

Policy 2.24

Planning for School Provision in the Archdiocese of Melbourne

1. Planning for School Provision

RATIONALE

Planning for the construction and consolidation of Catholic schools supports the Church's mission. The provision of Catholic primary and secondary schools enables Catholic families to choose a Catholic education instilled with an understanding of Christ and his teachings. Planning staff at Catholic Education Melbourne work in collaboration with other archdiocesan personnel and parish authorities to ensure that archdiocesan directions and parish needs are met.

Catholic education is intrinsic to the mission of the Church. It is the responsibility of the Church to establish and direct Catholic schools. The role of the local bishop is to guide Catholic schools to ensure they 'offer an education imbued with a Christian spirit'¹ based on sound religious instruction and supported by skilled teachers who model Christian values. Australian bishops established Catholic schools in the 1860s as the main instrument of catechesis and sacramental preparation for Catholic children.

In the Archdiocese of Melbourne, as in the rest of Australia, bishops continue to promote Catholic schools and evaluate their progress in transmission of the faith. This divine mandate from Jesus Christ is renewed and reimagined through the history of the Church. The Second Vatican Council reissued the call to be the 'light of the nations' and Pope John Paul II asked all Christians to join in 'a new evangelization and ... mission', which he considered no believer or institution of the Church to be exempt from, 'to proclaim Christ to all peoples'.²

In keeping with the above, Catholic Education Melbourne is committed to providing a place in a Catholic school for every Catholic student in the Archdiocese whose parents so choose. To fulfil this commitment, Catholic Education Melbourne undertakes a long-term strategic planning approach to establish new schools and ongoing monitoring and evaluation of the viability of existing schools.

To honour this commitment to high-quality provision of a Catholic education, this policy is supported by strong planning principles, which inform the preferred models that guide the development of new schools. The policy, planning principles and preferred models are regularly revised. Clearly defined and well-established benchmarks assist in the process of monitoring and assessing the ongoing viability of Catholic schools. This policy and accompanying procedures outline the guiding principles and essential procedural requirements associated with these matters.

PRINCIPLES

Planning for changes to an existing school (e.g. an additional campus or closure) or for a new school should be consistent with the following principles.

Accessibility: Children of Catholic families will have access to quality local Catholic primary and secondary schools organised on a parish or regional basis. This should not exclude organising schools on a diocesan basis where appropriate.

Workforce: Regular assessment of the availability of teachers committed to the mission, and trained and formed to further it in the proposed setting, without diluting the availability of such teachers to other Catholic schools. The availability of quality teachers from curriculum and leadership perspectives is a fundamental consideration in the planning process.

Comprehensive and rational provision: Catholic Education Melbourne, together with parish authorities across the Archdiocese, is responsible for providing and maintaining access to local primary and secondary schools as far as reasonably possible.

¹ *Code of Canon Law* 1983, Latin–English edn, Libreria Editrice Vaticana, www.vatican.va/archive/ENG1104/_P2N.HTM.

² John Paul II (Pope) 1990, *Redemptoris Missio*, Libreria Editrice Vaticana, http://w2.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_07121990_redemptoris-missio.html.

Collaboration and consultation: Decision-making is undertaken through a just and comprehensive process involving participation of all key stakeholders. Decisions ultimately rest with the local canonical authority.

Evidence-based planning: Decisions are informed by analysis of data relating to the local context in addition to regional and statewide trends.

Learning-focused provision: Decisions are informed by a rigorous educational rationale, including facility design to meet contemporary teaching and learning principles.

Financial feasibility: Financial models that demonstrate currency and ongoing feasibility inform all planning decisions.

Compliance: The Catholic education system operates within political, economic and legal contexts; therefore, Catholic schools must comply with relevant state and Commonwealth legislation. The minimum standards and other requirements are set out in the *Education and Training Reform Act 2006* (Vic.) and Schedule 4 of the *Education and Training Reform Regulations 2017* (ETR Regulations). These are administered by the Victorian Registration and Qualifications Authority (VRQA). Some of the [minimum standards](#) pertain to:

- governance (Schedule 4 clause 15 of the ETR Regulations)
- not-for-profit status (Schedule 4 clause 17 of the ETR Regulations)
- enrolment (Schedule 4 clause 7 of the ETR Regulations)
- curriculum (Schedule 4 clause 6 of the ETR Regulations)
- school infrastructure (Schedule 4 clause 13 of the ETR Regulations).

The procedures and supporting information outlined in subsequent sections of this policy demonstrate how Catholic Education Melbourne meets the minimum standards required by the VRQA.

PROCEDURES

It is incumbent on Catholic Education Melbourne staff and other stakeholders to act in a way that is consistent with the principles outlined above. As a consequence of the implementation of these principles, all proposals for new or amended provision are:

- inspired by a pastoral mission
- in accordance with strategic planning endorsed by the local canonical authority to identify need in advance of provision
- based on the demonstrated needs of local communities, within defined catchments, agreed to by those communities
- consistent with key enrolment estimates of growth, including official short-term and long-term enrolment forecasts produced for a school by Catholic Education Melbourne
- consistent with the provision of skilled and accredited teachers
- in accordance with the Year 7 enrolment ceilings set in agreement with schools and school authorities
- subject to consultation with and suitable input from local parish authorities before being advanced to the Archdiocese of Melbourne
- based on demonstrably feasible financial models
- inspired by an educational vision, curriculum, and teaching and learning strategies that are influenced by gospel values, consistent with educational trends and government accountability requirements.

Strategic planning for the establishment of new schools and/or significant changes to existing school provision will observe and respond to a range of viability criteria and benchmarks as outlined in the following procedures.

New schools

To successfully plan for new schools, the Archdiocese, through Catholic Education Melbourne, adheres to set viability criteria that are tested to determine the need for a new school. Catholic Education Melbourne implements good practice procedural requirements for consulting with local stakeholders, purchasing suitable sites and establishing local planning steering groups. These are outlined in the accompanying [Procedures for the Establishment of New Schools](#).

School closures

The Archdiocese, through Catholic Education Melbourne, applies key indicators and standard procedures that school communities and their governing authorities must observe when considering the need for and implementation of school closures. These are outlined in the accompanying [Procedures for Evaluating Ongoing School Viability](#).

2. Procedures for Evaluating Ongoing School Viability

INTRODUCTION

In some instances Catholic communities are required to consider the future viability of their local school. On occasion local factors will create a scenario where the possibility of closing a Catholic school should be considered by those parish communities. To support this process, Catholic Education Melbourne implements good practice procedures and guidelines³ to assist school communities and their governing authorities to identify key indicators to understand the viability of the school and to begin to address enrolment decline or undertake to amalgamate or close a school.

This document provides information to assist school authorities in this process.

ESTABLISHMENT OF A WORKING PARTY

Usually as a result of a significant decline in the Catholic population or enrolments, the local canonical authorities, in partnership with Catholic Education Melbourne, will propose to evaluate the viability of a school. The first step in the process, prior to any decision to amalgamate or close a school, is for the local canonical authority and Catholic Education Melbourne to convene a working party to study the proposal. Membership of the working party normally consists of various stakeholders including, but not limited to:

- the local canonical authority (parish priest/canonical association representative/congregation representative)
- the principal of the school to be evaluated
- principals of other schools in the parish or catchment area
- two representatives nominated by the parish priest, one of whom is a parent from the school concerned
- representatives from Catholic Education Melbourne, as appointed by the Executive Director, including one from the particular region.

In the case of congregational schools, Catholic Education Melbourne would only be part of the working party when requested by the congregation. In the case of a joint project involving congregational and regional schools, the process begins with a letter sent from the particular congregation to the Executive Director requesting the involvement of Catholic Education Melbourne staff.

It is advisable that the following matters are determined before a working party is convened and begins its deliberations:

- the appointment and role of a Chair
- the size and composition of the group
- working party procedures regarding the number and schedule of meetings, voting processes, confidentiality of documents and draft reports
- the consultative process, its format and timeframe
- the reporting process
- the timeframe for reporting.

Tasks to be undertaken

The key tasks of the working party include:

- consulting with stakeholders

³ Catholic Education Melbourne 2010, *Planning for Catholic Schools in the Archdiocese of Melbourne*, Catholic Education Melbourne, East Melbourne.

- evaluating viability against key indicators and benchmarks
- reporting and recommendations.

Consultation with stakeholders

Led by the working party, community engagement and consultation is an integral part of the process. Comment and opinion from stakeholders is gathered via public forums, focus groups, surveys and/or written submissions.

After consultation with stakeholders, the working party may choose to implement processes that seek to increase enrolments at the school.

Evaluating viability against key indicators and benchmarks

Key indicators

In determining the viability of a school, the working party will consider the following indicators or evidence:

- **Pastoral mission:** The call of Christ to his followers is to ‘make disciples of all nations’ (Mt 28: 19). Therefore there needs to be a strong link between the school and the work of the local parish. Ensuring the integration of school activities into the life of the parish is pivotal.
- **Enrolments:** A Catholic school must have the potential to maintain high numbers of Catholic students as a proportion of total enrolments to support the pastoral mission of the school, and sufficient enrolments in total to support the delivery of comprehensive educational programs.
- **Educational programs:** A school is required to provide a comprehensive curriculum based on the [Victorian Curriculum](#) and suitable assessment and reporting procedures, supported by sound educational leadership and professional teaching standards.
- **Finance:** The school must demonstrate an ongoing capacity to meet loans and to provide upgrades and maintenance of facilities, staffing within funding entitlements and a comprehensive curriculum.
- **Site/facilities:** The site should be safe and of adequate size and the facilities suitable to conduct the required educational programs. There needs to be a capacity to meet a regular planned maintenance program for all facilities within budget.

The working party should evaluate the school in each of the above criteria against a set of Catholic Education Melbourne benchmarks, which are as follows.

Benchmarks

Pastoral mission

- Quality of the Religious Education program as commented on in the school review.
- Integration of Catholic beliefs, values and practices into the curriculum and school activities.
- Catholicity of students at the school.
- Degree of integration between school and parish or parishes.
- Linkage to the broader missionary activities of the parish(es).

Enrolments

The minimum enrolment benchmarks below are to be used as a guide and form only one part of a detailed enrolment analysis. This includes:

- assessment of the proximity of students to the school
- capacity of the school to attract students from within the local parish
- change in student numbers over time
- capacity of the school to attract sufficient students in Prep to ensure optimal educational outcomes over the long term.

Notional enrolment benchmarks for each particular type of school to meet the requirement to deliver optimal education outcomes include:

- 150 students for P–6 primary schools
- 400 students for junior secondary Years 7–10 schools
- 400 students for senior secondary Years 11–12 schools
- 650 students for full secondary Years 7–12 schools.

Schools should aim to maximise their Catholic enrolments overall and as a proportion of total enrolments.

A school must meet the minimum student enrolment numbers required by the VRQA. A school must have a minimum of 20 students. A secondary school must have an average enrolment of 10 or more students for each year level. A specialist school must have a minimum of 11 students.

Refer to the VRQA Guidelines to the [minimum standards](#) for further information.

Educational programs

- The capacity to implement the Victorian Curriculum is a key requirement, as is the teaching of Religious Education. Recent school development plans and school review reports need to be considered by the working party.
- In the case of secondary schools, the breadth of subject offering (especially for VCE) should be evaluated for suitability, comprehensiveness and the needs of the school community.

Finance

- Capacity to meet normal expenditure requirements.
- Maintenance of cash reserves of over 10% of total annual income.
- Minimal reliance on special factor support.
- Capacity to generate an overall surplus over a period of time.
- Staffing within agreed funding entitlements over a period of time.

Site/facilities

- The Archdiocese of Melbourne has adopted the area guidelines established by Catholic Capital Grants (Victoria) Ltd⁴ to determine the appropriate size for school sites and facilities. The current educative need is based on an area guideline of 6.13 m² per primary student and 9.75 m² per secondary student.
- A schedule of recommended site sizes can be found in *Planning for Catholic Schools in the Archdiocese of Melbourne*.

Additional considerations

Access to quality Catholic education by Catholic children is a priority for the Archdiocese of Melbourne. Any assessment concerning a possible school merger or closure needs at all times to take into account alternative educational options.

Schools should not necessarily be earmarked for closure because they fail to meet one of the above benchmarks. Although these benchmarks inform the decision, detailed evidence such as the following should also be considered:

- general demographic data of the school, the parish and the regional area, including specific population indicators such as a breakdown of age distribution, religious denomination, ethnicity, household structures, urban development and forecast population trends (data are available from Australian Bureau of Statistics Census and municipal reports, as well as from Catholic Education Melbourne)
- social and cultural impacts on the local community
- transport facilities
- alternative education possibilities.

⁴ Catholic Capital Grants (Victoria) Ltd 2017, *Capital Grants Programme Procedures Manual*, Catholic Education Melbourne, East Melbourne.

Reporting and recommendations

The working party will prepare a report that includes a (set of) formal recommendation(s) to be considered by the:

- Executive Director of Catholic Education Melbourne
- parish priest in the case of parish primary schools
- responsible canonical authority in the case of secondary schools.

The canonical authority would then request the support of the Executive Director to seek approval from the Archbishop to implement the recommendation(s). The request for Archbishop approval is sent by the Executive Director of Catholic Education Melbourne on behalf of the parish or canonical authority.

After Archbishop approval is obtained, a further consultative process is undertaken to inform school staff and the parish and/or school communities of the decision to implement the recommendation(s).

As the system authority, it is the responsibility of the Catholic Education Commission of Victoria Ltd (CECV) to notify the relevant Victorian and Australian government authorities of particular decisions, such as a school closure or amalgamation.

3. Procedures for the Establishment of New Schools

INTRODUCTION

Catholic Education Melbourne, in partnership with Catholic parishes located in the growth corridors of Melbourne, identifies opportunities to open new schools to meet demand for Catholic education in growing parish communities. Provision for new schools in growth corridors is strategically identified and planned well in advance to provide sufficient lead time to acquire suitable sites in new estates. This initial stage of planning involves the development of the *Melbourne Archdiocese Strategic Plan*⁵ (ASP), which identifies existing and new schools within the Archdiocese of Melbourne. The ASP is updated every five years, after the Australian Bureau of Statistics makes new Census data available.

Strategic planning for schools would ordinarily take place at least five years in advance of opening to ensure that future school sites can be included in the appropriate level of regional and municipal planning documentation, and allow time to negotiate with individual landowners and developers.

The planning of new schools within the Archdiocese is based on a number of key indicators and procedures outlined below, in accordance with guidelines contained in *Planning for Catholic Schools in the Archdiocese of Melbourne*.

CONSULTATION AND NOTIFICATION

Community engagement and consultation are an essential part of the process of planning a new school. A series of consultations take place with the local and broader community, and existing schools, at different points in the planning process.

PROCESS FOR PLANNING A NEW SCHOOL

Strategic planning: This is the key level of consultation to establish when and where a new school should be located. With the ASP as the main reference document, Catholic Education Melbourne Planning staff implement an ongoing strategic planning process to monitor and assess the need and timing of future educational provision in parishes. This process includes a discussion of the timing of proposed new schools with parishes and schools in a specified location. The new schools timing process document forms the basis of these consultations.

Site purchase: Site purchase is undertaken by the Property Office of the Catholic Archdiocese of Melbourne on the advice of Catholic Education Melbourne and the local parishes, in accordance with the ASP. Site purchase will not normally involve consultation with surrounding parishes or schools beyond the strategic planning phase.

Evaluation of impact on other schools: An impact statement is prepared by Catholic Education Melbourne and discussed with surrounding parishes and schools before planning for the school is initiated. This may cause some alteration to timing and the size of the school, but not to delivery of the school or where it is located. The approval of the Archbishop is required prior to any announcement to open a new school.

⁵ Catholic Education Melbourne 2014, *Melbourne Archdiocese Strategic Plan*, SGS Economics and Planning, Melbourne.

Establishment of a local steering committee: Once approval for a new school is obtained from the Archbishop, a local steering group is established which includes the parish priest, parents, Catholic Education Melbourne representatives, the principal-elect and the architect. This group meets on a regular basis to oversee planning for the school, survey parents and consult with the local community about curriculum, policies, operational issues and school design.

Notification: The Catholic Education Commission of Victorian Ltd (CECV) notifies the relevant Victorian and Australian government authorities about the planned new schools. Workforce projections are made available so that joint planning can occur with relevant institutions.

Compliance: Catholic schools must comply with all relevant state and Commonwealth legislation. This includes complying with the minimum standards that schools must satisfy in order to be registered under the *Education and Training Reform Act 2006*. In Victoria, schools are regulated by the Victorian Registration and Qualifications Authority (VRQA).

INDICATORS OF VIABILITY FOR A NEW SCHOOL

Catholic Education Melbourne adopts a set of indicators to assess the need for a new school in a parish. These indicators include:

- long-term enrolment
- site location
- timing of school opening
- ongoing financial viability.

These indicators include key benchmarks that form the criteria to be evaluated to determine whether or not a new school is viable in an emerging community. The criteria, indicators and benchmarks are summarised below.

Long-term enrolment and school catchment: A new school catchment requires sufficient Catholic households to support a primary school with a long-term enrolment (LTE) of between 200 and 500 students. New schools in metropolitan areas are planned for an LTE from 400 to 500 students, and regional or rural areas are planned with a minimum of 200 students. Catholic secondary schools (Years 7–12) are planned to achieve an LTE of at least 700, with optimal growth from 1,200 to 1,500 students. In some locations, new Catholic secondary colleges may exceed the 1,500 LTE benchmark. The number of households in a school catchment sufficient to maintain these enrolments is directly related to the proportion of the community that is Catholic. These are listed in an appendix to the ASP. The ASP includes a detailed report for each region (Northern, Eastern, Southern and Western) that includes catchment boundaries for new and existing schools with an estimate of the LTE for each new school catchment.

Site: A site must be purchased or under negotiation to purchase before the decision to open a new school in the area is confirmed. The site must meet site selection guidelines, including the area, as set out in Catholic Education Melbourne's *School Site Selection Criteria*.⁶ A site is usually given a notional location in the relevant Strategic Plan of the area, which is completed prior to the site purchase.

Initiation of planning: The standard benchmark that must be met to begin the process of planning for the opening of a new primary school is 1,500 occupied dwellings within a catchment. Planning a new secondary college is more complex and includes an assessment of the demand for Catholic secondary education at existing colleges, and analysis of projected population and dwelling growth in a broad location.

Enrolments: The enrolment benchmark for opening a new primary school is 120 students. Secondary schools require a Year 7 enrolment of three streams or 80 students. The financial model will ultimately determine the minimum number to ensure feasibility. The Year 7 enrolment ceiling for the school is directly related to the predicted enrolment yield of the defined school catchment.

Finance: Prior to the decision to open the school, a financial model is prepared that clearly demonstrates the projected enrolment of the new school will allow for ongoing viability. The financial model identifies the sources and quantum of funds required to achieve this outcome. Normal sources of capital funds include the Australian Government Capital Grants Program, the Supplementary Capital Fund (primary schools only) and school borrowings. The financial model cannot guarantee those funds which are applied for independently on the advice of Catholic Education Melbourne.

⁶ Catholic Education Melbourne 2019, *School Site Selection Criteria*, Catholic Education Melbourne, East Melbourne.

Any assessment of the ongoing viability of a school will be in accordance with the requirements of a not-for-profit school under the ETR Regulations. The criteria include, but are not limited to:

- all money and property received by the school or the proprietor will be used solely for the purpose of the conduct of the school
- any agreements/arrangements will be made in good faith at reasonable market value and not considered a prohibited agreement.

Refer to the VRQA Guidelines to the [minimum standards](#) for further information.

EXTERNAL REFERENCES

[VRQA Guidelines to the Minimum Standards and Requirements for School Registration – January 2019](#)

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POLICY DATABASE INFORMATION	
Related documents	Planning for Catholic Schools in the Archdiocese of Melbourne (2018) Melbourne Archdiocese Strategic Provision Plan (2019)