Common courtyard, Rodrigues de Fretas Secondary School, Porto
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0 | EXECUTIVE SUMMARY

Background

This is the report of a review undertaken by the OECD Centre for Effective Learning Environments (CELE) for the Portuguese Government of the Secondary School Building Modernisation Programme (SMP) a major programme to rehabilitate the secondary schools in Portugal. The programme is an ambitious one, entailing the rebuilding, extension, adaptation and re-equipment by 2015 of 332 of the 477 schools that provide upper secondary education in Portugal, with a total investment for the first 205 schools of EUR 2.45 billion. The Portuguese Government has established a state-owned company, Parque Escolar, which has a high degree of independence, to oversee and manage all aspects of the SMP.

The OECD Review Team was asked to focus on five key issues:

- How effectively the SMP addresses the physical quality of school buildings, the suitability of the facilities for current and future needs, whether there are sufficient spaces to meet these needs, and how stakeholders are engaged in the process;
- How the SMP can better meet Portugal's strategic objectives for secondary education;
- Whether and how the overall programme should be rationalised;
- The governance structure of the SMP and the relationship between Parque Escolar, national educational authorities, school institutions and other stakeholders; and
- The funding mechanisms, levels of funding available, and the efficiency with which resources are used.

The physical quality and suitability of school buildings

Parque Escolar has driven the SMP strongly and effectively, drawing on international benchmarks and best practice. The SMP is set to secure a transformation in the physical quality of the majority of secondary schools in Portugal, and ensure their suitability for a more practical, scientific and vocational curriculum and for changing educational needs. This is a challenging task. It is made more difficult by the speed of implementation of the SMP, which has been determined for a mixture of reasons related to the availability of finance, the state of the global economy and other factors exogenous to the needs of the education service.

Meeting Portugal's strategic objectives for secondary education

The SMP is intent on meeting the government's key objectives for secondary education, and:

- Forecasts of demand used to determine the design size of each school in the SMP, combined with space standards that have some headroom or flexibility by international standards, so as to ensure that the stock of schools is sufficient for the foreseeable future;
- The implications for the size and character of secondary schools in Portugal of the rise in the compulsory school participation age to 18;
- Curricular developments towards much greater use of ICT and more personalised and laboratory-based teaching methods;
- Restoring a vocational curriculum option to all secondary schools.

There are issues, however, as regards the capacity of the remodelled secondary schools to meet all the specialist education and training needs of young people that elsewhere (e.g. in Australia or the United Kingdom) would be met in larger scale and more employer-focused specialist facilities, or to motivate the kind of young people who would previously have chosen to leave school but, in future, will be obliged to stay on.

To address these issues, the government, along with Parque Escolar, should monitor the impact on demand and outcomes of the new vocational provision for 15-18 year olds in secondary schools. If there is evidence of gaps or failures to meet demand, it will consider options for the development of more specialist vocational provision serving a local area or cluster of schools.

Governance and relationships

The creation of Parque Escolar as a special-purpose state owned company with specific responsibility for planning and delivery of the SMP has been a very significant, if not the crucial, factor in its success to date. The model developed has drawn on international practice in other countries where economic stimulus programmes and public-private-partnership (PPP) programmes are being run; but it has also drawn on Portugal's own traditions and its analysis of what combination of public and private sector best practice is most likely to work. The resulting body is well organised, and ably managed by people with appropriate expertise in architecture, engineering, finance and project management. It has succeeded impressively to date. It may serve as a model for international application.

The development of the design for each school and its execution have entailed

Figure 0.1. Dining area, Rocha Peixoto Secondary School, Póvoa de Varzim

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good relationships and close consultation with the schools themselves and others most directly affected locally; but at national level there has been relatively little consultation with the key national stakeholders. This may mean that valuable opportunities for developing ideas and for integrating the SMP with developing education, economic and social policies are being lost. The Government should appoint a national consultative body to provide advice and feedback to Parque Escolar.

To complement this, Parque Escolar should introduce a number of refinements to its procedures, including: undertaking post-completion reviews of each school under the SMP; independent research to establish how the spaces in a structured sample of the schools are being used; development of a web-based design manual, management guidelines for schools and short-term training and workshops, each embodying the best practice identified by the above processes; and creation of a specialised but widely accessible Technical Documentation Centre relating to the SMP.

Funding

With substantial support from the European Union (EU), and taking advantage of a political and economic climate in favour of such public investment, between 2007 and 2011, the Portuguese Government is investing EUR 2.45 billion in modernising the first 205 schools under a building programme that is intended to transform 332 of the country's secondary schools by 2015. In doing so, it aims to make up for a generation of under-funding that has resulted in the physical deterioration of the buildings, obsolete equipment, and spaces for learning which do not reflect 21st century needs. The indications are that the sums allocated are sufficient for the intended principal purpose.

There remain questions as to the provision of funding for the similar updating of at least some of the 145 secondary schools which are not included, and which within the next few years may show similar deficiencies to some of those now being remodelled. Primary and other schools delivering basic education will also need to be renovated.

The provision within the overall SMP funding to provide for the repair and maintenance of the 332 schools is an admirable – and possibly unique – feature of the SMP. It is a potential model for international application. It is not clear, however, that the sums set aside (7% of the total programme) will be sufficient for the purpose, i.e. whether they are to include provision for updating and re-equipping the schools between now and 2037 in line with the requirements for the changing curriculum, pedagogy and learning styles.

Funding mechanisms

At system level, funding for the SMP has come from a mixture of grants (EU Structural Funds and the Portuguese Exchequer) and loans (long-term loans from the European Investment Bank, Council of Europe Development Bank and Commercial Banks). Their negotiation has required political commitment, professional expertise and ingenuity, and timely application. The SMP has benefitted from

Figure 0.2. Social space, Soares dos Reis Secondary School, Porto
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enjoying political priority at a time when the circumstances of Portugal within the EU, and the world recession, have given the Portuguese Government a dual incentive to press forward with an Intervention Programme with all due speed. Those concerned are to be congratulated on having secured so large an injection of funding into the secondary school system.

Innovation has been shown in the development of the regime for the continuing maintenance of schools after their remodelling. There are, however, questions as to the robustness of these arrangements for the longer term. The contractual maintenance arrangements, and levels of finance set aside under them for continuing repairs and improvement, should be kept under review over the years ahead and be adapted if it makes sense to align responsibilities with new models of service delivery.

Delivery

Responsibility for the whole process involved in the SMP rests with Parque Escolar. So far, the indications are that it is on course to achieve the planned rate of delivery. That in itself would be an impressive achievement. Where there have been delays to individual projects, they have been no more than a few weeks. In relation to some concerns expressed as to the consultation process, the design and the flexibility of the resulting buildings, the arrangements seem well suited for their purpose. They reflect or exceed international best practice and are likely to secure the efficient achievement of its completion.

The speed of the build up of the SMP, however, is such that there is limited scope for learning and applying lessons along the way as regards either education and design issues or finance and the budget. A lot therefore depends on having established a "right first time" allocation and control process. The process is clearly efficient. In the Review Team's view, it is too early to be quite so confident about the cost-effectiveness of the SMP:

- The quality of finish of the buildings observed is commendable, but the design may not always prove as flexible and representative of best 21st century innovative practice as might have been expected of the learning environments of today and the foreseeable future.
- The modernised schools need to include appropriate spaces for the vocational education and training (VET) curriculum envisaged in each case locally, but the specialist spaces may not always prove to be fit for purpose in a few years' time as demand for different specialisations fluctuates.
- The space standards being applied provide generous spaces and give flexibility of delivery, but within finite resources may be at the cost of other objectives: schools that are unnecessarily large will impose additional long-term energy, cleaning and maintenance costs. It may be possible to make better use of the space and associated financial resources.
- At a system level, the use of the resources available for schools that have attracted priority allocations means that the remaining secondary schools may struggle to attract funding for their modernisation, as may schools for younger pupils and alternative forms of delivery of VET, which may be needed for a proportion of young adults.

The various processes advocated above should be used to ameliorate the effects of concentrating so large an investment programme into so short a space of time, and to consider holding back a reserve to provide for implementing desired modifications thus identified.

Options for rationalising the Secondary School Building Modernisation Programme

Benefitting from its independent status and highly focussed remit, Parque Escolar has made a major impact and achieved a considerable amount in a short time. However, the very strengths of such independence are also a potential weakness. Questions arise as regards links with other policies and programmes and engagement with other bodies and stakeholders. The Review Team has recommended measures to address these. Nevertheless, the SMP is of a scale and importance to justify and support the separate infrastructure created to manage it so long as the active period of construction is underway. Thereafter, it will be necessary to consider how to manage the transition to the next stage.

Figure 0.3. New laboratories, Rainha Santa Isabel Secondary School, Estremoz
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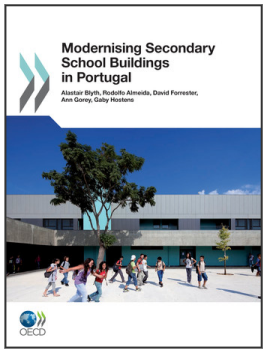

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