
7 PERSPECTIVES
How COVID-19 will Transform the Design of Education Spaces

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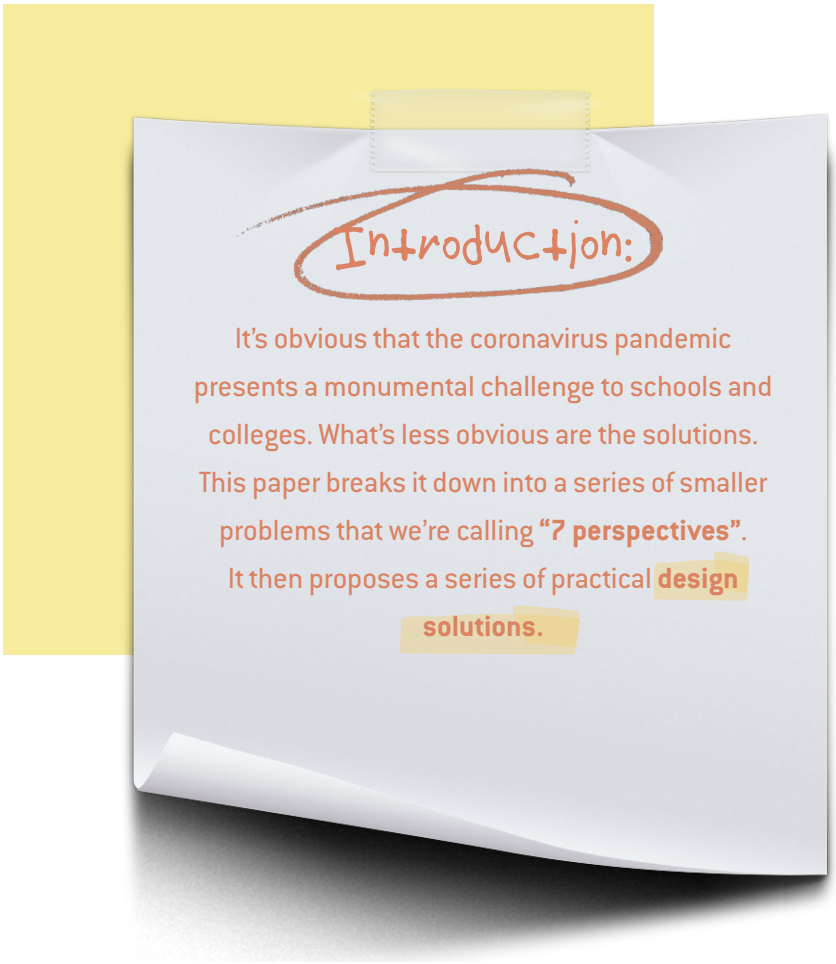

Key Takeaways

1: Quick design fixes can 'COVID-proof' schools and help them re-open. Reduce density with fewer kids per classroom; create new classrooms by repurposing gyms, canteens & corridors; graphics on the floor and walls can reinforce behavior; touchless toilets; anti-microbial materials; HEPA filters.

2: Don't waste a crisis: education spaces will never be the same again. 79% of industry experts agreed that there will be a long-term legacy for the design of education spaces. Only 21% ticked "if it ain't broke don't fix it." Blended learning, 'phygital' spaces and 'sweating the asset' are all here to stay.

3: Fewer classrooms, more 'WeWork'-style spaces. 85% of teachers agreed that schools need spaces inspired by co-working offices. Spaces such as individual deep work pods; 1-on1 meeting spaces; breakout space for small groups; café-style social spaces.

4: The magic happens in science labs and sports halls. While lecture-style classroom teaching lends itself well to 'Khan Academy' style video learning, specialist spaces cannot be replicated at home. Science labs, sports halls, maker spacers, drama theatres and playgrounds produce some of the most meaningful outcomes in terms of educational attainment and personal enrichment.

5: Do 'more with less' in affordable schools. While many premium schools were already embracing blended learning, it has been a steeper slope for many affordable and mid-market schools, which often have less space per student and less technology, in school and at home. Designers must 'do more with less' to make sure that all students are served in a COVID and post-COVID world.

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A quick note on that word "design". While designers have an important role to play in conceiving and implementing design solutions, they do not have all the answers. Far from it. That's why most of the contributors to this White Paper are not designers. The line-up includes teachers, a doctor, a psychologist, the former CEO of an investment firm, academic researchers, and so on.

Dubai, June 2020

Contributors:

Tristan de Boysson, former CEO, Amanat

Amanat is an investment firm. Its assets include Middlesex University Dubai and the campus of North London Collegiate School Dubai.

Alan Williamson, CEO, Taaleem

Taaleem is one of the UAE's largest private school operators, with 13 schools and 14,000 students, across multiple curriculums.

Shaun Robison, Co-Founder, BBD Education

BBD Education is a consultancy that advises, and in some cases operates, schools across the Middle East.

Dr Rania Ayat Hawayek, Specialist Paediatrician, Circle Care Clinic

Dr Rania is founder of Circle Care Clinic. As well as a respected paediatrician, she is a prominent thought-leader on children's health and well-being.

Briar Jacques, Psychologist, The Free Spirit Project

As well as being a psychologist, Briar Jaques is a qualified instructor in yoga, mindfulness and ACT (Acceptance and Commitment Therapy).

Graeme Fisher, Director of Projects, EduReach

Graeme is an architect specializing in education design. EduReach is a company that helps UK schools set up and run operations overseas.

Prof Basem Mohamed, Professor of Architecture, Zayed University

Zayed University is a UAE university established in 1998. It is one of three government-sponsored higher education institutions in the United Arab Emirates

Dr. Natasha Ridge, Executive Director, Sheikh Saud Bin Saqr Al Qasimi Foundation for Policy Research

Dr Ridge is an education researcher. She heads a think tank that focuses on education, public health and urban development.

James Mullan, Founder, Which School Advisor

Whichshooladvisor.com is a website that offers reviews, news and analysis on schools.

Pallavi Dean, Creative Director, Roar

Pallavi is an architect. Roar is an interior design firm that has designed multiple education buildings across the Middle East.

Moderator: Richard Dean, Roar

methodology
(noun) a system of methods used in a particular area of study or activity

Two research methods were used in the development of this white paper.

Qualitative, through a focus group conducted by video conference, with a small group (n=10) of experts from across the sector: teachers, administrators, investors, researchers, doctors, consultants and designers.

Quantitative, through a short survey of a wide group industry professionals (n=135); 59% were teachers, with the other 41% non-teachers such as owners, administrators, designers and consultants.

Dubai-based interior design firm Roar conducted the fieldwork and wrote the finished White Paper.

Survey Question 1: Tell us about yourself: what's your role in the education system?

Teachers  **59%**

Non-teachers  **41%**

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The Designer's Perspective

short term

The problem

There was broad consensus that the most pressing problem is allowing schools and colleges to re-open in September. There was also broad consensus that when schools do return, it will likely be phased or staggered: "The current thinking globally is that it is unlikely that the school community will return to school at one time," observed one panelist. Schools and colleges are planning for a range of scenarios, including:

- Prioritise younger students, as they struggle with self-directed digital home schooling.
- Prioritise older students with graded assessments (CBSE, GCSE, IB etc), as their grades have a big impact on later life.
- A rota system, with students attending campus one, two, or three days a week.

> The sooner we can design COVID-proof schools, the sooner children will be allowed to return, and in greater numbers.

Ultimately, these decisions are unlikely to be made by schools and colleges themselves, but by regulatory authorities (see section 6 below).

For designers, the short-term challenge is to accelerate the timing and extent of the re-opening. The sooner we can design COVID-proof schools, the sooner children will be allowed to return, and in greater numbers. Below are some of the practical design solutions suggested by the panel to achieve this.

The Design solutions

Re-plan existing classrooms. De-densify to accommodate fewer children per square meter. Simply put, if a classroom used to have 30 kids, re-plan it for 10 or 15 kids.

Create extra 'classrooms'. Re-purpose non-teaching spaces. Prime candidates include sports halls, dining halls, drama spaces and non-essential administrative offices.

Review circulation spaces. Assess corridors to see if they can be repurposed as temporary classrooms/teaching spaces. Use acoustic materials to partition/zone these repurposed spaces. In general terms, optimize the ratio of teaching space to GFA (gross floor area), or "sweat the asset" as one panellist put it.

Modify medical facilities (see section 4 for more detail on this).
Use outdoor spaces. Well-shaded outdoor spaces can sometimes be repurposed as teaching spaces. Finland and New Zealand were cited as examples of this.

Use graphics. Engaging graphics on the floor and walls can remind children about social distancing rules, without frightening them. "Children respond very well to this," noted one medical practitioner.

Sanitization. Employ best practice measures already employed by public spaces such as malls. These include health checks on entry and reducing touch points (door handles, bathrooms etc).

Build modular classrooms. In extreme cases where the above measures still leave a shortfall of space, modular pre-fabricated classrooms can be built in just a few months and at relatively low cost.

Focus on the 'affordable' sector | that message came loud and clear from our experts. "We're very concerned about the issue of equity," observed one panelist. Panelists noted that affordable schools tend to have less space per student (c.8 sq m) than premium schools (c.11 sq m); blended learning is new to many affordable schools; and families at affordable schools sometimes have limited access to digital devices and Internet connectivity than families at premium schools. As one panelist observed: "We have to make sure it's not just the middle class and the wealthy that get back to school, but that every child gets back to school."

Survey Question 2: When will layout and student spacing return to normal in schools & colleges?

Late 2020		**27%**
Early 2021		**31%**
Late 2021		**26%**
2022 or beyond		**9%**
Never		**7%**

The vast majority (84%) of respondents expect schools to return to normal spacing and density by the end of 2021.

Survey Question 3: To 'COVID-proof' schools & colleges in the immediate back-to-school phase, rank the following design solutions.

1. Reduce the number of children per classroom
2. Anti-infection equipment (Hepa filtration systems, anti-microbial surfaces, touchless bathrooms etc.)
3. Graphics on floors and walls (such as circles which children must stay within)
4. Separate medical facilities for suspected Covid-19 cases
5. Re-purpose gyms, canteens, corridors etc as extra classrooms

The clear winner was "reduce the number of children per classroom"; 46% of respondents ranked it #1, followed by anti-infection equipment (26%)

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The Designer's Perspective

long term

The problem

There was consensus that the long-term design legacy of the COVID-19 pandemic is harder to pinpoint than short-term design fixes. But for school owners and operators involved in either new build or significant refurbishments, they have no option but to confront these long-term issues now. Before proposing practical design solutions, it's important to understand some general assumptions among the panelists:

Design will be different. *The short-term need for social distancing in schools will probably recede within a year or two, with medical breakthroughs such as a vaccine, treatment or herd immunity from COVID-19. But that will not simply mean a return to pre-2020 education design. Design will be different forever.*

Accelerated trends. *Several trends in education design were already gathering momentum before the pandemic. While not a direct response to COVID-19, these trends will be accelerated by the outbreak.*

Bricks and mortar still matter: *"If there's one thing this crisis has taught us, it's that physical space matters," observed one panelist. Aside from practical teaching and learning factors, benefits of physical space include: socializing among students; the symbolic significance of a building in academic rituals like graduation; extra-curricular activities such as sport and the arts.*

Don't waste a crisis. *The pandemic is forcing educators to rethink all aspects of formal education, from pedagogy to technology to economics to building design. This reset can have a positive long-term impact: "Don't waste a crisis," as one panellist observed. In normal times several factors (inertia, resistance to change, vested interests in maintaining the status quo etc.) can be barriers to reform in any field. Extreme situations can dismantle these barriers.*

The Design Solutions

No more vanity projects | One panelist noted: "We have a seen a lot vanity projects where people like shiny buildings that look really nice from the outside, but quite often get the inside of the school wrong." Instead, owners and operators will focus more on the functionality of the internal and external space, and less on the cosmetic appearance of the facade.

Flexible interiors | "Flexible space, adaptable space, is just going to be so, so important," noted one panelist. Practical solutions proposed included: folding walls to open and close spaces; moveable furniture; moveable space dividers such as book cases. Another panelist noted: "Traditional dining halls are used for about 20% of the school day. Instead they can be conceived as a social and learning space," with dining just one of many functions. One panellist noted that flexible school spaces have been fashionable before, in the 1970s and 90s, but were maybe ahead of their time.

Fewer 'classrooms', more collaboration | "One thing this has taught us is that simply delivering the curriculum can be done quite effectively online," observed one panelist. "It's the interaction with teachers and collaboration with students where they miss that face-to-face experience." As such, build fewer traditional classrooms and lecture halls, which are designed for one person delivering content to a large group. Build more spaces designed for one-on-one or small group work, borrowing ideas from office design and co-working spaces. *(For more on this see Section 3: Teacher's Perspective).*

Focus on science labs, music rooms etc. | Several panelists noted that the physical spaces which students and teachers are craving the most are those with a dedicated function and specialist equipment. "I can teach the theory and software quite well over video, but the design studio is the problem," noted one panelist. "That and fabrication of physical models – you just can't have the equipment to do that from home."

Practical spaces that fall into this category include: sports facilities, sciences labs, computer labs, maker spacers, rehearsal/performance spaces for arts. One panelist noted that for mid-market and affordable schools, designers should seek creative and cost-effective ways to make these spaces economically viable, such as multi-functionality and flexibility.

Fewer corridors more useable space | Several panelists observed that even before the pandemic, many education operators were rethinking circulation spaces and ratios of teaching to non-teaching space. The pandemic will accelerate these trends. One panelist observed that their organization is looking to reduce corridors from the traditional ratio of 20-25%: "I would like to get that down to 5% so that the corridors are not corridors, they are used as amenities, so there is a real purpose to the interior." The panelist cited several examples of global schools that have embraced this, including John Bosco Arts College in Liverpool, UK .[1]

> "The Coronavirus is a loud wake-up call for education. We now have an opportunity to retool and reenergize schools and schooling so that it looks very different than the place we all learned in with rows upon rows of classrooms, each with one teacher gamely struggling to impart "knowledge" to an increasingly disinterested audience."
>
> Prakash Nair, Author,
> Learning by Design [2]

Indoor/outdoor learning | Using outdoor space for learning can be an effective fix to reduce student density in the short-term. But several panelists suggested it could be retained as a long-term trend. Traditionally, outdoor has been seen as a recreation/play/sports space, with academic learning happening indoors. With creative and cost-effective passive design solutions such as shading, outdoor spaces can become effective learning spaces.

Touchless toilets | Several suggestions were given for re-designing wash-rooms used by students, with one panelist noting "handles are harbingers of infection." Solutions included using screens rather than doors; for doors that remain, replace handles with foot handles; anti-microbial materials; sensors for soap and towels. One panelist noted that this could also reduce bullying, which sometimes takes place behind locked toilet doors. Safeguarding and fire/safety must be considered in any re-design, as well as infection.

Contactless access | Many panelists noted that entry and exit points often involve touch, particularly door handles and gates. Depending on considerations of security, cost and fire regulations, touchless solutions could include: doors activated by sensors; removing doors; antimicrobial door handles.

1 https://www.archdaily.com/554541/st-john-bosco-art-college-bdp

2 https://educationdesign.com/wp-content/uploads/2020/03/Newsletter.pdf

Survey Question 4: Long-term, which of the following statements do you most agree with?

If it ain't broke, don't fix it. Design of education spaces will return to normal in a couple of years.

21%

Don't waste a crisis. Take this opportunity to overhaul design of education spaces.

79%

Most panelists (79%) picked "don't waste the crisis". The responses were broadly the same from teachers and non-teachers.

Survey Question 5: How do you feel about this idea: "Schools and colleges need more agile 'We-Work' type co-working spaces, such as quiet pods for deep work; 1-on-1 meeting spaces; small group breakout spaces; social cafe-style spaces."

No, it's a gimmick

17%

Yes, it will boost educational outcomes

83%

With this question, we were testing a 'trendy' design concept that we thought might provoke a backlash. Surprisingly, there was broad enthusiasm (83%) for the 'WeWork-ification' of education spaces – particularly among teachers (85%).

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The Teacher's Perspective

The problem

Education design is, ultimately, the slave of education outcomes. Set the learning outcomes that students and teachers want to achieve, then work backwards to design a space that delivers those outcomes. As such, a White Paper like this – focused on changes in education design – cannot ignore changes in pedagogy.

A full analysis of the pedagocical implications of the 2020 coronavirus pandemic is way beyond the scope of this humble document! Here we simply look at a handful of the most obvious/likely changes in pedagogy that might arise – and suggest a few practical design responses. One panelist stressed that no single, dominant pedagogy will emerge: different subjects and different curricular will call for different teaching approaches, and therefore different design approaches. These pedagogical shifts include:

HYBRID LEARNING:

There was broad consensus that some form of hybrid learning – partly digital, partly physical – will be the future of education. “Even when we are fully open, the new model needs to be more hybrid than it has been over the past 150 years,” noted one panelist. Some called it “blended learning”, some “phygital”, some referred to the “flipped classroom”.

PASSIVE LECTURES - DIGITAL:

More than one panelist noted that of all learning scenarios, passive lecture-style settings transition most effectively to video learning.. Several panelists agreed that this style of static teaching/learning translates relatively well to Khan Academy-style video tutorials.

ACTIVE DISCUSSIONS - PHYSICAL:

By contrast, the pandemic has highlighted that some of the highest-value education experience comes from dynamic interaction between teachers and students, individually and collectively. While passive ingestion of information can work remotely in front of a screen, active discussion, debate, deliberation and feedback benefit greatly from personal connection.

HANDS-ON LEARNING:

As noted previously, science labs, maker spaces, computer labs, music rooms and sports facilities cannot be replicated at home. As one panelist observed: "We can teach history and theory over Zoom – but we can't dissect mice or build drones."

PROJECT LEARNING:

"I think the trend towards project-based learning was definitely in the works, but I think and hope it will now really take off," observed one panelist. Another panelist noted some early evidence that students in IB curriculum – with a greater focus on project learning – were adapting better to home schooling.

SYNCHRONOUS vs ASYNCHRONOUS LEARNING:

Several panelists noted that a hybrid model would allow students to take some classes at a time that suits them (asynchronous) rather than having to be at school or college at a specific time (synchronous). One panelist observed: "It's like TV. Before if you wanted to watch your favourite show, you had to be there at 8pm. Now we have streaming on demand, you watch shows when you want to." This is better suited to older school children and college students.

EXTRA-CURRICULAR:

"Children are missing the totality of the learning experience," noted one panelist. Particularly extra-curricular activities, both formal (sports teams and drama productions) and informal (playtime and lunch breaks).

The Design solutions

The design responses to these pedagogical shifts can be boiled down to just two simple ideas:

Reduce low value-add spaces

Several panelists observed that traditional education buildings often have sub-optimal allocation of space. Some spaces within a school or college are in use for just a few hours a day (corridors and canteens), while others are used for relatively low value-add education experiences (administration). Traditional classrooms still have a role to play, but often punch above their weight, taking up a disproportionate amount of teaching space. Of course, every building is unique. But in general, spaces that can potentially be re-purposed more efficiently include:

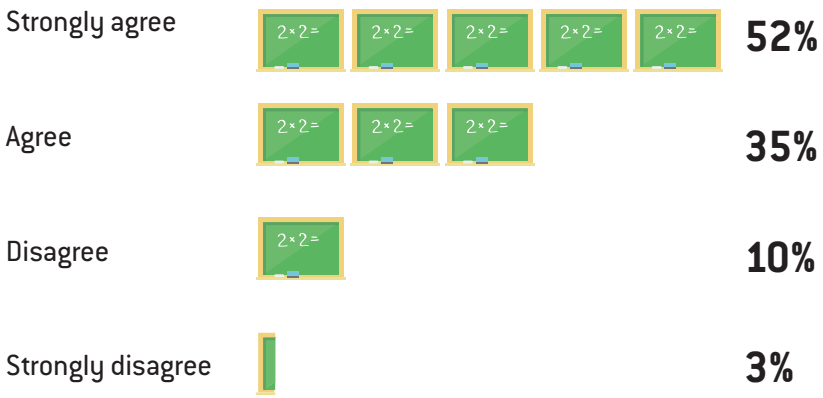
- Traditional classrooms and lecture halls
- Corridors
- Canteens
- Administrative offices
- Outdoor play areas used only at "break time"

Increase high value-add spaces

By contrast, the panelists identified several spaces that add relatively high value to educational outcomes, but often punch below their weight in traditional school and college design. If designers are able to decrease the area given to relatively low value-add spaces, they can increase the sq ft given to high value-add spaces, including:

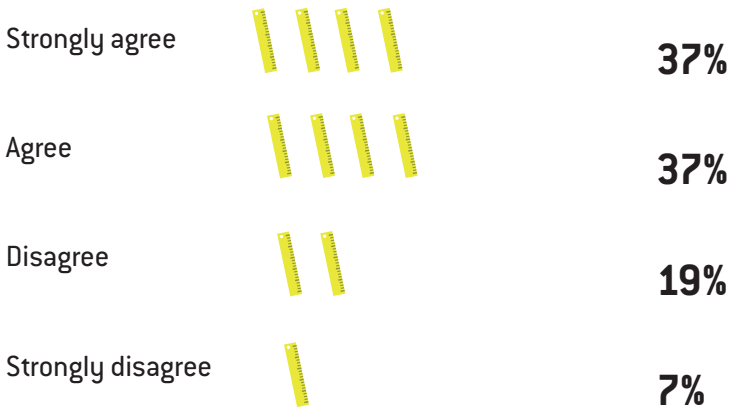
- Specialist 'hands-on' spaces such as labs and music rooms
- Agile teaching spaces with flexible furniture
- Deep work pods for solo concentration
- Private spaces for one-on-one meetings
- Breakout spaces for group work
- Congregation spaces for 'town hall' style large gatherings
- Communal social spaces for play, recreation and eating

Survey Question 6: Do you agree or disagree with this statement: “Blended learning - a mix of physical and digital - is here to stay.”



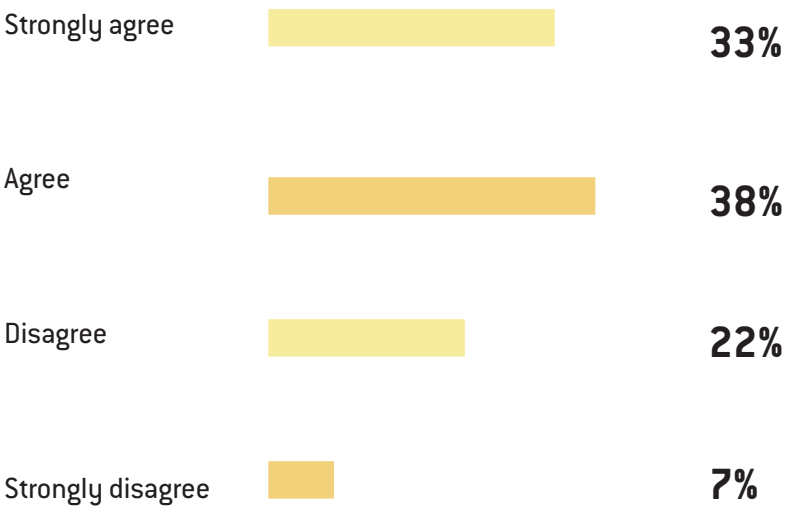
There was broad, but not unanimous agreement (87%) among all respondents. Agreement was even higher (88%) among teachers.

Survey Question 7: Do you agree or disagree with this statement: “The traditional classroom is a relic of the 19th century, ill-suited to the needs of 21st century learners.”



This was a deliberately provocative question! A significant minority (26%) disagreed or strongly disagreed, but clearly a majority believe the classroom does indeed need a re-think. There was virtually no difference between the proportion of teachers (76%) and non-teachers (77%) who agreed/strongly agreed with the “relic” statement.

Survey Question 8: Do you agree or disagree with this statement: "The 'flipped classroom' is an idea whose time has come."



This was another question deliberately phrased to polarize opinion! In the end, there was no clear winner, but a bias (71%) towards those agreeing with the statement. Interestingly, teachers (76%) were far more in favour of the flipped classroom than non-teachers (62%)

DEFINITION:

The flipped classroom is a model of blended learning. It argues that for simple 'transmission of information' (i.e. traditional lecture-style teaching with the teacher at the front of a class), students are better off watching videos at home, in the style of Khan Academy or Netflix. The real value added by a teacher in a classroom is facilitating face-to-face discussion of the material. As education reformer Alison King famously described it: "from the sage on the stage to the guide on the side."

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The Doctor's Perspective

The problem

The was broad agreement that schools cannot return until safeguards are in place to minimise the physical health risks presented by COVID-19.

The first problem is COVID-19 itself. As one medical practitioner on the panel noted: "When children re-enter society, we could very well begin to see that dreaded second surge. Schools closed early on because children are seen as the super-spreaders. Children are more likely to not show any symptoms, and hence can spread the virus back home to their families, vulnerable people and older members of staff."

The second problem is other health risks. "The other issue we have as a medical community is that you won't just see a surge of COVID, you will see a surge of all the other viruses and infections that these children have not been getting over the last few months." Children have not been building up immunity to everyday infections such as Influenza and Hand, Foot and Mouth, and some children are behind with vaccinations for infections such as measles, because many parents have been avoiding taking their children to clinics during this time.

The third problem is how to allow children to enjoy the benefits of school while observing health guidelines. "How do we teach children phonics with a mask on?" noted one panelist.

The Design solutions

Standard preventative measures | temperature checks on entry, hand sanitizer stations, touchless doors and toilets.

Visual cues | remind children of the need for handwashing, distancing etc with age-appropriate graphics on walls and floors.

Use gamification to promote distancing | panelists noted that it is difficult for children to observe rules such as staying 2 metres apart. One panelist suggested "gamification" to make it a fun challenge.

Infection-fighting equipment | Consider HEPA (high-efficiency particulate air) filtration systems, and anti-microbial coatings for surfaces, although these have significant cost implications.

Dedicated classrooms for vulnerable students | "Within every school we have vulnerable groups of students, students with immune problems. They need to be shielded within the school environment," noted one panelist, who suggested creating small makeshift classrooms where they connect digitally.

Isolation room | "If there is a suspected coronavirus case, there has to be - for lack of a better word – a COVID room," noted one panelist. This must be separate from the established school clinic/nurse/first aid room. "Parents have to know that if their kids get a cut or a scrape, they are not going to be mixing with the ones who have a fever or symptoms suggestive of COVID."

5

The Psychologist's Perspective

The problem

The contributors were unanimous in identifying mental health as a key factor, not just for students but also teachers, parents and other stake-holders such as support staff. Some of the potential issues included:

- *Not all students are the same. Some are thriving in distance learning, others are struggling*
- *While curriculums may be delivered effectively online, the lack of socialisation is a key issue for many students*

"We don't want a bunch of kids with OCD or PTSD"

"We have to guard against catastrophizing the situation."

- *On returning to school, bullying is a potential problem, with children who sneeze being targeted*
- *Measures implemented to restrict COVID-19 could traumatize children*
- *Children are remarkably resilient. With the right approach, many will adapt relatively well.*

The Design solutions

Panelists observed that design of physical space can only play a limited role in addressing these complex issues; design cannot be relied upon to do the heavy lifting when it comes to mental health. That will have to be done by people: counsellors, teachers, parents etc. However, design can play an important supporting role. Design solutions include :

Don't "catastrophize" the situation

The design solutions proposed in section one (Short-term 'back-to-school' design fixes) must be done sensitively. "We can't put up yellow and black police tape sealing off areas to make it look like a disaster movie," noted one contributor.

Counselling spaces Create spaces to allow for one-on-one counselling and for small group discussions, which are less intimidating for some students.

Defensible spaces One panelist noted: "Within an open space, we need to provide defensible spaces, where students can be cocooned, yet feel part of the wider school community." This is particularly important for children who are vulnerable, either psychologically or with conditions such as diabetes/immunity.

Sanctuaries for teachers "We need well-equipped breakout rooms for staff so they can maintain the energy to deal with this. It's almost like teachers are going to have to take on a psychological role," noted one panelist.

Give older students a 'cool' social space: "Adolescent kids need a quality, funky room that they can make their own. Somewhere they can make and imprint those memories with their friends – even though we have COVID, it shouldn't rob them of that," noted one panelist.[3]

3 https://www.psychologytoday.com/us/blog/animal-emotions/201801/the-biophilia-effect-exploring-the-healing-power-nature

6

The Government's Perspective

The problem

Government regulations will be a key driver of education design decisions in both the short and long term; there was broad consensus among contributors on this. The UAE, like many countries, has multiple overlapping regulators when it comes to education design. They include:

- Ministry of Education (Federal UAE)
- KHDA Knowledge and Human Development Authority (Dubai)
- ADEC Abu Dhabi Education Council (Abu Dhabi)
- Civil Defence (all jurisdictions, for fire and safety regulations)
- International regulators (for international curriculum schools such as US, UK, Indian, IB etc)

There was little consensus on specifically how regulations will influence education design in the short or long-term. But there was broad agreement that it will be significant. Comments included:

"We will have to completely re-evaluate municipality regulations on how many classrooms you need, how many car-parking spaces you need. All of that will have to be re-evaluated in a post-COVID world."

"If the regulator says class sizes are 10-1 or 15-1, then that's what it will have to be."

"Often regulations limit what schools can do from a design perspective."

"We are in constant dialogue with [xyz regulator], and they are willing to listen and are open to changes."

"The [xyz regulator] has just begun assessing the quality of distance learning, which is completely new territory. It'll be fascinating to see what they come back with."

"The KHDA in Dubai had already launched its Rahhal ("traveller" in Arabic) initiative, even before COVID-19[4]. It was exploring many of the issues highlighted by COVID, such as the role of classrooms, technology and modes of learning. This suggests that regulators – far from the traditional view of stuffy defenders of the traditional status quo – can be the ones driving change."

The Design solutions

Specific design solutions will be developed in response to specific regulations – but at the time of this report (late May/early June 2020) specific regulations for post COVID-19 education design had not been published.

4 https://www.khda.gov.ae/en/rahhal

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The Accountant's Perspective

The problem

The main focus of this White Paper is privately-run schools in the UAE; many are for-profit (run by companies like Taaleem & GEMS, or independent owners), while some are not-for-profit. Whether generating a dividend for shareholders or not, some entered the coronavirus crisis facing economic challenges, as an oversupply of new schools led, in some cases, to higher vacancy rates and discounting of fees.[5][6]

> "Non-payment of fees by students, the provision of discounts, and uncertainties regarding new enrollments and variable operational costs is putting tremendous pressure on schools that can affect operational continuity."
>
> The Education Business Group, UAE

The pandemic has, in many cases, exacerbated these factors. In June 2020, the Education Business Group was formed, representing more than 100 private UAE schools, ranging from independent operators to enterprise scale groups Taaleem and GEMS. A press release from the group noted that: "non-payment of fees by students, the provision of discounts, and uncertainties regarding new enrolments and variable operational costs is putting tremendous pressure on schools that can affect operational continuity."

Like it or not, teachers, owners and designers must pay attention to The Accountant's Perspective.

A detailed financial (or indeed philosophical) debate about the for-profit school model is way beyond the scope of this White Paper. Below are simply a few practical ideas for education owners and operators that emerged from the research which may improve the economics of their educational model. Some are design-related, others not.

5 https://www.reit.ae/pageFileC/investor-relations/Emirates-REIT-holds-discretionary-interim-dividend-Jan-2020.

6 https://www.khaleejtimes.com/news/education/dubai-school-shuts-down-after-30-years-of-operations

The Design solutions

Below is a collection of design solutions that could have a positive impact on the finances of a school or college. Many of them have been mentioned previously in this report – this list curates the design solutions most relevant to The Accountant's Perspective.

Short-term, invest in back-to-school quick fixes. This will get more students back in school more quickly – and therefore make parents more likely to pay the fees. Re-zoning gyms and canteens, sanitization areas, upgrade medical facilities, graphics to promote distancing, touchless toilets etc can all be done.

Long-term, no more vanity projects. Don't waste money on glitzy exterior architectural facades.

Focus real estate dollars on spaces that make a real difference. Specialist spaces such as science and music labs; small collaborative spaces in the 'WeWork' style; play spaces. These are the difference-making experiences that students, teachers, and (perhaps most importantly) fee-paying parents really value.

"Sweat the asset." Maximize the ratio of teaching space as a percentage of gross floor area (GFA). Achieve this by minimizing wasted space such as corridors and admin, and re-purpose common areas like canteens, theatres, gyms and outdoor play areas into hybrid teaching spaces.

Do more with less: design solutions for affordable and mid-market schools. Demand for these institutions may increase, as some parents have taken pay cuts and may trade down from more premium schools. (In economic terms, affordable schools are the equivalent of so-called "Giffen Goods" such as white bread and cheaper cuts of meat, demand for which typically increases during economic downturns). Given that affordable schools have lower budgets and less space per child, designers will have to get creative in doing more with less.

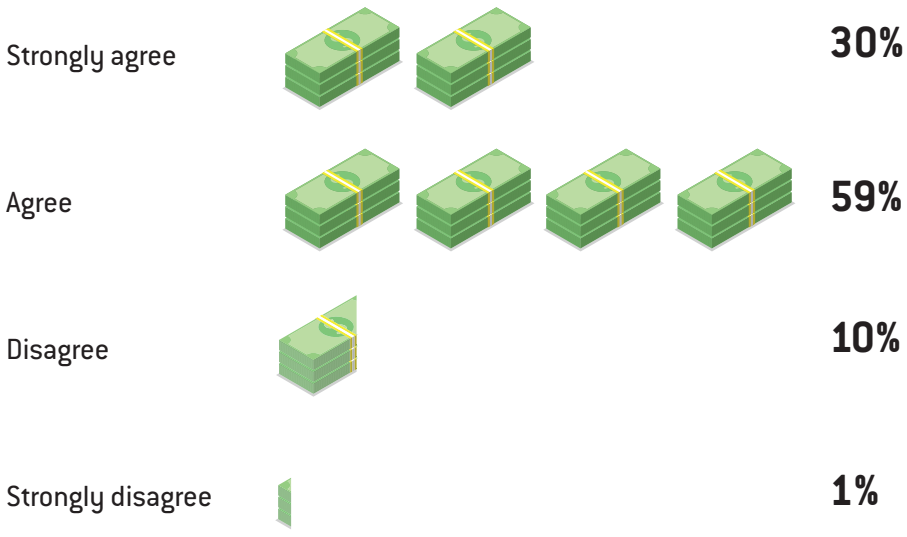
Non design-related financial ideas

"Large players with several assets are coping better than single schools," noted one panelist. They have economies of scale and a lower cost base. They can potentially acquire single school assets.

"Having a strong balance sheet is important," noted another panelist. For example, Taaleem was able to offer discounts of c.20-25% for term 3 because its balance sheet was strong (i.e. relatively low debt.)

"Invest in schools offering strong value for money. Or, if the fee is high, something exceptional," noted another panelist.

Survey Question 9: Do you agree or disagree with this statement: "Some owners have wasted money on vanity projects, wasting money on glitzy architectural facades - money that should have been spent on the interior."



There was little dissent on this, with 94% of teachers picking agree/strongly agree. Non-teachers were slightly more forgiving – but only slightly – with 84% picking agree/strongly agree.

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www.designbyroar.com

@designbyroar

contact@designbyroar.com

DUBAI DESIGN DISTRICT, STUDIO
204, BUILDING 9, DUBAI UAE.

00971 52 509 8720