Trust shall be responsible for all decisions (in accordance with agreed protocols with the congregations) with regard to:

1. The reassignment of the land or buildings in the event that the property is no longer to be used as a school.
2. The alienation of property in order to realise capital funding.
3. The use of property as collateral against any loan raised by the school for a legitimate development project.
4. Any capital developments and refurbishments of the land or buildings.
5. Decisions on the use of the land and buildings other than as a school.

1. Reassignment of Property

The role of the Trust is that of stewardship. The Trust will not pursue a management strategy that actively seeks the rationalisation of property or capital as part of a business venture or opportunity. In setting up the new Trust, we are conscious of demographic changes in Irish education that have led to:

- the development of new schools,
- the amalgamation of schools to form new, non-denominational schools,
- amalgamations to form new voluntary secondary schools and
- direct closures.

Such rationalisation is usually negotiated at local level, either through the intervention of the Department of Education and Science or through the initiative of individual Boards of Management.

In the case of land or buildings no longer being required for the mission of Catholic education, the property becomes available for reassignment. In the case of the land having been donated to the Trust, then the assets may be realised and used in furthering the aims of the Trust. In the case of a licence or lease, the assets return to the founding congregation, which may then decide to reinvest the property, or part of it, in the Trust, or may decide to use the assets for other works of the Congregation.

In the case of a proposed amalgamation involving a school(s) attached to the Trust, the role of the Trust in any negotiations will be to support the school(s) in the Trust. It will:

- Promote the position and rights of the school assigned to the Trust.
- In the case of two schools assigned to the Trust being involved in such a negotiation, the Trust will appoint separate personnel to work with the different schools in the negotiation.

In the event that capital funding becomes available to the Trust, it will be entitled to enter into negotiations on setting up a new voluntary secondary school attached to the Trust.

2. Alienation of Property

Property is a valuable asset, and there may be a situation where a school proposes to realise part of the property in order to pursue the overall development of the school. The technical term for such a venture is the alienation of property. This has serious implications in both civil and canon law.

The main role of the Trust is to ensure the well-being of each school, not to protect property in itself. The property is to be seen as a means to an end - the mission of Catholic education. However, the alienation of any property has serious long term implications, and should only be undertaken when no other options are available. The Trust will be responsible, in accordance with any protocols developed by the original Congregation, and in consultation with a local Board of Management, for any decision on the alienation of property.

3. Use of Property as Collateral

Rather than alienating property, the asset may be used as collateral to secure a loan to enable other developments take place. The property is used to secure the loan. This approach carries some risk (however minor) to the property. Permission to enter into such an arrangement with a lending agency will rest entirely with the Trust, and be guided by any protocols set by the Congregation on the transfer of the property. In making a decision, the Trust will seek a balance between the developmental needs of the school; the ability of the school to raise funds to meet that development and the risk involved in using the property as a security for a loan.

4. Capital Developments and Refurbishments

As stated earlier, responsibility for all capital development rests with the Trust. Normally, proposals for development come from the Board of Management. The Board has no right to initiate any such developments without written consent from the Trust. This is the position that exists at present. Just as a Board of Management dealt with the congregation, so also, it must deal with the Le Chéile Trust in any proposal for capital development or refurbishment.

Depending on the protocols set by a congregation on the transfer of property, if negotiation with the founding congregation was needed before development could take place, the Le Chéile Trust (and not the Board of Management) would carry out any negotiation with the congregation.

5. Other Uses of the Land and Buildings

In managing the property of an individual school, a Board of Management may seek to benefit from agreements of rental and leasing. This could refer to the use of classrooms, sports facilities, grounds (e.g. car parks). Some activities may take place during the school year and other activities may take place during school holidays. The Board of Management shall clear any such arrangements with the Trust before entering into agreement with a “client”.

In general, the Trust will publish a set of guidelines on appropriate use of school facilities. This can be adapted to local requirements.



THE PROPERTY OF THE TRUST

FINANCIAL FUNDS

TRUST FUND

The Congregations have decided, in principle, to set up a Trust Fund that will ensure the work of the Trust for a period of time. In this way, the congregations agree to contribute to the Trust for the service it will give to the schools. In effect, the Trust will replace the bulk of the contribution being made by the congregations to their own Education Offices.

There are two basic approaches to a Trust Fund.

Option A. The Congregations contribute a sum of money to the Trust Fund, and the Trust works from the interest generated from this Fund. The capital remains fixed, and some of the interest earned may be used to augment the capital and guard against inflation.

Option B. The Congregations contribute a sum of money to the trust Fund. The Trust is empowered to use both interest and capital of the Fund. Protocols can be set in place which guard the rate of use of the capital so that it generates a fixed income over a given period of time.

An example of OPTION B is where the Congregations contribute a sum of approximately €9 million. This will generate an index-linked income of approximately €500,000 per annum for twenty years before the Fund is exhausted. These calculations are based on fixed actuarial figures projected over the twenty-years. Obviously, economic conditions may vary, giving rise to greater earning capacity or to higher inflation rates. In setting up a Trust Fund in this way, there would be strict protocols and management strategies in place to safeguard the Fund against such contingencies.

Clearly, to get a similar return from OPTION A would require a much higher sum of money, as the Trust would not be using any of the capital. In deciding on the mechanism for the Trust Fund, the congregations have regard to:

- The assets currently available to the congregations to invest in the Fund
- Setting a realistic time limit on their responsibility for the schools. Just as they are looking to the future of the schools within the context of

their present resources, they hope that the new Trust will take responsibility for ensuring the future of the Trust in ten or twenty years time. Some congregations may still be in a position to make on-going contributions to this Fund. Others may not.

- Guaranteeing a level of service from the Trust to the schools for a foreseeable future.

TRUST FOUNDATION

As Catholic education looks to the future, it will look to develop the schools as they seek excellence in the service they offer. A major source of funding for such development will be in partnership arrangements with the Government. However, it is likely that there will be aspects of Catholic schools that will not be supported from Government Funds. Some schools have the capacity to raise funds for different projects from among parent bodies. Others schools with the Trust will not have such a capacity. However, the Trust itself may develop the capacity to attract funds from philanthropic sources who are willing to support education and the particular focus on values incorporated into the vision of Le Chéile.

In setting up the Trust, the congregations are not contributing to such a Trust Foundation. This is something for future consideration, and the funds from such a Foundation will mainly be used for capital projects, or development projects within the Trust. The Trust Fund outlined above will be used for on-going administrative needs.

OTHER FUNDS

In the past, some congregations have made funds available to schools to support particular activities. Such activities might include:

Activities undertaken by the Congregation as part of their general mission and apostolate, from which schools in general could benefit. A particular example of this might be running a spirituality centre, or retreat centre. Particular projects might be undertaken that were school related - training Student Councils. As these activities are general, all schools can benefit from them, not just those of the founding congregation. The activity is not related specifically to the work of trusteeship in any one school.

Ethos Development. These activities focus on giving specific groups of people in a school an opportunity to reflect on the ethos issues - growing in a deeper awareness of the spirituality of the congregation and exploring the practical implications in school decisions. Some of these activities are related to national networks, and others are related to international networks.

Funding key elements of school activity. This level of funding often made up for a shortfall in government funding. Three examples of such funding might be the payment of a part-time or full-time ex-quota chaplain; providing resources for Religious Education and giving interest-free loans for any urgent or necessary cause. It is proposed that any such funding be incorporated into the transfer of the school to the Trust and that the ring-fenced fund be administered by the Trust rather than the congregation. This would alleviate any confusion over the role of the Trust, and would prevent a two-tier system developing where some schools could approach a congregation independently for extra funding, while others would not be able to do this.

Project Support. This refers to short-term projects or programmes within the school. An example of such a project would be the support of school personnel on in-service diploma or degree courses.

Some general principles should guide the use of such funds.

- In maintaining a relationship with schools, the founding congregation should not set out to provide a service to their schools that the Trust endeavours to provide to all schools.
- The use of such funds should promote equity within the Trust rather than giving some schools an advantage over others.
- There must be flexibility for Congregations to maintain a relationship with their schools, particularly in terms of ethos. This will be encouraged as much as possible. Where some congregations can not offer such a service to schools, this is not to be seen as a problem, but as a challenge to the Trust to find new ways of creating opportunities that reflect good practice.
- The continuing relationship between the congregation and the new Trust should not be one that confuses roles or in any way disempowers the Trust. In general, the direct relationship between the schools and the congregation will focus on ethos issues rather than physical resources issues. The physical resources will be administered through the Trust.
- No school should be worse off than it is at present in the new Trust. Therefore, if there is a funding arrangement to augment the school, then every effort should be made to establish the continuation of that funding on a ring-fenced basis, providing the congregation is in a position to do so. The administration of that funding will be in the hands of the Trust.

Identifying and clarifying lines of communication with regard to such funds will be

very important.

SCHOOL ASSETS

The schools in the Trust will be treated as independent units. They will retain their own assets for the day-to-day running of the school. In general, the administration of any one school should not impact on the running of other schools. However, it is recognised that some schools will have greater capacity than others schools for fundraising activities. A question arises as to whether all schools should contribute to a central fund to be used for designated administrative projects.

The Articles of Management make allowance for Trustees to collect a Licence Fee from individual schools. In the past, this has been thought of in one of two ways:

A rental on the property of the school. The fee was paid by the Board of Management for the use of the building and the land. The Trustees were able to use this money either to support the congregation or to re-invest in the maintenance of the property. Often, this fee was calculated on a nominal basis, rather than a commercial basis.

A Fee for Services, relating to the ongoing work, and basically paying for the services rendered by the Education Office or delegate of the congregation. This fee was sometimes calculated on a per capita basis (e.g. €5 per student, with the option for seeking alleviation in some cases).

It should be noted that some congregations have never asked schools to contribute to a Licence Fee.

Four different types of income can be identified in a school:

- **Capitation Grants.** This refers to the general basis by which the government funds the day-to-day running of the school. A sum of approximately €300 per student is given to cover expenses, including the licence-fee payment to the trustees.
- **Other Government Grants.** This refers to money given by the government for specific projects - book schemes, equipment, secretarial and caretakers, etc.
- **Voluntary Contributions.** Parents in schools often make voluntary contributions to help with the general running of the school. There is no designated project for which the fund is developed.
- **Fundraising.** Schools are sometimes forced to raise money for a specific project - e.g. capital expansion. The source of such funding will be parents, past-pupils and the local community.

Not all schools benefit from income in the same way in each of these areas. In consulting about the possibility of schools contributing to the Trust, some general

principles were discussed:

- The development of levies should not be excessive and should be strictly limited. The idea would be that the schools develop a sense of solidarity with one another, not that they become a key source of funding for new projects. One way of doing this would be to put a percentage limit on the level of any Licence Fee requested. This would be requested in terms of services offered, and would be linked with payments due to AMCSS, which offers a parallel service in support of the schools. For example, a limit of 3% would give a maximum of €9 per student.
- Funds designated for specific projects (e.g. grants) should not be levied.
- If monies raised through fundraising were to be levied, this would occur only if the Trust were to incur some expenses as a result of the project - e.g. legal fees, etc.
- All monies collected in this way would be put into a special fund, which would specify types of projects against which the monies might be claimed.
- The school that pays a levy would also be entitled to claim against the fund.

In proposing this mechanism, the congregations are conscious that budgeting for the operation of a school is not an easy thing in to-day's climate. The aim of the new Trust will be to enhance the work of the school through the quality of service offered.





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APPENDIX 1

List of Congregations and schools

Cross and Passion Sisters
 De la Salle Brothers
 Dominican Sisters
 Faithful Companions of Jesus
 Holy Faith Sisters
 Patrician Brothers
 Poor Servants of the Mother of God
 Religious of Christian Education
 Sisters of Charity of St. Paul
 Sisters of Jesus and Mary
 Sisters of St. Louis
 Society of the Holy Child Jesus

SCHOOLS UNDER TRUSTEESHIP OF CONGREGATIONS

PRIMARY SCHOOLS

Poor Servants of Mother of God

Carrigtwohill, Co. Cork

Sisters of Charity of St. Paul

St. Paul's Senior Primary School, Dublin

Sisters of St. Louis

St. Louis Infant School, Rathmines (with Dublin Archdiocese)

St. Louis Primary School, Rathmines (with Dublin Archdiocese)

Holy Faith Sisters

Our Lady of Consolation, Donnycarney, Dublin 9

Our Lady of Divine Grace, Ballygall, Dublin 11

Sisters of Jesus and Mary

Our Lady's Grove Primary School, Goatstown, Dublin 14

Jesus and Mary Primary School, Scoil Céde, Galway

COMMUNITY SCHOOLS

Sole Trusteeship

Holy Child Community School, Sallynoggin, Co. Dublin. Society of Holy Child

Joint Trusteeship

Blakestown Community School St. Louis, Servite Fathers, Dublin VEC

Ramsgrange Community School St. Louis, Co. Wexford VEC

St. Louis Community School, Kiltimagh, St. Louis, Mayo VEC

St. Tiernan's Community School, Sandyford Road, Dublin 12

Faithful Companions of Jesus, Carmelites (O.Carm.)

Oldbawn Community School, Co. Dublin. Dominican Sisters,

Dominican Fathers and Dublin VEC.

LIST OF VOLUNTARY SECONDARY SCHOOLS UNDER TRUSTEESHIP OF CONGREGATIONS

Cross and Passion Sisters

Cross and Passion College, Kilcullen, Kildare
Maryfield College, Glandore Rd. Dublin 9

De La Salle Brothers

Árdscoil La Salle, Raheny, Dublin 5
Beneavin De La Salle College, Beneavin Rd, Dublin.11
Da La Salle College, Churchtown, Dublin 14
De La Salle College, Waterford.
De La Salle Secondary School, Dundalk, Co. Louth
St Benildus College, St. Benildus, Uppr Kilmacud Rd. Co. Dublin.
St Johns College De La Salle, Ballyfermot, Dublin 10
St. Gerald's College, Castlebar, Co. Mayo

Dominican Sisters

Dominican College, 204 Griffith Ave, Dublin 9
Dominican College, Wicklow
Dominican College, Taylor's Hill, Galway
Muckross Park College, Donnybrook, Dublin 4
Saint Dominic's Secondary School, Ballyfermot, Dublin 10
Scoil Chaitriona, Bothar Moibhí, Dublin 9
Sion Hill Dominican College, Blackrock, Co. Dublin
St Dominics College, Cabra, Dublin 7
St Dominic's High School, Santa Sabina, Dublin 13

Faithful Companions of Jesus

Árd Scoil Mhuire FCJ, Bruff, Co. Limerick
FCJ Secondary School, Bunclody, Co. Wexford
Laurel Hill Coláiste FCJ, Limerick
Laurel Hill Secondary School FCJ, Limerick

Holy Faith Sisters

Holy Faith Secondary School, Clontarf, Dublin 3
St David's Secondary Co-Educational School, Greystones, Co. Wicklow
St Mary's Secondary School, Glasnevin, Dublin 11
St Marys Secondary School, Killester, Dublin 5
St Michaels Secondary School, Finglas, Dublin 11

Patrician Brothers

Patrician College, Finglas, Dublin 11
Patrician Presentation, Fethard, Co. Tipperary
Patrician Secondary School, Newbridge, Co. Kildare
St Joseph's College, Galway

Poor Servants of the Mother of God

St Aloysius College, Carrigtwohill, Co. Cork
Manor House School, Raheny, Dublin 5

Religious of Christian Education

Our Ladys School, Templeogue, Dublin 6W

Sisters of Charity of St. Paul

Scoil Pól, Kilfinane, Co. Limerick
St Pauls Secondary School, Greenhills, Dublin 12

Sisters of Jesus and Mary

Jesus & Mary Secondary School, Enniscrone, Co. Sligo
Jesus & Mary Secondary School, Gortnor Abbey, Crossmolina, Co. Mayo
Jesus & Mary Secondary School, Salerno, Salthill, Galway
Our Ladys Grove, Goatstown, Dublin 14.

Sisters of St. Louis

St. Louis Secondary School, Monaghan
St Louis Secondary School, Carrickmacross, Co. Monaghan
St Louis Secondary School, Dundalk, Co. Louth
St Louis High School, Rathmines, Dublin 6

Society of the Holy Child Jesus

Holy Child Secondary School, Military Rd., Killiney, Co. Dublin

APPENDIX 2

List of Indicators on Catholic Schools (New Zealand)

A common way of helping schools and systems participate in self-evaluation is to present them with a set of indicators. The Inspectorate in Ireland has done this with regard to Whole School Evaluation, by publishing Looking At Our Schools. Indicators also exist at trans-national level, generated by the OECD and by the European Union. New Zealand Catholic Education Office has developed a sample set of indicators that might be used by a school as part of a self-review, and which might form part of an external review that takes place every 4 years.

There are three dimensions examined: - Catholic Community; Pastoral Care; Religious Education

Each Dimension has a number of Focus points, which specifies what is meant by the main dimension. These are numbered 1.0, 2.0, 3.0

Each Focus point has a number of specific Indicators, which refer to specific structures or behaviours. These are numbered x.1, x.2, x.3, etc. under each focus point.

When doing a self review, schools are asked to present evidence that a particular dimension, focus or indicator is being met. The indicators are not regarded as prescriptive. The instructions read:

The following frameworks show one way of presenting summary review material for three of the Catholic Special Character Dimensions. It is possible to use quite different self review frameworks, so long as the foci and dimensions are still covered.

Each framework contains key indicators. It will be noted that similar indicators may appear in more than one framework. It is quite appropriate to cross reference evidence rather than repeating material. Not all indicators may be relevant to a particular school. Any school may also choose to frame its own indicators.

The New Zealand indicators are presented here as an example of how a system has developed. A similar system might be developed for the Irish system, in consultation with the schools. This might be a task for the Forum in the new Trust.

CATHOLIC COMMUNITY

The school is a community where gospel values are central, where faith is nourished, and where Christian celebration in the Catholic tradition is highly valued.

1.0 Spirituality

The individual and communal spirituality of the whole school community is promoted and nurtured.

- 1.1. An awareness of the presence of God is nurtured through opportunities to pray in a range of styles suited to different personalities and individual stages of development.
- 1.2. Links are explicitly fostered between the community's love of God, and good works to establish the Kingdom of God in daily life.
- 1.3. Members of the community are encouraged to see daily life in the light of their eternal destiny.
- 1.4. Students are exposed to major philosophical questions - "Who am I? Why am I here?" at an appropriate level.
- 1.5. Religious Education classes include the teaching and practice of spirituality.
- 1.6. A chapel or quiet space is available, its use is promoted and it is treated with respect

and reverence.

- 1.7. On school trips, provision is made for prayer times and worship.
- 1.8. Resources are available to staff, students and Board members to assist them in their spiritual development.
- 1.9. Parent newsletters regularly contain items of a spiritual nature.

2.0 Evangelisation

The school is a faith community which endeavours to spread the Good News by word and witness.

- 2.1. The school proclaims the mission and gospel of Jesus Christ
- 2.2. All members of the school are encouraged to be examples of Christians living in faith and service.
- 2.3. The orientation process is sensitive to the background and needs of new members of the school community.
- 2.4. The school values knowledge and understanding of scripture and the teachings of the Catholic Church.
- 2.5. The school has a peer ministry programme.
- 2.6. All members of the school community are aware of and knowledgeable about the school's unique Catholic Special Character, its traditions and founding history.

3.0 Partnership

Education is a collaborative responsibility

- 3.1. The school builds working relationships among Principal, Board, staff, students, home.
- 3.2. Collaboration is promoted between Catholic primary and secondary school(s)
- 3.3. If primary, the school fosters linkages with local Catholic early childhood centres.
- 3.4. The school community is actively involved in Catholic Special Character activities.
- 3.5. Staff contribute to the development of Catholic Community, Religious Education and Pastoral Care.
- 3.6. The Board of Trustees consults and works with the Proprietor on questions relating to Catholic Special Character.
- 3.7. There is an annual compliance report form Proprietor Appointees to the Proprietor.
- 3.8. Efforts are made to foster good relationships with the local Maori community.
- 3.9. The school reaches out to the Pacific People's community and to migrant groups.

4.0 Values

The school identifies and actively promotes gospel values.

- 4.1. Values of the school are identified.
- 4.2. Values are taught, modelled and promoted, with students learning how to face ethical issues from a Catholic perspective.
- 4.3. Values are incorporated into significant school documents
- 4.4. Teachers respect and reflect the Catholic special character of the school in all curriculum areas and in all school activities.
- 4.5. Excellence in the learning process is upheld as a strong Catholic value.

5.0 School Culture

Catholic Special Character is visible in the relationships and the artistic expressions, seen throughout the school.

- 5.1. Visitors are welcomed to the school and treated courteously.
- 5.2. Staff and students treat each other with courtesy, consideration and aroha.
- 5.3. The school's physical environment is welcoming.
- 5.4. There are Catholic symbols obvious to everyone throughout the school.
- 5.5. Student work on display includes Catholic Special Character material.
- 5.6. The Mission Statement of the school is well communicated.

- 5.7. Students understand the meaning of the school motto and crest.

6.0 Leadership.

Leadership effectively shapes the faith-based vision, direction, values and outcomes of the school programme.

- 6.1. The school has a written Catholic Special Character policy.
- 6.2. The school statements of mission, philosophy, values and goals are Catholic in substance.
- 6.3. The school's communications all contain acknowledgement of Catholic Special Character.
- 6.4. The Board of Trustees promotes Catholic Special Character in its communications.
- 6.5. The Principal ensures that Catholic Special character values are monitored and maintained.
- 6.6. The Principal leads by example.
- 6.7. The Principal demonstrates ongoing commitment to personal faith development.
- 6.8. The Principal and the D.R.S. work collaboratively to lead the development of Catholic Special Character.

7.0 Stewardship

The school accepts responsibility for delivering education with a Catholic Special Character

Charism

- 7.1. Where there is an identified charism associated with the school (e.g. founding order/patron saint) this is actively promoted.

Organisation

- 7.2. Planning and policy documents have a Catholic Special Character component.
- 7.3. School organisation goals are grounded in Catholic values, reviewed annually and revised as required.
- 7.4. Catholic Special Character roles are clear, understood, followed and reviewed on a regular basis.
- 7.5. The Principal is qualified by education and experience for the Catholic Special Character responsibilities of the position, and shows a commitment to the Catholic Special Character.
- 7.6. School promotion material included the Catholic Special Character mission statement.
- 7.7. The school budgets annually for Catholic Special Character activities.
- 7.8. BOT members have access to, and are familiar with, the following documents; The Declaration, the Handbook for New Principals, the Guidelines for the Appointment of A Principal, D.R.S. manual, Accreditation manual, 'S' forms.

Enrolment

- 7.9. Enrolment procedures are transparent, and meet the requirement of the Integration Agreement.
- 7.10. The enrolment policy of the school does not discriminate on the basis of race, disability, intelligence or socio-economic situation.

Employment

- 7.11. The school has a written Appointments policy in keeping with the needs of the Catholic Special Character.
- 7.12. Advertisements for positions indicate that the school is Catholic.
- 7.13. In making staff appointments, due recognition has been given to qualifications relevant to Catholic Character which applicants have gained e.g. Certificate in Catechetics, Diploma in Religious Education, etc.
- 7.14. Documentation supplied to people seeking employment includes Catholic Special Character information.
- 7.15. Job descriptions and appraisal systems indicate the responsibility of each staff member to actively support the Catholic Special Character of the school.
- 7.16. Induction procedures for staff, including student teachers, relief teachers and health professionals, contain Catholic Special Character components.

7.17. The induction process is sensitive to the need of staff from different faith traditions.

Professional Development

7.18. Annual in-service opportunities in Catholic Special Character are available and actively promoted to staff and Board.

7.19. The orientation programme for new trustees ensures that they understand their Catholic Special Character responsibilities.

7.20. The Board regularly engages in ongoing Catholic Special Character formation.

Evaluation

7.21. Parents/guardians/caregivers/parish personnel and proprietor are involved in the process of Catholic Special Character review.

7.22. The appraisal of the Principal includes review of Catholic Special Character responsibilities.

8.0 Worship

A Catholic culture of prayer, liturgy and faith-based celebration is promoted in the school.

8.1. At least once a term the school or each R.E. class celebrates liturgies appropriate to the age, culture and development of students.

8.2. Staff and students collaborate in preparing and leading prayers and liturgies.

8.3. Students of differing cultures are encouraged to include elements of their culture in liturgies.

8.4. The school marks significant events with some form of liturgical celebration when relevant.

8.5. The school community celebrates the seasons of the Church year: advent, Christmas, Lent, Easter, Ordinary Time.

8.6. Community prayer is part of the daily life of the school.

8.7. The school provides opportunities for quiet and reflection for students, staff, Board and parents.

8.8. Staff, students and Board have access to appropriate resources for spiritual development.

8.9. Ancillary staff, parents and visitors are encouraged to join the school for liturgies.

8.10. Active staff participation is encouraged in prayer and liturgies.

8.11. Efforts are made to provide opportunities for practice of the sacraments in the school community.

9.0 Service

Students assist people in need through service and outreach opportunities provided by the school.

9.1. The school promotes outreach involvement in national and international communities where possible and appropriate.

9.2. There are opportunities, outside of the regular R.E. classes, for students and staff to develop their faith and witness to it (e.g. Young Vinnies, Caritas)

9.3. The school endeavours to provide opportunities for students to contribute actively to the life of the local community.

10.0 Collaboration with Parish.

The school collaborates with the parish(es) of which it is part.

10.1. The school endeavours to foster a collaborative relationship with its parish(es)

10.2. The school cooperates with the parish(es) regarding preparation for and reception of Baptism, Confirmation, Eucharist and Reconciliation.

10.3. In primary schools, there are school/parish liturgies occasionally throughout the year.

10.4. The school provides opportunities for students to contribute actively to the life of the parish(es)

PASTORAL CARE

The school community nurtures, supports and cares for individuals.

1.0 Relationships.

The school is a friendly, welcoming, co-operative learning environment where the dignity of each person is respected.

- 1.1. Interactions are characterised by friendliness, openness and effective listening
- 1.2. There is a climate of courtesy and respect among all members of the school community.
- 1.3. The aim of all conflict resolution is reconciliation
- 1.4. The school supports ethnic minorities and helps them feel part of the school community
- 1.5. The school is an inclusive community into which the poor and the marginalized are welcomed.
- 1.6. The school is sensitive to the difficulties of disadvantaged students and makes provision for them.
- 1.7. No one eligible to attend is denied Catholic education on the basis of inability to pay attendance dues.
- 1.8. Assessment and reporting procedures at the school affirm the achievement of individuals.
- 1.9. The pastoral care programme supports parents/guardians/caregivers in their responsibility for their children.
- 1.10. Staff are affirmed and appreciated.
- 1.11. Staff refrain from making derogatory comments about colleagues or students.

2.0 Safety

The school provides for students an environment that is safe - physically, emotionally, socially, spiritually, culturally.

- 2.1. The school promotes zero tolerance of violence
- 2.2. Failures and mistakes do not reduce an individual's future opportunities
- 2.3. Verbal abuse, such as sarcasm, ridicule, and undue impatience, and punishments which diminish the student's sense of self worth are not acceptable at the school.

3.0 Behaviour Management.

Discipline processes are just, reasonable, respectful and consistent.

- 3.1. Students are encouraged to take responsibility for their own behaviour.
- 3.2. Structures and processes are in place to foster this aspect of personal growth.
- 3.3. The school has a support system to reintegrate students after stand-down.

4.0 Cultural Awareness

The school is open to the enrichment of diverse cultures.

- 4.1. The school recognises the importance of the Treaty of Waitangi
- 4.2. Bicultural elements (tikanga, wairua, te reo, karakia - customs, spirituality, language, prayer) are part of the daily life of the school.
- 4.3. The school acknowledges the value of all cultures in an increasingly multi-cultural society.
- 4.4. The school respects different ways of being, acting, and believing, providing they harmonise with Gospel values.

5.0 Organisation

The way pastoral care is organised is evident to all members of the school community.

- 5.1. The school's pastoral care procedures reflect Gospel values.
- 5.2. The pastoral system makes use of support offered by Church, government, local authority and social service agencies.
- 5.3. Procedures and organisation are explained to students and parents.

RELIGIOUS EDUCATION

Religious Education reflects the fact that the school helps to fulfil the teaching mission of the Church by living and teaching the values of Jesus Christ.

1.0 Leadership

The Principal and Director of Religious Studies provide leadership and sound management in Religious education.

- 1.1. The school has a written Religious Education policy.
- 1.2. The Principal actively supports the D.R.S.
- 1.3. The D.R.S. manages resource materials and professional preparation for Religious Education.
- 1.4. The D.R.S. is involved in Catholic Special Character financial planning.
- 1.5. The D.R.S. is involved in the allocation of staff to the teaching of Religious Education.
- 1.6. The school has criteria for appointing the most suitable and qualified teachers of Religious Education.

2.0 Religious Education Curriculum

The Religious Education programme is professionally delivered.

- 2.1. Religious Education is given high status.
- 2.2. The school implements the national Religious Education curriculum.
- 2.3. Teaching is effective, creative and teachers implement strategies to meet the individual needs of students.
- 2.4. Specialised Religious Education induction programmes are provided for non-Catholic students who are foreign, and for students who are new to the Catholic education system.
- 2.5. International students are given specialised support and tuition.
- 2.6. The school's Catholic Special Character and Religious Education goals are documented, dated and current.
- 2.7. Student self-evaluation is encouraged.
- 2.8. Assessment and reporting procedures for Religious Education are evaluated regularly.

3.0 Integrated Curriculum

The teaching of Religious Education is integrated with other curriculum areas especially those which include ethical issues, personal relationships and sexuality education.

- 3.1. The D.R.S. initiates dialogue with teachers of other classes and subjects.
- 3.2. The Health Education programme reflects the Catholic Special Character of the school.
- 3.3. Sexuality education is presented in the context of the education of the whole person and the young person's stage of development.
- 3.4. School policy ensures that sexuality education is set in the context of the teaching of the Church.
- 3.5. Teachers of sexuality and morality have training provided by Proprietors.

4.0 Resources

The school makes financial provision for Religious Education and Catholic Special Character resources.

- 4.1. The staffing, time allocation and resources given to Religious Education are as recommended by the Bishops' Conference. (Primary schools: as in letter of 11.11.98 from N.Z. Catholic Bishops Conference. Secondary schools: as in letter of 29.8.00 from N.Z. Catholic Bishops Conference).
- 4.2. The school makes appropriate use of Catholic education advisory services.
- 4.3. The Religious Education programme is well resourced.

5.0 Professional Development

The school provides opportunities for regular Religious Education professional development and spiritual formation of staff.

- 5.1. All Religious Education teachers undertake regular professional development in Religious Education.
- 5.2. Religious Education teachers are accredited or are in the process of achieving Level 2 accreditation, or beyond.
- 5.3. The school encourages staff to undertake the Christian Family Life Education course.

6.0 Communication

The school communicates with parents about Religious Education.

- 6.1. Parents are informed regularly of the content and emphasis of the Religious Education programme.
- 6.2. Where appropriate, opportunities are available for parent involvement in Religious Education.
- 6.3. Parents receive regular feedback on students' progress in Religious Education.
- 6.4. In primary school: the school uses the Family-Whanau programme for parents.





APPENDIX 3. Questions for Reflection

CONTEXT AND VISION

Is the vision of Catholic Education clear?

Is the vision proposed by the Board compatible with the vision currently promoted in the school?

Is the historical link with the founding Congregation sufficiently protected?

How do you see the role of the Trust and the role of the Board of Management developing in terms of promoting this vision?

DEVELOPING THE TRUST

Does the Forum structure give adequate voice to the Board of Management in decision-making concerning Trustee issues?

How can the school develop meaningful involvement in the Forum?

- How often should the Forum meet?
- How many members of the Board should be involved in this Forum?
- What issues should the Forum deal with?
- Should the Forum have authority to make decisions with regard to ethos that might have implications for other schools in Le Chéile.

THE ADMINISTRATIVE ROLE OF THE TRUST

Supporting Vision

- **Building Capacity**
How can the Trust promote the vision of Catholic Education and Catholic Schools, and also promote leadership capacity and skills in a proactive way?
- **Quality Assurance.**
It is proposed that every five years or so, there should be a review of the Catholic Ethos of the school. This would be a self-review, followed by some discussion with the Trust on issues for development and support.
 - How might this be developed so that it is not an “inspection”, but at the same time can give assurances to parents and the Trustees that the school is working according to its ethos?
 - What type of support structures might be needed to ensure follow-up and development for these reviews?
- **Historical Links**
How can the Trust build into this structure a support for schools to follow their historical links with the congregation?

Relationship with the Board of Management

How do you respond to the proposals outlined in Section 3 for the relationship with the Board of Management?

- **Appointment and Training**
 - In developing a list of possible trustee representatives for appointment? What mechanism might work that preserves a genuine interest in the local

- school, and signals a link with the other Le Chéile schools?
- Based on your experience of training and support to day, and also your sense of the needs for the future, what training and support structures for individual members are necessary?
- What aspects of this training are directly related to the Trustee, as opposed to general training as organised by other bodies such as the Joint Managerial Body (JMB)?

Communications

In setting up a communication flow between the Trust and the Board, it will be important that the Board keep the Trust informed on developments. A key issue for the Trust is to find ways of dealing with this communication without adding a major burden to the work of the Board or its officers. Also, the Trust does not want to over-formalise the relationship between the Trust and Board. There are three main areas of communication:

- Key issues of concern to the Board - e.g. the minutes of Board Meetings. Of particular concern will be issues that might have legal implications for the Trust.
- Financial Issues - these concern the forward budget and annual accounts. Other ongoing reporting mechanisms might be important.
- Some type of annual report to the Trustees that deals with development issues and the success of the Board in implementing the School Plan.

Are there creative ways in which communication between Trust and Boards can develop in the future? How might responsibilities develop? What responsibilities might (a) belong solely to the Trust (b) belong solely to the Board or (c) be shared between the Trust and the Board?

- Supporting Individuals
What do you see as the responsibility of the Trust to support individuals? How do you see the Trust linking with other organisations in providing support for individuals in the schools?

LEGAL RESPONSIBILITIES OF THE TRUST

- Land
What are the expectations of the Congregation with regard to the land that will be assigned to the school?
- Finances
Does the Congregation currently make a financial contribution to the operation of the school?
What impact will moving to the Trust might have on these contributions in the future, and how will the change affect the operation of the school?
- School Contributions
Does the school currently make a Licence Contribution to the trustees? If they are to pay a licence fee to the new trust, what services would they see as essential to that fee?
What impact would LEVIES on income other than capitation have on the school?
 - How important is the idea of a common bond between schools - the development of a community fund, distributed by the Trust?
 - What income might be levied, and should some income be excluded from levies?
 - Are there specific projects that should be designated as linked to these funds, and other projects that should be excluded.



