



Joint Managerial Body/
Association of Community and Comprehensive Schools

A Proposal for Management Structures for Post-Primary Schools

February 2014



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Foreword

The Joint Managerial Body and the Association of Community and Comprehensive Schools are very concerned about the immediate and long-term effects of the moratorium on posts of responsibility in our schools. The moratorium has had the twin effects of reducing the capacity of schools to cope with important functions within the schools and burdening the principals of our schools with additional responsibilities, thus diverting them from more vital functions. This reduced management support is no longer tolerable. It will be seriously damaging to the effective functioning of schools. This would mean that students will immediately feel the effects of a reduction in pastoral care, diminishing support for students from staff, which can have very serious effects on both individuals and the cohort of students as a whole. The maintenance of the efficient operation of our schools and the smooth implementation of necessary changes and reforms to the system, which we support, relies on a vibrant and effective middle management structure. Such a middle management arrangement as proposed in this document will allow the senior management teams in our schools to fulfil their primary role of leading teaching and learning, while ensuring the efficiency and professionalism of service to students and parents in other areas as required and expected.

We have approached the issue in a responsible and professional manner by researching how the education systems in other jurisdictions respond to the needs of schools in respect of middle management. We engaged external consultants to support our work in this area and have teased out the comparisons with other systems in order to learn from them. Our work also involved engagement and widespread consultation with our executives, our respective boards of management and focus groups of principals in our schools in order to come up with proposals which are compatible with the practice of our schools but also take into account the political and economic realities in which we find ourselves. Being fully aware of the role and responsibility of middle management in the school, we set about striving to achieve a balance aimed at continuity, fitness for purpose and sustainability.

We hope and expect that the research and the proposals emanating from our consultative process will be approached in a spirit of partnership and be considered by the Minister and the officials in the Department of Education and Skills as an efficient way to make progress in an area which is vital to our schools and to the education of our students into the future. We believe that our approach is both realistic and innovative and will form the basis for a system which will be fit for purpose. We believe that the proposals contained within the document will give schools a flexible system of middle management which will support schools in processing the dynamic changes envisaged, while moderating the overall costs to the education system. We look forward to a realistic engagement with the Minister, officials in the Department and the other education partners on the detail of our proposals.

Fr. Paul Connell, President, JMB and Mr. Malachy Molloy, President, ACCS.

Introduction

This consultation document has been produced by the Joint Managerial Body and the Association of Community and Comprehensive Schools, supported by the Work Research Centre. The document has emerged as a result of a period of consultation led by a working group made up of members of JMB and ACCS. The preparatory process included a review of practices in four other jurisdictions and a workshop in which a group of more than thirty principals and members of boards of management from JMB and ACCS helped generate a structure for middle management in second-level schools.

It proposes a new structure for middle management and a draft set of rules that might operate the system. In doing so, it attempts to set out a vision for the future. It does not attempt to set out a pathway for getting to this future – that will be the subject of a later stage in the process.

This proposal has been developed on the basis of a new and more relevant middle management structure being introduced into post-primary schools. The introduction of such a structure does not eliminate the urgent need to appoint additional personnel, with an appropriate skillset, to undertake the ever-increasing levels of administrative work which are now part and parcel of post-primary schools.

This proposal has been approved by the JMB Council and ACCS Executive and will now be submitted to the Department of Education and Skills, with a view to obtaining agreement on new middle management structures. This proposal will be presented to the other education partners at the appropriate time.

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The philosophy of the proposals

The Education Act 1998 sets out a series of commitments and objects for the education system in this country, as follows:

- To give practical effect to the constitutional rights of children
- To provide a level and quality of education appropriate to meeting the needs and abilities of participants
- To promote equality of access to and participation in education and to promote the means by which students may benefit from education
- To promote the right of parents to send their children to a school of the parents' choice
- To promote best practice in teaching methods with regard to the diverse needs of students and the development of the skills and competencies of teachers
- To promote the language and cultural needs of students, having regard to the choices of their parents
- To enhance the accountability of the education system

Schools are challenged to operate in accordance with the principles outlined above and to ensure that the education system serves the needs of pupils and parents. In this regard, school management has a key role in promoting a school environment which is welcoming, inclusive, accountable and focused on high quality teaching and learning.

“ . . . both leadership and management in education are important and have the potential to make a significant difference to the effectiveness of schools and the quality of learning and teaching. ”

“Leading and Managing Schools” edited by Helen O’Sullivan and John West-Burnham.

Educational research demonstrates that effective leadership and management are inextricably intertwined. Principals need to be able to delegate leadership roles effectively so that they can concentrate their efforts on developing leadership within the schools. Distributive leadership with a flexible structure in schools allows for such delegation in an effective and meaningful way. Teachers need to have exposure to taking on such leadership responsibilities, gaining experience, competencies and the confidence required in order to take on senior management roles in the future.

These proposals set out a middle management structure based on school needs, providing for distributive leadership with meaningful accountability and a path for career development. This model of distributive leadership acknowledges the contribution of teachers to teaching and learning and provides them with opportunities to build their capacity to take on leadership roles, especially in the area of leaders of learning.

The philosophy of the proposals

The proposals for new management structures embody a number of principles:

- Allow for local level decision-making regarding the recruitment and structure of middle management roles
- Allow for local flexibility in relation to managing the middle management system
- Enable career development through the use of middle management structures
- Ensure accountability of middle management roles through better procedures for reporting, monitoring and sanction
- Promote mobility within the middle management structures as a preparation for advancement to senior management roles
- Create opportunities for senior management to prioritise teaching and learning in schools.

The basis for the proposals concerning middle management structures comes from a consultative approach involving a wide range of experienced educationalists, resulting in a proposal which sets out to achieve the following:

- Defines the set of middle management roles that need to be undertaken in post-primary schools – the list is not exhaustive
- Develops a five-tier graded middle management structure to complement the senior management team (principal and deputy principal) in a school
- Assigns points to schools based on their size
- Creates a focus on a leadership team in schools underpinned by an emphasis on shared leadership
- Provides for a flexible management structure based on individual school needs
- Allows for the creation of career development pathways.

Framework for Developing Management Structures

Six main areas associated with school management have been identified as outlined in Table 1 below:

Table 1: School Management Components	
1	Policy and Planning
2	Curriculum Development
3	Student Development and Support
4	School Administration
5	Human Resources
6	Communications

The middle management structures proposed in this document are premised on the existence of the following core management posts in schools:

- Principal
- Deputy Principal
- Programme Co-ordinator

The above posts are regarded as being entirely separate from the middle management roles as outlined in this document.

In addition, the proposals for reform of the Junior Cycle will require the appointment of the following core management posts in schools to ensure the successful implementation of the reforms. These two posts have not been included in the proposals outlined below as it is envisaged that they will be introduced into all schools on an ex quota basis

- Leader of Curriculum Development
- Leader of Assessment

The main middle management roles outlined below in Table 2 can be grouped within the six school management components listed above. Table 6 in Appendix 2 outlines an example of the allocation of middle management roles to one or more school management components.

This feature could enable a career path within specific types of role groupings to be developed. Alternatively, teachers may seek to acquire competencies across all or some of the school management components and the acquisition of such competencies may assist teachers in pursuing promotion.

Framework for Developing Management Structures

The following are the main middle management roles that have been identified:

Table 2: Middle Management Roles

Year Heads
Pastoral/student care
Student behaviour
Special needs co-ordination (including gifted children)
Co-ordinating school self-evaluation
Examinations Administrator
Staff development
School planning
Co-ordination of literacy/numeracy
ICT for learning
Promotion of positive mental health
Co-ordinator of work experience
Timetabling
Attendance management
Student enrolment
Extracurricular co-ordination
Management of book rental
PT Meetings Co-ordinator
Academic tracking
Anti-bullying Co-ordinator
Parents Association Liaison Officer
Student Council Co-ordinator
Health & Safety Manager
Public relations
Voluntary activities

This list is not exhaustive and individual schools may add to or subtract from the list as school needs dictate.

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Assigning Management Posts and Points to School Size

A key issue relating to the proposed new management structures concerns how school size is to be taken into account. It is proposed that the basis for assigning management roles be related to the size of the school. The method adopted in assigning points to schools is outlined in detail in Appendix 1.

Schools will be awarded points on the basis of their size. The total points can then be assigned by the board of management in the context of each school's circumstances, using the flexibility offered by the tiered system. The board of management will finalise the post structure to be adopted, based on the total points allocated to the school. It should be noted that the posts of principal, existing deputy principals and the programme co-ordinator are not included in these calculations – all of these posts will be allocated to schools on an ex-quota basis.

The following table outlines the level at which deputy principal posts are awarded:

Table 3: Allocation of Deputy Principal Posts Based on School Size	
Size of School (Enrolment)	Deputy Principal Posts
1 - 500	.5*
501 - 700	1
701 – 1200	2
1201+	3

* The .5 involves the allocation of an additional 11 hours per week to a school. The deputy principal allowance is already paid to a deputy principal in each school.

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Allocation of Posts and Remuneration within a School

Each point awarded to a school is valued at €1,000 in respect of salary. Posts are allocated to staff members in a tiered manner. In order to distribute leadership in a realistic manner over a range of school sizes, five tiers of middle management are suggested, where the middle management roles listed in Table 2 can be assigned to appropriate tiers, related to level of responsibility and to the significance of the position given the size of school.

There are five tiers in the management structure with a graded range of points being awarded to each tier, as outlined in Table 4:

Tier	Points awarded	Allowance payable
M1	10	€10,000
M2	8	€8,000
M3	6	€6,000
M4	4	€4,000
M5	2	€2,000

Boards of management will decide on both the total range of roles to be assigned in a school and the tier at which each role is to be awarded. Boards will make such decisions based on a process of consultation at school level and the needs and context of the school at any given time. The more posts that are assigned at the higher tiers (M1 and M2), the fewer posts a board may award.

It is a matter for school authorities to organise, reorganise and prioritise the appropriate duties for middle leaders to reflect the changing needs of a school. Post-holders must be prepared to change roles and duties in response to such developments.

Boards of management, in accordance with DES CL 25/2011, may assign post-holders to responsibilities appropriate to the level of the post as required by the priorities and needs of the school.

Example: A school with 66 points (401 to 500 pupils) could award posts as follows:

3 x M1 = 30 pts 2 x M2 = 16 pts 2 x M3 = 12 pts 1 x M4 = 4 pts 2 x M5 = 4 pts	Or	2 x M1 = 20 pts 3 x M2 = 24 pts 2 x M3 = 12 pts 2 x M4 = 8 pts 1 x M5 = 2 pts
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The tiered approach will provide opportunities for teachers to progress along a career path.

Recruitment to Middle Management Roles and Career Development

The duties of the post-holders will be decided by the board of management, in collaboration with the school principal, following a period of consultation. Issues such as school size, mobility, recruitment and career development will be taken into account. It is the intention of the proposers to develop role descriptors for the middle management posts outlined in Table 2 above. The board will be the final arbiter in deciding the levels of posts and the duties attached to each post. Each board of management will have the autonomy to select the posts most appropriate to the needs of the school.

It is proposed that schools will be allocated points, based on school size, to award to middle management posts (See Appendix 1). Schools will decide on the number of posts at each tier to meet its needs. The transition from the present system will be explored at a later date.

When the post structure is decided within a school, the duties and conditions of each post should be specified in detail (a job or post description) and these duties should be in line with the tier of the post and between tiers of posts. Each set of duties should be open to review by the board of management on an annual basis or as a post becomes available, to meet the changing needs in schools. The board of management will be the final arbiter in deciding the revised duties. Boards of management will have the authority to reorganise and prioritise the appropriate duties for post-holders in the context of changing needs.

Existing holders of assistant principal (AP) and special duties teacher (SDT) posts may be appointed to the new tiers at M1 and M4 respectively provided they are prepared, in accordance with their contracts, to undertake the duties and responsibilities of the grades assigned to them. Appropriate duties will be assigned following consultation with individual post-holders.

In the event that an existing post-holder is not prepared to undertake duties specified in the new schedule of post duties, the post-holder may continue to retain duties of a similar level of responsibility to their existing duties and their allowance at the appropriate AP or SDT level.

Each board of management will then assign the remaining points to the new five-tier structure. As posts become available, appointments are made in accordance with the new five-tier structure and CL 42/2010.

Posts will be advertised with a clear definition of the tier at which they are offered, in addition to the role and responsibilities defined in the job description. The middle management structure must allow for roles that require a particular skillset (e.g. subject department heads).

Appointment to a middle management role will be by interview, following the current model of interviews as set out in CL 42/2010, with three interviewers to include the principal, a nominee of the board and a chairperson independent of the school. The person appointed will be the most

Recruitment to Middle Management Roles and Career Development

suitable applicant, given the skills and competencies required for the position and the relevant experience of the applicant, with a particular emphasis on the candidate's competencies in the six school management components. (See Table 1).

There will be a right of appeal, in line with the current appeal procedure.

Teachers will have greater possibilities for career development within the new system. Skills and competencies developed may be recognised by selection committees when teachers look for promotion to higher management levels.

With regard to career development and promotional opportunities, teachers may, over time, acquire experience of a range of roles that may be of significance when applying for other promotional posts, including those of principal and deputy principal.

All post-holders will be paid from Oireachtas funds, in line with current arrangements.

Responsibilities and Accountabilities

At the heart of these proposals is the idea that middle management roles should be carried out by the person who is the role-holder and that he/she is accountable for the performance of that role. A performance monitoring mechanism should be put in place which indicates that non-performance of the role may carry sanctions. In addition, the concept of responsibility carries with it a reporting function.

The responsibilities and accountabilities of the post must be clearly outlined and, at an initial meeting between the principal and the role-holder, prior to a start date, suitable goals and objectives for a year or some fixed term will be agreed. The goals need to be “SMART” goals and they must be linked to performance indicators. (Specific, Measurable, Achievable, Realistic and Time-Bound). This may be linked to school self-evaluation and some of the strategies used in SSE may be applicable.

The suitability of the person for the post in terms of having the appropriate skillsets is especially important. The development of a competencies-based approach with a clearly defined role is essential. The role-holder will be subject to a contract which clearly outlines the tasks to be undertaken, the term of the role and the procedures surrounding the management of the role.

Performance Monitoring

The elements addressed here form part of a review or appraisal system. Performance monitoring takes place in relation to:

- The goals/objectives for the post
- The actual delivery in a fixed-term time frame

The desired performance must be linked to these goals and objectives and ultimately to satisfactory delivery.

Measuring performance in service provision environments is a complex process. Given the dynamic demands on teachers, performance monitoring should be flexible. It should be based on performance indicators and should form part of a review or appraisal interview(s).

Assessment

An assessment system for monitoring performance will need to be developed. It should be based on relatively simple procedures and metrics and should contain some element of self- evaluation. In the event of disagreement between the principal and the role-holder, an appeals mechanism needs to be established which should involve the board of management.

Each post-holder will be required to submit a report to the principal and to the board of management each year.

Responsibilities and Accountabilities

Sanctions

Failure to perform the role should incur sanctions. There needs to be a range of these developed which could range from warnings to loss of pay to dismissal from the role. The application of sanctions should be subject to the appeals procedure.

Appendix 1

Assigning Points to Schools Based on Size:

A key issue relating to the proposed new management structures concerns how school size is to be taken into account. It is proposed that a basis for assigning management roles be related to the size of the school. The post titles of assistant principal and special duties teacher in Table 5 are used only for the purposes of calculating the number of points to be awarded to a school.

A specific proposal in this regard is made in Table 5 below.

School Size – No. of Pupils	Deputy Principal Ex-quota	Assistant Principal	Special Duties Teacher	Middle management points to award to a school based on size
1-200	.5	2	0	20
201-300	.5	3	1	36
301-400	.5	4	2	50
401-500	.5	5	3	66
501-600	1	6	4	80 + 6 = 86*
601-700	1	7	4	90 + 10 = 100*
701-800	2	7	5	96
801-900	2	7	6	100
901-1000	2	7	7	106
1001- 1100	2	8	7	116
1101-1200	2	9	7	126
1201-1300	3	9	7	126

The number of assistant principal posts per school size has been assigned on the basis of the threshold figures set out in CL 53/2011 plus an additional post at each size category. The special duties teacher posts are awarded on the basis of one-third of the special duties posts set out in CL 6/1998. These are used to generate points which can be utilised by the board of management operating the tiered system.

The points awarded to each school are calculated with the assistant principal as the base figure with a value of 1 and a value of .5 being awarded to each special duties teacher post. The total of assistant principal and special duties teacher posts is then multiplied by 10 to calculate the final points total for each category of school size. (e.g. A school with between 401 and 500 pupils: 5 x APs plus 3 x SDTs = 5 plus 3 x .5 = 6.5 x 10 = 65 points. This figure has been rounded up to 66 to allow for the allocation of the total points in a school).

* In order to introduce a level of equality, it is proposed to include an additional 6 points for schools with between 501 and 600 pupils and an extra 10 points for those schools with between 601 and 700 pupils.

Appendix 2

School Management Components:

1	Policy and Planning
2	Curriculum Development
3	Student Development and Support
4	School Administration
5	Human Resources
6	Communications

The following table outlines an example of the allocation of middle management roles to one or more of the six school management components.

Table 6: Middle Management Roles and School Management Components	
Roles	School Management Components
Year Heads	3, 4
Pastoral/student care	3
Student behaviour	3
Special needs co-ordination (including gifted children)	1,2,3,4
Coordinating school self-evaluation	1,2,3,4,5
Examinations Administrator	4
Staff development	5
School planning	1
Co-ordination of literacy/numeracy	1,2,3,4
ICT for learning	1,2,3,4
Promotion of positive mental health	3,5
Co-ordinator of work experience	3,4,
Timetabling	4
Attendance management	3
Student enrolment	3,4,5
Extracurricular co-ordination	3,4,5,6
Management of book rental	4,5,6
PT Meetings Co-ordinator	4,6
Academic tracking	1,2,3,4
Anti-bullying Co-ordinator	1,2,3,4,5,6
Parents Association Liaison Officer	4,6
Student Council Co-ordinator	2,4,6
Health & Safety Manager	4,5,6
Public relations	4,6

With regard to the career development and promotional opportunities, teachers may, over time, acquire experience of a range of roles that may be of significance when applying for other promotional posts, including those of principal and deputy principal.

Appendix 3

Research into Middle Management Structures in Four Other Countries – The Work Research Centre – October 2013

Overview of the situation in other countries

Other countries have undergone major changes in their education systems over the past number of years, which share common elements with the current Irish situation. According to the OECD¹, as countries have sought to adapt education systems to contemporary needs, they have moved in the direction of decentralisation of management to school level allowing greater autonomy and accountability at school level. Changes in systems have been driven by a combination of factors, many of which find echoes in the Irish context. These include economic trauma at national level, the need for curriculum change and the need to improve student performance.

As noted earlier, there is a trend towards increasing the level of autonomy at school level and reducing the decision-making power of central or regional authorities in relation to many aspects of education. Amongst others, the OECD and the Eurydice website² of the EU point to this trend. A corollary of this decentralising trend is that the arrangements for managing schools must change, with increasing levels of responsibility at school level (management boards and within the body of teachers). However, the precise design of school level arrangements is difficult to describe, in part because local autonomy means that arrangements differ even within systems.

However, some comparative information is available on the issue. In a 2008 study, Eurydice³ notes that:

- Across Europe there are widespread differences with regard to whether school leadership is shared amongst formal leadership teams. In the Nordic countries and the Netherlands and parts of Belgium, schools have complete autonomy with regard to how to organise this leadership distribution while in Ireland, England, Wales and much of Southwestern Europe there has been a redistribution of tasks amongst formal leadership teams. Elsewhere there has been either informal restructuring or none at all. However, while this may appear to place Ireland near the forefront of European trends in this regard, this finding does not address the key issues of responsibility and accountability.
- Becoming a school head requires specific training in many countries but not in Ireland. This lack of training for the managerial and administrative demands of the role is at odds with the increasing responsibilities that are currently being placed on it.

1 Op cit

2 <http://eacea.ec.europa.eu/education/eurydice>

3 http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/151EN_HL.pdf

Appendix 3

Scotland

Context

Scotland's education system⁴ has always been separate from those in England, Wales and Northern Ireland. Even before the establishment of the Scottish Parliament in 1999, Scotland had high levels of control (and pride in) its education system and this has been copper-fastened by the new parliamentary arrangements, which provide even greater Scottish autonomy over the education system.

In Scotland, all publicly funded secondary schools are comprehensive and most offer six years of secondary education. Secondary education is split into two, with the first four years classed as lower secondary and the final two years as upper secondary education. Many schools cover both groups but there are also specialist schools which provide upper secondary education only.

Scotland's distribution of population influences the organisation of education (much as in Finland). The majority of people live in the central belt but there are significant, scattered populations in the Highlands and Islands. Here there is a greater preponderance of smaller schools, which have difficulty in delivering the full range of educational opportunities across the six years of secondary education. Arrangements such as travelling teachers and providing accommodation away from home for upper second-level pupils are made to overcome problems of distance and low population levels in sparsely populated areas.

The Scottish Government has a Learning Directorate which is responsible for promoting education at all levels. This is advised by a new agency responsible for curriculum development and for maintaining educational standards (Education Scotland).

In Scotland, there is no regional level of educational governance. Instead, second-level education is provided through the 32 local authorities, which are responsible, inter alia, for:

- providing adequate and efficient school education
- meeting additional support needs of pupils
- providing adequate facilities for recreational and sporting activities
- providing buildings
- employing teachers and other school staff
- providing equipment and teaching materials
- taking responsibility for the curriculum taught in schools, taking account of national guidance.

⁴ The material for this section has been adapted from various sources, the main one being: https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/United-Kingdom-Scotland:Administration_and_Governance_at_Local_and/or_Institutional_Level

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Local authorities have education committees made up of local politicians and Church representatives. Executive power is given to a Director of Education who oversees the management of schools within the area.

Within secondary schools, the senior management team typically consists of a head teacher (HT), sometimes referred to as the rector, and a number of deputy head teachers (DHT). The head teacher normally does not teach and has an administrative, management and public relations role. Deputy head teachers normally have a limited teaching commitment and have administrative and management duties. These might relate to, for example, responsibility for year groups, for groups of subject departments or for the pupil support system. Middle management level also includes the heads of subject departments and specially trained pupil support staff, (Principal Teachers (PT) (Curriculum) and Principal Teachers (Pastoral)). Some local authorities and individual schools have structures in which staff such as principal teachers can have a cross-school role.

The head teacher is responsible for the curriculum and the quality of learning and teaching in the school, usually following national and local authority guidance. They also have some autonomy from the local authority to use funds to obtain teaching and learning resources, to recruit additional staff for specific purposes and to organise timetables and use of time within national statutory arrangements relating to teachers' contracts.

The head teacher is supported by senior managers and middle managers who meet regularly in separate groups and together. There are also several full-staff meetings each year. All secondary schools have a teamworking structure to deal with recurrent or ad hoc issues, such as continuing professional development, additional support needs, the development of new learning and teaching approaches or assessment and reporting procedures and the organisation of particular extracurricular events.

Middle management roles:

In some primary and secondary schools, new approaches to allocating management responsibilities have now created principal teacher posts with pastoral and other responsibilities, including, for example, leadership in curricular development, learning and teaching, continuing professional development and school improvement activities. The job descriptions in local authorities for teachers in middle management roles include:

Principal Teachers Curriculum Responsibilities

- leadership, good management and strategic direction of colleagues
- curriculum development and quality assurance
- contributing to the development of school policy in relation to the behaviour management of pupils

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- management and guidance of colleagues
- reviewing the continuing professional development needs, career development and performance of colleagues
- the provision of advice, support and guidance to colleagues.

Principal Teachers Pastoral Responsibilities

- leadership, good management and strategic direction of pastoral care within the school
- development of school policy for the behaviour management of pupils
- assisting in the management, deployment and development of pastoral care staff
- implementation of whole-school policies dealing with guidance issues, pastoral care, assessment and pupil welfare, working in partnership with colleagues, parents, other specialist agencies and staff in other schools, as appropriate.

Pay⁵

Unpromoted teachers in school education (including nursery schools) are paid on the Common Scale. From April 2010, this starts at £21,438. Once fully registered, teachers move onto a scale of 6 salary points from £25,716 to £34,200. Increments are granted, up to the limit of the scale, on 1 April each year.

Staff in principal teacher posts are paid at a higher rate than those on the Common Scale. Their salaries depend on several factors, including their role in the school and responsibilities for management, policy development and whole-school activities. The current principal teacher scale has 8 points from £37,284 to £48,120.

Senior promoted staff in schools (head teachers and deputy head teachers) are paid a salary determined by the same factors as apply to principal teachers. The salary scale for head teacher and deputy head teacher posts has 20 points from £42,288 to £82,542. Teachers with appropriate qualifications employed in a special school or special unit attached to a mainstream primary school and head teachers of primary schools with such units for children over the age of 12 may receive further allowances. There are also additions to salary for teachers employed in remote areas.

⁵ Taken from: https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/United-Kingdom-Scotland:Conditions_of_Service_for_Teachers_Working_in_Early_Childhood_and_School_Education

Appendix 3

Northern Ireland

Context

The organisation of second level education in Northern Ireland⁶ is undergoing major change in recent times. Until now, a range of educational institutions and agencies were overseen and funded by the Ministry of Education in NI. These included the Council for the Curriculum, Examinations and Assessment, the Council for Catholic Maintained Schools and others. Responsibility at local level resided with five regional Education and Library Boards which funded the range of schools within their area. These are now to be amalgamated into a single new body – the Education and Skills Authority.

All publicly-funded schools have high levels of autonomy, with a range of degrees of responsibility for budgets and staffing decisions. Regardless of the type of school, there is a board of governors that is responsible for the strategy and ethos of the school. Boards include representatives from a range of stakeholders.

Strategic and financial planning at school level is shared between the board of governors and the principal who is also responsible for operational management. Decentralisation and autonomy in the education system are balanced by a high degree of accountability, including the publication of inspection data.

Schools are responsible for planning the entire curriculum for pupils, in the context of a school's needs and circumstances. The curriculum should be a balanced and broadly based curriculum and it should deal with the spiritual, moral, cultural, mental and physical development of pupils at the school. All grant-aided schools must by law include the Northern Ireland Curriculum and religious education in the whole curriculum, regardless of denomination. Teaching hours for particular subjects are not centrally prescribed.

Education and Library Boards are the focal point for second-level education in Northern Ireland but the source of the majority of funding is the Ministry of Education. The boards are made up of local authority representatives, employers, trade unions and others. Education and Library Boards may top up this central funding with money from other sources. They can also keep some centrally-provided funds for local responsibilities. Independent schools receive no direct public funding.

Pay

The Department of Education determines teachers' pay in Northern Ireland. Determination of teachers' pay and conditions follows negotiations between the employing authorities/employer

⁶ <https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/United-Kingdom-Northern-Ireland:Overview>

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representatives, the Department of Education and the five recognised teachers' unions. The level of salaries is largely guided by arrangements made in England and Wales. Changes to the teachers' pay structure, including the establishment of a leadership scale, were introduced in 2000.

Allowances are paid for a range of responsibilities. Teaching allowances are paid in five bands ranging from £1,847 to £11,911. Other allowances are paid in relation to recruitment and retention, special needs and years in the job. The teaching allowances may be compared to the annual salary of principals, which begins at £42,379 and can reach a high of £105,097. Teaching allowances range from about 4.4% to 28.1% of the starting point of a school principal's salary.

Organisation of managerial tasks

Most school administration and management functions are delegated to boards of governors and principals/head teachers by the Education and Library Boards.

Every school principal is responsible for the internal organisation, management and control of the school. This is done within the framework set by the board of governors or other relevant authority. In carrying out their duties, principals must also consult, as appropriate, the Education and Library Board, the board of governors, the staff of the school and the parents of its pupils. The principal has the power to delegate the management of specific aspects of curriculum organisation, teaching methods or pastoral care to members of the leadership group (deputy heads, assistant heads) or other senior staff and enjoys considerable autonomy in this regard.

Finland

Context

Finnish basic education ranks very highly in international comparisons of learning performance (OECD, PISA survey). It is generally accepted that a major factor in this success is the principle of local self-government. The basis for this principle is that the more local the organisation of basic education is, the better able it is to meet the needs of pupils of all ages.

At the centre of Finnish education is a core basic, compulsory education system comprising nine class levels, ranging from 7 years to 16 years approximately. It is delivered through 3,200 co-educational comprehensive schools, the vast majority of which are run by local authorities and which are free for all pupils. Fewer than 2% of students attend private school. During the first six years of basic education, pupils are taught by a single teacher for all subjects. In the final three years, specialist teachers are also involved.

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The main responsibilities of the Ministry of Education and Culture are to plan and implement policy. The key reference document in the education sector is the Development Plan for Education and Research, which is issued every four years and which covers five calendar years.

The Finnish National Board of Education is responsible for developing guidelines and standards for all levels of the education system. It is made up of representatives of political decision-makers, local authorities, teachers and social partners. The Board is responsible for:

- Drawing up and approving national core curricula
- Specifying requirements for qualifications
- Evaluating learning outcomes
- Assisting the Ministry to prepare education policy.

General upper-secondary education continues on from the basic education syllabus. Licences to provide general upper-secondary education are granted by the Ministry of Education and Culture to local authorities, joint municipal authorities, registered associations or foundations. General upper-secondary studies can be accessed through distance learning which is offered in over a hundred general upper-secondary schools.

Upper-secondary vocational education prepares students for vocational qualifications and includes about six months of on-the-job training. Apprenticeship training may also be offered. Competencies-based assessment is often used to determine that learning objectives have been met. Access to vocational upper-secondary education and training is possible after completing general upper-secondary schooling.

The Ministry of Finance transfers resources to local authorities to fund the education system at basic and secondary level. Funding is calculated on the basis of the population figures in the local authority area. Central government funding covers about 35% of the costs but factors such as sparse population density, bilingualism, island municipalities, Swedish-speaking municipalities and the number of foreign-language children residing in a municipality can increase levels of funding. Each local authority or other education provider is free to decide how to allocate funds, although central government transfers must be spent on the type of education for which it is authorised. Upper-secondary vocational education and training (VET) is co-financed by central and local governments.

Since the early 1990s, educational governance has been substantially decentralised, with significant independent decision-making powers delegated to local authorities, education providers and schools. School administration is the responsibility of local bodies, the schools themselves and the school principal. Executive and administrative powers are vested in a municipal executive board and a number of subsidiary entities. In addition to education, local authorities are also

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responsible for social welfare services for students. Services can include transportation for those who need it, free school meals, school health and dental care, student welfare officers and school psychologists.

Local authorities can procure secondary educational services from other local authorities, joint municipal authorities or private education providers. Local authorities are not empowered to procure basic education services from the private sector except in the case where the service provider is licensed by Government. However, other types of services such as cleaning and maintenance services can be purchased in this way.

Each general upper-secondary education school must have a school board, a principal, institutional regulations adopted by the school board and a student body that promotes student cooperation and schoolwork. Upper-secondary education providers have the autonomy to decide on the number of working days, the school year and holidays, on the condition that instruction is organised so that students may complete the syllabus within three years. Each education provider is obliged to produce an annual school schedule, based on the National Core Curriculum, in which the provision of instruction, working days, distribution of lesson hours and other school activities are outlined.

Organisation of managerial tasks

Responsibility for the operation of basic education schools and upper-secondary schools rests with school principals who are assisted by vice principals. In addition, vocational institutions also have heads of department, responsible for the running of different departments. School management responsibility is usually assigned partly or totally to principals or directors who are free to organise their management in a manner that suits their purpose.

Education and training providers, and by implication school principals, are required to evaluate the activities of their own schools and participate in external evaluations. The only standardised assessment of learning is the Matriculation Examination at the end of general upper-secondary education. Other than this, no external national tests or examinations are required.

Both in general and vocational education, the emphasis is on evaluating efficiency. The main topics for the evaluation are:

- Teaching arrangements
- Human resources
- The culture of leadership
- Effectiveness is mainly focused on assessing learning results

Specific economic considerations are the extent of educational resources and how they are focused and effectively used.

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The focus of evaluation provides an insight into the responsibilities of school principals. A regional quality assurance tool consists of ten quality score cards which include:

- Four quality cards devised for the quality of structures:
 - Governance
 - Personnel
 - Economic resources
 - Evaluation
- Six quality cards relating to the pupil:
 - Implementation of the curriculum
 - Instruction and teaching arrangements
 - Support of learning, growth and well-being
 - Inclusion and influence
 - School-home cooperation
 - Safety of the learning environment.

The administrative and teaching staff of each school participates in the development of appropriate evaluation systems and in the evaluation itself.

Pay

The conditions of service for teachers are negotiated collectively. Salaries are set in line with other professions and are set through a collective agreement process. The minimum basic gross salary of a fully qualified full-time teacher varies from approximately €2,200 to €3,000 per month. Since 2007, a new system is in place aimed at improving the performance of municipalities, motivating staff and ensuring the competitiveness of municipal salaries. Instead of being based on the number of teaching hours and years of service, the new system bases salaries on the tasks and their requirements, the results of their work, the professionalism of the staff and work experience. In addition, a bonus can be paid, based on the results of the institution. Extra duties are also remunerated.

In addition to teaching, the tasks of teachers can include:

- Planning of instruction and pre- and post-class work
- The school's internal development tasks
- Cooperation with colleagues, homes and other partners, such as staff in pupil welfare services, social welfare services, the local family counselling clinic, the police, business life, etc., forms an integrated part of teaching work.

An allocation of two hours of work has been determined in the collective agreement for teachers in basic education and three hours in two weeks for teachers in general upper-secondary education for these purposes.

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There are few opportunities for teachers to apply for a position higher up the salary scale other than to apply for a principal's post. In some municipalities, teachers may be appointed as co-ordinating teachers in their subject.

Other educational staff in basic and upper-secondary education and training include:

- Guidance counsellors
- Health care staff
- Social welfare officer
- Special needs personnel
- School secretaries who, in addition to administrative duties, can be involved in pupil welfare services and staff administration.

New Zealand

Context

Secondary education in New Zealand⁷ has undergone almost continuous reform since 1989, when there was a move to reduce the control of the Ministry of Education and to promote more local autonomy, whereby schools are seen as a contract between school board, the local community and central government, with inspection being carried out centrally. These reforms were driven by an economic crisis in New Zealand as well as a perception that the system was inefficiently managed. Successive governments have undertaken these reforms and while there is not ideological agreement on them between political parties, there is nonetheless a certain consistency of approach across the political divide. These reforms, inter alia, have led to a greater managerial role for school principals.

These were radical changes – intermediate structures (between the Ministry and the schools) were abolished and schools (boards of management and principals) have become responsible for all aspects of administration and management. Schools became self-governing but they are managed within a national framework of regulation and guidance. National Administration Guidelines for school administration set out desirable principles of conduct or administration in schools. School boards are required to develop individual charters and annual plans and report their performance against these.

⁷ The main sources used to characterise the New Zealand schools system were:
http://www.minedu.govt.nz/NZEducation/EducationPolicies/InternationalEducation/ForInternationalStudentsAndParents/NZEdOverview/School_Education.aspx
<http://www.ncee.org/programs-affiliates/center-on-international-education-benchmarking/top-performing-countries/new-zealand-overview/>
<http://www.nzcer.org.nz/system/files/principal-vacancies-appointments-2011.pdf>
http://en.wikipedia.org/wiki/Ministry_of_Education_%28New_Zealand%29

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Organisation of managerial tasks

There is considerable autonomy within these guidelines, with schools being able to decide on such issues as staffing levels, finances and a range of other issues (though they must stay within the guidelines). The Ministry of Education has issued detailed guidelines for boards on issues such as operational funding and staffing, property, school transport, payroll management, performance management, teacher recruitment, risk management and energy efficiency. All of these areas must be managed at school level and the principal must do so on a day-to-day basis. In some cases, external agencies provide support services to schools, in areas such as human resource management, on a commercial basis. Decisions on such arrangements can be made at school level without recourse to the Ministry of Education.

The two key elements in the New Zealand reforms have been the increase in autonomy of schools (boards and principals) and the withdrawal of the Ministry of Education from direct management and administration. These changes have combined to allow schools more freedom to organise middle management in whatever way they see fit. It has not been possible to obtain a detailed overview of these arrangements but it seems clear that the changes have both increased responsibilities and the power that schools have to discharge those responsibilities.

Pay

Teachers in New Zealand⁸ enter the pay scale at different points, depending on their level of qualification. These relate broadly to the NZ National Qualifications Framework and more salary is awarded in relation to level of academic qualifications. For example, teachers with a Bachelor's degree enter the system at level 3, teachers with honours degrees enter at level 4 and teachers with Masters degrees or PhDs enter at level 5.

Teachers in NZ may also receive a range of allowances depending on the range of tasks that they do in addition to their normal teaching role. These consist of units, management allowances, role-related allowances and incentive allowances. On average, these would add about 12% to the base salary (entry point) of the teacher's salary.

Units (which are worth about NZ\$4,000) may be awarded for a range of tasks and roles and these differ somewhat between the first- and second-level sectors. At second-level, these units can be awarded for the purposes of management, responsibility (which may include responsibility for the curriculum), recruitment, retention and/or reward. A key feature of this system is that the employer (school boards of trustees) determines the use of units following consultation with the teaching staff.

In addition, allowances may be paid for some schools that are geographically isolated or hard to staff and there are some management allowances specific to each sector. About 47% of teachers receive unit-based payments and these are mostly for middle and senior management.

⁸ <http://www.minedu.govt.nz/NZEducation/EducationPolicies/SchoolEmployment/TopicsOfInterest/BaseSalaryandAllowances.aspx>

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Boards of management may also make payments (3R payments) in relation to recruitment, retention and responsibility. These are also worth about NZ\$4,000 and are paid as a means of enhancing educational outcomes.

Principals' pay⁹ is made up of a number of elements. These relate to the size of the school, the number of teachers and to the principal's level of experience.

All teachers are paid on an incremental scale. The increments vary between about 3% and 10.5% of salary.

Implications of Research in Four Countries for Management Structures in Ireland

There are a number of themes which are central to the potential restructuring of school management structures in Ireland. These need to be addressed systematically if any new management structure is to be effective and balanced. Changes within the school are necessary but so too is a rebalancing between internal and external administrative functions in order to ensure the sustainability of any new structure.

There are a number of common trends across jurisdictions in relation to the key themes of school management:

- School autonomy
- The structure of middle management and location of responsibility
- Rewards for school management

These are dealt with in the sections below.

School autonomy

There is a consistent trend in the jurisdictions studied towards an increase in the autonomy of schools¹⁰ to make their own decisions. However, there is quite a wide variation in what functions are devolved and to what bodies.

Often this is done through a devolution of discretion from Ministries to some intermediate body (e.g. local authorities in the case of Finland, Education and Library Boards in the case of Northern Ireland). The most radical change of this type, however, has taken place in New Zealand, where

⁹ <http://www.minedu.govt.nz/NZEducation/EducationPolicies/SchoolEmployment/TopicsOfInterest/PrincipalPayandAllowances.aspx>

¹⁰ In this context, 'schools' refers to both boards of management and school staff

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intermediate organisations appear to have been taken out of the system and autonomy has been placed directly at the level of the school. (It should be noted however, that schools are free to group together to organise and centralise administrative or educational functions in appropriate ways).

This process of increasing school-level autonomy relates to a range of functions. These commonly include finance, recruitment, human resource management and at its most radical, curriculum-related issues and student performance assessment. However, it is also common practice for some functions, such as ICT, buildings or staffing, to be centrally organised.

Whatever the conformation of tasks that results from this increase in the autonomy of the school, as the executive responsible for implementation of these devolution policies, the principal sees a broadening of his or her role, for which support must be provided.

The structure of school middle management and location of responsibility

The tasks attached to middle management roles did not vary significantly between countries. Schools in all of the jurisdictions had structures that supported educational management and administrative management. Roles such as year head, subject department head and the administration of examinations are common to all jurisdictions. Equally, administrative roles such as health and safety, IT management and others were common also.

The differences between the jurisdictions mainly related to where these roles were carried out and where responsibility lay. In New Zealand, where schools have the highest levels of autonomy, schools often contract out some of these functions while retaining responsibility for ensuring that they are carried out adequately. In Scotland, Northern Ireland and Finland, area-based (local authorities usually) agencies carry out some central functions that are typically managed at school level in Ireland. There is no clear pattern to what is managed centrally but they include such functions as human resource management, IT procurement and buildings maintenance and procurement. In addition, many of these local agencies have responsibility for setting curricula, often within a national framework.

Within schools, a number of trends were evident. Teachers often worked in teams and not just in relation to curricular issues. Subject teams were common and a number of the systems pointed to teams that worked in other areas. Also, it was clear, especially from the examples of New Zealand, Northern Ireland and Scotland, that middle management had responsibility for a wide range of functions. These do not differ so much in nature from those that existed under the old Posts of Responsibility scheme in Ireland but it does appear that there is more local autonomy to decide what these are and to allocate them in relation to local needs and that there is a genuine responsibility for carrying out these tasks. It also seems clear that there is a real reporting relationship between middle management and school principals in relation to fulfilling the roles of middle management.

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It should be noted that in at least two of the jurisdictions (Northern Ireland and New Zealand), middle management posts are not necessarily awarded permanently. In addition, in the Northern Ireland system at least, it is recognised that middle management roles can lead to a genuine career path.

Rewards for school management roles

The four countries surveyed approach the payment of teachers for middle management tasks in quite different ways. In New Zealand, where there is probably the highest level of school autonomy, salaries are set nationally but local boards of management may decide on how to award unit-based pay. Units are related to a range of responsibilities and the awards constitute about 3-10% of salary.

In the other three jurisdictions, there was less autonomy at school level in relation to these awards. Salaries are set nationally but awards may be made at a higher level than the school (typically the local authority). In Finland, there appears to be very little scope for extra payments nor is there much autonomy at school level to make them.

More generally in the EU, public sector pay levels are generally set centrally, though in the Nordic countries and some central European countries there is either a local-level element or a school-level input into setting pay levels¹¹.

¹¹ http://eacea.ec.europa.eu/education/eurydice/documents/facts_and_figures/salaries.pdf

Appendix 4

Members of Management Structures Working Group

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JMB and ACCS acknowledge the support received from Dr Richard Wynne and Dr Donal McAnaney from the Work Research Centre.







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