

INSTITUTIONAL EVALUATION PROGRAMME

EUROPEAN UNIVERSITY ASSOCIATION

**INSTITUTIONAL SELF-EVALUATION REPORT  
OF THE  
UNIVERSITY OF ÉVORA**

MARCH 2007

**UNIVERSIDADE**



**DE ÉVORA**

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Appendices on a separate document.

## LIST OF ACRONYMS

ECDU	University Teacher Career Statutes <i>Estatuto da Carreira Docente Universitária</i>
ECTS	European Credit Transfer System <i>Sistema Europeu de Transferência de Créditos</i>
ETI	Full time equivalent <i>Equivalência em tempo integral</i>
EU	European Union <i>União Europeia</i>
FCT	Foundation for Science and Technology <i>Fundação para a Ciência e Tecnologia</i>
FUP	Foundation of the Portuguese Universities <i>Fundação das Universidades Portuguesas</i>
GAPI	Industrial Property Support Office <i>Gabinete de Apoio à Propriedade Industrial</i>
GRI	International Relations Office <i>Gabinete de Relações Internacionais</i>
HEI	Higher Education Institutions <i>Instituições de Ensino Superior</i>
JNICT	National Committee for Scientific and Technologic Research <i>Junta Nacional de Investigação Científica e Tecnológica</i>
MCTES	Ministry for Science, Technology and Higher Education <i>Ministério da Ciência, Tecnologia e Ensino Superior</i>
NAE	Students' Support Services <i>Núcleo de Apoio ao Estudante</i>
NUFOR	Centre for Staff Development <i>Núcleo de Formação Contínua</i>
OTIC	Technology and Knowledge Transfer Office <i>Oficina de Transferência de Tecnologia e de Conhecimento</i>
PIDDAC	Program of Investments and Expenses for Central Administration Development <i>Programa de Investimentos e Despesas de Desenvolvimento da Administração Central</i>
PROQUAL	UÉ's Program for the Promotion of Quality <i>Programa para a Promoção da Qualidade da UÉ</i>
PRPQI	Pro-Rectorry for Quality and Innovation Policies <i>Pró-Reitoria para a Política da Qualidade e Inovação</i>
SIIUÉ	UE's Integrated Information System <i>Sistema de Informação Integrado da UÉ</i>
UÉ	University of Évora <i>Universidade de Évora</i>

## INTRODUCTION

Within the context of the current national reform of Higher Education, the government has initiated three separate processes of external evaluation and, to put it into practice, has called three supra-national bodies, the OECD, the ENQA and the EUA. In the case of the last of these, a programme of international evaluation of higher education institutions (HEI) was organized. The University of Évora (UÉ) took that opportunity, submitted its candidacy and was selected.

The process of institutional evaluation was coordinated by the Pro-Rector for Quality and Innovation Policies (PRPQI)<sup>1</sup>. The Self-Evaluation Committee was constituted by a rapporteur, the process coordinator, representatives of seven thematic work groups, the presidents of the Scientific Council and the Pedagogical Council and the president of the Student's Union. The thematic work groups included academic and non-academic staff, students and representatives from outside partners. All the academia was invited to participate in the self-evaluation process, and many members of the academic and non-academic staff, undergraduate and postgraduate students have volunteered to participate in the work groups. Other persons were specifically invited, namely representatives from the external partners.

The work of the committee was organized in weekly sessions by theme. The work of each thematic group was structured allocating questions of the programme outline to each theme and providing answers to them. The conclusions of the thematic work groups and the successive versions of the self evaluation report were made available at the university's e-learning platform, along with the EUA's guidelines, the list of participating individuals (Appendix I) and other relevant documentation, and comments were welcomed from all the academia.

This report constitutes a self-evaluation of the UÉ. Its fundamental purpose is that the University should find out how it can best accomplish its mission and fulfil its objectives. So, the self-evaluation report provides information for the evaluation team of the EUA with an emphasis on its quality management activities and institutional strategy and, together with the process of self-evaluation that preceded it, and led to its materialization, contributes towards the institution's capability for change and innovation through self-appraisal.

Of course, the report follows the format set out in the EUA's programme of institutional evaluation and the list of points for recommended use. It provides a response to all the questions on this list, interpreting, answering and organizing the reply to each question. The report begins with a presentation of the UÉ, *who are we and where are we*, goes on to *what we wish to be* at the UÉ, and what *constraints* do we identify, and presents and proposes *activities developed and strategies defined*, in what concerns actions and solutions for the main questions that are identified, the sort of institutional regulation that should be adopted, the internal quality monitoring processes that it implements, and plans for strategic monitoring and need for change in the context of its missions and the strategic objectives that it is trying to achieve.

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<sup>1</sup> As determined by Despacho nº 69/2006, which also introduced the process to all university members, appointed the steering committee and clarified its responsibilities.

# 1. INSTITUTIONAL CONTEXT

## 1.1 BRIEF PRESENTATION OF THE UNIVERSITY OF ÉVORA

### 1.1.1 Brief historical overview

The UÉ is simultaneously an old and a new university. Old because it was founded by Cardinal D. Henrique on the first of November of 1559, following an authorization, the *Cum a nobis* resolution, given by Pope Paulo IV on April 15<sup>th</sup> of the same year. It was handed over to the Company of Jesus, who directed it until 1759. On 1973, after two centuries, the UÉ was reconstituted as a public university and installed in its original building, the Colégio do Espírito Santo (College of the Holy Spirit).

During its first period outstanding figures of European culture lectured there, namely the Spanish Francisco Suarez and Luís de Molina, and the Portuguese Pedro da Fonseca e Manuel Álvares.

In the more recent period, of approximately thirty years, the UÉ adopts a departmental format, offers all different levels of studies within a perspective closely tied to scientific research and artistic creation (Appendix II) and claims itself, given its historical past, as heiress of a humanist universal mission. Human rights, in its different aspects, are the common denominator of UÉ honoris causa Doctors, as Léopold Senghor, poet and the first president of the Senegal Republic, Queen Sofia of Spain, Bishop Ximenes Belo (1996 Peace Nobel Prize) Mário Soares, ex-president of the Portuguese Republic, José Saramago (1998 Literature Nobel Prize), the photographer Sebastião Salgado, the prince Aga Khan, the pedagogue Rómulo de Carvalho, or the industrialist Rui Nabeiro, among others.

### 1.1.2 Geographical position

The UÉ is located in the core of the largest UÉ region of Portugal, the Alentejo. The region of 27 thousand Km<sup>2</sup>, about a third of the Portuguese territory, presents itself to the Atlantic through a coast line of 140 km long. Landscape is predominantly plain with few zones of mountains, the highest being approximately a thousand meters (S. Mamede Mountains); it has a particular type of Mediterranean climate, with hot and dry summers and rains concentrated in the winter.

The Alentejo is one of the European regions with the lowest population density: its value of 19,8 contrasts with the national average of 112 inhabitants per Km<sup>2</sup>. It is also one of the Portuguese regions that, according to the last census, registers population loss, -0.7%, also contrasting with a positive increase of 5% registered at the national level.

The population of Alentejo is also the most aged in Portugal, with the highest proportion of old and the lowest proportion of young people. Its illiteracy rate, of 15.9% in 2001, is again considerably higher than the national average of 9%.

Évora is the capital of the region Alentejo. It is an old town classified in 1986 by UNESCO as a World Heritage Site. Presumably, was founded by Celts and named originally *Ebora*. The first Romans called it *Ebora Cerealis* and on the year 27 B.C. Octaviano named it *Liberalitas Julia*. After Arab conquerors, it became *Yeborath*. Évora was roman for seven centuries, Visigothic and after Islamic during five more centuries; it is Portuguese since 1165. At Évora, emerging cultures of three religions of Abraão have crossed and left permanent marks in its urban structure (such as Moorish and Jewish quarters), as well as those that come

from the fact that Évora was several times capital of the kingdom and sheltered since the XVI century the second Portuguese university.

The Évora campus of the UÉ has several buildings, some of which are of great cultural value, such as its College of the Holy Spirit, that stand out, the Convent of S. Agostinho, the Vimioso Palace, the Luís António Verney and Pedro da Fonseca Colleges and the ex-plant “Os Leões”. They are spread around and therefore entangled with the city (Appendix III).

The UÉ extends into Alentejo, outside the city of Évora, with the Mitra campus, some ten kilometres outside the city, with campuses in other districts<sup>2</sup> and with Experimental Farms<sup>3</sup>, that accompany activities of teaching, research, experimentation and community service in specific areas such as farming, veterinary medicine, marine biology and land ecology, archaeology, ornamental stone, among others, adding value to these disciplines through the valuable links with sub-regional realities.

### 1.1.3 Institutional structure

The organizational and structural model in use at the UÉ, previously defined by its statutes, follows the Portuguese Law applied to all Portuguese Public Universities: the Law for Universities Autonomy (law, n° 108/88 in Appendix IV).

The structure is Departmental in nature. Departments are the scientific and pedagogical units. The departments are responsible for courses/teaching organization, academic staff management, research and interaction with the community. These last two functions are usually shared with the research centres. Research Centres are multidisciplinary units.

There are currently twenty four Departments, grouped into six Departmental Areas (Appendix V), plus the Nursing School S. João de Deus, which was recently integrated into the UÉ, but has an independent board of management and specific regulatory statutes.

Research and development activities are carried out in Research Centres, as well as in other pedagogical and scientific units, such as the Experimental Farms, the Veterinary Hospital, the Centre for Psychological Intervention, the European Documentation Centre, the University Orchestra and the Cinema Club, *inter alia* (Appendix V).

### 1.1.4 Students

Figure I displays the evolution of students enrolled in the last five years. The global figures are a bit over 8000, of which around 1600 are enrolled in post graduate courses (Appendix VI).

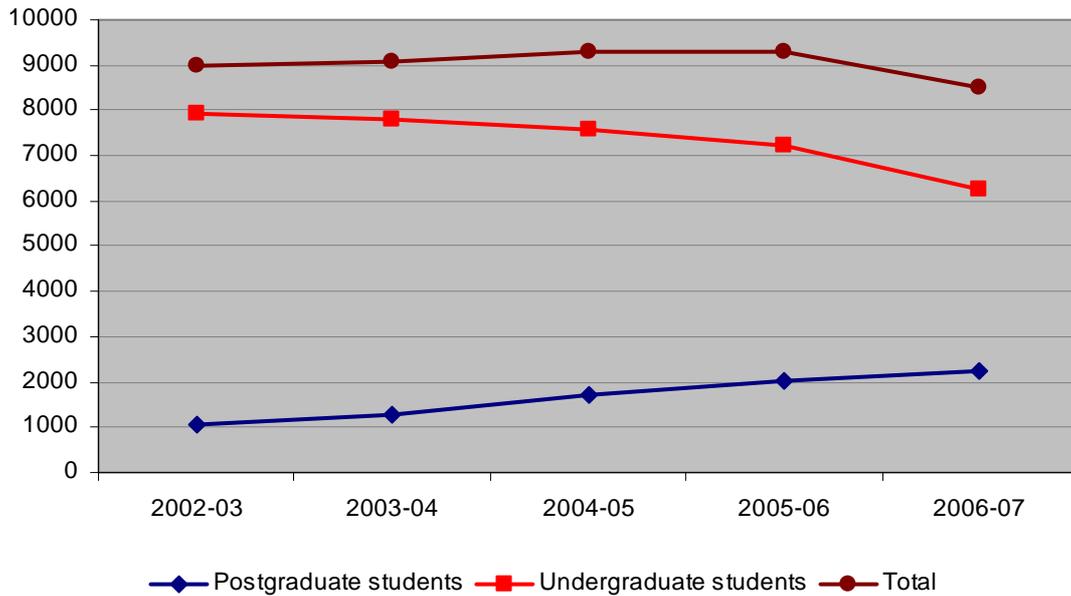
The distribution of first year students by Departmental Area is presented in Appendix VI. In spite of a recent global negative trend, areas such as Civil Engineering, Health and Arts have been registering an increasing number of enrolments. The evolution of post-graduate students, also presented in Appendix VI, shows that the constant increase in the number of 2nd cycle students has been steadily compensating the decline observed in the 1st cycle.

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<sup>2</sup> See geographical position in Appendix III.

<sup>3</sup> The positioning of the experimental farms is not shown.

**Figure I**  
Evolution in the number of total students, 2002-2006



**Note:** The number of postgraduate students in 2006/07 is an estimate based on past experience and may, therefore, differ from the figures in the Appendix VI, which show current numbers.

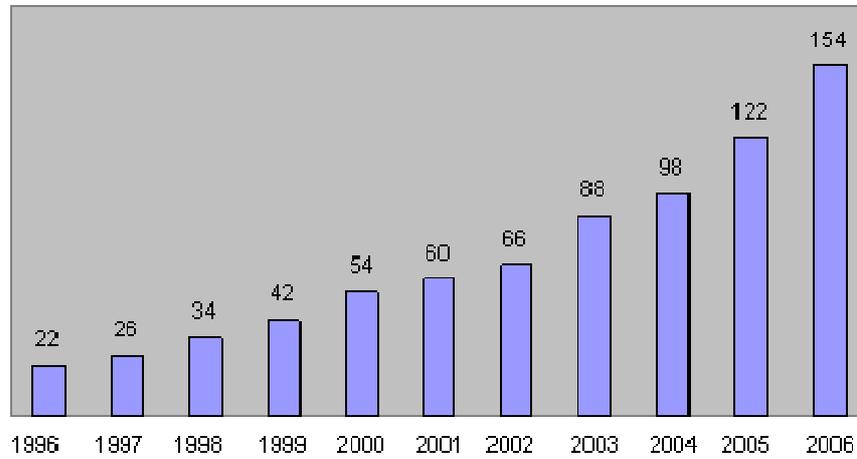
### 1.1.5 Research

The concept of a university as mainly a provider of scientific output and, therefore, as an institution that is scientifically certified to award Master and PhD degrees is relatively recent, in Portugal. The re-establishment of the UÉ, in 1973, has coincided with the beginning of an era of democracy. At the time, the main objective of higher education institutions was to significantly improve peoples' access to universities and to increase the number of graduates. Accordingly, scientific objectives were delayed by pedagogical ones and post-graduate courses were implemented in the UÉ only from the 80s onwards.

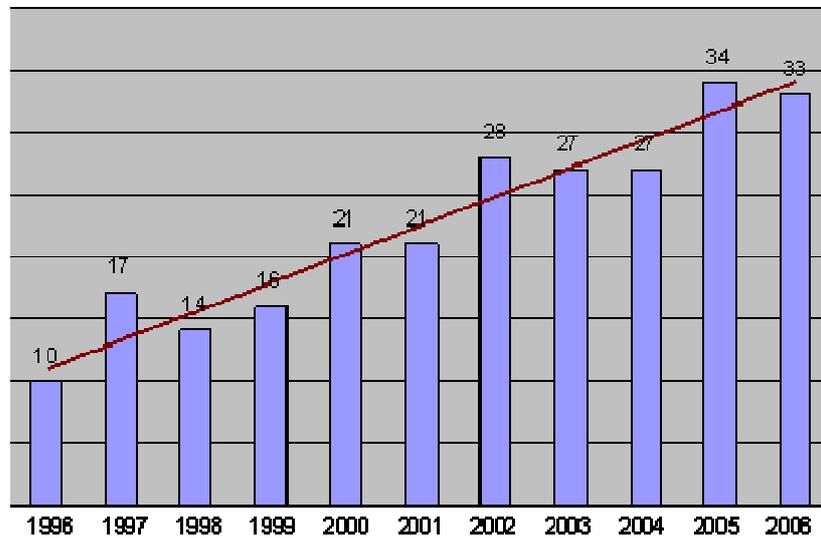
As a consequence, in Portugal, scientific research was, for a long time, a residual academic activity. The first significant funding was provided in 1991 by the programs CIÊNCIA and STRIDE. At that time, the majority of the currently existing research centres were created in Portuguese universities, with the support of the National Committee for Scientific and Technologic Research (JNICT), who financed most infrastructures, equipments, R&D projects and research scholarships.

The scientific performance of the UÉ, which mimics the trend observed elsewhere, although with a delay resulting from its relatively late inception, is reflected in the number of publications in international journals (Figure II) and in the number of awarded PhDs (Figure III).

**Figure II**  
 Number of scientific papers in international journals  
 referenced in the ISI Web of Knowledge



**Figure III**  
 Number of Ph.D. awarded in the last 10 years



**1.1.6 Finance**

In the last four years, the annual budget of the University was around 50 million euros. The main funding source is the Portuguese Government (directly through the State Budget, and indirectly via a governmental investment program - PIDDAC<sup>4</sup>) which, over the last five years, provided on average 70% of the UÉ's budget (see Appendix VII). The remaining 30% are generated by the university, more than a half of which come from students' tuition fees.

<sup>4</sup> PIDDAC stands for Program of Investments and Expenses for Central Administration Development.

## 2. INSTITUTIONAL NORMS AND VALUES

### 2.1 MISSION

#### 2.1.1. What balance is the institution aiming to achieve in terms of its local, regional, national, and international positioning?

The UÉ integrates the Portuguese public higher education system. Thus, its undergraduate courses (licenciaturas) are organized according to the national policy, determined by the Ministry for Science, Technology and Higher Education (MCTES).

The UÉ is located in an economically, socially and culturally depressed vast region, thus being a critical driving force for local and regional development. For this reason, the UÉ, together with the University of Algarve, the Alentejo's polytechnic institutes and the Mértola Archaeological Field have decided to create the Academia do Sul (Southern Academy), with the objectives of both rationalising the offer of first degree programmes and boosting scientific research in the south of the country.

The UÉ is located in Évora which, as mentioned before, is an historical city, classified as a World Heritage Site for having been able to preserve its millenary and multicultural heritage. The University assumes, therefore, the role of Évora's historical memory curator, as well as that of the promoter of a civilisational dialogue that the city should continue and enact.

At the European level, the UÉ supports the principles of the Magna Charta of the European Universities and its reformist content, and fully assumes its role as a member of the European Network for Higher Education and Scientific Research.

#### 2.1.2. What should be the institution's policy regarding international relations at European and international levels?

Although the University's impact is mainly reflected at the local and regional levels, its universalistic nature pushes it towards the establishment of international knowledge networks. Ordered by priority, the following are enunciated:

- The partnership to be established with the University of Algarve and the universities of the Spanish regions of Extremadura and Andalucía, aimed at creation of the **Iberian Southeast Region of Knowledge**;
- The projected partnership with the universities of Mediterranean countries such as Tunisia, Algeria and Morocco, to create the **Western Mediterranean Region of Knowledge**;
- The established cooperation relations with universities from Portuguese speaking countries;
- The cooperation with Far Eastern countries such as China, to exploit the potential of complementary expertise, in particular in health related subjects.

#### 2.1.3. What balance is the institution aiming to achieve among its teaching, research, and other services?

The UÉ considers as crucial the balanced development of its activities of research, teaching and other services to the community. The strategic vision of the UÉ for each of the referred activities fundamentally considers that:

- The different components of personal upgrading, i.e. the scientific, technical and artistic aspects, are considered as integrated components in a cultural process with a lifelong dimension.

- Fundamental and applied research assume a prominent role at the UÉ and the resulting productive and creative abilities displayed in science, technology and arts, support and impel learning and the offer of post-graduate degrees.
- Cooperation with the community, with the objective of reciprocal valorisation, is the way to exchange knowledge, to promote mutual enrichment through observation and experience, as well as to innovate and promote the community's social-economic development, whose success is the best guarantee of UÉ's sustainability.

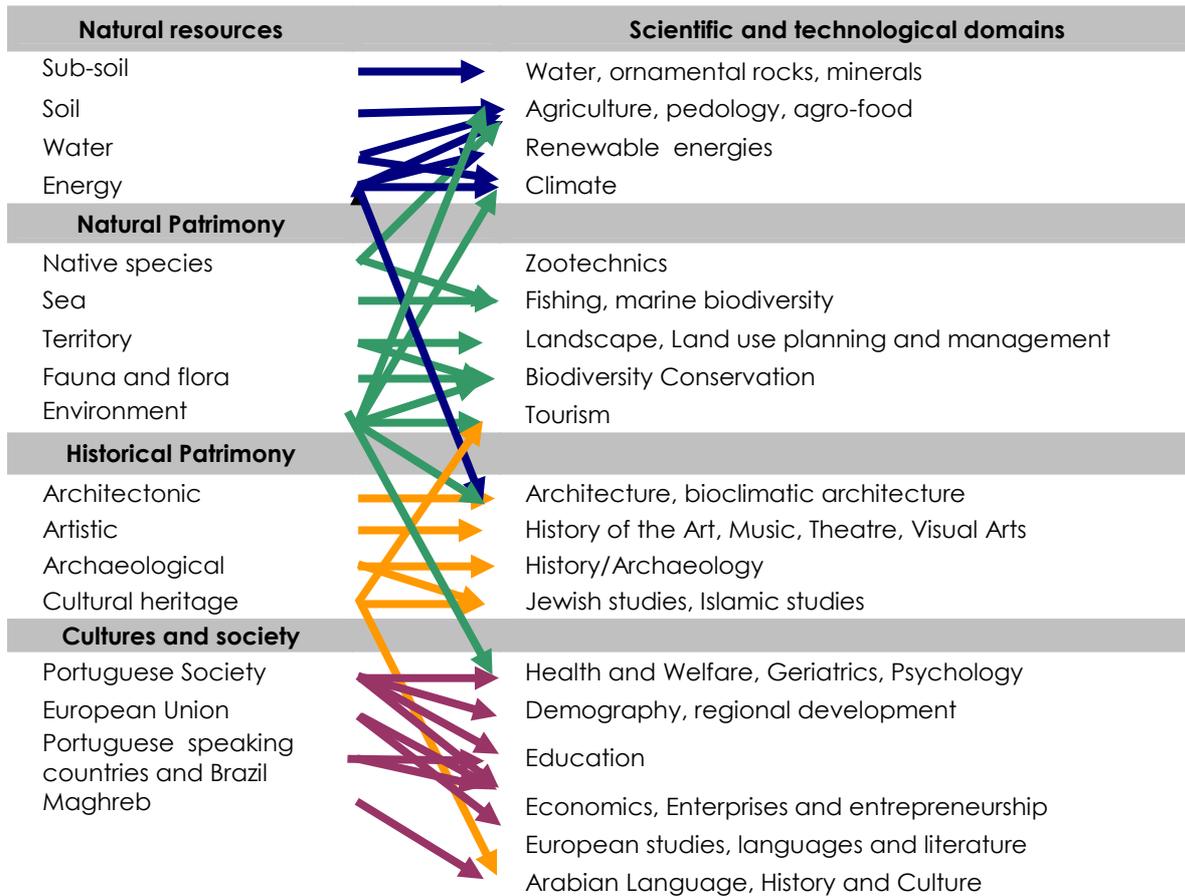
#### **2.1.4. What are the institution's academic priorities, i.e., which teaching programmes and areas of research are emphasised?**

The UÉ has built its competence and intervention profile on scientific and artistic domains in order to intervene with high effectiveness on:

- The processes of rational exploitation of the natural resources;
- The environmental, social and economical sustainable development;
- The preservation of both, natural and cultural patrimony;
- The cultural valorisation of both, city and region;
- The population educational levels, not only by preparing successive young generations but also by guaranteeing the re-adaptation of those who, on a life-long basis, want to become more useful to the society;
- The international relations.

In this sense, the following scientific-technologic domains are identified as priorities (Figure IV):

**Figure IV**  
Priority development areas



### 2.1.5. Which are the institution’s preferred didactic approaches?

Following the introduction of the model proposed by the Bologna reform, the degree programmes have been designed according to the *European Credit Transfer System (ECTS)* and the pedagogical model is now focused on the learning process, emphasising:

- The partnership with firms and public institutions;
- The highlighting of the humanist component;
- The use of e-learning technology<sup>5</sup>;
- The introduction of the tutorial model of student support.

### 2.1.6. What is the degree of centralisation and decentralisation that the institution aims for?

The structural units (Departmental Areas) have been granted with pedagogical, scientific and administrative autonomy by the University Statutes.

<sup>5</sup> The University provides an e-learning platform (moodle) with a wide array of instruments for teacher-student communication.

### 2.1.7. What should be the institution's relationship to its funding agencies?

The UÉ is mainly funded by the State. However, the level of public funding has been decreasing over the last years, forcing the institution to adopt a management model aiming at ensuring an increasing attraction of complementary income, namely by:

- Applying to financing agencies for specific funding for scientific research, for teaching improvement, namely academic success, and for administrative and information management;
- Collecting from the students a tuition fee corresponding to around 30% of the education costs;
- Establishing contracts with firms and other institutions, for scientific services or for their staff's advanced and lifelong studies, and promoting their involvement in the construction of academic curricula.

### 2.1.8. What should be the institution's relationship to society and its involvement in public debate?

The UÉ seeks to establish a relationship of complicity for development with the entities representing the regional community (Local and Regional Government, Schools, Firms, Foundations), requesting support and contributing for their management operations and programs, the innovation of processes and products, the training of human resources. The UÉ involves these partners in the definition of its strategy and organizes forums of discussion on regional, national and international issues.

## 2.2 CONSTRAINTS AND OPPORTUNITIES

### 2.2.1 Evaluation of institutional autonomy

#### 2.2.1.1 Selection, appointment, promotion and dismissal of academic and administrative staff

##### A) ACADEMIC STAFF

The recruitment and promotion of academic staff is ruled by the University Teacher Career Statutes (ECDU). The University has autonomy in selecting and hiring given the quantitative limits set by the MCTES, who determines:

- The total of ETIs (full time equivalent), based on students/staff standard ratios;
- The Map of Teaching Staff which establishes the number of Associate and Full Professors that the UÉ is entitled to.

The career promotion of the Assistant lecturers to Assistant Professors, after obtaining a PhD, is automatic, albeit at a provisional level. The other career promotions (from Assistant Professor to Associate Professor and then to Full Professor) can only occur through competition. The University has autonomy to open competitions to professors, if there are vacancies and the budget allows.

The rescission can only occur at the end of the work contracts (3 years for invited Lecturers and 5 years for invited Professors). For the Assistant Professors with Provisional Appointment, at the end of a probative period of 5 years, the rescission of the contract can only occur if the Scientific Council does not vote for tenure.

The current ECDU favours stability at the expenses of mobility. The relative immobility of academic staff hampers a staff management that responds to fluctuations of market demand and to new strategic choices of scientific, artistic and pedagogical developments (Appendix VIII).

## **B) ADMINISTRATIVE STAFF**

The non-academic staff is distributed by two categories: the staff in the Public Administration career, whose careers (selection, contracting, and promotion) are ruled by law, and the staff hired with a term contract. The former are paid by the state budget; the latter are paid by income generated by the institution (Appendix VIII).

### **2.2.1.2 Selection of students**

The University does not have, in general, autonomy to select its undergraduate students. The selection is made by the National Competition for Admission, for which the MCTES is responsible, and is subject to *numeri clause* previously approved by the Ministry. The selection of music students is an exception, having to apply to local competitions of musical instruments practice. Mature students (older than 23) are also recruited by local competition, for which the UÉ nominates a specific jury.

Unfortunately, foreign students do not have access to the university, with the exception of a very small number.

The UÉ has total autonomy to select the students of the 2<sup>nd</sup> and 3<sup>rd</sup> cycles.

### **2.2.1.3 Teaching and learning**

The University's autonomy theoretically allows such wide aspects as the organisational structure (the ability to create and suppress departments) or the development of its own didactic models and the creation of courses conferring, not a degree, but a specific title, such as that of *specialist*.

Autonomy is limited for programmes conferring an academic degree (first, second and third cycles), as every new proposal must be submitted and approved by the Ministry.

### **2.2.1.4 Research**

The University is totally free to create and close research centres. The research teams, whose existence depends on its members' dynamics, may evolve in variable geometry, autonomously apply to research programs, submit their projects and build national and international partnerships in order to achieve their goals.

### **2.2.1.5 Development of entrepreneurial activities**

University/firms cooperation is encouraged. The University has created a Technology and Knowledge Transfer Office (OTIC), with the aim of supporting the researchers in establishing connections with the entrepreneurial sector. There is also an Industrial Property Support Office (GAPI) to promote the registration of patents originated from both the researchers' work and the entrepreneurial innovation.

A project is being prepared for an Incubation Entrepreneurial Centre and a Science and Technology Park (Ebora Park) to be submitted to European financing in the next package of EU's structural funding.

### **2.2.1.6. Finance**

The State Budget contributes with the large majority of the UÉ's financial resources (71%). For this reason, substantial cuts, such as those inflicted in 2006 and 2007, greatly compromise the institution's viability.

The University's financial autonomy will essentially be guaranteed by four distinct ways:

- Income growth resulting from a higher number of research contracts and services to the community in general and to firms in particular.
- Income growth from projects of 'lifelong education' directed to the active population.
- Income generated by entrepreneurial activities, mainly in the agriculture, energy and tourism domains.
- Spending reduction, mainly through:
  - the adoption of computer technologies in the whole bureaucratic system;
  - the development of an institutional culture based on responsibility and accuracy.

## 2.2.2 Evaluation of the current regional and national labour-market situation

The Portuguese economy's long-term process of structural convergence towards European standards has enhanced economic growth, fuelled by EU structural funds, and augmented the dynamics of the job market. Nevertheless, from the early 2000's onwards, and following a worldwide economic crisis, Portugal has been lagging behind in European terms and compromising a once promising performance. The economic slowdown negatively affected the job market, promoting an acceleration of the unemployment rate, especially in less developed inner regions, such as Alentejo.

In spite of the current job market limitations, there are still many opportunities for the new graduates. They find jobs more quickly and earn relatively higher wages than the less qualified workers<sup>6</sup>. In Portugal, the wage premium of graduates is relatively high (63% against a EU15 average of 26%) and long lasting. The regional job market still provides UÉ's graduates with a substantial array of opportunities as around 51% find a job in Alentejo.<sup>7</sup> 55% of graduates from the UÉ find their first job in less than a month after graduation and more than 90% get a job within a year of graduation.

The large majority of UÉ's graduates find their first job in civil services and only 10% create their own firms. Following the current governmental effort to substantially diminish the number of the public sector's employees, the future success of our graduates' employability critically depends on their creative and entrepreneurial capacities.

## 2.2.3 Evaluation of the infrastructure

The UÉ's structural physical constraints are mainly a result from the geographical dispersion of its properties and from the nature of the facilities (mostly historical buildings) that are not easily adjusted to the current teaching and research activities (Appendix IX). From an operative point of view, the dispersion of the same type of activities by different buildings multiplies the number of support services, requires more staff and equipment, and prevents their supply in quality and quantity wherever required.

## 2.2.4 Evaluation of the students/staff ratio

The current ratios have been defined by the Rectors' Council of the Portuguese Universities and by the Ministry and are considered adequate, in general terms.

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<sup>6</sup> Portugal, P. (2004), Mitos e factos sobre o mercado de trabalho português: a trágica fortuna dos licenciados, Boletim Económico, Banco de Portugal.

<sup>7</sup> Caleiro, A. (2006), Analysis of the results of the Project ObseRegio: the case of graduated students from the University of Évora.

### 2.2.5 Evaluation of other constraints

The UÉ is facing serious constraints, beyond those referred above, namely those related to:

- The regional low population density, associated with a small percentage of young people;
- The weak entrepreneurial development, associated with the feeble dimension of existing firms.

## 2.3 ACADEMIC ACTIVITIES

### 2.3.1 Teaching

Given the fall in demand affecting essentially 19 degree programmes and the strategic interests that some of them represent, the UÉ has taken the following measures for the academic years of 2006/07 and 2007/08:

- To suspend 10 programmes;
- To maintain 9 programmes in the scientific areas of philosophy, mathematics, history, agriculture, zootechnics, environmental sciences, geology and mechatronics engineering, due to their strategic character, in spite of not being financed by government funding;
- To adequate to the Bologna Model all first cycle programmes, with the following guidelines:
  - Duration of 3 years;
  - Curricular flexibility through the inclusion of optional courses;
  - Inclusion of an English course in most programmes;
  - Inclusion of specific training in Entrepreneurship;
  - Tutorial support to the students;
  - Incentives to international mobility taking advantage of specific programmes (e.g. Socrates/Erasmus, Erasmus/Mundus, Ásia Link, Alban, Alfa, Tempus and Leonardo Da Vinci).
- To adequate to the Bologna Model all second cycle programmes, with the following guidelines:
  - Duration of 2 years;
  - Strong articulation with scientific domains that outstand by their scientific research;
  - Internationalisation.

### 2.3.2 Research

The research activities have become integrated within Research Centres to encourage the quantity and quality of the research, its relationship with teaching, and the possibility of obtaining external financing. The UÉ has taken some measures to stimulate merit and scientific output, namely:

- Creation of the Support Fund for Scientific Research (FAIC – *Fundo de Apoio à Investigação Científica*);
- Exemption of teaching service in the 1<sup>st</sup> cycle programmes for teachers that attain certain scientific productivity goals;

- Creation of a Scientific Research Council;
- Support to the submission of applications for funding and for the establishment of national and international partnerships;
- Support to the financial management of projects and the elaboration of the financial execution reports.

The pedagogical models, particularly for the 2<sup>nd</sup> and the 3<sup>rd</sup> cycles, aim at being in harmony with the most expressive sectors of the scientific research.

### **2.3.3 Evaluation of how these programmes and organisational units reflect the institution's mission and goals**

All structural units, in their specific areas of influence, aim at reflecting the University's mission. However, a number of weaknesses should be pointed out:

1. The adoption of the new teaching/learning paradigm, implied by the Bologna reform, has been quite slow and has faced some resistance on the part of academic staff;
2. The scientific culture is still weak and this translates into a poor, although increasing, scientific output. In the near future, such handicap may hamper the UÉ's capacity to offer Master and PhD courses in a number of areas;
3. The absence of English taught courses and programmes constrains international mobility, in spite of the current efforts to overcome the situation.

## **2.4 ACADEMICALLY RELATED ACTIVITIES**

### **2.4.1 Research and technology transfer**

Knowledge production is based on research and training units and the research and technology transfer is promoted and coordinated by the OTIC and by the Centre for Staff Development (NUFOR).

### **2.4.2 Student support services**

Student support is provided by four services:

- The **Students' Purveyor**, a unit to which students can appeal to solve pre-conflict situations;
- The **Students' Support Services** (NAE), which is the information office for new as well as enrolled students, intermediates the offer of professional training programs and supports students with special needs;
- The **International Relations Office** (GRI), which supports students involved in international mobility programs;
- The **Social Services**, which provide scholarships, administer student residence halls, canteens and cafeterias, and coordinate student sports activities.

### **2.4.3 Evaluation of how these programmes and organisational units reflect the mission and goals**

The relationships with firms are weak and have been difficult. At the moment, universities are more aware of the need to establish partnerships with firms than the reverse. However, some progress has been recently attained in this respect.

The student support may be considered as globally good. Notwithstanding this, some deficiencies still persist in areas such as the accommodation capacity in residence halls, or the support provided to academic sport.

## 2.5 FINANCE

### 2.5.1 Total budget of the institution (including social support)

The structure of the UÉ's consolidated budget, by financing source, is displayed in Table I. The table reveals a progressive nominal decrease in the funds transferred from the Government's Budget (the apparent increase in 2005 is justified by the integration of the Nursing School). Such decrease is also verified, and is even stronger, in the PIDDAC endowment. A significant increase in Own Revenues has partially compensated the mentioned losses, leading to a 2006 global budget comparable to that of 2003. In spite of this increase in Own Revenues, the UÉ remains highly dependent on government financing.

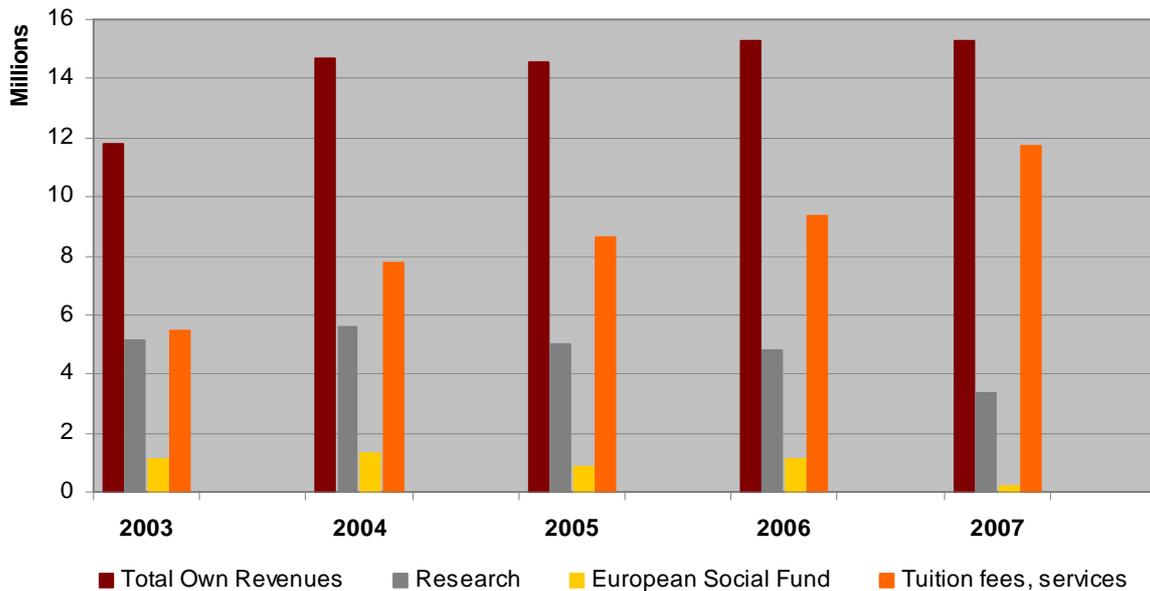
**Table I**  
University of Évora's Global Budget

	2003	2004	2005	2006	2007
<b>TOTAL (Government Budget + PIDDAC + Own Revenues)</b>	<b>51.975.010,96</b>	<b>54.454.085,13</b>	<b>55.791.752,08</b>	<b>54.832.648,45</b>	<b>53.873.721,00</b>
<b>Government (Total)</b>	<b>38.774.627,32</b>	<b>38.293.131,94</b>	<b>39.838.421,13</b>	<b>38.291.746,00</b>	<b>36.816.106,00</b>
Government Budget – UÉ	31.461.915,66	31.486.809,41	33.258.908,41	32.007.589,35	29.766.137,00
Government Budget – UÉ's Social Services	2.990.371,00	2.816.524,00	3.125.263,00	2.993.178,00	3.460.464,00
PIDDAC-UÉ	2.304.566,66	1.875.127,53	1.412.862,72	1.070.803,65	650.000,00
PIDDAC – UÉ's Social Services	139.120,00	300.810,00	179.455,00	263.828,00	531.383,00
Scholarships – UÉ's Social Services	1.878.654,00	1.813.861,00	1.861.932,00	1.956.347,00	2.408.122,00
Own Revenues – UÉ	11.785.286,64	14.660.471,19	14.573.838,95	15.297.883,45	15.271.840,00
Own Revenues – UÉ's Social Services	1.415.097,00	1.500.482,00	1.379.492,00	1.243.019,00	1.785.775,00

### 2.5.2 Revenues by source

Figure V discloses the sources of Own Revenues. According to the displayed information, the main sources are tuition fees paid by graduate and postgraduate students, services and the sale of goods. It is mostly with this financial item that the institution manages its functioning expenditures, whose value is, on average, 59.16 per cent of the own revenues and 17.44 per cent of the institution's total budget.

**Figure V**  
Distribution of Own Revenues



### 2.5.3 State allocation

The Government's Budget share intended to finance the regular functioning, scholarships and investments (PIDDAC) is presented above, in Table I. The displayed values have been steadily decreasing in nominal terms, in spite of, as previously referred, the integration of the Nursing School.

### 2.5.4 Budget distribution by departmental areas

The global budget is divided by the Departmental Areas, in accordance to the number of persons allocated to each one. This number is determined within the current framework for the financing of public higher education.

From 2007 onwards, the Areas became entitled to a part of their own revenues, to 35% of the revenues from postgraduate programmes and to 20% of the revenues from services to the community.

### 2.5.5 Centrally controlled budget

As may be seen in Table II, until 2007, the centrally managed budget has been dominant. The own revenues generated by the units comprehend the revenues from research activities and financing from the European Social Fund.

**Table II**  
Budget Endowments

Years	2003		2004		2005		2006		2007	
	Value	%								
<b>Total Budget</b>	<b>50.096.357</b>	<b>100</b>	<b>52.640.224</b>	<b>100</b>	<b>53.929.820</b>	<b>100</b>	<b>52.876.301</b>	<b>100</b>	<b>51.465.599</b>	<b>100</b>
<b>Assigned to the Units</b>	3.338.788	<b>6,66</b>	3.757.808	<b>7,14</b>	6.712.709	<b>12,45</b>	4.995.714	<b>9,45</b>	4.025.167	<b>7,82</b>
<b>Own Revenues managed by Units</b>	7.146.706	<b>14,27</b>	7.661.493	<b>14,55</b>	6.786.188	<b>12,58</b>	6.946.935	<b>13,14</b>	7.132.881	<b>13,86</b>
<b>Centrally Managed Budget</b>	39.610.863	<b>79,07</b>	41.220.923	<b>78,31</b>	40.430.924	<b>74,97</b>	40.933.652	<b>77,41</b>	40.307.550	<b>78,32</b>

### 2.5.6 Amounts used to implement new initiatives

The current budget stringency does not allow the assignment of resources to new initiatives. Nevertheless, three specific funds have been created:

- The **Support Fund to Scientific Research** (FAIC – *Fundo de Apoio à Investigação Científica*), designed to support researchers and to finance the expenses of intellectual property rights' registration and international cooperation commitments. FAIC is funded by 5% of the earnings generated with community services.
- The **Support Fund to Internationalisation and Mobility** (FAIM – *Fundo de Apoio à Internacionalização e Mobilidade*), created to support staff mobility and to finance the policy of international academic juries. FAIM is funded by 5% of the earnings generated with community services.
- The **Support Fund to Students Mobility** (FAME – *Fundo de Apoio à Mobilidade Estudantil*), destined to reinforce Erasmus student scholarships.

### 2.5.7 Allocation procedures

The allocation of budget endowments across units is decided by the Senate, on the basis of an Administrative Council proposal. Such proposal is grounded on the procedures described in 2.5.4., in the case of the Departmental Areas, and on the plan of activities, for the remaining units and services.

The execution of such funds is assigned to each unit's responsible, within the limits of the delegation of competences conferred by the Rector.

### 2.5.8 Ability to calculate the full costs of research and teaching activities

An accounting system allowing the determination of total costs by pedagogical activities, research, community services and other activities is not currently available. However, when such information is necessary, the university has considered allocation criteria for the costs to the distinct activities. To this end, the practice has been to allocate 25% of academic staff time to research, and 10% to activities other than teaching.

It should be underlined, however, that the UÉ is currently implementing a System of Analytical Accounting, having already acquired the appropriate software.

## 2.5.9 Analysis of strengths and weaknesses

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ High qualification of academic and non-academic staff.</li> <li>▪ Highly valued historical property.</li> <li>▪ Large agrarian patrimony.</li> <li>▪ Good relationship with municipal authorities.</li> <li>▪ Strong scientific links with the main regional industrial units.</li> </ul>	<ul style="list-style-type: none"> <li>▪ High dependence on government funding.</li> <li>▪ Weak institutional culture aimed at finding alternative sources of funding.</li> <li>▪ High functioning costs linked to the physical dispersion of property.</li> <li>▪ Insufficient planning and high level of autonomy for the acquisition of goods and services.</li> <li>▪ Absence of a system of analytical accounting.</li> </ul>

## 2.6 MANAGEMENT ACTIVITIES

### 2.6.1 Management practice

#### 2.6.1.1 What are the respective roles of central-level administrators, offices and departmental areas?

The Administrative Council, presided by the Rector, is globally responsible for the institution's financial management. The Presidents of the Departmental Areas and the Directors of other units have delegated powers to manage both financial and human resources.

#### 2.6.1.2 Does co-ordination among departmental areas take place, and if so how?

The coordination amongst Areas is monitored in monthly meetings of the UÉ's Administrative Council with the Presidents of the Areas' Directive Councils. In such meetings, attention is focused on the evolution of the budget execution, in the gathering of own revenues and in the execution of expenses.

#### 2.6.1.3 What does the institutional leadership control and decide?

The main objects of central decision are:

- Position opening announcements, career upgrade systems for all personnel, as well as the inception and the dissolution of contracts;
- Physical maintenance of all property and of communication and information equipments, energy supply, security and sanitation;
- Administration of academic processes, including the settlement of tuition fees and other emoluments;
- Administration of the budget endowment allocated to central services;
- Implementation of the cultural policy, institutional advertising, and staff performance evaluation.

#### **2.6.1.4 What do the departmental areas control and decide with respect to the selection and promotion of academic and administrative staff?**

Departmental Areas decide on the:

- Criteria for opening of academic staff positions;
- Academic staff hiring proposals to submit to the Rector;
- Allocation of teaching tasks, in harmony with the programmes curricula, to be submitted to the Rector's homologation;
- Allocation of tasks to non-academic staff;
- PhD examinations and on the tenure of academic staff.

#### **2.6.1.5 What do the departmental areas control and decide with respect to the selection of students?**

Departmental Areas are responsible for the selection of Master and PhD students, as well as students enrolled in courses that do not lead to a degree.

#### **2.6.1.6 What do the departmental areas control and decide with respect to finance?**

The Departmental Areas decide in terms of the management of financial resources, allocated by the Administrative Council, as well as those obtained with the supply of goods and services, or of training courses, excepting the *overheads* retained by the central administration.

#### **2.6.1.7 What do the departmental areas control and decide with respect to academic activities?**

The Departmental Areas propose the creation of formal and non-formal teaching programmes (with the respective programme syllabus) but do not interfere in terms of scientific research.

#### **2.6.1.8 What do the departmental areas control and decide with respect to development of entrepreneurial activities? 2.6.1.9 What do the departmental areas control and decide with respect to research policies?**

These activities and policies are not a responsibility of the Departmental Areas.

### **2.6.2 Students involvement in institutional governance**

The students are involved in the University Assembly, the University Senate, the Administrative Council and the Pedagogical Council as well as in the programme committees.

### **2.6.3 Evaluation of how management practice reflects the institution's mission and goals**

The organisational and functional structure is inadequate to the institution mission and objectives, namely in four decisive aspects:

- The units managing the academic staff (Departments and Departmental Areas) do not equally coordinate the scientific research (Research Centres);

- The units proposing the first, second and third degree study programmes (Departmental Areas) do not equally coordinate the scientific activities nor the research projects which support and confer credibility to post-graduations (Research Centres);
- At the diverse levels of the formal hierarchy, the presidents do not hold the power (and therefore do not have effective responsibility); the decision power is always on the unit whose composition, many times numerous, does not reflect the academic hierarchy and is permissive to personal or group self interests;
- Consequently, the decision chain is slow, not always harmonised with the institution's strategic interests and governance is necessarily not agile.

#### 2.6.4 Evaluation of how adequate are the institution's human resources, human resource policy and practice to current and future needs

- The academic staff is inadequate for the range of teaching programmes offered by the university, with a deficit in the more rapidly growing areas (Arts, Health, and Technologies) and a surplus in other areas.
- The institutional leadership can not regulate the system in view of the current and prospective needs, since they do not intervene at any stage of the promotion of academic staff: the renewal of contracts with the 'Assistentes' (non doctorates) is decided by the Departmental Area's Scientific Councils; once they get their PhD's, they are immediately promoted to 'Assistant Professors' for a five year period; at the end of this probation period, they can obtain tenure, a competence of the Departmental Area's Scientific Councils.
- Non-academic staff with graduate studies is steadily increasing in relative terms, and intermediate positions in the structural organization increased, which has had positive effects in administrative and management governance of the institution.

#### 2.6.5 Analysis of how the institution involves students in institutional governance

The institution respects the students' involvement in governance.

#### 2.6.6 Analysis of strengths and weaknesses and proposed action plan

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ Wide autonomy from the government.</li> <li>▪ Democratic decision making.</li> <li>▪ Strong student involvement.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Weak relationship between post-graduate degrees and scientific research.</li> <li>▪ Poor coordination between staff selection policies for teaching and research.</li> <li>▪ Weak decentralisation of responsibilities.</li> <li>▪ Weak administrative decentralisation.</li> <li>▪ Total incapacity to regulate human resources.</li> </ul>

#### Action Plan (crucial measures):

Review of the University of Évora Statutes, aiming at:

- Creating new structural units, the **Schools**, merging Departments and Research Centres;

- Reinforcing the power and responsibilities of the presidents of the Departments, research centres and Schools.

### 3. QUALITY MONITORING AND QUALITY MANAGEMENT

#### 3.1 QUALITY MONITORING

##### 3.1.1 How responsibilities for quality monitoring are shared across the institution?

The concern with quality has obviously been a permanent reference throughout the history of the UÉ, like in most HEI in Portugal. The process of teaching programme evaluations of public universities (between 1994 and 2005), nationally coordinated by the Foundation of the Portuguese Universities (FUP), was cyclical and mandatory. After two evaluation cycles, the whole process was restructured at the national level, resulting in the creation of the Evaluation and Accreditation Agency for Quality Assurance in Higher Education, in February 2007.

The UÉ joined the evaluation process from its onset, reinforcing internally its institutional framework through the creation of the Evaluation Council (responsible for establishing the general internal procedures)<sup>8</sup> and a support unit, later coordinated by a pro-rector. This support structure has been regularly adjusted, maintaining its central mission of coordinating all external evaluation processes but also the internal evaluation requests. In terms of research activities, the research centres are evaluated by and according to the guidelines of the Foundation for Science and Technology (FCT).

The evolution of society, and particularly of its higher education sector, demands now from the HEI higher transparency and methodizing in the promotion and monitoring of quality. The commitment with the promotion of quality is now a strategic development policy at the UÉ, clearly stated in the Rector's strategic orientations, in the plan of activities, in a collection of internal regulations and in the programme for the promotion of quality.

In March 2006, the newly elected Rector redefined the competencies of the pro-rector, emphasising the role of innovation and quality promotion. This unit is also responsible for the technical support of the proposals for the creation and adjustment of study programmes to the Bologna guidelines, following the recent government requirements, for all the processes of programme accreditation and evaluation, and for coordinating the institutional evaluation process.

##### 3.1.2 Is quality monitoring based on explicit quality standards? 3.1.3 Are these quality standards widely known and accepted in the institution? 3.1.4 Is there a shared culture of quality?

During 2006, a comprehensive survey was conducted on all university units, with the objective of assessing their internal initiatives for quality promotion and monitoring, whether in place or planned. The results suggested the need for a wider implementation and diffusion of instruments and mechanisms for the promotion of quality.

Based on the diagnosis suggested by the survey results, and on the university's policy documents, a program for the promotion of quality (PROQUAL) was proposed to the academia, systematising the responsibilities and the actions for promoting and monitoring quality in the different sectors of the university: research, teaching, entrepreneurial activities,

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<sup>8</sup> Presided by the rector, it comprises the vice-rectors for teaching and research activities, the pro-rector for quality policies, the presidents of the Scientific and Pedagogical Councils, two students proposed by the Pedagogical Council and a member of the Student's Union.

institutional promotion and external relations, student support, administrative processes, human resources and staff development.

This program is intended to be a dynamic document, benefiting from the contributions of all the academia, and continuously adapted to the university strategic planning and its external environment, namely to the requirements of the *Evaluation and Accreditation Agency for Quality Assurance in Higher Education*.

In complement to this document, a set of indicators for quality monitoring was assembled by the pro-rectory from information collected in the different university units. This set of indicators is intended to continuously reflect and be reflected in the university's strategic development planning. These indicators can be consulted online in the university's web page, and include information regarding their definition and construction methodology, connection with the PROQUAL, historical evolution and analysis. All the academia was asked to comment and to propose new indicators, contributing to a shared quality culture.

### **3.1.5 How adequate are the resources available to support internal quality processes?**

The support unit coordinated by the pro-rector includes three technical staff and one collaborator, and manages an annual budget of ten thousand euros. In spite of these relatively short resources, the pro-rectory has been able to satisfy all external evaluation and accreditation demands, and also all the internal evaluation requests from departments, programme committees, teachers and students, making extensive use of all available information technologies. In cooperation with the Computer Services, a number of instruments have been developed, to collect information and also opinions in a more efficient and less resource-consuming ways.

The UÉ's Integrated Information System (SIUÉ) is an indispensable tool in quality monitoring, integrating information from all university sectors, namely in what regards teaching, research and administration. Besides all this information, this tool also integrates several features allowing the access to existing data, the introduction of the summaries of lectures, the grades, the distribution of teachers by the different courses, the teacher and the course reports, the student register and also to conduct opinion surveys.

All staff, both academic and non-academic, and students have an individual profile allowing access to their personal and other relevant data, without jeopardising data confidentiality and protection.

### **3.1.6 What are the available quality monitoring processes with respect to teaching activities?**

The observance of strict quality standards in all university teaching programmes, and its continuous monitoring, is a responsibility shared, according to the university statutes, by the Scientific and Pedagogical Councils, the Senate, the programme committees and the Departmental Areas.

At the end of each semester, the PRPQI conducts opinion surveys to students about all courses and the respective teacher performance, disclosing the results on its web page. Opinion surveys have also been conducted on teachers, asking about their courses, the programmes and their working conditions.

The programmes evaluation process was coordinated between 1994 and 2005 at the national level, resulting in a set of recommendations analysed at the institutional level, namely by the Evaluation Council, and disclosed in the pro-rectory web page. The UÉ intends to proceed internally with this regular process of programme evaluations, necessarily adapted to the future requirements of the Evaluation and Accreditation Agency. The self-evaluation process is a responsibility of the programme directors, supported by the pro-rectory.

As mentioned above, the SIUÉ allows teachers to introduce the classes' summaries and the courses and teachers reports, information available *online*. The Departments and programme committees can regularly monitor the fulfilment of these responsibilities, which are analysed at the end of each semester in a meeting between the vice-rector and the Departmental Areas.

All the university degree programmes are organised according to the ECTS. The correct correspondence between the number of credits ascribed to each course and the amount of work developed by the student, and the overall coherence of credits within each programme is a responsibility of the president of the Scientific Council in each Departmental Area.

A working group has been recently constituted by the rector with the mission of devising a methodology to evaluate the academic staff, including their teaching activities and also research, entrepreneurial and administrative activities.

### **3.1.7 What are the available quality monitoring processes with respect to research activities?**

The FCT regularly evaluates the activities of the research centres, namely for financing purposes. All other research centres not evaluated by the FCT must submit to the rector their plan and report of activities, the financial budget and report, and an internal evaluation of their activities and validation of the plan. The rector allocates the necessary means for an external evaluation of these research units.

The *Council for Scientific and Technological Research (CICT)*, with members from the research, technology and entrepreneurial sectors, has the mission of supporting the rector, the Senate and the Scientific Council in the definition and monitoring of the university's research policy.

In order to monitor the scientific output of the academic staff, the university created the Scientific Archive, comprising the Digital Record of Scientific Publications, the Digital Archive of CV's, and the Digital Archive of Research Projects and Contracts.

### **3.1.8 What are the available quality monitoring processes with respect to student performance?**

The monitoring of student performance is of utmost importance to the university, namely the analysis of the so-called 'value added' between admission and graduation. This analysis begins by characterising students in the moment of admission, continues by supporting their integration in academic life, and culminates in the observation of their professional careers.

The characterisation of the new students, as they enter the university, is performed annually by the pro-rectory through the analysis of a survey conducted in the moment they register.

For a more personal student support, it has been recently introduced the figure of the tutor (a teacher) and of the mentor (a student), who may, among other aspects, provide guidance through the syllabus and analyse the possible causes for academic failure. The NAE is also responsible for ensuring a smooth integration of students in the university, particularly aiding students with disabilities. The international students support is a mission of the GRI.

The Students' Purveyor is a support unit within the rector, with the mission of assisting students in their pedagogical and administrative relationships with the institution, defending their legitimate rights and ensuring legality and justice in the internal procedures.

The prevention of academic failure is a shared responsibility of all academia, and begins by the diagnosis and careful consideration of all specific situations. For that, the Academic Services provide at the end of each semester, through the SIUÉ, data allowing the

construction of several indicators such as the rates of academic success and desistance rates in each course unit and the graduation and abandonment rates in each degree programme. The analysis of these rates is complemented with the results of the student and teacher opinion surveys. When a problem is detected, a specific opinion survey on the causes of academic failure may also be conducted.

The monitoring of teaching activities and student performance, and the dissemination of good practices, is also allowed by the examination online in the SIUÉ of the course reports filled in by the teachers, which include the success rates and a report critically analysing those rates and the overall functioning of the course unit.

### **3.1.9 What are the available quality monitoring processes with respect to administrative processes?**

Quality monitoring in administrative processes is focused on process rationalisation and simplification, emphasising the adoption of new technologies. This monitoring is a responsibility of the Administrative Council and of the Administrative Audit, whose mission comprises the submission of proposals for quality promotion, namely in what concerns the services' economical-financial operations, and the efficiency of administrative criteria.

The Mission Group Simplex/UÉ was created in 2006 with the mission of proposing the adequate measures for the modernisation and simplification of administrative procedures, and the elaboration of a Procedures Manual for the Acquisition of Goods and Services.

Quality in administrative processes will be monitored particularly through the Work-Flow and Documents Management System, technically supported by the Computer Services but transversal to all university units. This system aspires at the progressive substitution of print documents, and associated administrative processes, by an electronic system which allows digitalising, guiding, dispatching, accessing and implementing decision making supporting indicators of all documents entering, leaving and processed by the institution.

The implementation of this system requires a survey of all university processes, an opportunity to understand their interactions, identify existing administrative problems, automate manual procedures, increase efficiency, reduce red tape procedures and, if necessary, reformulate functions and competences in the different structural units.

The conduction of opinion surveys on the users of all university services is also an important tool of quality monitoring.

### **3.1.10 What are the available quality monitoring processes with respect to entrepreneurial activities?**

The OTIC is the university's interface structure with the entrepreneurial sector. The OTIC manages the UÉ's Scientific Information System allowing, at any moment, the publication of an up-to-date guide with the university's scientific research and technological results.

The adequation of all technological teaching programmes, post-graduate and others, to the needs of Alentejo is based on a survey of existing regional needs, also a responsibility of OTIC.

A specific mission group has been recently appointed to evaluate and monitor the occupation of specific physical spaces to receive research teams, emerging entrepreneurial initiatives and partner firms.

### **3.1.11 What are the available quality monitoring processes with respect to external relations (local, regional, national and international)?**

The composition of the UÉ's Consultive Council aspires at reinforcing the connections with society, by inviting and including in its members representatives from firms, local authorities, schools and other public or private social or cultural institutions.

Opinion surveys have also been conducted on the current or prospective employers of the university graduates, and also on the graduates themselves, with the objective of understanding their needs and consequently adapt the programmes curricula and the courses contents.

### **3.1.12 How regularly are activities monitored?**

All teaching related activities are usually monitored at the end of each semester. The research centres external evaluation is subject to the calendar imposed by the FCT, usually every three years, although internal evaluations are carried out every year. The internal indicators for quality monitoring are collected and published at the end of the year. The timings for monitoring other processes, when clearly defined, were mentioned above.

### **3.1.13 How extensive are the collected data?**

The SIIUÉ is the central repository of all academic data, gathering information on enrolments, grades, classes' summaries and reports, teacher reports, among many other data. The system has also been gradually incorporating other information, namely of administrative nature. The SIIUÉ is also the main source of data for the construction of the indicators of quality monitoring presented in the Appendix X, and also the support to the opinion surveys on students, teachers and graduates. Besides these surveys, as mentioned above, the pro-rectory has also administered, namely within the regular programme evaluation processes, surveys on employers, new students and non academic staff.

### **3.1.14 To what extent are their outcomes used in decision-making and strategic planning?**

All these quality monitoring processes aim at, evidently, consolidating a strong quality culture in the institution, reflected in the decision making and planning processes. But this is a gradual assimilation process, in a context where the promotion, monitoring and assurance of quality are relatively recent concepts in the Portuguese higher education system.

The university is conscious of the extensive work still required to consolidate this shared quality culture, and to generalise the promotion and monitoring of quality and its integration in strategic planning.

## **3.2 QUALITY MANAGEMENT**

### **3.2.1 How does the institution integrate quality monitoring into institutional policy?**

The recommendations from the programme evaluation processes have been submitted to the Scientific and Pedagogical Councils, the Evaluation Council and the respective departments and programme committees, to implement the necessary correction measures and to be considered in their planning of activities. In the particular case of the student surveys, the results are disclosed to the Departments and programme committees for a joint analysis with the respective teachers, complemented for example with data from the course reports and the academic success rates.

The NUFOR regularly administers a survey on all university units to grasp the needs for staff development and propose its plan of activities.

The recommendations from the external evaluation of the research centres by the FCT, and from the internal evaluation of the other research centres' activities, are analysed and integrated in the strategic planning and the planning of activities.

The programme for quality promotion and the indicators for quality monitoring, recently proposed, must reflect the institutional policies and be considered in the university's strategic planning.

## **4. STRATEGIC MANAGEMENT AND CAPACITY FOR CHANGE**

### **4.1 HOW RESPONSIVE IS THE INSTITUTION TO THE DEMANDS, THREATS AND OPPORTUNITIES PRESENT IN ITS EXTERNAL ENVIRONMENT?**

The response of the institution to the demands, threats and opportunities is consubstantiated in seven vectors:

1. Attraction of more students of graduate and postgraduate levels, through:
  - Promotion actions directed to students of the secondary schools, namely supporting their preparation for exams of admission to the university;
  - Launching a programme of scholarships funded by the local councils;
  - Implementation of new 'sandwich' programmes in partnership with firms (degrees with strong employability).
2. Securing new markets in the country:
  - Offer of degrees aiming at lifelong learning, in the classroom or by e-learning;
  - Creditation of professional competences;
  - Admission of external students to attend single courses, crediting them in case these students enrol later in a regular programme degree.
3. Securing new markets in Africa: offering degrees in universities established in Portuguese speaking African countries.
4. Creation of knowledge networks in partnership with other Portuguese and foreign universities.
5. Restructuring the institutional model with the objective of creating a real pyramid of competence and responsibility.
6. Consolidating the strong bonds with the entrepreneurial sector, with the objective of stimulating the scientific activities and the technological development.
7. Establish a policy for quality, increasing rigour and institutional cohesion.

### **4.2 HOW ARE REPRESENTATIVES FROM THE EXTERNAL ENVIRONMENT INVOLVED IN THE INSTITUTION'S STRATEGIC MANAGEMENT?**

The external partners are involved through the Consultive Council, integrating representatives from industry, local authorities and schools, and including also a strategic nucleus with personalities of high national distinction.

### **4.3 WHICH CHANGES CAN BE EXPECTED TO BE MADE TO THE INSTITUTION'S AIMS?**

The fulfilment of the UÉ's aspirations and projects is dependent on changes in the institution's organisational structure, the academic staff mentality and its attitude towards the outside world, the flexibility of the internal circuits supporting decision making and the agility of access to the relevant information.

### **4.4 HOW CAN A BETTER MATCH BE ATTAINED BETWEEN THE CURRENT AND FUTURE MISSIONS AND AIMS, AND THE ACTIVITIES?**

The match will be attained through the correct management of the available resources, the realistic arrangement by degrees of ambition, the involvement of most members of the academia in projects resorting to individual stimuli.

### **4.5 WHAT ROLE DO QUALITY MONITORING AND QUALITY MANAGEMENT PLAY IN THESE DEVELOPMENTS?**

Quality monitoring and quality management aim at being a catalyst for change, reflecting and being reflected in strategic planning, disseminating good practices and gradually promoting a shared culture of quality.