

October 2015

# Patronage Manual

Primary



Educate  
Together

<b>Introduction .....</b>	<b>4</b>
<b>Role and responsibilities of a patron .....</b>	<b>4</b>
<b>Section B: Policy and Procedure .....</b>	<b>6</b>
<b>Part 1: New Schools.....</b>	<b>6</b>
<i>Applications for recognition of new schools.....</i>	<i>7</i>
<i>The establishment of interim management structures for a new school .....</i>	<i>8</i>
<i>The appointment of the Principal of a new school .....</i>	<i>9</i>
<i>The appointment of first teaching staff to a new school.....</i>	<i>10</i>
<i>The appointment of patron nominees to a new school .....</i>	<i>11</i>
<i>The provision and planning of accommodation for a new school.....</i>	<i>12</i>
<b>Part 2: Established Schools .....</b>	<b>13</b>
<i>Patron's responsibilities towards Boards of Management. ....</i>	<i>13</i>
<i>Appointment of patron nominees on Board of Management .....</i>	<i>14</i>
<i>Appointment of the Chairperson of the Board of Management .....</i>	<i>15</i>
<i>Appointment of the Board of Management.....</i>	<i>16</i>
<i>Removal of board member/dissolution of Board of Management.....</i>	<i>17</i>
<i>Approval of any debts incurred by Board .....</i>	<i>18</i>
<i>Define the 'patron's curriculum' and the characteristic spirit - 'ethos' - of the school.....</i>	<i>19</i>
<i>Oversight of Board of Management of an Educate Together school.....</i>	<i>20</i>
<i>Enrolment Policy.....</i>	<i>21</i>
<i>The patron's responsibilities in relation to school appointments.....</i>	<i>23</i>
<i>Approval of appointment of teachers (including Principals) and SNA staff .....</i>	<i>24</i>
<i>Procedures for transfer of patronage from existing schools. ....</i>	<i>25</i>
<i>Proposals to transfer patronage of schools .....</i>	<i>26</i>
<i>Applying for permanent recognition .....</i>	<i>28</i>
<i>Patron approval for generating a new stream in a school .....</i>	<i>29</i>
<i>Annual reporting of child protection and anti-bullying procedures .....</i>	<i>30</i>
<b>Conclusion.....</b>	<b>31</b>
<b>Approval and Status.....</b>	<b>31</b>
<b>Section C: Appendices.....</b>	<b>32</b>

<i>Patron Nominee Application Form</i> .....	32
<i>Patron Nominee Re-Appointment Form</i> .....	33
<i>Acceptance of Membership</i> .....	34
<i>Approval of Teacher Appointments</i> .....	35
<i>Approval of Special Needs Assistant Appointments</i> .....	36
<i>Application for approval of any debts incurred by board</i> .....	37
<i>Checklist for Annual Review of the Child Protection Policy</i> .....	38
<i>Checklist for Annual Review of the Anti-bullying Policy</i> .....	41
<b>Glossary:</b> .....	<b>43</b>
<i>Data retained by Educate Together in relation to Patronage</i> .....	43

# Educate Together Patronage Manual

## Introduction

Since becoming a company limited by guarantee in 1998, Educate Together has opened many schools with its patronage. In that time, it has worked to develop clear policies and procedures in order to carry out its legal responsibilities as patron.

This manual is set out in three sections. Section A will define the concept of a patron, explain the legal basis for its duties and set out its role and responsibilities.

Section B sets out the policies and procedures that Educate Together implements in discharging its duty as a patron of national schools.

Section C lists the documents, reports and archives that are maintained by Educate Together in relation to this aspect of its operations.

This document is a living document. It is updated as our policies and procedures develop. In this regard Educate Together welcomes comments and suggestions from our members, friends and colleagues.

It is important to note that the relationship of the Board of Management of an Educate Together National School with its patron is significantly different to that between the Board and patron in schools with Catholic or Protestant patronage. In the case of denominational schools, a Deed of Variation exists that radically alters this relationship and bestows considerable powers of direction and control on the patron. There is no such Deed of Variation in place in Educate Together schools and the legal relationship rests entirely on the rights and obligations set out in legislation by the Oireachtas principally in the Education Act (1998), and in other related Acts and Departmental rules and regulations. It is for this reason, that we describe the relationship as a school operating “with” the patronage of Educate Together.

## Role and responsibilities of a patron

The definition of a patron of a national school in Ireland, and the legal basis of its role and duties, are set out in a variety of documents:

- The Constitution of Ireland
- The Education Act 1998
- The Education (Welfare) Act 2000
- The Rules for National Schools, published in 1965
- Governance Manual for Primary Schools
- Precedence and Practice, as defined in Circulars published periodically by the Department of Education and Skills (DES).

As a patron of schools, Educate Together also must abide by a wide range of statutory provisions - most notably, the Equal Status Acts and the Employment Equality Acts.

The definition of patron is set out in the Education Act 1998 as follows:

**8. (1) (a)** *The person who, at the commencement of this section, is recognised by the Minister as the patron of a primary school,*

*(2) In any case other than that provided in subsection (1), the patron of a recognised school shall be the person who requested recognition of the school or a nominee of such person and the name of that person shall be entered in the register.*

The DES reserves to itself the right to recognise a person or company as an appropriate patron for a national school.

Recent criteria drawn up for the recognition of new patrons by the Department of Education and Skills includes a requirement that patrons have a clear understanding of the financial and legal implications of being a patron, particularly in the area of employment legislation.

The roles and responsibilities of Educate Together, as a patron of a National School includes the following:

- In the case of new schools to:
  - Seek the permission of the DES to establish a school
  - Establish an interim management structure for a new school
  - Approve the appointment of the principal and other teaching staff
  - Ensure the timely establishment of the Board of Management
  - Organise the accommodation for the new school and enter into any agreements, licences or leases for this purpose.
  
- Where schools are established to:
  - Approve the appointment of all teaching staff
  - Appoint independent assessors to selection boards
  - Appoint patron nominees to Board of Management
  - Appoint the Chairperson of the Board of Management
  - Appoint the Board of Management when properly constituted
  - Institute action under Section 16 or 19 of the Education Acts to seek reports from, remove Board Members or dissolve the Board of Management when required and with the permission of the Minister
  - To give prior approval for any debts (e.g. temporary overdraft) incurred by the Board of Management
  - Approve the publication of the enrolment policy of the school
  - Act to preserve the 'characteristic spirit' or ethos of the school
  - Provide or approve the premises for the school and enter into any agreements, licences or leases for this purpose
  - Set out, monitor and support a curriculum of ethical education that comprises 2.5hrs of teaching contact time for all pupils per school week
  - Be aware of the needs of the school, seek regular reports and be in a position to act to support, advise and if necessary intervene in the interests of the school, its children, parents and staff
  - Seek the closure of the school or its amalgamation with other schools if and when this is necessary in the common good.

## Section B: Policy and Procedure

### PART 1: NEW SCHOOLS

Responsibility for the establishment of a national school rests with a patron, which must first have been recognised as such by the DES and be on the register of patrons maintained by the Minister.

Since 2009, there has been a considerable change in the way in which new schools are recognised by the Minister. Up until 2009, patrons could propose the recognition of new schools in the manner envisaged in Section 10 of the Education Act (1998). Since 2010, however, the Department of Education and Skills identifies areas where it is proposed to open new primary schools, and invites applications from patrons to open schools in those areas. These arrangements put in place the New Schools Establishment Group, whose role is to advise the Minister on determining the patronage of new schools. The new procedures also provide for evidence of parental demand to be demonstrated for each new school and for increasing the diversity of patronage in schools. The Forward Planning Section of the Department deals with the establishment of new schools. The DES has also identified areas where it expects reassignment of the patronage of existing schools to take place and is developing a process whereby such reassignment may take place.

The criteria for Ministerial recognition of a new school broadly consist of:

- that there is a viable demand for such a school that cannot be met by the existing establishments in the area,
- that there is a body capable of undertaking the effective management of the school and
- that suitable accommodation will be available for the proposed school.

Once an application is successful, it is the responsibility of the patron to take the practical steps to ensure the opening of the school – recruiting staff, offering places to children, appointing a Board of Management and working with the Planning and Building Unit of the DES to source and prepare premises.

The Planning and Building Unit of the DES is responsible for identifying the need for school accommodation. The Site Acquisition and Property Management Section is responsible for acquiring sites to meet the requirements of the School Building Programme. The School Capital Appraisal Section is responsible for processing applications for rental of temporary accommodation and additional accommodation and identifying projects to be prioritised to meet the accommodation needs identified by the Forward Planning Section.

A new primary school is granted temporary recognition by the DES. This gives it the right to, inter alia, funding from the DES, to employ staff (on receipt of a Roll Number) and call itself a National School. National Schools are granted permanent recognition when there is evidence that the school will be viable in the long term. The number of children enrolled in the school and predicted future enrolments are the essential criteria in this regard but quality of leadership and governance, school policies, and accommodation are also important factors in the granting of permanent recognition.

## Applications for recognition of new schools

The patron applies to the Minister for the recognition of a new school. The National Office will regularly monitor levels of unsuccessful applications for places in existing schools, requests from parents, general enquiries and local and national demographic trends and maintain a list of areas in which it is considered that there is a viable demand for a new Educate Together school. In most cases, but not all, there should be sufficient demand to ensure the development of a 2-stream school.

<b><i>Policy P001 - Applications for new schools</i></b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers CEO Board of Directors	Start-up groups Parents DES	CEO, Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*The Department of Education and Skills identify where new schools are required. The DES then open a 'patronage determination process'.*

*Where Educate Together is interested in applying, the New Schools Programme team will work to establish start-up groups of parents and supporters to advance the application project. In some cases, where the local situation dictates, a RDO will manage the project without the involvement of a formal start-up group. If successful and Educate Together is appointed as patron of the proposed new school, the following process applies.*

*If and when the CEO is satisfied:*

- that there is viable demand for the school,*
- that appropriate steps have been taken to ensure the management of the school,*
- that appropriate accommodation will be made available,*
- that the National Office has sufficient resources to support the project,*

*a report will be submitted to the Board of Directors of Educate Together seeking its approval for the submission of a formal application for recognition of a new school.*

*Once the Board of Directors have approved the application, it will be submitted to the appropriate officer of the Department of Education and Skills as decided by the Minister.*

*Whilst Educate Together is committed to working in partnership with the DES on such projects, it reserves its right to support new school groups on parental preference, human rights and diversity grounds in areas not considered "priority" by the DES.*

## The establishment of interim management structures for a new school

The patron has the responsibility to establish interim management structures for a new school.

<b><i>Policy P002 - Interim management structures for new schools</i></b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme CEO	Start-up groups DES	CEO
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*Where a local start-up member is deemed suitable for appointment as school manager, the relevant Officer in the National Office will arrange for the completion of the necessary form assessing prospective managers against a set of criteria (see below). The form will be completed by a staff member working closely with the group, based on an interview with the prospective manager, and a check of referees provided by the prospective manager. The form will be signed off by the relevant Programme Manager, and submitted to the CEO with a formal request to appoint a manager for the school until such time as the Board of Management can be established (usually in October of the start up year). The criteria for the choice of manager are:*

- *Personal integrity (background check including Garda vetting and references)*
- *Commitment to the ethos of Educate Together*
- *Ability to work on their own initiative with the direction of the National Office*
- *Management ability*
- *Support of the start up group*
- *Interpersonal skills*
- *Available time*

*On the recommendation of the head of the relevant section, the CEO may appoint a member of staff as a manager. The decision of the CEO in this interim appointment is final and may be rescinded if circumstances warrant.*



## The appointment of the Principal of a new school

The patron has the responsibility to select the first principal of a new school.

<b>Policy P003 - Appointment of Principal of a new school</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme CEO	Start Up group School Manager	CEO Chairperson, Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	November 2012/October 2015	

*At an appropriate time after recognition has been formally granted, the manager will arrange for the advertisement for the post of principal teacher to be placed in the relevant media and that all information necessary or required by DES regulation is included. The appointment procedures must conform to those set out in the Governance Manual for Primary Schools. The CEO will appoint a Selection Board in consultation with the Governance and Patronage Programme Manager, School Manager and Regional Development Officer where appropriate. The Selection Board should ideally be drawn up from the following:*

- An Educate Together principal with experience of a start up environment and/or an established school.*
- The manager of the school, who will act as chair of the Selection Board*
- An officer from the National Office not involved in the patron's approval process*
- One or two other persons, ideally with managerial or recruitment experience, selected from the start up group or wider community.*

*The Selection Board will be empowered to decide not to appoint a principal if it is not satisfied that any of the candidates are of sufficient quality to undertake this important and central role. In this case it may recommend re-advertising and the appointment of an acting principal until a new selection process is completed.*

*When the selection is complete, the manager of the school must assure the patron that the selection procedure has been carried out faithfully and according to the high standards of integrity expected in Educate Together schools. He or she must provide a report on the selection process to the National Office. The CEO, on behalf of the patron, will arrange for the appointment to be formally approved. In the case of principal appointments, only the Chairperson of the Board of Directors of Educate Together may issue approval and no provisional appointments may be made.*

*When approved, the manager of the school will be so informed in writing.*

*If the National Office is not convinced that the process has been completed correctly, the CEO may instruct the School Manager/ Board of Management that the process must be restarted at a specific point, up to and including a complete re-advertisement.*

## The appointment of first teaching staff to a new school

The patron has the responsibility to ensure that the school manager has taken the necessary steps to ensure the timely appointment of all staff.

<b><i>Policy P004 - Appointment of first teachers of a new school</i></b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme Managers CEO	Manager	CEO
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*The manager will ensure that the necessary steps are taken for the school to open with a full complement of staff. This includes interacting with all relevant redeployment panels. The appointment procedures must conform to those set out in the Governance Manual for Schools. The Selection Board for the teachers will consist of:*

- The Principal appointed*
- The manager*
- An external assessor – usually an Educate Together principal with experience of both a start up environment and an established school*

*The recommendation of the Selection Board will be made to the CEO using the standard approval of teacher appointments form signed by the manager. The CEO or an officer designated by her/him may make enquiries as to the probity of the process. The CEO will then either approve the appointment or require the restarting of the process. See Appendices for internal administrative arrangements for Patron Approval.*

*When the selection process is complete, the manager of the school must assure the patron that the selection procedure has been carried out faithfully and according to the high standards of integrity expected in Educate Together schools. He or she must fill in and sign the relevant request for patron approval of teacher appointments form and send it by post, fax or email to the National Office. The CEO, on behalf of the patron, will arrange for the appointment to be formally approved.*

*When approved, the manager of the School will be so informed in writing.*

*If the National Office is not convinced that the process has been completed correctly, the CEO may instruct the manager that the process must be restarted at a specific point, up to and including a complete re-advertisement.*

## The appointment of patron nominees to a new school

The patron has the responsibility to ensure that a Board of Management is established for a new school. In the transition period from a school being sanctioned to a Board of Management being appointed, the manager will work closely with the starting community of the school, and relevant officers of the National Office.

<b>Policy P005 - Appointment of Patron Nominees to the Board of Management of a new school</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme CEO	Manager Start up-group	CEO
Review By:	Board of Directors	Annually
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*In the period prior to the opening of the school, the National Office will seek to identify suitable persons willing to act as one of the two patron nominees to the Board of Management. Such persons will be selected according to the following criteria, some essential (E), some desirable (D), in keeping with the current role description for patron nominees:*

- *Personal integrity (background check) (E)*
- *Commitment to the ethos of Educate Together (E)*
- *Interpersonal skills (E)*
- *Experience in the management of national schools (D)*
- *Experience of management in another context or HR skills (D)*
- *Team skills balance (D)*

*The relevant officer, in consultation with the relevant RDO, will submit the patron nominee application form to the CEO proposing two names to be appointed as nominees of Educate Together to the Board of Management of the school. In the event of an excess of candidates seeking and approved for the nomination, interviews may be held. Once an appointment is proposed, the CEO or an officer designated by him/her may make enquiries as to the probity of the process. The CEO will then either approve either or both appointments or require that further candidates be identified.*

*The manager will arrange a parent's/legal guardian's election and a teacher's election according to the Governance Manual for Primary Schools. These elections should not take place before the second week of October. Steps should be taken to ensure that there is maximum participation in these elections.*

*The further process of establishing the Board of Management should proceed according to the Governance Manual for Primary schools. The patron's appointment of the Board and its Chairperson will proceed according to the policy detailed in the next section of this manual. (See Policy P008)*

## The provision and planning of accommodation for a new school

The patron has the responsibility to ensure that appropriate accommodation is provided for new schools.

<b><i>Policy P006 - Accommodation for new schools</i></b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme CEO	Manager Start up Group DES	CEO Board of Directors
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Educate Together will only propose recognition of a new school if it is reasonably satisfied that there are concrete and credible plans for the permanent accommodation for that school. If interim accommodation is necessary, Educate Together will only enter into license or lease agreements under the following circumstances:

- *The premises conform to Health, Safety and Planning regulations*
- *That there is sufficient space for educational activities to operate in professional fashion*
- *That the school has complete control over access to the premises, especially over areas with access to children or to school records.*
- *That there are reasonable plans to allow for the natural growth of the school for the duration the DES intends the school to remain in interim accommodation.*
- *That the rents proposed have been approved by the DES*
- *That the legal contract documents have been examined and approved by Educate Together's legal advisors*
- *Educate Together is satisfied that the Board of Management of the school will carry out the terms of the lease.*

## PART 2: ESTABLISHED SCHOOLS

### **Patron's responsibilities towards Boards of Management.**

Responsibility for the day-to-day running and management of a National School rests with the Board of Management and Principal teacher. Boards of Management of National Schools who have a recognised staff of more than one teacher consist of eight people: the school Principal and one member of the teaching staff elected by the teaching staff as a whole; two members, one male and one female, selected from the parent body by election, two patron nominees, nominated by the patron, and two members of the wider community who are chosen by the other members of the Board. In schools having a recognised staff of one teacher the Board of Management shall comprise of the Principal, one parent elected from parents of pupils enrolled in the school, one patron nominee, and one member of the wider community who is chosen by the other members of the Board. This structure is defined by the Department of Education and Skills. All members are volunteers and act as a Board with collective responsibility and an obligation to confidentiality.

The patron of a school has the responsibility to nominate the patron nominee(s) of the Board, to appoint the Board as a whole, to select the Chairperson of the Board and where necessary, to seek the approval of the Minister for Education and Skills to seek reports on the Board's activities, dissolve the Board or remove a member.

It should be noted that there is at present no mechanism whereby other members of the school staff have representation on Boards of Management of National Schools and Educate Together expects the Boards of Management of its schools to take concrete steps to ensure that the views and interests of such staff are taken into account in its deliberations.

## Appointment of patron nominees on Board of Management

The patron nominates patron nominees to the Board of Management.

<b>Policy P007 - Appointment of patron nominees to a new school board</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme CEO	School Community, Board of Management, Principal	CEO
Review By:	Board of Directors	Annually
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*In the period prior to end of the current term of the Board of Management, the National Office will seek to identify suitable persons willing to act as patron nominees to the Board of Management. The process of identification may include but not necessarily be restricted to consultation with the Chairperson of the Board of Management and the Principal teacher and/or advertisement on relevant websites. Patron nominee application or reappointment forms must be completed by applicants. Such persons will be selected according to the following criteria, some essential (E), some desirable (D):*

- *Personal integrity (background check) (E)*
- *Commitment to the ethos of Educate Together (E)*
- *Interpersonal skills (E)*
- *Demonstrable Leadership Skills (Chairperson) (E)*
- *Willingness to work with policies and procedures (E)*
- *Available time (E)*
- *Experience in the management of national schools with preference for experience gained in Educate Together schools (D)*
- *Knowledge and confidence of the school community (D)*
- *HR skills (D)*
- *Team skills balance (D)*
- *Experience of working with policies and procedures (D)*

*The relevant officer, in consultation with the relevant RDO and manager will submit a report to the CEO proposing the names to be appointed as nominees of Educate Together to the Board of Management of the school. In the event of an excess of candidates seeking nomination, interviews may be conducted. Once an appointment is proposed, the CEO or an officer designated by him/her may make enquiries as to the probity of the process. The CEO will then either approve either or both appointments or require that further candidates be identified.*

*The decision of the patron is final.*

## Appointment of the Chairperson of the Board of Management

The patron has complete authority over the appointment of the Chairperson of the Board of Management from the members of the Board except the Principal or teacher representative.

<b><i>Policy P008 - Appointment of Chairperson to school Board of management</i></b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme CEO	School Community, Board of Management, Principal	CEO
Review By:	Board of Directors	Annually
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*Simultaneously with the procedure detailed for the appointment of patron nominees, the relevant officer assigned to the school will compile a report on the availability of persons with suitable commitment, managerial and interpersonal skills to perform the important role of Chairperson of the Board of Management. The process of identification may include but not necessarily be restricted to consultation with the outgoing Chairperson of the Board of Management and the Principal teacher.*

*The criteria for the choice of Chairperson are in keeping with the current role description, some of which are essential (E), and some of which are desirable (D):*

- *Personal integrity (background check) (E)*
- *Commitment to the ethos of Educate Together (E)*
- *Ability to work on their own initiative with the direction of the national office (E)*
- *Interpersonal and leadership skills (E)*
- *Participation in Educate Together training courses (E)*
- *Available time (E)*
- *Experience in the management of national schools with preference for experience gained in Educate Together schools (D)*
- *Knowledge and confidence of the school community (D)*
- *Experience of management in another context or HR skills (D)*

*The relevant officer will submit a patron nominee application or re-appointment form to the CEO proposing a person to be appointed Chairperson of the Board of Management of the school. In the event of an excess of candidates seeking nomination, interviews may be conducted. Once an appointment is proposed, the CEO or an officer designated by him/her may make enquiries as to the probity of the process. The CEO will then either approve the appointment or require that further candidates be identified.*

## Appointment of the Board of Management.

Once Board members have been properly nominated/elected by the various constituent groups, they must meet to select the one or two wider community representatives to complete the Board. When this process is complete, it is the responsibility of the patron to formally appoint the Board of Management, and to notify the Minister for Education and Skills accordingly.

<b>Policy P009 - Appointment of Board of Management</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme CEO	School Community, Board of Management, Principal	CEO
Review By:	Board of Directors	Annually
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*As part of the nomination process, each member of the Board must complete an acceptance of membership form in which they make a formal undertaking to abide by the Rules of National Schools and all relevant legislation, uphold the principles of the Educate Together Charter in the management of the school and maintain the confidentiality of Board business. The Chairperson will then submit a report form to the CEO confirming that all stages of the establishment of the Board have been completed in accordance with the Governance Manual for Primary Schools (DES) and with integrity. The CEO or an officer designated by him/her may make enquiries as to the probity of the process.*

*The CEO will then either formally appoint the Board and inform the Department of Education and Skills of the appointment and the names and contact details of the Chairperson of the Board of Management or require that the process is restarted at any necessary step.*

*The National Office staff will ensure that the contact details for all Board members are entered into the company database in the correct manner.*



## Removal of board member/dissolution of Board of Management

Once the Board of Management has been appointed, the patron cannot dismiss any member of the Board (including its own nominees) without the prior agreement of the Minister for Education and Skills. If the patron feels that the Board of Management (or a member thereof) is not effectively discharging its duties, it may apply to the Minister to dissolve the Board or remove the member.

<b>Policy P010 - Dissolution of Board of Management/removal of member</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers Governance Specialist G&P Programme CEO	School Community, Board of Management, Principal, DES, Legal Advisor	CEO Chairperson, Board of Directors
Review By:	Board of Directors	Annually
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*In the event of serious deficiencies in the work of a Board of Management, the patron may apply to the Minister for permission to either remove a member of the Board or to dissolve it. These powers are detailed in Section 16 and 19 of the Education Act. In the case of a dissolution, such an application will involve the appointment of a manager by the patron to manage the school until a new Board can be established.*

*In the case of gross misconduct involving assault, financial loss or danger to children, the patron reserves the right to immediately suspend a Board member pending an investigation. An application for such action can be made by a relevant Educate Together Officer, and approved by the CEO subject to the permission of the Minister. Such an application will not be processed unless legal advice on the matter has been taken by the patron.*

*In all other cases, a proposal to remove a member or dissolve the Board must be made in writing by the Governance and Patronage Programme Manager, and may include (but is not limited to):*

- *Recommendation from the Chairperson of the Board (unless the Chairperson is the subject of the proposal)*
- *Information received from a Board member or other relevant person*
- *In the case of a proposal to remove a member:*
  - *Results of a witnessed interview with the member*
- *In the case of a proposal to dissolve the Board:*
  - *The minutes of a Board meeting at which the Officer and a witness present the case for dissolution to the Board.*
- *Any such interview or Board meeting must be held in such a way as to ensure natural justice to a member or Board*
- *Legal advice*

*On receipt of this report, the CEO may either notify the Minister that it is initiating a report process under Section 19 of the Education Act or decide to seek the Minister's permission to remove a member or dissolve the board or issue warnings or advice to the parties concerned. In all cases, the decision of the CEO must be approved by the Chairperson of the Board of Directors of Educate Together or a Director appointed for this purpose.*

## Approval of any debts incurred by Board

Debts incurred by a Board of Management (including overdrafts) must be approved by the patron in advance. In addition, any capital expenditure, such as extension or replacement, must have the prior approval of the patron. In particular, only the patron can sign leases or other contractual arrangements in relation to the accommodation of the school.

<b>Policy P011A - Approval of debts</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
G&P Programme CEO	Board of Management, Principal DES	CEO Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*It is not recommended that Boards of Management of National Schools incur debts. However, in the rare occasion where such steps are necessary, the Board must apply to the patron in writing. The Application form for such a request is available in the Appendices of this document. Such a request will be reviewed by the CEO, who will either approve or disallow the request. In the event of requests for debts in excess of €20,000 such a decision must be approved by the Board of Directors of Educate Together.*

<b>Policy P011B - Approval of significant projects/decisions</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Regional Development Officers G&P Programme CEO	Board of Management, Principal DES	CEO Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*In the case of significant capital decisions involving building projects, commercial arrangements or leases, approval will only be considered on the basis of a written report submitted to the CEO by the school with a formal recommendation by the relevant national officer and accompanied by legal advice where appropriate. The officer may request further information from the Board of Management to enable them to make a recommendation.*

*In the case of proposals involving accommodation, the written views of the DES may be required.*

*The CEO will then either approve or disallow the proposal to be presented to the Board of Directors. In the case of all lease agreements which constitute a significant liability to the patron, only the Board of Directors may approve and sign the legal instruments and will do so only on the basis of a legal undertaking by the Board of Management of the school to adhere to the terms of the lease and indemnify the patron for any breach they may perform - deliberately or otherwise.*

*Please note that the Board of Directors of Educate Together may assign the decision processes detailed above to a sub-committee.*

## Define the ‘patron’s curriculum’ and the characteristic spirit - ‘ethos’ - of the school

The National School system sets down the necessity for a patron to define a religious or ethical education core curriculum. This curriculum defines the concepts and values which must permeate the entire school programme and is allocated 30 mins discrete contact time with all students each school day. The ethos of the school must also be clearly defined and displayed prominently in the public areas of the schools.

<b>Policy P012 - Ethical Curriculum</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
All schools operating with Educate Together's patronage	Board of Management, Principal	General Meeting of Members
Review By:	General Meeting of Members	Annually
Approved/Last Review:	July 2009/October 2015	

*All schools operating with Educate Together's patronage must implement the Learn Together ethical education curriculum, train their teachers in its implementation and contribute to its on-going development.*

*No faith-formation classes may take place within the compulsory school day in an Educate Together school.*

*The ethos of Educate Together schools is defined by The Educate Together Charter.*

## Oversight of Board of Management of an Educate Together school

Boards of Management of Schools are responsible in law to “uphold, and be accountable to the patron for so upholding, the characteristic spirit of the school...”. Educate Together maintains an ongoing dialogue with its members on how such accountability should best be implemented in keeping with the organisation’s commitment to participatory democracy.

<b>Policy P013 - Oversight of Board of Management</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Boards of Management of Schools operating with Educate Together’s patronage Regional Development Officers Governance Specialist G&P Programme CEO	Boards of Management of Schools operating with Educate Together’s patronage	CEO Board of Directors
Review By:	General Meeting of Members	Annually
Approved/Last Review:	October 2015	

*Boards of Management of Educate Together schools must develop and maintain an open and constructive dialogue on matters of school planning and development with the relevant section of the national office. This dialogue may include matters of concern as well as development opportunities.*

*Boards of Management will be required to formally report to the National Office on an annual basis in relation to:*

- *Enrolments, appointments, policies, finances and resources*
- *Actions taken to implement the Learn Together curriculum*
- *Attendance at cluster, regional and national meetings*

*From time to time, the CEO may require the preparation of a detailed report from a relevant officer in relation to matters concerning a specific school. Boards of Management are required to cooperate fully with the drawing up of such a report. The CEO must inform the Board in writing that such a report is being requested and must ensure that the Board has reasonable opportunity to express its views in relation to matters under consideration.*

## Enrolment Policy

The Education Act 1998 obliges Boards of Management of Schools to:- "establish and maintain an enrolment policy which provides for maximum accessibility to the school and "publish, in a manner as the Board with the agreement of the patron considers appropriate, the policy of the school concerning admission to and participation in the school....." It is only with such approval that the enrolment policy of a school is legally established. Educate Together's policy in relation to such patron approval is bound by a number of motions that have been passed at its Annual General Meetings.

<b>Policy P014 - Approval of Enrolment Policies</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Boards of Management of Schools operating with Educate Together's patronage Regional Development Officers G&P Programme CEO	Boards of Management of Schools operating with Educate Together's patronage	CEO Board of Directors
Review By:	General Meeting of Members	Annually
Approved/Last Review:	October 2015	

*A recognised school must have an enrolment policy drawn up in accordance with current legislation and Department regulation. This legislation requires that such a policy must be approved by the patron. Educate Together's National Office maintains a set of legally proofed enrolment policies that the Board of Directors consider to be legally sound, conform to current legislation and to a school's obligations to the Educate Together Charter. Educate Together will approve enrolment policies that implement the "First Come, First Served" principle. Boards of Management of schools operating with Educate Together's patronage may seek approval for variations from such a policy. Such variations may be approved in such cases where a school Board makes 'a serious and reasoned case for such a variation in order to address their obligations to equality' in their own communities under the Educate Together Charter and all relevant legislation. (Motion passed at Educate Together AGM 2010).*

*When drawing up an enrolment policy a board of management should :*

- Uphold the commitments to equality in the Educate Together Charter
- Adhere to all relevant legislation
- Demonstrate best practice, in transparency, accountability and fairness

*Before any enrolment policy can be published, it must be submitted to the National Office for approval.*

*Schools who wish to deviate from the standard "First Come, First Served" policy should ensure that the following steps are completed:*

*A Board meeting held at which the issue and any consequences of the proposed change to the enrolment policy have been discussed. A copy of the minute of this discussion should be forwarded with the application.*

*This discussion shall consider:*

*The issues that have arisen with their current enrolment policy,*

*The consequence of any proposed change to:*

- Children already enrolled in the school
- Children who wish to enrol in the school in the coming years
- The connection of the school with its wider community

- *Any reputational implications for the school*

*If after this discussion the Board of Management agrees that there are substantial reasons for changing the current approved policy it should prepare a written report on the proposed change and contact Educate Together's National Office to take advice on the viability of the variation.*

*Educate Together will inform the Board of Management whether the variation that they propose is viable or whether the board will need to seek appropriately qualified legal advice and/or require wider consultation with the school community before proceeding.*

*If legal advice or wider consultation is required the Board of Management must seek this out and provide a report to Educate Together's National Office.*

*The National Office will evaluate the submitted report and make its own report to the Patronage Sub-committee of the Board of Directors.*

*The Patronage Sub-committee will maintain a set of approved enrolment policy templates, and the National Office will maintain a register of those schools whose enrolment policies have been approved, a copy of the policy approved and the dates of such approvals.*

*The Patronage Sub-committee of the Board of Directors shall review the list of approved enrolment policies from time to time and report to the full Board on its work in these matters at least on an annual basis.*

## The patron's responsibilities in relation to school appointments

It is the responsibility of the patron to ensure that all procedures with regard to the recruitment of teachers are properly carried out, and to approve the appointment of teachers by the Board of Management. Until such approval has been granted, no appointment is properly made.

The patron also has a duty to appoint an independent assessor to all Selection Boards for the appointment of teachers to a school and to maintain an agreed panel of assessors for Selection Boards considering the appointment of posts of responsibilities in schools.

<b>Policy P015 - Approval of appointment of independent assessors</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Boards of Management of Schools operating with Educate Together's patronage Regional Development Officers G&P Programme CEO	Boards of Management of Schools operating with Educate Together's patronage	CEO Chairperson, Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

### **Independent assessors**

*The National Office will maintain a list of approved independent assessors for Selection Boards for teaching vacancies in schools. It will maintain a list of experienced independent assessors who have the experience necessary to sit on Selection Boards for Principal appointments. It will also maintain a panel of independent assessors for Selection Boards making appointments to posts of responsibility in schools. Independent Assessors for appointments to posts of responsibility must be agreed by both Educate Together and the Irish National Teachers Organisation.*

*When a Board appoints a new teacher, Principal or post of responsibility, it must follow the procedure set down in the relevant DES circular.*

*Application for the approval of the appointment of an independent assessor must be made in writing to the relevant officer in the National Office. Approval will be forwarded to the Principal and/or Chairperson of the Board in writing.*

## Approval of appointment of teachers (including Principals) and SNA staff

<b>Policy P016 - Approval of appointments</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Boards of Management of Schools operating with Educate Together's patronage Regional Development Officers G&P Programme CEO	Boards of Management of Schools operating with Educate Together's patronage	CEO Chairperson, Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*When the selection process for SNA staff, teachers and Principals is complete, the Chairperson of the Board of Management of the school must assure the patron that the selection procedure has been carried out faithfully and according to the high standards of integrity expected in Educate Together schools. He or she must fill in and sign the relevant request for patron approval of appointment form and send it by post, fax or email to the National Office. The CEO, on behalf of the patron, will arrange for the appointment to be formally approved. In the case of Principal appointments, only the Chairperson of the Board of Directors of Educate Together may issue approval and no provisional appointments may be made.*

*When approved, the Board of the School will be so informed in writing.*

*If the National Office is not convinced that the process has been completed correctly, the CEO may instruct Board of Management that the process must be restarted at a specific point, up to and including a complete re-advertisement.*



## **Procedures for transfer of patronage from existing schools.**

From time to time, Educate Together is approached with proposals to transfer the duties of patronage from an existing patron of a school. In the recent past a number of independent patrons who are themselves members of Educate Together have requested such a transfer. Educate Together considers such requests on a case-by-case basis and is open to approaches from patrons of schools that are themselves not currently members of Educate Together. The following is the procedure that Educate Together has adopted to handle such requests.

## Proposals to transfer patronage of schools

In the event of a formal request from a patron of a school to transfer its duties as patron to Educate Together, Educate Together will adopt the following approach.

The guiding principle of this procedure is that transfers will only be undertaken where there is clear and substantial evidence that such a transfer is supported by the school community, that that school community is properly aware of and understands how the Educate Together model operates and how it will operate in their own school. In this case, the term school community includes parents, children, staff and Board of Management.

<b>Policy P017 - Transfer of patronage</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Patrons of schools seeking transfer of patronage, Boards of Management of such schools Regional Development Officers G&P Programme CEO Board of Directors	Schools seeking transfer of patronage	CEO Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*In the event of a informal contact from a patron of a school seeking transfer, the CEO will instruct a suitable qualified National Office Officer to hold informal discussions with the relevant officer of the patron and, through him or her, the Chairperson and Principal of the school as appropriate. The National Officer may also consult with the DES to ascertain the Department's support or otherwise for the transfer.*

*If the National Office Officer is satisfied that there is substantial interest in the transfer, a meeting of the school community will be requested at which an officer of Educate Together will a) explain clearly what such a change will entail and b) ascertain the level of support from parents and staff for the transfer.*

*If further meetings with patron, Board of Management, staff and parents confirm support for the transfer, the appointed National Office Officer will invite the patron to formally apply to the Board of Directors of Educate Together for such a transfer.*

*The Board of Directors will consider a report from the CEO on this matter and may decide to reject the proposal, agree to progress the application or to defer consideration until further information is available.*

*In the event of a decision to proceed, the CEO will undertake a process of due diligence on behalf of the Board and Members of Educate Together.*

*The information requested must include documentation providing evidence of the following:*

- 1. Patron's approval of the appointment of all staff employed in the school*
- 2. Patron's appointment of independent assessors to Selection Boards for such appointments*
- 3. Patron's appointment of nominees and Chairperson of the current Board of Management*
- 4. Patron's oversight of the procedures for establishing the Board of Management and its composition*
- 5. Patron's appointment of the Board of Management, undertakings signed by members of the Board and its notification of same to the Department of Education and Skills*
- 6. Patron's approval of the Enrolment Policy of the school*
- 7. Minutes of any dealings the patron has had with the Board of Management of the school during the past year*
- 8. Minutes of the meetings including financial reports of the Board of Management of the school during the past year*
- 9. Accounts of the Board of Management for the previous year and the most recent financial report for the Board*

10. *Any current contracts, leases or other legally binding agreements entered into by the patron in relation to the school*
11. *All policies approved by the Board of Management of the school, especially the following:*
12. *Enrolment Policy*
13. *Ethical Education Curriculum ('Religious Education Core Curriculum', 'Core Curriculum') Policy*
14. *Child Protection Policy*
15. *Confirmation that there are formal contracts in place for all staff of the school (teaching and non-teaching)*
16. *The list of seniority of teaching staff and SNA staff*
17. *Confirmation that all posts of responsibility have been made according to the regulations and information concerning any appeals*
18. *Summary details of any Section 29 Appeals against decisions of the Board of Management*
19. *Details of any legal or administrative challenge to decisions of the Board of Management of the school in the past 5 years*

*In addition, the CEO will provide a report on the viability of the school and its enrolment, the standards of education delivered, the quality of management, staff, parent and child relationships, any outstanding issues of accommodation or resources, the general atmosphere of the school and the attitude of the DES and other education partners to the transfer.*

*The Board of Directors will then decide whether to proceed with the transfer, reject the transfer or defer the transfer pending further information.*

## Applying for permanent recognition

When a primary school is newly opened, it is granted temporary recognition by the DES. This gives it the right to, inter alia, funding from the DES, to employ staff (on receipt of a Roll Number) and call itself a National School. National Schools are granted permanent recognition when there is evidence that the school will be viable in the long term. The number of children enrolled in the school and predicted future enrolments are the essential criteria in this regard but quality of leadership and governance, school policies, and accommodation, are also important factors in the granting of permanent recognition. When a school is granted permanent recognition it can avail of more grants, like the Summer Works Scheme, from the department and if it is in temporary accommodation it can be placed on the building list for a new school building.

<b>Policy P018 - Permanent recognition</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Boards of Management of schools seeking Permanent Recognition Regional Development Officers G&P Programme CEO	Schools seeking Permanent Recognition	CEO Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*Permanent recognition is usually applied for once a school is open for three years, has had 17 or more junior infants enrolled each year and the school is operating in accordance with the Rules for National Schools.*

*When a school is eligible to apply for permanent recognition they should inform the patron that they are applying and write to the Schools Capital Appraisal section of the Department of Education and Skills in Tullamore.*

*The Schools Capital Appraisals section will look for confirmation that the school had a minimum initial enrolment of 17 junior infants and an enrolment of at least 51 pupils for the third year in operation.*

*Other information which will be requested from the school could include:*

- *Current enrolment and confirmation that all intake pupils at junior level are at least four years of age on the 30th September of the year enrolling*
- *Enrolment policy of the school particularly for children with special needs*
- *Evidence that the school is following the primary school curriculum*
- *Confirmation that the school is complying with the rules and regulation for National Schools and the provisions of the Education Act, 1998*
- *Confirmation that the school operates under a Board of Management that has been appointed in accordance with the requirements of the Department of Education and Skills*
- *Confirmation/evidence that the school employ recognised primary school teachers*
- *The school's use of existing accommodation*
- *Any other matters deemed relevant from visits to the school and/or consultation with the school management.*

## Patron approval for generating a new stream in a school

Many of our schools have an increasing demand for places and may need to generate a new stream to meet this demand. Where a school is expanding the number of intake classes which would generate a new stream, the school must have received prior approval for such expansion from both the school patron and from the Planning and Building Unit of the Department of Education and Skills.

<b>Policy P019 - Generating a new stream</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Boards of Management of schools seeking to generate a new stream Regional Development Officers G&P Programme CEO	Schools who wish to generate a new stream	CEO Board of Directors
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*As a school grows and there is an increasing demand for places, it may need to increase the number of streams. Along with seeking approval from the Department of Education and Skills to be granted permission to generate a new stream, the Board of Management should submit a report to the patron outlining;*

- *History and growth of the school*  
*A brief history of the school including when it opened, how it has grown, enrolment figures and pre-enrolments for the upcoming years*
- *Accommodation plans*  
*What plans have been made for the accommodation of the extra class(es) and evidence of planning permission sought if applicable*
- *DES approval for number of streams in the school*  
*The number of streams approved at opening and subsequently*
- *Confirmation from Planning and Building Unit of the Department*  
*Confirmation that prior approval has been obtained from the Planning and Building Unit of the Department of Education and Skills*

*The CEO will then decide whether to approve, reject or defer the generation of a new stream pending further information and so inform the Board of Management of the school.*

## Annual reporting of child protection and anti-bullying procedures

Patrons of schools are responsible for the establishment and oversight of schools under their patronage in accordance with the Education Act 1998 (as amended). They also have a specific oversight role under the 2011 Child Protection Procedures for Primary and Post-Primary Schools (**the DES 2011 Child Protection Procedures**) and 2013 Anti-bullying Procedures for Primary and Post-Primary Schools (**the DES 2013 Anti-bullying Procedures**)

<b>Policy P019 - Annual reporting of child protection and anti-bullying procedures</b>		
<b>Applies to</b>	<b>Effects</b>	<b>Authority</b>
Boards of Management of schools with Educate Together patronage G&P Programme Patronage Sub-committee of Boards of Directors CEO	Educate Together Boards of Management	CEO
Review By:	Board of Directors	Annually
Approved/Last Review:	October 2015	

*Each September the National Office will write to Boards of Management of schools with Educate Together patronage requesting assurances that the annual review for child protection and anti-bullying checklists are completed and a copy has been submitted to the National Office within the first three months of the school year. For schools who are in their first year of operation a copy of their ratified policies will be requested.*

*These copies of the annual review checklist or ratified policies will be stored electronically in the school's file and the National Office will maintain a register of such assurances.*

*If child protection training needs are identified from the returned checklists, schools will be advised of available online Moodle training or training available to schools from the PDST.*

*The CEO will present a report in January of each year to the Patronage sub-committee of the Board of Directors listing the Boards of Management who have complied with this requirement.*

*In the event of a Board of Management failing to provide such evidence of compliance, the Patronage sub-committee will write formally to the Board of Management of the school concerned seeking compliance within a specified period. If they fail to comply within that period, the sub-committee will consider the appropriate action, which could include advising that Section 16 and/or Section 19 of the Education Act 1998 should be invoked.*

*If either, a patron body that is a member of the Company and who has signed up to the Educate Together Charter and/or an Educate Together Board of Management which does not have Educate Together as its patron, have not ensured that they and/or their school(s) are compliant with the DES 2011 Child Protection Procedures, they are not operating in a manner that is compatible with Educate Together's Charter or membership of the Company. Such a situation will be reported to the Board of Directors and may be dealt with according to the company's Bylaws.*

G&P - Governance and Patronage  
DES - Department of Education and Skills  
PDST- Professional Development Service for Teachers

## Conclusion

The role of patron is a very serious role which offers schools great support and protection at a time of increasing legal and other liabilities.

Educate Together is committed to continuous improvement in the policies and procedures whereby it carries out its role as patron of schools. Such policies and procedures are also subject to the democratic oversight of general meetings of its members<sup>1</sup>. As a result, this manual is an evolving document. It is Educate Together's intention to continue to develop and refine its procedures in order to ensure that patronage functions are carried out with efficiency, transparency and fairness. Suggestions and recommendations from our members and partners are welcome.

Educate Together is also conscious that its patronage function must be carried out in partnership with the Boards of Management of schools that operate with its direct patronage.

It also has a responsibility to provide guidance to those schools with independent patronage that are members of Educate Together. It is hoped that this manual will be of use to all our member schools and is also being placed in the public domain as a contribution to the evolution of the role of patron in the Irish education system.

Educate Together is committed to updating the manual as often as required.

## Approval and Status

This manual was approved for publication by the Board of Directors of Educate Together at its meeting in October 2015.

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<sup>1</sup> Please note that decisions at AGMs and EGMs that alter Educate Together's policies as patron can only be voted on by the representatives of Boards of Management of schools operating with Educate Together's patronage.

## Section C: Appendices



Educate  
Together

### Patron Nominee Application Form

<i>School Name</i>	<i>For new applicants who wish to be considered</i>
Name:	
Phone:	
E-Mail:	
Postal Address:	
How did you hear about this volunteering opportunity?	
Why are you interested in being appointed a Patron Nominee? What are your motivations for this role?	
Can you tell us how your experience & skills would make you suitable for this role  (Please see role description for reference. You can also attach a CV if you would like.)	
Do you have an understanding or a willingness to learn about the Educate Together ethos?	
Briefly describe how you operate in a professional setting, particularly with regards to time-keeping, decision making and dealing with interpersonal conflict.	
Is there anything else you would like to add	
<b>Referee 1</b> Name: Position: Phone number: E-Mail:	<b>Referee 2</b> Name: Position: Phone number: E-Mail:

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_



# Patron Nominee Re-Appointment Form



*For existing Patron Nominees who wish to be considered for re-appointment to the Board of Management for another term.*

**Patron Nominee Nomination Form** Please write School Name

Nominee 1	Nominee 2
Name:	Name:
Phone:	Phone:
E-Mail:	E-Mail:
How do you know this person?	How do you know this person?
When was this nominee appointed to your Board?	When was this nominee appointed to your Board?
Have you discussed this nomination with the nominee? What are their feelings on it?	Have you discussed this nomination with the nominee? What are their feelings on it?
What merits / experience / expertise do you think the nominee would bring to your school's Board of Management?	What merits / experience / expertise do you think the nominee would bring to your school's Board of Management?
Is there anything else you would like to add?	Is there anything else you would like to add?
Signed (by the person nominating)  _____	Signed (by the person nominating)  _____
Role in the School: Contact email address: Contact number: Date:	Role in the School: Contact email address: Contact number: Date:

## Acceptance of Membership

School: .....Educate Together National School

Roll No. ....

I declare that I accept membership of the Board of Management of the above-named school for its current term of office, and undertake, with the other members of the Board, to manage the school in accordance with the Regulations of the Department of Education and Science, and in keeping with Educate Together’s ethos as reflected in the Educate Together Charter and the Learn Together Curriculum. I undertake to keep confidential those matters which are deemed to be confidential, and I understand it is my responsibility to represent the decisions taken by the Board while I am a member.

Member’s signature

Date

.....	.....
.....	.....
.....	.....
.....	.....
.....	.....
.....	.....
.....	.....
.....	.....
.....	.....

On completion, this form should be kept as part of the Minutes of the Board of Management, and a copy returned to Educate Together, National Office

## Approval of Teacher Appointments

School: .....

Roll Number: ..... Position: .....

Name of candidate proposed for appointment:.....

As Chairperson of the Board of Management of the above school, I confirm as follows:

1. All Rules and Procedures as set out in the document “Governance Manual for Primary Schools”, Appendix D, have been properly followed.
2. All requirements in relation to the Educate Together Redeployment Panel have been met, and approval has been given by the Department of Education and Science to advertise the above post.
3. To the best of my knowledge and belief, there were no undeclared interests among any of the members of the Selection Board.
4. To the best of my knowledge and belief, there were no conflicting interests between any member of the Selection Board and any candidate for the position.
5. All documentation in relation to the selection process is in order, will be stored confidentially, and will be available for inspection if required by law for a minimum of one year.
6. The Selection Board has conscientiously checked the references of the successful candidate and satisfied itself that the candidate is a fit person to be appointed. (When Garda vetting is available, this will include, but not be restricted to, such vetting).
7. Each individual member of the Selection Board has formally undertaken to keep the business of the Board confidential at all times, unless required to do otherwise by a legal process.
8. The Members of the Selection Board, as individuals and as a Board, have performed their required duties properly, in keeping with the Rules and Procedures set out in the document “Boards of Management of National Schools, Constitution of Boards and Rules of Procedure”, Appendix D
9. The Board of Management has formally approved the appointment of the above named teacher to the above position, and this decision has been minuted by the Board of Management at its meeting.

Date of Board meeting:.....

Signed: .....

Date: .....

Chairperson, Board of Management

Please add Name IN CAPS .....

Appendix E

## Approval of Special Needs Assistant Appointments

School: .....

Roll Number: ..... Position: .....

Name of candidate proposed for appointment:.....

As Chairperson of the Board of Management of the above school, I confirm as follows:

1. All Rules and Procedures as set out in the document “Appendix E, Governance Manual for Primary Schools”, have been properly followed.
2. The allocation of the post has been approved by the National Council for Special Education (NCSE).
3. To the best of my knowledge and belief, there were no undeclared interests among any of the members of the Selection Board.
4. To the best of my knowledge and belief, there were no conflicting interests between any member of the Selection Board and any candidate for the position.
5. All documentation in relation to the selection process is in order, will be stored confidentially, and will be available for inspection if required by law for a minimum of one year.
6. The Selection Board has conscientiously checked the references of the successful candidate and satisfied itself that the candidate is a fit person to be appointed. As per DES Circular 94/2006 an application will be made for Garda Vetting. If the vetting process cannot be completed before the commencement of the post the candidate will be made aware in writing that the post can only be offered on a provisional basis.
7. Each individual member of the Selection Board has formally undertaken to keep the business of the Board confidential at all times, unless required to do otherwise by a legal process.
8. The Members of the Selection Board, as individuals and as a Board, have performed their required duties properly, in keeping with the Rules and Procedures set out in the document “Circular SNA 03/03- Appointment Procedures for Special Needs Assistants (Updated August 2007)”
9. The Board of Management has formally approved the appointment of the above named Special Needs Assistant to the above position, and this decision has been minuted by the Board of Management at its meeting on:

..... (insert date of Board Meeting)

Signed: .....

Date: .....

Chairperson, Board of Management

Please add Name IN CAPS .....

## Application for approval of any debts incurred by board

Debts incurred by a board of management (including overdrafts) must be approved by the patron, in advance.<sup>2</sup>

### Report to the CEO

\_\_\_\_\_ Educate Together National School

Type of debt and Amount proposed: (e.g. Overdraft of €5,000)
Purpose of the proposed debt: (e.g. to pay day-to-day school running costs until the capitation grant comes through)
Reason for the debt: (e.g. delay in payment of a grant which has been promised)
Length that debt will be required:
Signature of Chairperson on behalf of the Board of Management
Comments from Governance & Patronage Programme Manager
Decision and signature of the CEO

<sup>2</sup> Educate Together Patronage Manual, 2015, pg. 18 states: *“It is not recommended that Boards of Management of National Schools incur debts. However, in the rare occasion where such steps are necessary, the Board must apply to the patron in writing. Such a request will be reviewed by the CEO, who will either approve or disallow the request. In the event of requests for debts in excess of €20,000 such a decision must be approved by the Board of Directors of Educate Together.”*

## Checklist for Annual Review of the Child Protection Policy

The Board of Management must undertake an annual review of its child protection policy and the following checklist shall be used for this purpose.

The checklist is designed as an aid to conducting this review and is not intended as an exhaustive list. Individual Boards of Management may wish to include other items in the checklist that are of particular relevance to the school in question.

As part of the overall review process, Boards of Management should also assess other school policies, practices and activities vis a vis their adherence to the principles of best practice in child protection and welfare as set out in the school's child protection policy.

	Yes/No
Has the Board formally adopted a child protection policy in accordance with the 'Child Protection Procedures for Primary and Post Primary Schools'?	
As part of the school's child protection policy, has the Board formally adopted, without modification, the 'Child Protection Procedures for Primary and Post Primary Schools'?	
Are there both a DLP and a Deputy DLP currently appointed?	
Are the relevant contact details (HSE and An Garda Síochána) to hand?	
Has the DLP attended available child protection training?	
Has the Deputy DLP attended available child protection training?	
Have any members of the Board attended child protection training?	
Has the school's child protection policy identified other school policies, practices and activities that are regarded as having particular child protection relevance?	
Has the Board ensured that the Department's "Child Protection Procedures for Primary and Post Primary Schools" are available to all school personnel?	
Has the Board arrangements in place to communicate the school's child protection policy to new school personnel?	
Is the Board satisfied that all school personnel have been made aware of their responsibilities under the 'Child Protection Procedures for Primary and Post Primary Schools'?	
Since the Board's last annual review, was the Board informed of any child protection reports made to the HSE/An Garda Síochána by the DLP?	
Since the Board's last annual review, was the Board informed of any cases where the DLP sought advice from the HSE and as a result of this advice, no report to the HSE was made?	
Is the Board satisfied that the child protection procedures in relation to the making of reports to the HSE/ An Garda Síochána were appropriately followed?	
Were child protection matters reported to the Board appropriately recorded in the Board minutes?	
Is the Board satisfied that all records relating to child protection are appropriately filed and stored securely?	
Has the Board ensured that the Parents' Association (if any), has been provided with the school's child protection policy?	

	Yes/No
Has the Board ensured that the school's child protection policy is available to parents on request?	
Has the Board ensured that the Stay Safe programme is implemented in full in the school? (applies to primary schools)	
Has the Board ensured that the SPHE curriculum is implemented in full in the school?	
Is the Board satisfied that the Department's requirements for Garda Vetting have been met in respect of all school personnel (employees and volunteers)? *	
Is the Board satisfied that the Department's requirements in relation to the provision of a child protection related statutory declaration and associated form of undertaking have been met in respect of persons appointed to teaching and non-teaching positions?*	
Is the Board satisfied that, from a child protection perspective, thorough recruitment and selection procedures are applied by the school in relation to all school personnel (employees and volunteers)?*	
Is the Board satisfied that the 'Child Protection Procedures for Primary and Post Primary Schools' are being fully and adequately implemented by the school?	
Has the Board identified any aspects of the school's child protection policy and/or its implementation that require further improvement?	
Has the Board put in place an action plan containing appropriate timelines to address those aspects of the school's child protection policy and/or its implementation that have been identified as requiring further improvement ?	
Has the Board ensured that any areas for improvement that that were identified in any previous review of the school's child protection policy have been adequately addressed?	

Signed \_\_\_\_\_  
Chairperson, Board of Management

Date \_\_\_\_\_

Signed \_\_\_\_\_  
Principal

Date \_\_\_\_\_

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Notification regarding the Board of Management's annual review of the child protection policy

To: \_\_\_\_\_

The Board of Management of \_\_\_\_\_ wishes to inform you that:

- The Board of Management's annual review of the school's child protection policy was completed at the Board meeting of \_\_\_\_\_ [date].
- This review was conducted in accordance with the checklist set out in Appendix 2 of the Department's 'Child Protection Procedures for Primary and Post Primary Schools'

Signed \_\_\_\_\_  
Chairperson, Board of Management

Date \_\_\_\_\_

Signed \_\_\_\_\_  
Principal

Date \_\_\_\_\_



## Checklist for Annual Review of the Anti-bullying Policy and its implementation

The Board of Management (the Board) must undertake an annual review of the school's anti-bullying policy and its implementation. The following checklist must be used for this purpose. The checklist is an aid to conducting this review and is not intended as an exhaustive list. In order to complete the checklist, an examination and review involving both quantitative and qualitative analysis, as appropriate across the various elements of the implementation of the school's anti-bullying policy will be required.

	Yes/No
Has the Board formally adopted an anti-bullying policy that fully complies with the requirements of the Anti-Bullying Procedures for Primary and Post-Primary Schools?	
Has the Board published the policy on the school website and provided a copy to the parents' association?	
Has the Board ensured that the policy has been made available to school staff (including new staff)?	
Is the Board satisfied that school staff are sufficiently familiar with the policy and procedures to enable them to effectively and consistently apply the policy and procedures in their day to day work?	
Has the Board ensured that the policy has been adequately communicated to all pupils?	
Has the policy documented the prevention and education strategies that the school applies?	
Have all of the prevention and education strategies been implemented?	
Has the effectiveness of the prevention and education strategies that have been implemented been examined?	
Is the Board satisfied that all teachers are recording and dealing with incidents in accordance with the policy?	
Has the Board received and minuted the periodic summary reports of the Principal?	
Has the Board discussed how well the school is handling all reports of bullying including those addressed at an early stage and not therefore included in the Principal's periodic report to the Board?	
Has the Board received any complaints from parents regarding the school's handling of bullying incidents?	
Have any parents withdrawn their child from the school citing dissatisfaction with the school's handling of a bullying situation?	
Have any Ombudsman for Children investigations into the school's handling of a bullying case been initiated or completed?	
Has the data available from cases reported to the Principal (by the bullying recording template) been analysed to identify any issues, trends or patterns in bullying behaviour?	
Has the Board identified any aspects of the school's policy and/or its implementation that require further improvement?	
Has the Board put in place an action plan to address any areas for improvement?	

Signed \_\_\_\_\_  
Chairperson, Board of Management

Date \_\_\_\_\_

Signed \_\_\_\_\_  
Principal

Date \_\_\_\_\_

Notification regarding the Board of Management's annual review of the anti-bullying policy

To: \_\_\_\_\_

The Board of Management of \_\_\_\_\_ wishes to inform you that:

- The Board of Management's annual review of the school's anti-bullying policy and its implementation was completed at the Board meeting of \_\_\_\_\_ [date].
- This review was conducted in accordance with the checklist set out in Appendix 4 of the Department's Anti-Bullying Procedures for Primary and Post-Primary Schools.

Signed \_\_\_\_\_

Date \_\_\_\_\_

Chairperson, Board of Management

Signed \_\_\_\_\_

Date \_\_\_\_\_

Principal

## **Glossary:**

CEO - Chief Executive Officer

DES - Department of Education and Skills

ET - Educate Together

FCFS - First Come First Served

GP - Governance and Patronage

RDO - Regional Development Officer

SNA - Special Needs Assistance

## **Data retained by Educate Together in relation to Patronage**

Archived lists and records in relation to schools operating with Educate Together's patronage are maintained in the National Office. They include:

Names, contact details, dates of appointment and correspondence in relation to the appointment of patron nominees to Boards of Management

Names, contact details, dates of appointment and correspondence in relation to the appointment of members of Boards of Management. This archive includes formal undertakings by Board members

Names, contact details, dates of appointment and correspondence in relation to the appointment of Chairpersons of Boards of Management

Names, dates, school and formal undertakings by Boards of Management in relation to all staff appointments approved by the patron, including appointment of independent assessors to selection boards

Copies of enrolment policies approved

Copies of reports of Boards of Management concerning their upholding of the ethos of Educate Together and the running of their schools

Copies of leases and other undertakings concerning school accommodation

Copies of annual review checklists for child protection and anti-bullying

Copies of correspondence with the Board of Management, Minister and Department of Education and Science concerning the recognition, establishment and operation of the school and any further matters that require the approval of the patron.