

# **Integrated Education Fund**

## **Company Limited by Guarantee**

### **Trustees' Annual Report (Incorporating the Directors' Report)**

**Year ended 31 March 2024**

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#### **Reference and administrative details**

##### **DIRECTORS**

Peter Osborne *Chair*  
Ken Cathcart

Grainne Clarke *(Retired 17 April 2024)*  
David Cooke *(Retired 16 August 2023)*  
Sorcha Diver *Treasurer from 13 December 2023*  
Barbara McAtamney *Deputy Chair until 16 August 2023*  
Michael McKernan  
Brandon McMaster *Treasurer until 13 December 2023*  
Ellen McVea  
Jane Morrice  
Patricia Murtagh *Deputy Chair from 16 August 2023*  
Kathleen O'Hare OBE *(Retired 9 July 2024)*  
Mary Roulston MBE *Deputy Chair until 16 August 2023*  
June Wilkinson *Deputy Chair from 16 August 2023*

##### **AUDITORS**

GMcG Belfast  
Chartered Accountants and Statutory Auditor  
Alfred House  
19 Alfred Street  
Belfast BT2 8EQ

##### **BANKERS**

Bank of Ireland  
28 University Road  
Belfast BT7 1NH

Danske Bank  
Business Plus  
PO Box 183  
Donegall Square West  
Belfast BT1 6JS

**CHARITY REGISTRATION NIC104886**

**COMPANIES HOUSE NI636289**

**HMRC Reference NI00545**

NI Central Investment Fund for Charities  
Level 5, Causeway Exchange  
1-7 Bedford Street  
Belfast BT2 7EG

##### **SENIOR MANAGEMENT STAFF**

Tina Merron (Chief Executive)  
Jill Caskey (Parental Engagement Manager)  
Sean Pettis (Acting Parental Engagement Manager)  
Paul Caskey OBE (Head of Campaign)  
Paul Collins (Head of Public Affairs and Advocacy)  
Gavin McGrattan (Finance Manager)  
Janine Turner (Head of Operations)

Progressive Building Society  
Progressive House  
33-37 Wellington Place  
Belfast BT1 6HH

Ulster Bank  
Business Direct  
1<sup>st</sup> Floor, Donegall Square East  
Belfast BT1 5UB

##### **CONTACT DETAILS**

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##### **SOLICITORS**

Cleaver Fulton & Rankin  
50 Bedford Street  
Belfast BT2 7FW

##### **IEF REGISTERED OFFICE**

Integrated Education Fund  
Forestview, Purdy's Lane  
Belfast BT8 7AR

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# **Integrated Education Fund**

## **Company Limited by Guarantee**

### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

#### **Year ended 31 March 2024**

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This report addresses the following matters:

1. Operating context for the year
  2. Structure, governance and management
    - 2.1 Mandate
    - 2.2 Governing document
    - 2.3 Board of Directors
    - 2.4 Director induction and training
    - 2.5 Organisation and committees
    - 2.6 Pay policy for senior staff
    - 2.7 Risk management
  3. Objectives and activities
    - 3.1 Purposes of the charity
    - 3.2 Strategic vision
  4. Achievements and performance
    - 4.1 Empowering Parents - Parental Engagement
    - 4.2 Empowering Schools - Effective Funding Programmes
    - 4.3 Effecting Policy Change – Engaging at a political, educational and individual level
    - 4.4 Major Gift Fundraising – Supporting the growth & development of Integrated Education
  5. Financial review
    - 5.1 Principal funding sources
    - 5.2 Investment powers and policy
    - 5.3 Reserves policy
    - 5.4 Grant making powers and policy
    - 5.5 New financial software system
    - 5.6 Other significant events that have affected financial performance
  6. Plans for future periods
  7. Trustees' responsibilities statement
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# Integrated Education Fund

## Company Limited by Guarantee

### Trustees' Annual Report (Incorporating the Directors' Report) *(continued)*

**Year ended 31 March 2024**

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#### 1. OPERATING CONTEXT FOR THE YEAR

The year 2023/24 saw some very significant developments for Integrated Education in Northern Ireland.

From April 2023 until the end of January 2024, Northern Ireland functioned without a devolved administration or sitting Assembly following the collapse of the Executive in February 2022. This would mean there would be no Minister of Education in place for the majority of the period of this report. The absence of a Minister would present several challenges during the year with responsibilities passing to the Permanent Secretary for the Department of Education, Dr Mark Browne. This would include responsibility for the implementation of the new Integrated Education Act (Northern Ireland) 2022 which placed a further statutory duty on the Department of Education (DE) to "support" as well as "encourage and facilitate" Integrated Education. The new legislation should have presented a tremendous opportunity to see increased government support for the growth and development of Integrated Education; instead, the Integrated Education Fund (IEF) grew increasingly concerned that the DE would stall on full implementation of the requirements of the Act. This is because the DE's proposed strategy and action plan resulting from the Act seemed to indicate a reluctance not only to set meaningful targets and benchmarks for the growth of Integrated Education but also to present a clear way forward as to how demand for Integrated Education would be measured. Moreover, the suggestion that DE would set an implementation budget as low as £50,000, caused the IEF some concern about the likelihood of the Department being able to meet its legal obligations under the Act in full.

The absence of a functioning devolved government also delayed the planned publication of the final report from the Independent Review of Education chaired by Keir Bloomer. This report was finally published in December 2023. There were several recommendations in the report which the IEF found encouraging, not least its support for the expansion of the number of Integrated schools. The Independent Review also proposed a reconfiguration of the network of schools to potentially create 177 new or reconfigured jointly managed community schools and sixth forms with expanded numbers of learners from different communities attending the same school and learning together. Whilst it was not clear whether such schools would resemble the current Integrated model, the IEF viewed such an approach worthy of further exploration. The IEF also agreed with the Review's recommendation that a new approach to the area planning process was necessary and that an independent Area Planning Commission should carry out a review of the existing network of schools in Northern Ireland. The IEF concurred with the recommendation that proposed changes to the network of schools should be made on a 'sector-blind' basis, prioritising the needs of learners and efficiency of delivery. Unfortunately, the DE has yet to make an official response to the findings of the Review despite their publication several months previously.

In addition to the Independent Review of Education, the Northern Ireland Affairs Committee at Westminster launched an Inquiry into Integrated Education in December 2023. This Inquiry was the result of work by the Integrated AlumNI in requesting that such an Inquiry take place. The IEF presented both oral and written evidence to the Committee, alongside our colleagues in the Northern Ireland Council for Integrated Education (NICIE) and the AlumNI, as well as several bodies representing various education stakeholders. However, due to the announcement of a UK General Election in July 2024, the Inquiry did not produce a detailed final report, rather it issued its findings in the form of two letters in May 2024, one to the Secretary of State for Northern Ireland and one to the Education Minister. In those letters the Chair of the Committee simply summarised some of the key issues raised through the Inquiry.

In February, ten Integrated schools and one shared education campus, received the devastating news that their planned capital rebuilds, to be funded under the Fresh Start Agreement, would no longer be progressing as planned. Instead, the impacted schools were informed that they would now have to compete with some 50 other schools in the lengthy DE Capital List which is already underfunded. This development was a result of the reallocation of £150 million of previously ring-fenced Fresh Start funding being given to the Northern Ireland Executive as part of a deal put forward by the UK Government to restore devolution. This news was a huge setback to all the schools involved, some of which had been planning for their new school for up to eight years. That said, the IEF does appreciate that many

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### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

#### **Year ended 31 March 2024**

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Integrated schools have benefited significantly from the funding which had been made available under the Fresh Start Agreement, with a number of new school builds at construction stage or already completed and those schools who had reached 'contract' stage by February 2024 will still progress.

Despite these many challenges and the ongoing political impasse for much of 2023/24, the IEF continued to implement its three-year strategy (*Strategic Vision 2022-2025: Towards 100 Integrated Schools*). Central to this strategy is developing the work to empower parents, local communities and schools who want Integrated Education and to inform them as to how they can become involved in making such positive change a reality. The IEF also continued to challenge the segregated nature of our education system through evidence-based research, as well as support schools to deliver integration in both policy and practice.

Momentum has continued to build. In September 2023, one primary school was approved by the DE to transform to Integrated status. However, three schools' proposals were not approved which was so disappointing to all the families and schools concerned. In the last twelve months, eight schools have completed ballots of their parent body, asking them whether they want their school to submit a proposal to become an Integrated school. A few of these schools are in small rural communities, looking to see if Integrated status could bring a more sustainable future - for some it might be too late but many of the schools that have chosen to move forward with Transformation are strong sustainable schools and, in some cases, schools that are already oversubscribed. The IEF, through its grant programmes, continues to support all the schools on their Transformation journeys as well as provide support for growth opportunities in existing Integrated schools too. Support has not stopped there - a number of additional grant programmes, funded by donors, are assisting Integrated schools in their development.

Alongside growth of Integrated Education because of school Transformations, this year has seen the approval of two new school projects: a new Post-Primary Grant Maintained Integrated School in the Mid Down area and a new Post-Primary Controlled Integrated School in the Causeway area. Each of the projects incorporates an existing Integrated school (Blackwater IC and North Coast IC respectively) and are intended to create two new sustainable Integrated Colleges. Three schools also received approval to establish Nursery school places, which is an important aspect of Primary school sustainability.

However, it was not just the increased activity and support at a school and local community level that gave the IEF optimism throughout the year but also the developments at a national government level too. 2023 marked the 25<sup>th</sup> Anniversary of the signing of the Good Friday (Belfast) Agreement and the IEF was involved in a number of significant events surrounding the Anniversary. On 06 April, we were honoured to be hosted by the Secretary of State for Northern Ireland Chris Heaton-Harris and Tánaiste Micheál Martin at W5 Belfast to celebrate the contribution of Integrated Education to the reconciliation process. The IEF also continued to be supported by the Northern Ireland Office with funding to support its work with Transformation, the Future Schools Project and research while, together with NICIE, the Fund continues to benefit from the support of the Irish Department of Foreign Affairs' Reconciliation Fund as a Strategic Partner.

The IEF and NICIE continued to work with more schools, parents and local communities than ever before.

The IEF appreciates that none of this success could have been achieved without the help of all our supporters and donors.

Thank you.

# **Integrated Education Fund**

## **Company Limited by Guarantee**

### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

**Year ended 31 March 2024**

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## **2. STRUCTURE, GOVERNANCE AND MANAGEMENT**

### **2.1 MANDATE**

The mandate of the IEF is derived from the expressed demand of parents and individual schools who seek Integrated Education for their children and pupils.

### **2.2 GOVERNING DOCUMENT**

The IEF was established in 1992 as a charitable trust to provide a financial foundation for the development and growth of Integrated Education in Northern Ireland. Until April 2016 it was governed by its Deed of Trust, dated 17 February 1992. In early 2016 the IEF completed the process of incorporation in order to give the Fund a stronger, more secure legal identity, and has been operating as a charitable company limited by guarantee since 01 April 2016. The IEF is registered with Companies House (NI636289) and the Charity Commission for Northern Ireland (NIC104886) and is recognised as a charity for tax purposes under HMRC reference NI00545.

### **2.3 BOARD OF DIRECTORS**

The Fund is managed by a Board of Directors (who are also the Trustees for the purposes of charity law) – the maximum number of Directors is 15. In 2023/24 one member retired from the Board (David Cooke), no new members joined and, at 31 March 2024, there were 13 Directors. One Director stepped down in April 2024 and another in July 2024 reducing the number to 11. Each Director may serve for three years after which period they may put themselves forward for re-appointment for a second or further term, however no member may serve longer than six years or, if so resolved by all the then Directors in accordance with the Memorandum and Articles of Association, nine years continuously.

The Board meets on an annual basis to agree the broad strategy and areas of work for the Fund, and meets regularly (at least 4 times per year) for the consideration of the Fund's activities including grant making; advocacy work; fundraising; parental engagement; investment; reserves; risk management and other policies and procedures; and performance.

The Board keeps the skills requirement for Directors under review and, in the event of a vacancy arising on the Board, the Board has an agreed policy and procedures for recruiting new members such as advertising (for example via the IEF website or by direct mailing to all Integrated schools), or personal referral. The ultimate decision on appointments is a matter for the Board.

The IEF works closely with the Northern Ireland Council for Integrated Education (NICIE) at all levels: the two Boards meet together every year, the two Chairs meet twice per year, and the Chief Executive Officers meet every month for updating and discussion of current issues.

### **2.4 DIRECTOR INDUCTION AND TRAINING**

The induction process for any newly-appointed Director comprises an initial meeting with the Chair and the Chief Executive, followed by a series of briefing meetings with key members of staff. The strategic vision, the Board and decision making processes, policies and procedures, and the financial structure and performance of the Fund are discussed in detail. Any training needs are also discussed.

# **Integrated Education Fund**

## **Company Limited by Guarantee**

### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

**Year ended 31 March 2024**

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#### **2.5 ORGANISATION AND COMMITTEES**

The Board of Directors administers the charity; the day-to-day operations of the IEF are managed by the Chief Executive (appointed by the Board) and the Chief Executive's staff. To facilitate effective operations the Board has delegated authority to the Chief Executive for operational matters including finance and human resources. In October 2023, Tina Merron, Chief Executive of the IEF since August 1998, advised the Board of her plans to retire in the summer of 2024. The Board decided to seek a company to provide professional assistance with the recruitment of a new Chief Executive with a view to having a successful candidate in post to work alongside the current CEO during her final month at the IEF. The invitation to tender was sent out to a number of recruitment agencies in January 2024 and the agency appointed then worked with a small group of five IEF Directors on the recruitment and selection of the new Chief Executive. The post was widely advertised and the successful candidate, Paul Caskey, the IEF's Head of Campaign, will take up his new role in July 2024.

As well as working with the Board and IEF staff, the Chief Executive works closely with a small number of Director-led committees to which the Board has also delegated specific powers:

- The Grants Committee has been delegated powers to consider in detail applications to the IEF for funding, and to make decisions about applications which meet specific criteria, or make recommendations to the full IEF Board. The Committee also develops new grant programmes, as funding becomes available, to ensure that the most critical needs of schools and groups are addressed, and that the programmes have maximum impact and deliver maximum value for money.
- The Public Affairs and Advocacy Group has been set up by the Board to drive forward the IEF's work to bring about structural and policy change in education. The group oversees public affairs and advocacy.
- The Staffing Committee has been delegated responsibility for ensuring compliance with the requirements of employment law and IEF policies and procedures with regard to staffing, and to make recommendations to the Board as appropriate. The day-to-day management of Human Resources is delegated to the Head of Operations.
- The Risk Management Committee, on behalf of the Board, identifies and assesses risks to the IEF, and regularly reviews the controls which are in place, to ensure they continue to meet the IEF's needs.
- The Parental Engagement Working Group has been tasked by the Board with overseeing the IEF's work to empower parents to grow more Integrated Education through the process of Transformation and work alongside NICIE to support any school in Northern Ireland embarking on the journey to Integrated Education.
- The Strategic Funding Oversight Group is a consultative forum providing strategic direction to ensure that Key Performance Indicators (KPIs) are being met effectively in relation to external funding received by the Integrated Education Fund from the Northern Ireland Office (NIO), Irish Department of Foreign Affairs (IDoFA) and the International Fund for Ireland (IFI). The group meets twice per year and all issues, proposals and recommendations are referred to the full IEF Board of Directors for discussion and decisions.

Each of these six committees has their own Terms of Reference (ToR) detailing their remit, schedule of meetings and membership. ToRs are reviewed every three years by the Board.

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# **Integrated Education Fund**

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### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

**Year ended 31 March 2024**

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#### **2.5 ORGANISATION AND COMMITTEES *(continued)***

Working groups meet as required, for example in relation to research work.

In addition to the Board of Directors and its committees and working groups, the IEF also has a Campaign Council, chaired by David Montgomery, to provide advice and guidance for its major gift fundraising campaign. The Campaign Council is serviced executively by the Fund's Chief Executive and Head of Campaign. The campaign is further supported by volunteers in London and Belfast.

#### **2.6 PAY POLICY FOR STAFF**

The IEF Board considers Directors and the Senior Management Team to be the key management personnel of the charity in charge of directing and controlling, running and operating the IEF on a day-to-day basis.

All Directors give of their time freely and no Director received remuneration in the year. Details of Director expenses are disclosed in Note 19 to the accounts.

In view of the nature of the charity and its economy of operations, the Directors benchmark staff salaries both against National Joint Council (NJC) pay scales and other charities of a similar size and activity, to ensure that the remuneration set is fair and not out of line with that generally paid for similar roles. NJC pay scales are local government pay scales extensively used in the voluntary and community sector. They result from negotiations between trade unions and Local Government Employers and any agreed increase in the rates of pay are reflected in IEF salaries. Staff also receive annual increments, subject to a satisfactory annual appraisal, until they reach the top of their particular pay band. Three new staff members joined the IEF during the year, and three existing staff members left, and the total number of staff at 31 March 2024 was 16 (15 full time equivalent).

#### **2.7 RISK MANAGEMENT**

The Board of Directors is responsible for the management of risks faced by the Integrated Education Fund. Detailed consideration of risk is delegated to the Risk Management Committee.

Risks are identified and assessed, and controls are established throughout the year. A formal review of the charity's risk management processes, including the risk register, is undertaken annually.

The key controls used by the IEF include:

- established organisational and governance structure and lines of reporting
- detailed terms of reference for all committees
- comprehensive financial planning, budgeting and management accounting
- formal written policies and hierarchical authorisation and approval levels
- regular review of current risks to the Fund

Through the risk management processes established by the Fund, Directors are satisfied that the major risks identified are being adequately managed. It is recognised that systems can provide reasonable but not absolute assurance that major risks have been adequately managed.

As part of ongoing risk management, and as important aspects of best practice, the IEF monitors and evaluates internal policies, procedures and controls, as well as key areas of the Fund's work.

In 2023, after a selective tendering process, Jackson Andrews Chartered Accountants were appointed to carry out the IEF audit for the financial year 2023/24 and for the following two years with the option

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# **Integrated Education Fund**

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### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

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#### **2.7 RISK MANAGEMENT *(continued)***

to extend for a further two years. The annual audit includes reporting to the IEF Board on, for example, any issues relating to the Audit, Financial Reporting and Internal Controls in order to meet the mandatory requirements of International Standards on Auditing (UK and Ireland). Later in 2023 Jackson Andrews Chartered Accountants was acquired by GMcG Chartered Accountants and GMcG Belfast are now the IEF's auditors.

### **3. OBJECTIVES AND ACTIVITIES**

#### **3.1 PURPOSES OF THE CHARITY**

The purposes of the IEF are the furtherance of Integrated Education in Northern Ireland whether directly or indirectly and by any lawful and charitable means.

The Directors confirm that they have referred to the guidance on public benefit provided by the Charity Commission for Northern Ireland (CCNI) when implementing the Fund's strategic plan, reviewing its objectives and planning future activities.

#### **3.2 STRATEGIC VISION**

The Integrated Education Fund (IEF) shares the vision held by an overwhelming majority of people in Northern Ireland that more integration and mixing between communities is essential to building a better and more reconciled society.

The IEF wants a society where, increasingly, children from different traditions learn and play together at the same schools, helping to build a more united community where there is respect and celebration, not fear, of religious and cultural diversity.

According to the latest Northern Ireland wide attitudinal poll in March 2023, 66% of people believe Integrated Education - where children from Protestant, Catholic, other faith backgrounds and none, are educated together and where the symbols, ethos and traditions of the entire community are valued and respected - should be the main model for our education system.

The IEF wants an education system which fully prepares its young people to contribute positively to a modern democracy and be successful citizens in an increasingly complex global society. An essential ingredient for this future is the development of more Integrated Education in a reformed education system – a system which ensures that all children and young people feel included and welcome in the school environment.

In order to achieve its aims, the IEF has a three year strategic vision (*Strategic Vision 2022-2025: Towards 100 Integrated Schools*) which contains four key focus areas: Empowering Communities to Access Integrated Education, Supporting the Growth of Integrated Education, Challenging our Segregated Education System and Supporting Integration in Action.

# **Integrated Education Fund**

## **Company Limited by Guarantee**

### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

**Year ended 31 March 2024**

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#### **4. ACHIEVEMENTS AND PERFORMANCE**

##### **4.1 EMPOWERING PARENTS - PARENTAL ENGAGEMENT**

The Parental Engagement Campaign continues to grow support for the legal process of Transformation, in which a non-integrated school becomes Integrated. In particular, the Integrate My School (IMS) website continues to enable parents across Northern Ireland to support Transformation specifically for their school. The success of the campaign is borne out in survey data. In 2011 around 15% (IPSOS Mori) of parents were aware of the process of Transformation, compared to 66% in 2023 (LucidTalk Survey 2023).

Since the start of the campaign in 2017, 26 schools have been supported to hold successful parental ballots regarding Transformation to Integrated status. The average "Yes" vote has been around 90% with an average turnout of 71%. At the time of writing, we are aware of a further two schools that will move to ballot in the 2024/25 financial year.

Following a parental ballot in favour of Transformation, a school submits a Development Proposal (DP) to the Education Authority and the Department of Education for consideration.

In September 2023 Sion Mills Primary School was approved for Transformation by the Department of Education and opened as an Integrated school in January 2024. Proposals from three other primary schools - St Anne's (Donaghadee), Straid and Gillygooley - were all not approved by the Department of Education, with the issue of sustainability being the main reason given; this was also the case in April 2024 for St Eugene's Primary School (Tircur). However, we were pleased that Lurgan Model Primary School was approved by the Minister in mid-April 2024 and will open as an Integrated school in September 2024.

The following schools have submitted a Development Proposal (DP) for Transformation, and the Minister of Education will make a decision in relation to these:

##### **Submitted in 2022/23**

- St Eugene's Primary School, Victoria Bridge
- Magherafelt Nursery School
- Cairnshill Primary School, Belfast

##### **Submitted in 2023/24**

- Bangor Academy and 6<sup>th</sup> Form College
- Rathmore Primary School, Bangor
- Downshire Nursery School, Banbridge

There are also a number of other schools that held successful parental ballots in 2023/24 that will also move towards submitting a DP:

- Ballyhenry Primary School, Newtownabbey
- Culmore Primary School, Derry
- Downshire Primary School, Hillsborough
- Duneane Primary School, Toomebridge
- Killowen Primary School, Coleraine

These schools have availed of a range of support services from the IEF's Parental Engagement Team including parent information and community engagement sessions, with some also attending marketing and communications training.

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# Integrated Education Fund

## Company Limited by Guarantee

### Trustees' Annual Report (Incorporating the Directors' Report) *(continued)*

#### Year ended 31 March 2024

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##### 4.1.1 Community Outreach

Reaching out to communities to provide information continues to be a priority, using outreach stalls, events and conferences such as a conference on 'Diversity in Our Schools' (held as part of Good Relations Week 2023), events at the Féile an Phobail and the series of 'Tenx9' story telling events in Derry, Belfast and Omagh.

The IEF continues to work in partnership with Ulster University to deliver the Future Schools Project. The aim of this project is to include more school and community input in the Area Planning Process. The Primary School Toolkit that was created as part of this project has been disseminated to schools and communities to help them consider the sustainability of their school and to ensure that any potential pathways for working together with other schools are considered, including exploring an Integrated option. Ulster University is now working on a toolkit for Post-Primary Schools which will be launched in September 2024.

In 2023/24 we provided presentations to local councils, particularly in rural areas where small schools are vulnerable to closure. We have reached out to schools, community groups and elected representatives, informing them about the Future Schools approach. Ulster University will be leading a series of 'Community Conversations' in the next financial year which will further test the methodology, engage communities and provide rich data on the type of schooling communities want in their area.

Our collaboration with Ulster University and Educate Together, to gather the views of border communities on education, came to a conclusion in October 2023, with the launch of a final report, *People, Schools and Borders*. This project was funded through the IFI's Communities in Partnership Programme.

##### 4.1.2 Wider Promotion

The IEF has continued to hold outreach stands at a variety of events and festivals to promote the IMS campaign. There have been a number of articles featured in local and national newspapers highlighting the team's work and the positive parental ballots and transformations.

##### 4.1.3 Empowering Schools - Integration Works

The IEF, working alongside NICIE, continues to support schools that are exploring Transformation through our annual *Integration Works* events for school principals and staff, and for school governors, as well as Transformation Support Programme (TSP) events. The *Integration Works* project has been supported by the Irish Department of Foreign Affairs and Trade's Reconciliation Fund through their Strategic Partnership Grant (which is due to run until April 2025), and by the NIO. This collaborative project between the IEF and NICIE supports early engagement with schools in relation to Transformation, as well as development and leadership programmes for recently transformed schools - the two organisations continue to meet monthly to develop their joint strategy for engaging with schools.

##### 4.1.4 The Year in Numbers

- Through **Community and Parental Outreach**, we engaged with **1,878** people across **62** events.
  - Through **School Leadership** outreach and events, we engaged with **55** schools, providing information on Integrated Education.
  - We supported **8** schools to move to successful **Parental Ballot**.
  - We increased registrations on the IntegrateMySchool.com platform by **33%** on the previous school year.
  - Training and support sessions offered to schools received a rating of **100%** of participants either **satisfied** or **very satisfied**.
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# **Integrated Education Fund**

## **Company Limited by Guarantee**

### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

**Year ended 31 March 2024**

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#### **4.2 EMPOWERING SCHOOLS - EFFECTIVE FUNDING PROGRAMMES**

Grant making is aligned to the IEF's strategic vision for 2022-2025 and aims to empower schools to support the growth of Integrated Education towards 100 schools by 2025; at 31 March 2024 there were 71 Integrated schools. The IEF promotes and manages a number of grant streams, each with programmes which have their own criteria against which applications are assessed and grants made. There are four main grant streams:

- Integration Works: Transforming Schools Support Programme (Exploring Transformation; Building the Case for Transformation; and Newly Transformed Schools, post DE approval)
- Going for Growth: Existing Integrated Schools Support Programme (Impact of Growth Grants)
- Strengthening Integrated Education (Trust Programmes, the Carson Awards, Lincoln Awards, Integration Through Sport, Uniform Grants, Local Heritage Grants, Early Intervention/Additional Needs Support and the Integrated AlumNI)
- Restricted and Other Grants (Working with donors to administer restricted donations)

##### **4.2.1 Integration Works: Transforming Schools Support Programme**

The IEF has been working with a number of schools which are exploring the Transformation process. Each school will take whatever length of time is appropriate for their particular circumstances to consider what integration would mean for them. Once parents or governors of a school formally initiate Transformation, Civica Election Services conducts a confidential ballot of parents. If a simple majority of those who vote in the ballot is in favour of Transformation, and at least 50% of those eligible to vote have done so, the Board of Governors must submit a Development Proposal (DP) supported by a Case for Change to the Education Authority (EA). The school must provide pertinent background and robust and verifiable information relating to the DP to support their Case for Change and to enable those affected by the proposal to understand the educational and other merits of the proposed change.

In 2023/24, three grants were awarded to schools to enable the teachers, governors, parents and the wider school community to explore what Transformation could mean for their school, to prepare for, and carry out ballots of parents to determine if the work toward Transformation should continue. Nine grants were awarded to support schools that had previously successfully balloted their parents and who were continuing their Transformation journey. Two grants were awarded to schools that have recently transformed and are developing their Integrated ethos as well as publicising their new status. Currently, there are 6 DPs for Transformation awaiting a DE decision.

##### **4.2.2 Going for Growth: Existing Integrated Schools Support Programme**

The number of pupils at Integrated standalone nursery schools is 113 (two Nursery schools), with 12,195 primary and 15,367 post primary pupils from September 2023, totalling 27,675 across 71 schools. These figures have increased from 27,183 pupils across 70 schools in 2022 i.e. an additional 492 pupils.

There were five published Development Proposals for growth relating to existing Integrated schools which were awaiting a decision by DE as of 31 March 2023 and these included Spires, Omagh, Bridge and Cliftonville Integrated Primary Schools for new or additional nursery units, and an increase to admissions and enrolment numbers for Millennium Integrated Primary School (IPS). It should be noted that Millennium IPS's Development Proposal has since been approved (in April 2024), lowering the number of Integrated schools awaiting a DP for growth decision to four.

The Development Proposal for a new Integrated College in the Mid Down area, which would incorporate Blackwater Integrated College, was approved in October 2023 and an IEF grant continues to support the project.

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The Development Proposal for a schools' amalgamation involving North Coast Integrated College, Dunluce School and Coleraine College was approved in September 2023. An IEF grant is continuing to allow the three schools to work together and to help with growth and awareness raising.

Whilst growth in Integrated schools and school places is what the IEF and its donors and supporters continually work towards, achieving this growth also brings with it challenges. This year the IEF was pleased to be able to help a number of Integrated schools to deal with such challenges, including Mallusk, Omagh and Oakgrove Integrated Primary Schools and Naíscoil na Seolta. Naíscoil na Seolta is an Irish language playgroup in East Belfast that is currently working towards a DP to become an Integrated Nursery and Primary School taught through the Irish Medium. The IEF will contribute to the costs of the P1 teacher and classroom assistant salaries. The Impact of Growth Programme is generously funded by a number of funders including Hagan Homes and the NIO.

#### **4.2.3 Strengthening Integrated Education**

An Integrated ethos does not happen by simply having a mix of pupils. Schools need to continually consider ways to deliver integration in practice. They need to not only reflect on but also develop their practice to ensure all pupils, staff and governors feel welcome and their identity is celebrated, irrespective of their cultural or religious background. The IEF offers a number of funding streams to help strengthen ethos by supporting work in Integrated schools that celebrates diversity.

##### **The Trust Programme**

The Trust Programme supports Integrated schools wishing to further develop and embed the ethos and practice of integration within their own school. In some cases, Integrated schools located close to each other have worked together, with their parents and governors, to renew their integration. Round 8 of the programme, for projects within the 2023/24 academic year, has been generously supported by the Pears Foundation (£40,000) and Hagan Homes (£25,000). This has enabled the IEF to award grants totalling £76,727 to 20 projects. These projects, involving 24 schools, are due to be completed by June 2024. An additional five projects totalling £12,821 were also supported through Integration in Action funding.

##### **The Carson Awards**

Founded by legendary Northern Ireland comedian the late Frank Carson, and his son Tony, the Carson Awards reflect their long-standing support for Integrated Education in Northern Ireland as well as their commitment to celebrating the creative talents of young people. Now in their sixteenth year, the Awards offer pupils at Integrated schools the opportunity to develop and display their creative skills through bursaries and a prize competition by demonstrating 'What Integrated Education means to me'. The IEF was delighted to be able to award 17 Carson Bursaries in December 2023 totalling £13,282.

##### **Lincoln Awards**

The Lincoln Awards were founded by Geraldine Hughes and Conor Allen, who also provide generous sponsorship for the programme. The Awards are designed to support Integrated College students who have been accepted for a University or Higher Education place but who are experiencing financial hardship. Each award is for £1,000. This year the programme received additional contributions from the Irish American Partnership as well as several donations in memory of Baroness May Blood. In 2023/24, awards totalling £9,000 were allocated to former Integrated College students.

##### **Integration Through Sport**

The core purpose of the programme is to help introduce new sports to a school in order to provide opportunities for pupils to experience sports normally associated with just one cultural tradition in Northern Ireland. The sports considered eligible include Hockey, Hurling, Camogie, Cricket, GAA Football and Rugby. Consideration is also given to supporting schools which have recently started on the 'Integrated sports' journey and would benefit from further investment. This is the second year in

# **Integrated Education Fund**

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##### **4.2.3 Strengthening Integrated Education *(continued)***

which this programme has been funded by Hagan Homes. The programme supports coaching, apparel and equipment costs. Twenty schools benefited from grants awarded, totalling £34,787.

##### **School Uniforms**

This programme was designed to help support the needs of families who struggle financially to provide regulation uniform and PE kits for their children. Twenty-two schools received School Uniform grants totalling £12,400 with funding being provided by Hagan Homes.

##### **Early Intervention/Additional Needs Support**

This programme is generously supported by Hagan Homes and the primary aim was to make a positive difference for children within nursery/playgroups, Foundation stage and/or Key Stage 1. This programme was heavily oversubscribed. The IEF was able to support seventeen schools with grants totalling £97,184 with additional funding from other IEF donors to support this programme.

##### **Integration Through Local Heritage**

This programme, established and funded by former IEF Director, Roderick Downer, aims to encourage greater understanding and respect for diversity in children and young people, through exploring and experiencing their local heritage. Now in its second year, the programme is benefitting a further nine schools with grants totalling £13,100.

##### **4.2.4 Other Grants**

##### **Integrated AlumNI**

The Integrated Schools Alumni Association, known as the Integrated AlumNI, is now a charity in its own right, with a network of past pupils from Integrated and other schools, and active individuals in Northern Ireland as well as London, Edinburgh and Liverpool. The Integrated AlumNI is still in receipt of an IEF grant to support their development.

##### **4.2.5 Restricted Grants**

As well as providing financial support to schools and projects through its various grant making programmes, the IEF also administers restricted donations received for specific purposes.

The IEF is in receipt of funding from the Northern Ireland Office towards Transformation grants to schools for Exploration, Pre- and Post-Ballot activities, and Post Development Proposal grants, as well as the Future Schools Project and the Impact of Growth Programme.

#### **4.3 EFFECTING POLICY CHANGE: ENGAGING AT A POLITICAL, EDUCATIONAL AND INDIVIDUAL LEVEL**

##### **4.3.1 Political Advocacy and Engagement, Stormont**

##### **Integrated Education Act (Northern Ireland) 2022**

Following on from the passing of the Integrated Education Act, the IEF has engaged with the Department of Education (DE) and other education stakeholders to implement the Act. The IEF is represented on both the Integrated Education Implementation Group and the Working Group along with NICIE, the Association of Principal Teachers of Integrated Schools (APTIS) and the Integrated AlumNI. In addition, the IEF contributed to the DE *Integrated Education Act Action Plan* Consultation (31 August to 30 November 2023).

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# Integrated Education Fund

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### Trustees' Annual Report (Incorporating the Directors' Report) *(continued)*

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##### 4.3.1 Political Advocacy and Engagement, Stormont *(continued)*

As part of the implementation of the Act, DE published *A Strategy for Integrated Education in Northern Ireland* along with an accompanying Action Plan on 26 April 2024. The IEF expressed concerns that the new Strategy fell short of the expectations of the Act in that it did not include a clear method of measuring demand for Integrated Education, clearly defined targets, nor sufficient funding to support the Strategy.

The IEF, in partnership with Public Interest Litigation Support (PILS), are pursuing legal action which may lead to a Judicial Review against the DE to challenge whether or not they have delivered on the requirements of the Integrated Education Act.

##### **Fair Employment (School Teachers) Act 2022**

Meetings were held with both the Executive Office and Equal Opportunities Commission in preparation for the Act becoming law on 12 May 2024.

##### **The Independent Review of Education (IRE)**

On 13 December 2023 the IRE panel published their final report *Investing in a Better Future*. The report gained significant media coverage as it called for the end of the Strule Shared Education Campus which led to criticism from local politicians and the DE. The IEF broadly welcomed the report as it supported Integrated Education and called for the independent review of Area Planning. However, there was a lack of clarity in relation to the creation of 177 jointly managed community schools which the IEF raised during their meeting with Keir Bloomer (Chair, IRE) on 15 January 2024.

##### **Further engagement with elected representatives**

**Council Elections (18 May 2023):** A successful hustings event was run with Integrated AlumNI on 11 May at Malone Hotel, Belfast. In addition, the IEF ran a successful social media campaign on ten asks from our elected representatives over ten days leading up to the Elections.

**Ulster University Conference (24 October 2023):** The theme of the conference was the *Social cost of division in Northern Ireland*, highlighting the Ulster University research published in April 2023 which included an estimate that the cost to the public purse of maintaining a divided education system is £600,000 per day (Transforming Education Briefing Paper 18). The event, which was held at the Ulster University Belfast Campus, was attended by Steve Baker MP (Minister of State for Northern Ireland) as well as MLAs, leading academics, and business and community representatives.

**Education Unplugged (02 November 2023):** This event with the Integrated AlumNI in Crumlin Road Gaol involved presentations by Pat Sheehan MLA (SF) and Ian Paisley MP (DUP) followed by a lively discussion to a packed audience.

**Fresh Start Funding:** On 21 February 2023, ten Integrated Schools and one Shared Education campus were informed that they would not receive capital funding which had been allocated to them under the UK government's Fresh Start Agreement. This issue has generated considerable media attention and resulted in a NI Assembly Alliance motion / debate on 12 March. The IEF wrote to both the Education Minister and Secretary of State seeking clarification.

A delegation of MLAs and MPs visited Forge Integrated Primary School, Belfast on 26 March and they were quizzed about the decision. The IEF successfully applied to PILS to get a Legal Opinion on the decision. If the Legal Opinion advises that there is a case to be heard, the IEF will issue a Pre-Action Protocol Letter to the relevant party.

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# Integrated Education Fund

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### Trustees' Annual Report (Incorporating the Directors' Report) *(continued)*

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#### 4.3.1 Political Advocacy and Engagement, Stormont *(continued)*

**Meetings and Conferences:** IEF information stands were taken at the Sinn Fein All Ireland Ard Fheis, as well as DUP, Alliance, UUP and SDLP annual conferences. In addition, there were private briefings with Pat Sheehan MLA, John Loughran (Special Advisor to Michelle O'Neill MLA), Conor Diamond (Head of Education Policy) (all Sinn Fein); Richard Bullick (Special Advisor to Education Minister) (DUP); Naomi Long MLA, Nick Matheson MLA, Connie Egan MLA, Kellie Armstrong MLA (all Alliance); Matthew O'Toole MLA and Cara Hunter MLA (SDLP); and Cllr Ryan McCready and Robbie Butler MLA (UUP).

#### 4.3.2 Political Advocacy and Engagement, Westminster

The IEF continued to engage with Westminster and collaborated with the Integrated AlumNI in setting up The NI Affairs Committee (NIAC) Integrated Education Inquiry. The IEF along with Integrated AlumNI and NICIE gave oral evidence to NIAC on 28 February 2023. In addition, NIAC Committee members visited Hazelwood Integrated College on 11 March. Further engagement included meetings with Colm Eastwood MP (SDLP), Sir Jeffrey Donaldson MP, Lord Dodds, Sammy Wilson MP, Carla Lockhart MP, Jim Shannon MP, Gregory Campbell MP, Ian Paisley MP, Gavin Robinson MP (all DUP), and Stephen Farry MP (Alliance).

#### 4.3.3 Research Based Advocacy

The 2023/24 year saw an increase in research activity which aims to better understand public opinion of Integrated Education, challenge the existing education system and provide practical support and knowledge for Integrated and transforming schools.

The Fund's continuing collaboration with Ulster University through the Transforming Education (TE) research has been central to developing the Fund's evidence base. During the year further Transforming Education Briefing Papers were published by the University:

Paper 19 *Schools in Northern Ireland: Sustained without Sustainability*

Paper 20 *Integrated Education in Northern Ireland: The Story So Far*

The papers are available on the IEF and Ulster University websites and were distributed to elected representatives and policy makers. At the time of writing, Paper 21, which is an update of research exploring isolated pairs of schools, is being developed.

Thanks to the NIO funding, two other research initiatives were developed during the year and, following a competitive tendering process, two contracts have been awarded to Queen's University, Belfast:

- Prof Joanne Hughes and Dr Rebecca Loader are producing a report on the strengths and weaknesses of the Integrated Education Transformation process. This is due to be finalised in May 2024 and will provide an invaluable evidence base for schools, support bodies and the Department of Education, as policy around Transformation is revised in light of the Integrated Education Act.
- Dr James Nelson and a team from Queen's University have been awarded a contract to explore the links between participation in Integrated Education and social/intergroup attitudes and associated behaviours. This will be one of the largest studies to date that measures aspects of the impact of Integrated Education on children and young people. The report is due to be completed in December 2024.

# Integrated Education Fund

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### Trustees' Annual Report (Incorporating the Directors' Report) *(continued)*

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##### 4.3.3 Research Based Advocacy *(continued)*

Two small scale research projects, funded by a number of other funders, have also been awarded that will support Integrated schools to develop their ethos and practice:

- *Exploring Religious Education and Related Practice in Integrated Primary Schools* has been awarded to Confluence Facilitation. Completing in August 2024, this project will support good practice across Integrated Education in delivering inclusive Religious Education that affirms all beliefs, traditions, and none.
- *Religious balance in Integrated Schools* will focus on the ways in which schools work towards achieving religious balance. Harnessing practice from other areas where community background data is collected, it will provide guidance for schools around how to meaningfully communicate about, and collect religious background data. RF Associates will produce a final report in September 2024.

The IEF continued to work with LucidTalk to measure public attitudes to Integrated Education and the education system more generally, as previously quoted. Alongside the regional polls, a micro poll was held in the Larne area, with further polls in the next year scheduled for Holywood, East Belfast and West Belfast. In August, the IEF received ARK's report on methods that can be used to measure demand for Integrated Education. The IEF also developed a module of questions for the Young Life and Times survey, with responses expected in June 2024.

#### 4.4 MAJOR GIFT FUNDRAISING: SUPPORTING THE GROWTH AND DEVELOPMENT OF INTEGRATED EDUCATION

Fundraising continues to underpin all aspects of the IEF's work as the Fund is solely reliant on the financial contributions and generosity of its donors.

2023/24 represents one of the most successful years in terms of income generation, with approximately £2 million being raised to support the growth and development of Integrated Education.

The need for the IEF remains because government still does not plan effectively to meet the demand for Integrated Education. Financial support is needed to enable the IEF to work with parents, local communities and schools wanting to access Integrated Education. Parents need to know how they can create an Integrated choice for their child and be supported with information and guidance. Communities need to know how their opinions can be considered when planning is taking place for education in their local area. Schools need help to explore the benefits of Transformation and, for those schools who do begin the journey to Integrated status, additional support is needed for engaging the school community as well as marketing and communicating any changes within their local community. The IEF also needs to advocate successfully to challenge ongoing segregation within the education system and for policy change so that one day the need for the Fund will be diminished or even removed. All this work requires financial and practical support from the IEF, through the generous support of its donors.

The IEF Campaign Council which comprises several of the Fund's key donors and supporters, continues to meet twice per year. Following the passing of the late Baroness May Blood in 2022, David Montgomery was nominated by Campaign Council members to serve as its new Chair from September 2023. The Council provides invaluable advice and guidance to our fundraising and advocacy campaign. Regular updates are provided to members by email, video calls, by phone and in person.

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##### **4.4.1 Planned events**

During the year the IEF was able to organise and benefit from several fundraising events. The most significant event of the year was the May Ball on 24 May 2023. The Ball was held to pay tribute to our late champion, Baroness May Blood, who devoted over 20 years of her life to helping our fundraising and advocacy efforts as Campaign Chair. May was an inspiration to all who knew her. More than 300 guests celebrated her life at the Ball which was attended by her family and friends, Integrated schools and supporters of the IEF. Later in the Autumn, the IEF held further fundraising events, including the now annual 'Stand Up for Integrated Education Comedy Gala' on 19 October at the Ulster Hall which featured the talents of Tim McGarry, Colin Murphy, Neil Delamere and Conor Keys, as well as an Afternoon Tea, with comedian Wendy Wason hosting, at the Ulster Reform Club on 08 November. The Afternoon Tea featured writer Tara Flynn and broadcaster Pamela Ballantine as well as contributions from Maire Thompson, Principal of Hazelwood Integrated College and Hilary Copeland from the Integrated AlumNI.

2023 marked the 25<sup>th</sup> Anniversary of the signing of the Good Friday (Belfast) Agreement and the IEF was involved in a number of significant events surrounding the Anniversary. On 06 April, we were honoured to be hosted by the Secretary of State for Northern Ireland Chris Heaton-Harris and Tánaiste Micheál Martin, at W5 Belfast to celebrate the contribution of Integrated Education to the reconciliation process. The IEF was also represented at the Queen's University Agreement 25 Conference and Gala Dinner courtesy of Sir Harvey and Lady Allison McGrath. On 19 April, the IEF organised its own special screening of Patrick Kielty's documentary *My Da, the Peace Deal and Me* at Hazelwood Integrated College which was followed by a panel discussion chaired by broadcaster Jim Fitzpatrick.

Other event highlights included the annual Carson Awards Showcase held on 26 October at Integrated College Glengormley which featured a selection of creative works by students on the theme of 'What Integrated Education Means to Me'. Our compere for the day was again Jim Fitzpatrick with special guests Tony and Edna Carson, sponsors of the programme. The House of Lords Supporters Dinner, also generously sponsored by the Carson family, took place on 04 December with Barry Corr, Principal of Seaview Integrated Primary School as special guest speaker and Lord Dubs as our sponsoring Peer. Throughout the year the band *Stiff Little Fingers* continued their support for the IEF through concert collections and merchandise sales as well as a special quiz organised by their loyal fans before their Custom House Square concert in Belfast in August.

##### **4.4.2 New prospect development**

The IEF continues to reach out to new prospects through personal introductions and enlistment events as well as through desk research. We are indebted to many of our supporters who continue to advocate for our work and help raise awareness of the organisation and its need for support.

##### **4.4.3 Existing supporter development**

The IEF benefits from a high level of support from its existing donor base. Throughout 2023/24 the Fundraising and Communications Team continued to build relationships with existing supporters, and used regular ezines, update reports, phone calls, the Learning Together newsletter, email updates and social media to keep supporters and donors informed about key developments. Many donors continued to be extremely generous in their support of the Fund. The IEF appreciates any support it receives and in all its forms, including from the many individuals who contribute regularly through the Ten Club and from Integrated schools through the 'Odds On' fundraising initiative.

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# **Integrated Education Fund**

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##### **4.4.4 Other trusts and foundations**

Developing relationships with other trusts and foundations is a very important part of the Fund's work and this year the IEF was delighted to be able to support specific projects through its work with organisations such as the Magheramourne Foundation (for Acorn, Central and Millennium Integrated Primary Schools), the Irish American Partnership (for core costs and the Lincoln Awards), The International Fund for Ireland (Communities in Partnership Programme, Our Peace Our Future), the ARN Foundation (Oakwood, Carhill and Rowandale Integrated Primary Schools), The Enkalon Foundation (Six Mile Integrated Primary School), the Eighty Eight Foundation (Integrated AlumNI), and the Ireland Funds (for many individual projects).

A number of other trusts and foundations have also generously supported the work of the Parental Engagement and Integrate My School Campaign including the Eighty Eight Foundation and the Reconciliation Fund of the Irish Department of Foreign Affairs and Trade.

The Fund also continues to work closely with the Pears Foundation who provided a further major contribution to support the IEF's Trust Programme – this programme is also generously supported by Hagan Homes.

The IEF is indebted to Sir Harvey and Lady Allison (of the McGrath Trust) and Hagan Homes whose continued unrestricted financial support underpins much of our work. In addition, Hagan Homes have ensured the IEF can run a series of significant grant programmes to benefit the growth and development of Integrated Education.

The support of the Northern Ireland Office has continued in 2023/24 supporting Transformation, the Future Schools Project and the Impact of Growth Programme as well as specific research and attitudinal polling.

##### **4.4.5 Gifts in kind**

The IEF is thankful to the many people and organisations who provide support 'in kind' including CME Group, who generously donated laptops and monitors, and Johnstone's Leyland for donations of paint, to Integrated schools. In addition, there are many examples of individuals who volunteer, or give their time freely to speak and perform at IEF events. There are too many people and organisations to list here but rest assured we are extremely grateful for such support.

##### **4.4.6 Communications**

Thanks to the incredibly generous support of the Eighty Eight Foundation the IEF was able to undertake a major communications campaign from October 2023 to February 2024 which featured TV, Radio, Outdoor, Online and Cinema advertising. The campaign was a great success with an estimated 85% of the Northern Ireland population having viewed or listened to the ad.

The Fund's social media platforms continue to be important channels of communication. Over 7,000 individuals and organisations follow the IEF's Facebook page and X/Twitter feed, both of which are updated regularly.

The IEF continues to work with many media organisations and is grateful for the extensive coverage secured throughout the year.

# **Integrated Education Fund**

## **Company Limited by Guarantee**

### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

**Year ended 31 March 2024**

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#### **5. FINANCIAL REVIEW**

##### **5.1 PRINCIPAL FUNDING SOURCES**

The Integrated Education Fund continues to work from its capital base which is supported by its major gift fundraising campaign, (receiving donations from individuals, businesses and other trusts and foundations), and investment income. The Fund also benefits from the fundraising team's income generating events.

In addition, the Fund acts as an intermediary body to administer grants and donations on behalf of other outside funding bodies and individuals.

Total income in 2023/24 was £1,982,681 compared with £1,648,362 in the previous year. Total expenditure was £1,864,912 compared with £1,245,123 in the previous year.

Charitable activities accounted for 89% of all expenditure, and the cost of generating funds accounted for 11% (in 2022/23 the comparative figures were 87%, and 13%). This year, after recognised gains and losses were considered and transfers between funds had taken place, there was a net income of £144,510 compared to a net income of £373,417 in the previous year. The net income is made up of £203,679 in unrestricted funds and net expenditure of £59,169 in restricted funds.

##### **5.2 INVESTMENT POWERS AND POLICY**

Under the Memorandum and Articles of Association, the charity has the power to invest in whatever ways the Directors think appropriate. The Directors, having regard to the liquidity requirements of the current grant making programmes, the financial requirements of potential independent schools and to the reserves policy, have determined that available funds are kept in interest bearing deposit accounts, spreading the risk across a number of banks.

During 2023/24, IEF funds were deposited with Bank of Ireland, Danske Bank, Progressive Building Society, and Ulster Bank. The level of funds held as current asset investments and cash in these banks is £2.214 million in total (£1.806 million in the previous year), which will be reduced when outstanding commitments are paid out during 2024/25. In addition, since 2013/14 the IEF has had funds invested in the Northern Ireland Central Investment Fund for Charities (NICIFC) with the aim of securing a better return than that offered by fixed term deposit accounts. NICIFC is administered by the Department for Communities and is classified in the IEF accounts as an investment.

The IEF's day to day banking is conducted through the Ulster Bank.

##### **5.3 RESERVES POLICY**

###### **5.3.1 Unrestricted reserves**

At the end of March 2024 the IEF had £1,588,573 in unrestricted reserves (£1,384,894 in the previous year) (see Note 28).

###### **Key Principles**

It is the aim of the IEF to match unrestricted expenditure with unrestricted income on an annual basis. Unrestricted expenditure includes budgeted core costs and unrestricted grants expenditure.

If expenditure is higher than income the IEF Board need to be advised and agree any deficit which would come from unrestricted reserves. If expenditure is lower than income the IEF Board need to be

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# Integrated Education Fund

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##### 5.3.1 Unrestricted reserves *(continued)*

advised and agree what should be done with the surplus i.e. plan to spend it in the next year or simply add it to unrestricted reserves. During the year any additional expenditure not included in budgets and that needs to be funded by unrestricted reserves should be agreed by the Board.

The unrestricted reserves should be sufficient to cover at least one and a half years' of IEF running costs, grant making and potential fluctuations in unrestricted donations. Currently that is approximately £1m, unless a significant funding stream stops.

Projections regarding the utilisation of unrestricted reserves, based on estimates of income and expenditure for the current financial year and following two years, are brought to the Risk Management Committee every six months for discussion, and then to the subsequent Board of Directors meeting as part of forward financial planning.

##### 5.3.2 Restricted funds

At the end of March 2024, the balance of restricted reserves was £715,394 (£774,563 in the previous year). This balance will fluctuate during the coming year as other restricted donations are received and/or as the funds are used in accordance with the donors' wishes and IEF grant making policy.

##### Key Principles

Restricted funds should be used for the purpose the donors have specified.

The reserves policy is reviewed by the Risk Management Committee on an annual basis (after the presentation of the accounts) and recommendations are made to the Board as necessary.

##### 5.3.3 Total funds

The total funds held by the charity at 31 March 2024 was £2,303,967 (2023: £2,159,457). Total unrestricted funds excluding tangible fixed assets carried forward at 31 March 2024 was £1,578,928 (2023: £1,375,535).

#### 5.4 GRANT MAKING POWERS AND POLICY

The Board of Directors has delegated powers to a Grants Committee to carry out the IEF's Grant Making Policy which includes:

- i. To ensure that the grant making process is fair and equitable at all times and to establish and agree criteria for grant programmes.
- ii. To ensure that grants meet the terms and objectives of the original funders.
- iii. To uphold the reputation of the Fund as a grant making organisation that is clearly focused, fair, accountable and consistent.
- iv. To be the link between the schools (grantees) and the Board (grantors).
- v. To consider in detail applications to the IEF for funding and to make recommendations to the full IEF Board. The Board ultimately has executive power over grant allocations, the Grants Committee has executive power at an operational level for anomalies arising within existing live grants.
- vi. To ensure on-going financial and operational monitoring of programmes, measuring the outcomes of projects against stated aims and objectives

# Integrated Education Fund

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#### 5.5 NEW FINANCIAL SOFTWARE SYSTEM

Following a period of testing, Liberty Accounts was implemented in April 2023 and a period of parallel running with the manual system took place until October 2023 when the IEF's new auditors carried out a quality assurance audit on both the system setup and its data integrity.

The auditors provided the IEF with a positive quality assurance management report on Liberty stating that they were pleased with the IEF's progress to date with the new accounting software and, subject to some minor adjustments, they considered the system to be working effectively. On the back of that assurance the Risk Management Committee recommended that the IEF stop running the Excel and Liberty systems in parallel and the dual running stopped at the end of November 2023.

The financial statements for this year ending 31 March 2024 have been calculated using the figures supplied by the new accounting software.

#### 5.6 SIGNIFICANT EVENTS THAT HAVE AFFECTED FINANCIAL PERFORMANCE

The IEF secured NIO funding of £1.465m in 2022/23 over two and a half financial years, of which £540k was received into restricted funds in 2023/24 to support the IEF work on three key objectives: the growth of Transformation, Future Schools and Research. Funding from Hagan Homes has provided significant support for a number of grant programmes and funding from the Irish Department of Foreign Affairs and Trade Reconciliation Fund has helped the IEF's Parental Engagement team to support the number of schools seeking to transform to Integrated status.

#### 6. PLANS FOR FUTURE PERIODS

In June 2022, the IEF launched its *Strategic Vision 2022-2025: Towards 100 Integrated Schools*. The IEF will now be moving into the final year of implementation. In 2024/25 year we will also be saying farewell to our Chief Executive, Tina Merron, who will be retiring after 26 years of dedicated service, and welcoming Paul Caskey into the role. Paul has worked as the IEF's Head of Campaign since 2000.

The strategy has four key focus areas:

- First, to empower communities to access an Integrated Education:

This incorporates the IEF's innovative Integrate My School campaign led by the IEF's dedicated Engagement Team who will work with interested parents, schools and the wider community. There are currently 71 approved Integrated schools in Northern Ireland but there are also a further 11 schools (8 in this financial year) who have held positive parental ballots to transform to Integrated status – 6 have already submitted their Development Proposal to the Education Minister and are awaiting a decision on their future. One more parental ballot is planned before the end of the academic year 2023/24, with further ballots planned in the forthcoming financial year 2024/25. There are also plans to establish the first ever Integrated school operating in the Irish language.

The IEF will seek to build on its first ever major advertising, marketing and promotional campaign aimed at parents, prospective parents, schools, young people and local communities. The IEF will continue to organise information events for school leaders and governors working in partnership with NICIE. This key focus area will also include the Future Schools Project to encourage local communities to engage with area planning of education to ensure more sustainable school solutions for the future.

The IEF will continue to work with other education stakeholders to disseminate, promote and utilise the new 'Future Schools Tool-kit', a pathway resource developed by Ulster University.

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# **Integrated Education Fund**

## **Company Limited by Guarantee**

### **Trustees' Annual Report (Incorporating the Directors' Report) *(continued)***

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#### **6. PLANS FOR FUTURE PERIODS *(continued)***

- Second, supporting the growth of Integrated Education through grant making:

The IEF will continue to assist the growth of Integrated Education by supporting existing Integrated schools, the Transformation of schools to Integrated status, cross sector solutions for schools as well as new parents' groups who want Integrated Education. The IEF will provide Transformation Support Grants, Impact of Growth Grants, New Model Support Grants and grants to new Parents' Groups. The aim is to support growth in existing Integrated schools, support schools progressing through the Transformation process and assist any proposed single school solutions on a cross-community basis.

- Third, challenging the segregated nature of our education system:

The IEF is working towards the day when it is no longer needed. That will only happen when Integrated Education is adequately planned for by government and when parental demand for it is being met. To bring this day closer we need to continually work with policy makers, influencers, politicians and government. If necessary, we will continue to use strategic litigation to ensure legislative commitments to Integrated Education are implemented in full. The IEF will also continue to undertake major Northern Ireland wide attitudinal surveys, micro polling and other market research whilst also working with academic partners such as Ulster University and Queen's University Belfast to provide an effective evidence base on issues relating to Integrated Education. This key focus area also includes supporting the development of the Integrated AlumNI and engagement with young people. The voices of young people must be listened to given that they have had the most recent experience of our education system. Young people can be important advocates for how schools can deliver a more inclusive education.

- Fourth, supporting schools to deliver 'Integration in Action':

An Integrated ethos does not develop by simply having a religious and cultural mix of pupils in a school. Schools need to regularly think about how they deliver integration in both policy and practice. They need to ensure all pupils, staff and governors feel welcome, and that their identity is celebrated, irrespective of their cultural or religious background. The IEF will assist this through its Trust Programme which supports activities that encourage schools to develop and enhance their Integrated ethos. It will also continue to organise the Carson Awards to celebrate the creative talents of young people. The Integration Through Sport Programme will help introduce new sports to a school in order to provide opportunities for pupils to experience sports normally associated with just one cultural tradition in Northern Ireland.

Along with delivering the above strategy, we will continue to press for full implementation of the Integrated Education Act. It is vital that a fair and effective way of measuring demand for Integrated Education is agreed upon and that government action follows to meet such demand. This would represent a major step forward in terms of the growth and development of Integrated Education. Likewise, recommendations from the Independent Review of Education that aim to address the failures of effective area planning for schools, the need for more cross sector solutions and the desire to expand Integrated Education can also not be ignored.

None of these plans can be achieved without the generosity and support of so many individuals and organisations.

The IEF is forever grateful to all those who help us in so many ways.

# Integrated Education Fund

## Company Limited by Guarantee

### Trustees' Annual Report (Incorporating the Directors' Report) *(continued)*

Year ended 31 March 2024

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#### 7. TRUSTEES' RESPONSIBILITIES STATEMENT

The trustees (who are also directors of the Integrated Education Fund) are responsible for preparing the trustees' report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the charity trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the income and expenditure of the charitable company for that period.

In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2019 (FRS 102);
- make judgments and accounting estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. The trustees are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

#### Disclosure of information to auditors

We, the trustees of the charitable company who held office at the date of approval of these Financial Statements as set out above each confirm, so far as we are aware, that:

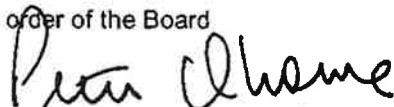
- there is no relevant audit information of which the charitable company's auditors are unaware; and
- we have taken all the steps that we ought to have taken as directors in order to make ourselves aware of any relevant audit information and to establish that the charitable company's auditors are aware of that information.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

#### Small companies' exemption

This report has been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

By order of the Board



Peter Osborne  
Chair, Integrated Education Fund

21 August 2024