

## FOREWORD

Between 1999 and 2001 the Nuffield Foundation supported a research project into aspects of integrated education in Northern Ireland. The project was co-ordinated by Prof Alan Smith, University of Ulster, and Prof Tony Gallagher, Queen's University Belfast. The final report was presented to the Nuffield Foundation in 2002 and a seminar was held in London later the same year to discuss its implications, particularly in the light of discussions on faith schools in England. Given the range of information gathered during the project, Nuffield agreed to support a series of further seminars to consider the current and future state of integrated education in Northern Ireland.

There are three reports in the series:

Integrated Education in Northern Ireland:

1. Participation, Profile and Performance;
2. Integration in Practice; and
3. The Challenge of Transformation.

This report is the third in the series and focuses on the challenge of transformation. The report is based on data gathered from six schools that have gone through the process of transformation.

## ACKNOWLEDGEMENTS

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## INTRODUCTION

Transformation is a process whereby existing schools can change status to become a recognised Integrated school. The existing legislation allows schools to adopt one of two management structures, as either a grant maintained integrated (GMI) or a controlled integrated (CI) school, if they go through the transformation process. The main difference between the two management types lies in the structure of their Board of Governors, in that Controlled Integrated schools have representatives appointed by the local Education and Library Board (ELB). In practice almost all the schools that have taken the transformation route have opted for Controlled Integrated status.

The model of transformation was first proposed at an All Children Together (ACT) conference in the late 1970s and was later promoted by the Department of Education in Northern Ireland (DENI) as a financially more prudent way to extend integrated education (DENI, 1999). At present a little over a third of all the integrated schools have come through the transformation route.

However, despite the increasing importance of transformation in extending integrated education, there has been little research evidence on the transformation process in practice. As part of the wider Nuffield Foundation funded project on integrated education, this report provides the results of a study that mapped the process of transformation in six case study schools in Northern Ireland.

The paper is divided into two sections. Section one outlines the development of the transformation policy since its inception in the late 1970s, including a description of the formal procedures involved in transforming a school. Section two presents the results of the empirical study that mapped the process of

transformation in practice. It begins by giving background information on the six schools that took part in the research. This is followed by an overview of the main processes involved in transforming each of the six schools, including a consideration of the factors involved in the initiation of the process, the relationships that developed to build support for the idea and the process of implementation.

The data were collected using the Cambridge Manual of Research Techniques *'Mapping Change in Schools'* (Hopkins et. al., 1994). This manual was devised by a number of experienced researchers who came together in Cambridge to try to find *'more user-friendly yet penetrating techniques for investigating and measuring complex processes and relationships involved in mapping the process of change in schools'* (Hopkins, et. al., 1994 p.1). A fuller account of the methods, data and analysis on which the report is based is available in McGonigle (2001).

## DEVELOPING AND DEFINING TRANSFORMATION POLICY

In the early 1970s, Basil McIvor, the then Minister for Education in the power-sharing Executive, was promoting the schooling of Protestant and Catholic young people together. The collapse of the Executive following the Ulster Workers' Council strike, and the start of what was to be a quarter of a century of Direct Rule from London, removed locally elected politicians from power. In the absence of any local political pressure for further developments, a number of parents took up the challenge to lobby for change in this area. The group of parents called themselves All Children Together (ACT) and they began to press strongly for developments in integrated education.

At one of their conferences, a member of the Alliance party, together with ACT representatives, drafted a parliamentary bill

that would enable existing schools, most of which were almost all Protestant or Catholic in their pupil enrolment, adopt an integrated structure of management (technically known as transformation). With the help of Lord Dunleath, the bill was passed in the 1977-78 parliamentary session and published as part of the 1978 Northern Ireland Education Act. The Act allowed Controlled schools with a small percentage of the minority community attending their school to invite the trustees of Catholic Maintained schools to share governance with existing Protestant representatives on the Board of Governors, thus creating a Controlled Integrated school. The change required the support of 75% of existing parents, although there was some dispute on whether potential parents from the minority community could or should be consulted.

At the end of the 1970s, the arrangements in the legislation were taken up by one Controlled primary school that was facing closure in Belfast. Although the local authorities approved the request in 1981, only limited action followed, no Catholic governors were appointed and the school failed to attract cross-community support. The school therefore became *'integrated without a Catholic child attending it, without a Catholic member of staff being employed at this school and without the Catholic population taking notice of it'* (Schubotz, 1996 p.25).

In 1989 the Education Reform Northern Ireland Order amended the requirements of the 1978 Dunleath Act in regard to developing shared governance in existing schools. The new provisions meant that existing Controlled or Maintained schools could transform to GMI or CI status if a simple majority of the voting parents were in favour of the change. If less than 50% of eligible parents voted, the ballot would have to be held again, but on this

occasion a decision to transform could be approved by a simple majority of those voting.

The 1996 Education Order made the process of transformation even clearer and it was evident that transformation as a route to integration was becoming increasingly popular. The then Minister for Education, Michael Ancram, MP, was quoted as saying that he particularly welcomed *'transformation proposals'*:

*'Now that integrated schools have proved themselves, we should be able to look to more transformation cases, and not have to rely on new purpose built schools as the main vehicle.'* [For integrated education] (DENI, 1996).

This caused some concern among those who believed in *'planned'* integrated schools, that is, setting up new schools. They were afraid that this overt preference for the transformation route to integration would threaten their ability to secure funding for new, planned integrated schools. In 1997 their fears appeared to be confirmed when a development proposal seeking grant-aid for a new Integrated school was rejected by the then Minister for Education, Tony Worthington. He stated in the associated press release that his decision was partly due to the adverse impact that approval of a GMI primary school might have on the local transforming school. This was the first time in which a GMI proposal had in any way clashed with a transforming school.

*'This caused unrest within the integrated movement on two counts, firstly that government support for integrated education was becoming selective and secondly, that any school could potentially block a GMI development by announcing its decision to transform.'* (Donnelly, 1998 p.12).

Those who believed in planned integration became increasingly unhappy with the statutory requirements for transformation which at the time only required schools to *'be likely to be attended by reasonable numbers of both Protestant and Roman Catholic pupils'* (Education Reform Order, 1989, Article 71, para. 8). They saw this as a very narrow conception of integration and one that could threaten both the growth and the impact of integrated schools in Northern Ireland. Due to these concerns a more comprehensive debate arose about the process of transformation and it was widely recognised that the process of an existing school changing its status is not a *'quick-fix'* solution to integration. Soon after this, the Department of Education published *'A Framework for Transformation'* (DENI, 1997 b) that redefined the earlier legislation concerning *'reasonable numbers of both Protestant and Roman Catholic pupils.'* It stated that:

*'...evidence that at least 10% of the annual intake in the first year are drawn from the minority religion will be required before the school's integrated status could be approved (with the objective that over time this would increase to 30% or more).'* (DENI, 1997 b).

The framework also made clear that the impetus for transformation may come from the Board of Governors, the Principal or the parents. Before the school proceeds to formally balloting the parents, they should:

*'...ensure that all concerned have a full understanding of the process and the changes which would be necessary to successfully transform.'* (DENI, 1997 b p.1).

This process should include consultation with the local ELB, parents, staff and local Church representatives *'as well as an initial assessment of the schools' potential for attracting*

*reasonable numbers of pupils from the relevant minority community'* (DENI, 1997 b p.1). It was also stated that some schools may want to contact the Transferors' Representative Council (TRC) and that it would be expected that full consultation would take place with the Northern Ireland Council for Integrated Education (NICIE).

Following this period of consultation if the Board of Governors decides that they wish to proceed with the process they must pass a resolution in favour of holding a ballot of parental opinion:

*'A resolution might be worded along the following lines: - "...that a ballot of parents should be held on the question of whether [controlled] [grant-maintained] integrated status should be sought for the school under Part VI of the Education Reform (NI) Order 1989."* (DENI, 1997 a p.5).

When this decision has been taken the Department of Education then arranges for the Electoral Reform Society to conduct a secret postal ballot of the parents. The Board of Governors have to ensure that this is held between 28 days and 3 months after the resolution was passed and it is recommended that it is not carried out during school holidays. The parental ballot only puts one question to parents which is:

*'Do you wish the Board of Governors of your child's school to apply to the Department of Education for controlled integrated status in accordance with Part VI of the Education Reform (NI) Order 1989?'* (DENI, 1997 a p.7).

If a ballot of parents provides evidence of support for transformation then the Board of Governors of the school is required to submit a development proposal to the relevant ELB. The ELB then publishes the proposal in the local

newspaper allowing a two-month period in which objections may be lodged. They also send it to the Department of Education where four criteria are used to determine whether the proposal for transformation should be permitted to proceed. The four criteria are:

1. Is the school viable in terms of pupil numbers?
2. Is it likely to be attended by reasonable numbers of both Protestant and Roman Catholic pupils? The expectation is that it will have at least 10% of its intake from the minority community in the first year, rising to 30% over a designated period.
3. Is there evidence of the school's awareness of, commitment to, and preparation for the process of integration? The Department of Education describes this in the following terms:

*'If the aim is to create an educational community based on tolerance and mutual respect, it is essential that all concerned have a sound appreciation of those changes in attitude, custom and practice that may need to be undertaken to ensure that the school is a place in which all those who work and learn in it feel comfortable and valued'* (DENI, 1997 b p.3).

4. What impact would any change in status have on other schools in the area?

If the first three criteria can be answered positively, and there is no evidence of an undue impact on other schools in the local area, then the school will be granted approval to transform to either GMI or CI status.

After that:

*'... it will be a matter for [the school], in co-operation as necessary with other agencies, to put in place those measures*

*which will enable it to develop and operate effectively as an integrated school.'*  
(DENI, 1997 b p.4).

The Department of Education will carry out a progress review after no more than five years to check the development of *'religious balance in enrolments, intake, staff and Governors, changes in the curriculum and the development of the transformation process.'* (DENI, 1997 b p.4). The Education and Training Inspectorate will undertake a focused audit, which will inform this review, and the findings will be reported back to the school. Subsequent progress will be monitored and a further formal review will be carried out after no more than ten years.

Also at this time it was acknowledged that if schools are to be encouraged to transform:

- There is a need for an agreed information pack which covers all options and offers clear guidance on what is necessary to qualify for integrated status;
- Roles and responsibilities of all interested parties should be clarified and co-ordinated;
- More resources should be available to support curricular changes, staffing pressures and improved pastoral provision; and
- The concerns of the teaching staff affected by transformation and the key role of the Principal also need to be considered and addressed; in particular, adequate training is necessary for Principals, staff and Governors to prepare them for transformation and for their leadership roles in bringing it about.

Following the 1998 Good Friday Agreement a working party was set up by the then Minister for Education, Tony Worthington MP with the aim of promoting a culture of tolerance in schools and to consider ways in which the

education system could become more integrated. Within this remit specific attention was given to the process of transformation. Thus, in 2000 *'Transformation: An Information Pack for Schools'* was published with the aim of providing clear, accessible guidance on the resources that are available to assist the transformation process and the formal procedures involved in transformation. It was set out as a three-phase process that may be identified as follows: -

#### *Phase 1: Pre-ballot preparation and ballot*

Identify existing strengths and weakness which may help or hinder the transformation process;

- Assess the strength of support in the local community for integration;
- Assess the impact of change on other schools;
- Consult on these issues with ELBs, TRC, CCMS and NICIE; and
- Raise parents' awareness of the issues and then proceed to formal ballot.

#### *Phase 2: Development proposal and conditional appraisal*

Schools should proceed in preparing a development proposal that includes information on:

- Management, for example, reconstituting the Board of Governors;
- Organisation, for example, school name, symbols and rituals, curriculum materials and admissions criteria;
- Curriculum, for example, reviewing policies on religious education, sport, music, history;
- Governors and parents, for example, awareness raising/training about the issues;
- Pupils, for example, pastoral care/peer mediation, extra-curricular activities;

- Staff development, for example, in-service training and secondment opportunities;
- Schools, for example, forging links with other schools in the area to attract applications from the minority religion;
- Support organisations, for example, formalising links with ELBs, NICIE, TRC, etc.; and
- Wider Community, for example, specific links with local community interests such as churches, political and community representatives.

Plans should include an assessment of any resource or timing implications.

#### *Phase 3: Transforming - implementing the Transformation Development Plan*

The Boards of Governors will have the responsibility for deciding which plans are to be implemented with regard to priorities, resource implications, time-scales and target setting;

- Bids for financial assistance can be made to the Department of Education to cover the costs of additional teaching staff, development of curriculum materials, books, publicity, INSET, etc.; and
- Governors will review aspects of their plans as appropriate. The Department of Education will review the religious integration achieved after five years. There will also be a formal review of integrated status after 10 years.

This set of procedures provides a template for schools to follow during the process of transformation. An aim of the present study was to chart the process of transformation in a number of actual schools to consider the actual steps they took and to examine the extent to which the recommended template was followed.

## DESCRIBING AND ANALYSING TRANSFORMATION PRACTICE

### The Transforming Schools: Background Information

At the time the research was carried out there were twelve transforming schools in Northern Ireland, four post-primary and eight primary schools. The post-primary schools varied in their enrolment from less than 300 to more than 700 pupils, while the primary schools varied their enrolments from less than 100 pupils to more than 450 pupils. The schools were located across three of the five ELB areas.

The information pack available to schools identified the roles and responsibilities of various parties and the funding available to assist transformation. While it can be debated whether the concerns of teaching staff affected by transformation and the key role of the Principal have been adequately considered in the policy documents, it is clear that the information available on the transformation process generally had vastly increased over the previous five years. However, up until this point little is still known about what transformation actually means in practice, hence the rationale for the study on six of the then twelve transforming schools in Northern Ireland. A description of these schools and the results of the study are presented below.

The sample schools for the study comprised two post-primary and four primary schools. Both of the post-primary schools had broadly similar enrolments while the primary schools included one large, one medium and two small schools. Two of the schools had officially transformed in the early 1990s, one mid-decade and three towards the end of the decade. Two of the schools were located in religiously mixed areas, three in areas that were predominantly Protestant and one in an area that was predominantly Catholic, although it should be noted that Integrated

schools typically draw their pupils from wide catchments. The schools were located across three ELB areas. More specific details on each of the case study schools are as follows:

- School A is a co-educational, 11-16 integrated post-primary close to the centre of an affluent small town. When this research was carried out it had a little under 400 pupils and almost 30 full-time teaching staff;
- School B is a co-educational, 11-16 integrated post-primary situated in the centre of an area of considerable social deprivation. The school had a little over 350 pupils and over 20 full-time teaching staff. Schools A and B had been involved with raising standards initiatives promoted by the Department of Education;
- School C is a large integrated primary school situated in the centre of an affluent large town. When this research was carried out it had a little under 500 pupils and nearly 20 full-time teaching staff;
- School D is a co-educational controlled integrated primary school situated near the centre of a small town. It had less than 100 pupils and five full-time teaching staff, including the Principal;
- School E is a co-educational integrated primary school situated in the middle of an estate at the edge of a medium sized town. It had a little over 100 pupils and five full-time teachers, including the Principal. Additional staff work in a Special Education Unit. The school has been part of the School Support Programme; and
- School F is a co-educational integrated primary school located in a rural community.

It had about 50 pupils and three full-time staff, including the Principal.

At this initial stage it is clear that transforming schools are situated in a variety of community contexts. Two of the sample schools were in prosperous communities that have experienced comparatively little sectarian violence, whereas two were situated in areas of considerable social deprivation and sectarian tensions. The other two schools were situated in religiously mixed, rural communities. Thus, there is no 'blueprint' for the type of community where a transformation process can be undertaken. In particular, it does not appear to be a process that is only embarked upon in relatively 'peaceful' communities where parents are thought to have liberal attitudes.

In order to provide an indication of the schools' readiness to change, data were collected on teachers' perceptions of the development structures and social structures of the schools. In regard to development structures, the school improvement literature (Gallagher et.al., 1998, Mortimore, 1998) suggests that a school that is predisposed towards successful change and development is characterized by the following features:

- Proper attention is given to *inquiry and reflection*;
- Commitment is given to *collaborative planning*;
- Staff, students and the community are highly *involved*;
- Commitment is given to *staff development*;
- Effective *co-ordination strategies* are used; and
- *Leadership* is given at all levels of the school.

Table 1 shows the perceptions of the teachers in each of the sample schools on these six dimensions. In each case the data have been simplified to indicate whether the teachers felt that the school was below average (-), at or about average (=), or above average (+) on each of those features. (Further detail on the derivation and significance of these measures can be found in McGonigle, 2001).

Table 1: Teachers' perceptions of the development structures of the case study schools

School	A	B	C	D	E	F
Inquiry and reflection	+	+	+	=	+	+
Collaborative planning	+	=	+	+	+	+
Involvement	=	=	=	=	+	+
Staff development	=	+	+	+	-	=
Co-ordination strategies	=	=	+	+	+	+
Leadership	=	=	+	+	=	+

Note: (+): above average; (=): at or about average; (-): below average



The data indicates that each of the schools had a variety of strengths and weaknesses in terms of school development structures, although they did not indicate that any of the schools had the optimum capacity for change or potential for innovation. At the level of individual schools, the data suggests that Schools, A, B and perhaps E showed less capacity for change than Schools C, D and F.

The social structure of the schools focuses on whether teachers felt them to be more 'collegial' than 'traditional.' Conventional wisdom on school improvement indicates that 'collegial' schools are more predisposed to successful change and development (Maden & Hillman, 1996). In general schools that are more 'collegial' tend to be:

1. More democratic in decision making (political);
2. Integrated in staff culture (micro-political);
3. Rotational in job descriptions and delegation (maintenance); and
4. Open to change and external relations (development and service).

Data in Table 2 suggests that teachers in Schools A-F would generally describe their schools as being more collegial than traditional, although in Schools A and E teachers described their political structures as being more traditional, that is, having a more 'top down' and hierarchical approach to school decisions, as opposed to a democratic and egalitarian style. The staff in School C also described their school as being more traditional than 'collegial' in its maintenance structure, that is, there are clearly defined job descriptions, rules and policies throughout the school. Therefore, although these data point toward transforming schools as being more 'collegial' than traditional in terms of general school structures, there are clearly some elements of more traditional practice in some of the schools.

Table 2: Teachers' perceptions of the social structures of the case study schools

School	A	B	C	D	E	F
Political	-	=	=	+	-	+
Micro-political	+	=	+	+	+	+
Maintenance	=	=	-	+	=	+
Development	+	=	+	=	=	+
Service	=	+	+	=	+	+

Note: (+): above average; (=): at or about average; (-): below average

## THE TRANSFORMATION PROCESS

Having examined some aspects of the context of the schools, we turn to the examination of the process of transformation the case study schools followed. We do this in four sections. The first section briefly outlines the overall process the schools went through. The steps involved in this process are laid down in Department of Education procedures, but there are areas where a degree of variation can exist. Our interest lies in charting the overall direction of change and any variations that exist within that overall pattern. Following this we focus on three key moments in the process of transformation. These key moments are:

- The actor or actors who were responsible for initiating the process of change;
- The steps that were taken to garner support for transformation; and
- The steps taken within the schools to implement transformation.

### Stages of transformation

The common steps followed by all six case study schools through the process of transformation were: initiation, consultation, balloting, development and implementation phases. Within this overall pattern there were variations in specific approach. Thus, for example, at the initiation phase, each of the six schools had a slightly different experience. In three schools the process was initiated by the Principals who brought the idea to, in one case, a meeting of the Governors, in another it was brought to the staff and in another it was brought to the local community. In two cases the issue was raised at a meeting of the Board of Governors, while in the final case, the issue was brought to the Principal by a group of parents.

Once the issue had been raised all the case study schools carried out consultations with key groups. In four of the six case study

schools this involved consultations with Governors, staff and parents. In the two other cases the consultations focused on the Governors alone, or the staff and parents alone. In addition to these key groups, two of the case study schools consulted with their ELB, and one school consulted with Governors at other Integrated schools. It should perhaps be noted that there were no formal consultations identified with other local schools, the local Catholic community or with local Church figures. All of the Boards of Governors will have included Transferors' representatives, although there is no evidence that specific consultations took place with these figures.

Four case study schools received endorsement of the proposal from parents on a single ballot. One school required two ballots, while the final school required four ballots before a decision to support change was received. In all six cases, the ballot decision was followed by the publication of a development proposal for transformation, a period in which reactions to the proposal could be lodged with the Department of Education and eventually, Department of Education approval of transformation.

Not surprisingly, the most complex stage of the process involved the implementation of the decision to transform. At this stage we want to highlight the general character of action at this stage as it affected various aspects of the school. At the management level the main implementation decisions involved the hiring of a Catholic teacher to teach Religious Education, the reconstitution of the Board of Governors and the receipt of funds from the Department of Education. In one case a Catholic teacher was appointed to the senior management team of the school and in another case a survey was held to determine the religious composition of the student body.

Four schools advertised in their local communities and/or sought media publicity for the new development. One school held a special open day, while all of them changed the school name and created a new school prospectus.

All of the schools established some change in their curriculum. The most common change was to make explicit provision for Catholic Religious Education, a step that was carried out by five of the six case study schools. Two schools sought help from external agencies to enhance their provision on EMU and Cultural Heritage. The same two schools made contact with other transforming schools for advice and support. One of the schools embarked on an ambitious programme to add a range of new areas to the curriculum, including Gaelic language, sports and dance, Ulster Studies and a programme of peer mediation. In the sixth school a *'transformation committee'* was established to examine curriculum change.

Three schools established staff development activities: one sent staff to courses on conflict resolution, another ran two-day staff workshops while the third ran a series of staff training days. All six schools sought support from their local ELB and NICIE. Two of the six sought support from the Catholic Church.

Having examined the broad outlines of the journey followed by the six case study schools, we now turn to focus in more detail on the three key phases of initiation, support and implementation.

### *Key Stage 1 - The Initiation Phase of the Transformation Process*

There is anecdotal evidence to suggest that some, if not many, view a decision to transform as being motivated by considerations other than the pursuit of integration –evidence presented in the second report in this series

suggests that this view was shared, to some degree, by some Principals in GMI schools (Montgomery et. al, 2003). The claims for ulterior motives include the suggestion that transformation is really about increasing, or holding pupils numbers, gaining access to additional funds for the schools or seeking to block a proposal for an entirely new Integrated school in the local area.

Whatever the motives of key people in a process of change such as transformation, it is clear from the literature on educational change (and from the outline data presented in this report) that it is a complex process, involving a range of actors and interests and often involving a range of motivations. Most of the theoretical work on educational change makes reference to the fact that *'there are countless variables potentially influencing whether a change program gets started'* (Fullan, 1991 p.50). The data from the six case study schools confirms the actual complexity of this process.

Even at a basic level it is possible to identify a range of concerns that the Principals of the case study schools brought to the possibility of transforming:

**School A:** *'It is to be formal and up front and saying that we are to open it up to maybe a wider community.'*

**School B:** *'To give every child in our area the option of attending a school which actively encourages the enrolment of both Catholics and Protestants.'* (School prospectus) *'To encourage children to think and hopefully allow them to escape to a certain extent from the socialisation, the very negative socialisation, that goes on in this community.'*

**School C:** *'I feel strongly it should exist for parents...Fostering peace and reconciliation and encouraging tolerance and respect is of fundamental importance for the future of our children, our province and our country.'*  
(School prospectus)

**School D:** *'Well all along we just thought we had so many mixed marriages in school ...it seemed the logical thing to do.'*

**School E:** *'Because of the mix, the religious mix it would have seemed like something that should have been considered.'*

**School F:** *'As a controlled school, outsiders would naturally assume School F was a Protestant school. To counteract this notion and to show that the mixed nature of the school was important to them and something to actively develop, the parents of children at the school took a bold step: in 1991 they voted to seek Controlled Integrated status.'*  
(School prospectus).

However, from an analysis of the data collected within each of the case study schools it is possible to identify a number of broad patterns at the initiation phase.

In five of the six case study schools there was a perception by the school that it operated in a mixed religious area and in four of the schools this context was believed to have led to a religious mix within the school body. In the sixth case there was a perception that the local community was *'open'* to the idea of integration.

In four of the six schools the Principal was newly arrived and in two of these cases the

Principal arrived with a firm commitment to pursue integration. Parents were an important influence in starting discussions in two of the schools, whereas in two others the Governors were initially reluctant to pursue the issue when it was first discussed. In contrast, in one case it seemed as if the arrival of a new Governor with a past involvement in integrated education provided the spur to discussion.

The influence of pupil numbers was complex: in three cases the pupil numbers were falling or unstable, in one case local schools had closed due to falling numbers, but in one case the pupil numbers were rising and this, allied with the arrival of a new Principal, created a context in which it was believed integration was possible.

In two cases a local community initiative to propose the establishment of a new Integrated school seemed to provide a spark for the consideration of transformation.

The evidence here suggests that the process of initiating transformation in the six case study schools was far from simple. They highlight the interrelation between leadership, school and community characteristics that eventually led to the idea of transformation being considered as a possibility for each of the six schools. While the evidence highlights unique aspects of each case study school it does seem possible to suggest that the initiation of transformation in the six case study schools can be conceptualised around the three inter-related factors of **Belief**, **Threat** and **Plausibility**.

In School A it was the *'belief'* of the member of the Board of Governors who was involved in promoting integrated education through All Children Together (ACT), that was reported to be the main impetus behind the idea. Yet when the data are examined more closely it is obvious that this *'belief'* is accompanied by a range of other factors that made the idea

*'plausible'* to other significant people within the school. Due to the community being somewhat mixed, and the school being located close to an army base, School A had a tradition of Catholic pupils attendance. This pattern increased when the school grew in numbers, and this in turn probably helped to encourage even more heterogeneity in intake patterns. The growth in pupil numbers had allowed the school to employ more teachers, some of whom were Catholic, and many of them were young and open to innovation. The leadership in general was open to innovation and since the new Principal had arrived it was reported that there had been a renewed emphasis on school improvement. Over time, and for many of the same reasons, the Board of Governors had also become mixed which, together with the existing involvement that the school had in community relations work, added to the overall *'plausibility'* of the idea.

In School B it was emphasised that the *'belief'* of the former Principal, in integrated education had played a significant part in the initiation of transformation. However, it was also admitted that this was accompanied by *'threats'* both in the school and the community. Due to the over-provision of schools in the area the pupil numbers in School B were said to have been falling which posed a threat both to job security as well as the security of the school as a whole. Therefore, whenever it was realised that a local group was considering setting up a new integrated school this was viewed as another potential threat to pupil numbers. Finally, in School B the fact that the surrounding community was mixed, which in turn brought a representation of Catholic pupils to the school, meant that the *'plausibility'* of transformation did not seem so far off.

In School C it was the parent's *'beliefs'* in integrated education that affected initiation. However, once again this was not the only

factor at work in the process. The fact that the community were beginning to talk about the possibility of setting up a new integrated school was reported to have posed a certain *'threat'* to the Principal who in turn began to consider the *'plausibility'* of transformation. The schools geographical position together with the general openness of community attitudes were reported to be factors that helped the Principal recognise the *'plausibility'* of the idea. This was then supplemented by information from the staff who mentioned the part that staff beliefs, the peace process and the school's involvement in community relations work played in making the idea *'plausible'*.

In School D it was reported that parents *'beliefs'* had initially affected the process of initiation. Having seen a nearby primary school undergoing the *'transformation'* process, it was reported that, they believed that their children should have the opportunity to attend an *'integrated'* school as well. Many of these parents were in *'mixed'* marriages and therefore believed that integrated education was more appropriate for their children. The fact that many of the pupils at the school were from mixed marriages and that the community was *'mixed'* was also thought to have helped the *'plausibility'* of the claim. It was also believed that the Principal considered *'transformation'* as a way in which the continual *'threat'* of unstable pupil numbers could be subsided.

In School E it was the *'beliefs'* of the former Principal that had initially affected the process of initiation. He was said to have been a convinced integrationist and went on to work in another integrated school. However, the Board of Governors did not share these beliefs largely, it was felt, due to the influence of the Chair who was a member of the Protestant clergy. When he was replaced the idea of *'transformation'* was reported to have seemed

more *'plausible'*. The idea of transformation was also thought to have been *'plausible'* in School E due to the mixed nature of the community in which it was situated which in turn brought an almost equal mix of Protestant and Catholic pupils to the school. These factors, together with the continual *'threat'* of falling pupil numbers, were reported to be the circumstances in which the new Principal considered the transformation option.

In School F it was the *'plausibility'* of the transformation option that was reported to have encouraged the former Principal and the new Principal to initiate the idea. The school was situated in a *'mixed'* community and had an almost equal mix of Protestant and Catholic pupils attending it. It also had a *'mixed'* staff and had done as long as the staff could remember. It was these factors, together with the *'threat'* of a number of small schools closing in the area that were reported to have initially encouraged the former Principal to initiate the idea of transformation. However, when the former Principal initiated the idea, although the staff were behind it, the Board of Governors were not immediately behind the move. This was reported to be linked to the Chair of the Board of Governors who was himself a member of the Protestant clergy and when he was replaced the *'plausibility'* of the new Principal initiating transformation was thought to have increased.

The descriptions above show that in Schools B, C, D and E the three concepts of **Belief**, **Threat** and **Plausibility** all combined to affect the initiation of the transformation process. They show that the concepts of **Belief** and **Plausibility** combined to affect the initiation of transformation in School A and the concepts of **Plausibility** and **Threat** combined to affect the initiation of *'transformation'* in School F.

Cross-case comparisons can be drawn from within each concept. Within the concept of

**Belief** comparisons can be drawn between Schools A, B and E whose initiation processes were driven by the *'beliefs'* of one individual who had an influential position within the school. Whereas within Schools C and D it was driven by the *'beliefs'* of a group of parents who were influential due to the policy of parental choice. In Schools E and F it was also thought to be the *'beliefs'* of one man in an influential position that hindered initiation at its early stages. Within the concept of **Threat** comparisons can be drawn between Schools B and C who were both *'threatened'* by the community considering the possibility of setting up a new integrated school. Comparisons can also be drawn between Schools B and E who were both threatened by falling pupil numbers. Within the concept of **Plausibility** comparisons can be drawn between Schools A, B, D, E and F who all reported situations in which both the school and the community were *'mixed'* (that is, included both Protestant and Catholic populations). In Schools A and F this included *'mixed'* staff. Comparisons can also be drawn between Schools A and C who both reported that the Schools prior involvement in community relations work made the move more *'plausible'*.

In conclusion, analysis of the data shows that, in keeping with the theory on educational change (Fullan, 1991), a variety of inter-related factors have affected the initiation of transformation in each of the six schools included in the study. Although, many believe that transformation is initiated to increase pupil numbers, gain money for the school or hinder a *'planned'* integrated school gaining recognition from the Department of Education, the evidence of these case studies suggests that transformation is initiated for a variety of reasons, most of which link into a framework of belief, threat and plausibility. The evidence does suggest that falling pupil numbers and the possibility of a *'planned'* integrated school

opening in the area are factors that contribute to the *'initiation'* phase of transformation in some of the case study schools. However, the evidence also suggests that there is hardly ever a single factor for *'initiating'* the process of transformation. Rather they are variously accompanied by plausible conditions within the school and community, strong beliefs of individuals in influential positions and, in some instances, a favourable educational and political climate.

### *Key Stage 2 - The Support Raising Phases of the Transformation Process*

Having completed analysis of the initiation phase of transformation in each of the six schools in the study, the next stage is to consider the factors that affected the support raising phases of the process. The data suggest that both the **Plausibility** of the idea and the **Beliefs** of the initiators helped to secure the support of various interest groups in each of the six schools. The data also suggest that the support of various interest groups increased where there was a general belief that integrated education could help to ameliorate community relations in Northern Ireland. However, although the data showed that *'belief'* and *'plausibility'* factors significantly affected the support raising phases of transformation in each of the six schools. The data also showed that these were not the only factors. Factors that related to the concepts of **Understanding** and **Support** also affected these phases.

With the exception of School F, the support raising phases of the transformation process in each of the six case study schools were hindered by two main factors: first, a lack of understanding of the rationale behind the process among various interested parties, and second, a lack of understanding of the actual process itself.

First let us examine some of the evidence in relation to misunderstanding of the rationale for change. In School A, some staff were unhappy because they thought the rationale behind transformation was linked to some ulterior motive related to pupil numbers. Some parents or community members were also concerned or critical, as they believed the rationale was linked to boosting pupil numbers and gaining money for the school. In School B a lack of understanding of the rationale behind transformation evoked a *'mixed'* reaction from staff some of which did not see the point of the change. A perception that there was no particular *'need'* for transformation also caused reactions of staff in School C to be *'mixed'*, with some assuming that the real motive was related to finance. Some staff in School E were concerned that the idea of transformation was linked to gaining money for the school and boosting pupil numbers. This perception was shared by some in the local ELB and, for this reason, led to some negative newspaper publicity.

The second factor was that the support raising phases of the transformation process were hindered by a lack of understanding of the actual process itself. In School A some staff were unhappy with the idea of transformation as they believed that it would create additional bureaucratic burdens. Some of the Governors in School A were concerned about the idea of transformation because they did not understand whether it would mean the school introducing Catholic Religious Education and Gaelic sport into the curriculum or not. Some parents were concerned about the idea, as they did not understand what transformation meant in terms of Religious Education, Irish language, Gaelic sports or clerical involvement in the school. In School B some elements of the community were extremely unhappy with the idea of transformation due to a belief that it amounted to an attack on Protestant culture and heritage. In School C, staff responses to

the idea of transformation were mixed due to their concern over job security, Roman Catholic doctrine in the school, the staff employment policy, money for the school, pupils being '*poached*' from other schools, clerical involvement, changes in symbols and rituals, the existence of Scripture Union in the school and the effect on class sizes. Staff in School D were also concerned about the process due to their lack of understanding of how Catholic Religious Education would be both taught and timetabled. Finally, the staff in School E gave a mixed response to the idea of transformation due partly to their lack of understanding of how transformation would affect the school's employment policy.

The evidence suggests that the schools with the biggest problems in relation to understanding the '*rationale*' behind transformation were Schools A and E. Both of these schools had to deal with negative newspaper publicity that questioned the '*genuineness*' of the idea, even though the initiation data shows that falling pupil numbers was not a threat for School A and not as strong a rationale as '*plausibility*' in school E. Parents in School A had the most concerns about the process, although this may be related to the fact that the Governors in School A took a pro-active and controversial approach to discovering parents concerns whereas in others schools this type of '*probing*' was not reported.

Staff in School C had the most concerns about the actual process. This coincides with the initiation data that shows School C as having the least '*plausibility*' in terms of a mixed community and a mixed pupil ratio. This would suggest that the staff in School C would have had the least experience of educating pupils from the minority community and how this would change the school. School B had the most concerns from the community, which were related to an understanding of

transformation as a '*threat*' to Protestant culture and heritage. This finding was not surprising, as the area in which the school is situated is extremely political and a '*heartland*' for much of the current polarisation that exists in Northern Ireland.

The evidence suggests that Schools D and F had the least difficulty in terms of '*understanding*'. This may be related to the fact that they are small schools and that the '*plausibility*' of the idea was high. Although school E is also small with high '*plausibility*'; it is situated in an area that has suffered sectarian tensions and it is perhaps not unexpected that a transformation proposal in this context would attract some degree of controversy.

Another factor highlights the importance of **Support**. When various parties interested in transformation had concerns such as those discussed previously, the '*support*' for the idea was raised if they received '*support*' in addressing the concerns. Thus, for example, in school A, a pro-active approach was taken to addressing parent, Governor and community concerns. In the case of the Governors, the Principal of another '*integrated*' school took time to answer their concerns. In the case of parents the Governors took time to listen to and answer their concerns. And in the case of the community the member of the Board of Governors who had initiated the idea together with the Principal took a great deal of time carefully addressing the community concerns in a responsive newspaper article. School B was very careful to take time to answer all of the arguments of those opposing transformation and to put forward the positive arguments for change. In School C the Principal, senior management team and the local ELB put a lot of effort into making sure staff concerns had been answered. When questioned about this, the staff acknowledged the '*support*' given throughout this period by



the local ELB and said that it had made them feel stimulated, satisfied, comfortable and supported.

The corollary is also true, in that when concerns were not addressed, support for the process as a whole decreased. In School E there was little evidence that the Principal dealt with staff concerns, particularly their feeling that they did not have enough time to voice their opinions. There was some evidence that their sense of being excluded from the process made them feel increasingly negative about the proposal, and isolated, unsupported and undervalued. In School B the evidence suggested that a member of the senior management team who felt negative about the process did not have these concerns addressed. In School D staff also felt that the Principal did not formally address their concerns. Ironically, some of these teachers felt a little more comfortable when they had an opportunity to hear the process being explained at a parents evening.

In conclusion, analysis of the experiences of *'support raising'* in the six schools included in this research shows that the **Plausibility** of transformation and the **Beliefs** of initiators help to secure the support of various interest groups. The data shows that a general **Belief** in integrated education also greatly increases the support that various interest groups give to the idea of transformation. Negative responses to the idea of transformation could be received from the staff, parents, Governors and community when there is a lack of **Understanding** of the rationale behind transformation or a lack of understanding of the actual process itself. The data also show that when this lack of understanding is accompanied by a lack of **Support** in addressing these concerns, negative responses to the idea of transformation increase. In contrast, when a pro-active approach is taken to addressing the concerns of interested

parties, then these concerns tend to be allayed.

### *Stage 3: The Implementation Phase of the Transformation Process*

We now turn to the ways the case study schools implemented the decision to transform. This involved a number of common elements, including the hiring of Catholic teachers, the reconstitution of the Boards of Governors, changes to the name and prospectuses of the schools and the establishment of links with external bodies. The details of implementation in each school are briefly outlined below.

In school A the most obvious changes involved a school name, prospectus and uniform. In addition, Catholic teachers were employed and the Board of Governors was re-constituted to include representatives from the minority community. Teachers were sent on conflict resolution courses, links have been developed with NICIE and a *'transformation committee'* established to look at integration issues within the school. The English department introduced materials from the Republic of Ireland, steps were being made to introduce Gaelic sports, community links were being developed with Catholic maintained schools, political graffiti was being dealt with, and there was a conscious attempt to tackle controversial issues, and to celebrate both main traditions in Northern Ireland, through subjects such as Art and History.

School B also changed the school name, prospectus and uniform and reconstituted the Board of Governors to include representatives from the minority community. Catholic teachers were employed and one became a member of the senior management team. Irish language, Ulster studies, Catholic Religious Education, Denominational care, Gaelic sports, Irish music and dance, peer mediation and pupil retreats were all introduced into the curriculum. Pluralist assemblies, Catholic

retreats, Catholic Eucharistic services, a peace conference and various aspects of Gaelic culture were also introduced into the school. Finally, links were developed with NICIE.

School C changed the school name, prospectus and uniform and a Catholic teacher was appointed to teach Catholic Religious Education. Staff training events have been organised and links had been developed with NICIE. The school held a peace assembly; St. Patrick's Day was made a school holiday, new resources were introduced incorporating aspects of Irish culture. Irish music and dance was encouraged, Catholic hymns were used in assembly and policies on the display of controversial emblems, for example, certain football kits, were established. The role of the EMU co-ordinator was upgraded, the school took part in *'integrated schools week'* and a peace-garden developed at the front of the school.

School D changed the school name, prospectus and uniform and developed links with NICIE. The Board of Governors was reconstituted and a new Catholic teacher was appointed to teach Catholic Religious Education. Within the school there was a belief that increased awareness and understanding of Catholicism had occurred among both staff and pupils.

School E changed the school name, prospectus and uniform and reconstituted the Board of Governors. A part-time Catholic teacher was appointed to teach Catholic Religious Education. Links were developed with NICIE, and with the local Catholic school and Catholic priests. Links were also developed with another Transforming school and the school had been involved in cross-community events in the area. Expertise had been brought into the school to help develop EMU and Cultural Heritage in the curriculum, and Irish music and dance was encouraged. In addition, there was a conscious effort to teach more Irish history. In general, the school sees itself as having

become more open to Catholicism and more open in the way issues related to diversity are discussed in classes. Training was provided to help Protestant teachers become more aware of aspects of Catholicism and some attended the First Communion of some of the pupils.

In School F the school name, prospectus and uniform were changed, the Board of Governors reconstituted and a Catholic teacher appointed to teach Catholic Religious Education. Links had been developed with another Transforming school and external expertise brought in to assist with EMU and Cultural Heritage. Staff training days had been arranged and links have been developed with NICIE and the Catholic Church.

The analysis of the data collected in the schools on the implementation of change suggested that **Plausibility, Threat, Support, Understanding** and **Resources** are all factors that have had a significant impact. Perhaps counter-intuitively, the schools where *'plausibility'* of the change was the highest during initiation (Schools D, E and F, which also happened to be the smaller primary schools) they were also the schools where there had been the least amount of whole school change. In contrast, schools that appeared to face more hurdles in pursuing transformation, Schools A, B and C, were also the schools where the greatest amount of whole school change occurred. This is explained by a perception in the smaller schools that they were already integrated prior to transformation. Therefore, they believed that the change process was simply a matter of formalising an existing situation rather than embarking on a whole school change process. In the schools that more obviously were not *'integrated'* prior to *'Transformation'* (Schools A, B & C) there was a much greater sense of the transformation process being about whole school change.

The analysis highlighted the importance of a perceived *'threat'* to transformation, if the schools were not successful in attracting pupils from the minority community. The case study schools that had a relatively low percentage of pupils from the minority community were extremely aware of the need to *'market'* themselves. For this reason the importance attached to whole school change and an awareness of the need for such change was also high.

A further factor that impacted on implementation lay in the level of *'support'* received from external interest groups such as NICIE, the ELBs, the wider local community, the Department of Education and the Catholic Church. Where a lack of such external support was perceived, implementation of change was hampered. In addition, where there was a perception of a lack of support from some elements of staff in the schools, this also had a negative effect on those staff members who were enthusiastic and supportive of the change.

Within Schools A, B & C the implementation of change was also perceived to be negatively affected by a lack of *'understanding'* among some staff members on the process being followed and their role within it. When the process matched their understanding of change then the evidence suggests that staff reacted positively. However, if the process conflicted with their understanding of change the evidence suggested that staff reacted negatively.

The final theme to emerge from the data was that whole school change increased in the implementation phase of transformation when appropriate financial or human *'resources'* increased. This was sometimes realised in fairly prosaic ways, for example, through having Catholic teachers who know how to play Gaelic sports or a high enough percentage of Catholic

pupils to provide a warrant for significant organisational changes. In addition, the data suggested that whole school change was more favourably received by existing staff when new staff or pupils from the minority community were good ambassadors for their religion and traditions.

Following a consideration of the factors affecting implementation, consideration was given to the potential that these transforming schools have for continuing to effect change. For this analysis the primary interest in teachers' experiences and understanding of the change process.

Most of the research in the area of innovation has focused upon the institution rather than the individual, yet it seems self-evident to believe that teachers' experiences of the change process will greatly affect the success of change. More particularly, if teachers feel stressed and cynical about a change process then they are unlikely to contribute in a significantly positive way to the implementation of change.

Interviews with teachers in the case study schools suggested that they felt positive more often than they felt negative in relation to transformation. Teachers are not formally included in the decision making process in relation to transformation as they do not have a right to participate in the ballot on the transformation option. Sarason (1996) and Eisner (1992) had suggested that teachers' experiences of change varied according to how involved they were in initiating the change. This might imply that the lack of formal involvement of teachers in the transformation decision may incline them negatively towards the process. However, the evidence from the interviews in the case study schools suggested that the teachers more often felt committed, enthusiastic, optimistic, supported, comfortable, pleased and interested in the

process. During the interviews it emerged that one of the main reasons for this generally positive orientation was that a majority of teachers in the schools believed that integrated education was one of the most important ways of improving community relations in Northern Ireland.

While it is important that the teachers in the case study schools were generally supportive of the idea of integrated education, it was also important to check whether they had a shared conceptualisation on what integrated education actually means. The literature on change suggests that a prerequisite for whole school change is a shared understanding between staff on the nature and purpose of the change process. It is generally accepted that schools are difficult to change because teachers are working in an environment which is '*individualistic*,' '*present-orientated*' and '*conservative*' (Lortie, 1975). Therefore one of the most important ways of promoting change is to increase shared understanding of the nature and purpose of the change process among staff, which will in turn change school practice.

In fact, the evidence collected from the teachers suggested that there was very little consensus in each of the six schools as to what a transformed integrated school should actually be. Indeed, the discussions on the nature of integration often dealt with a range of different possibilities: was it about promoting a range of cultures or a range of religions? Was it to be hallmarked by tolerance, that is the acceptance of difference, or by the celebration of difference? And was it about promoting a shared sense of common Christian values, or should it involve a wider range of faith traditions? In other words, rather than displaying a shared sense of direction, many of the teachers queried what direction change should actually take and which of a number of end-states change was directed towards.

Thus, while the results suggest that teachers were positive about the transformation process and that their feelings were unlikely to hinder the implementation process, the results also showed that they did not share a consistent understanding of the type of school culture they were trying to create. This has the potential to lead to different practice across the schools over time as they pursue somewhat different tracks through the transformation process.

## CONCLUSION

The data presented in this report indicate that transformation is a route to integration that has brought about whole school change in a variety of segregated school and community contexts in Northern Ireland. While there are some who feel that schools seek transformation for reasons of self-interest, rather than in the interests of integration per se, the evidence here suggests that the route to and through transformation is much more complex. The evidence of these six case study schools would suggest that the most appropriate framework for understanding the initiation of a transformation decision is through a combination of '*plausibility*,' '*threat*' and '*belief*' factors.

The idea of transformation is underpinned by a power/coercive approach to change (Chin, Benne, and Bennis 1985 p.32) with an emphasis on '*restructuring*' (Poster, 1999, Ellis, 1994, and O'Donoghue & Dimmock, 1998). The data shows that using such an approach to integrating segregated schools in Northern Ireland is effective. Building on the current educational climate that favours educational '*choice*,' groups of parents, Governors or senior school managers have been able to amass the support of parents and ultimately bring about a change in the nature and identity of their schools. Although similar transformation attempts in the USA and Israel were hindered due to resistance from parents and teachers or because teachers '*were not given a dynamic*

role in this matter' (McAndrew and Lemire 1996 p.337), the data shows that this was not the case in Northern Ireland. Rather, the data would indicate that there was a general belief among both parents and teachers as to the importance of integrated education and therefore a willingness to support transformation for positive reasons.

However, the data also show that the transformation of schools in Northern Ireland faces difficulties. The Catholic Church and the Council for Catholic Maintained Schools (CCMS) opposes the concept of transformation, that is, the ability of a cohort of parents to determine the future fate of a school, but in practical terms this means that they have a limited engagement with schools going through transformation. In addition, Catholic priests are often reluctant to assist transforming schools in providing Catholic Religious Education.

In some instances NICIE, the ELBs, the Department of Education and other community groups also did not support the idea and schools faced difficulties when they did not have the *'expertise'* or the finances to introduce more elements of *'Irish'* culture and traditions into their schools. The data also shows that transformation faces difficulties in relation to the understanding of the process held by key participants in the school community. In many of the case study schools staff, parents, Governors and community groups lacked an understanding of the rationale behind the transformation and were not always clear on what the process of change would entail. On occasion this limited the degree of support they provided for the change process, and in some cases, actually encouraged people actively to oppose the proposal for change. The importance of understanding was also an important issue for staff. The data showed that staff in some of the case study schools lacked understanding of

the process and their role within it. More generally, with the exception of School F, staff in the case study schools did not have a shared understanding of the nature, purpose and direction of transformation.

Transformation currently exists as one of two ways in which new Integrated schools can develop in Northern Ireland. The support documentation available to schools outlines the formal procedures necessary for an existing school to apply for integrated status. However, while the procedures require that, before the proposers proceed to a formal ballot of parents, they should *'ensure that all concerned have a full understanding of the process and the changes which would be necessary to successfully transform'* (DENI, 1997 b p. 1). The evidence of this study suggests that, in practice, developing this *'understanding'* does not appear to be a high priority. Indeed, in some cases, when concerns were raised they were often met with assurances that not a great deal had to change in a school. Thus, while it is possible to continue to transform schools in Northern Ireland without a clear and consistent understanding of the rationale, aims and roles of all the potential actors involved in the process, it seems reasonable to suggest that more effective and efficient transformation will occur if this shared understanding exists. In particular, the evidence from this study suggests that some opposition to change, or reluctance to support it, is based on misunderstandings of the intent behind change. Furthermore, while the literature on educational change suggests that shared understanding between staff as to the nature and purpose of a change process will affect the success of implementation (Fullan, 1991), the evidence of the present study suggests that the lack of a formal role for teachers in a transformation proposal may hinder their sense of involvement, understanding and hence their degree of active support for a transformation process.

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