



University of Beira Interior

INSTITUTIONAL SELF-EVALUATION REPORT
Submitted to the
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LIST OF ABBREVIATIONS USED

AAAES - Agência de Avaliação e Acreditação do Ensino Superior | *Agency for Evaluation and Creditation of HEI*
AAUBI - Associação Académica da UBI | *Students' Union*
AFTEBI - Associação para a Formação Tecnológica da Beira Interior | *Association for Technological Qualification of Beira Interior*
BOOC - *On-line Library of Communication Sciences*
CES - Centro de Estudos Sociais | *Centre for Social Studies*
CET - Cursos de Especialização Tecnológica | *Technological Expertise Programmes*
CEVALOR - Centro Tecnológico para o Aproveitamento e Valorização das Rochas Ornamentais e Industriais | *Technology Centre for the Transformation and Enhancement of Ornamental and Industrial Rocks*
CFIUTE - Centro de Formação e Interacção da UBI com o Tecido Empresarial | *Centre for Qualification and Interaction between UBI and Beira Interior Enterprises*
CIEBI - Centro de Inovação Empresarial da Beira Interior | *Business Innovation Centre*
CPLP - Comunidade de Países de Língua Portuguesa | *Community of Portuguese-Language Countries*
Cybercentre - *Centre for IT Applications*
ECDU - Estatuto da Carreira Docente Universitária | *Statute of the University Teaching Career*
ECTS - *European Credit Transfer and Accumulation System*
ENQA - *European Network for Quality assurance*
ESTER - Associação para a Formação Tecnológica no Sector das Rochas Ornamentais e Industriais - *Association for Technological Qualification in Ornamental and Industrial Rock*
ETI - Equivalente a Tempo Integral | *Full-Time Equivalent*
FCT - Fundação para a Ciência e Tecnologia - *Foundation for Science and Technology*
GAAPI - Gabinete de Apoio a Projectos e Investigação da UBI | *Project and Research Support Office*
GAPI - Gabinete de Apoio à Propriedade Industrial da UBI | *Industrial Property Protection Office*
GPEARI - Gabinete de Planeamento, Estratégia, Avaliação e Relações Internacionais do MCTES | *MCTES Office for Planning, Strategy, Evaluation and International Relations*
IAESTE - *International Association for the Exchange of Students for Technical Experience*
IEFP - Instituto de Emprego e Formação Profissional | *Institute for Employment and Professional Qualification at UBI*
INVOTAN - *Research Programmes of NATO*
IPC - Instituto Politécnico da Covilhã | *Polytechnic Institute of Covilhã*
ISCED - International Standard Classification of Education (1997)
IUBI - Instituto Universitário da Beira Interior | *University Institute of Beira Interior*
LAU - Lei da Autonomia Universitária | *Law of University Autonomy*
LINCE - Questionários de Avaliação do Ensino-Aprendizagem-Avaliação | *Teaching Quality Assessment Questionnaires*
LLL/Erasmus - *Lifelong Learning Erasmus*
MCTES - Ministério da Ciência, Tecnologia e Ensino Superior | *Ministry of Science, Technology and Higher Education*
MTSS - Ministério de Trabalho e Solidariedade Social | *Ministry of Labour and Social Solidarity*
NATO - *North Atlantic Treaty Organization*
OBL - *Object-based Learning*
OE - Ordem dos Engenheiros | *Engineering Association*
OF - Ordem dos Farmacêuticos | *Pharmaceutical Association Society*
OTIC - Oficina de Transferência de Tecnologia e Conhecimento da UBI | *Technology and Knowledge Transfer Workshop*
PALOP - Países Africanos de Língua Oficial Portuguesa | *Official Portuguese Language African Countries*
Parkurbis - Parque de Ciência e Tecnologia da Covilhã, SA | *Science and Technology Park of Covilhã*
PBL - *Problem-based Learning*
POCP - Plano Oficial de Contabilidade Pública | *Official Accounting Public Plan*
PRODEP - Programa de Desenvolvimento Educativo para Portugal | *Educational Development Programme for Portugal*
RADE - Rácio de Avaliação dos Docentes (ensino e docência) pelos Estudantes | *Assessment Ratio of Teaching-learning*
RAT - Regime de Apoio Tutorial | *Tutorial Support Programme*
SASUBI - Serviços de Acção Social da UBI | *Social Action Services at UBI*
SIADAP - Sistema Integrado de Avaliação do Desempenho na Administração Pública | *Performance Assessment Integrated System in Public Administration*
SIGUBI - Sistema de Informação da UBI | *Information System of UBI*
SU - *Students Union*
UBI - Universidade da Beira Interior | *University of Beira Interior*
UNIVA - Unidade de Inserção na Vida Activa | *Unit for Access to the Job Market*
USAID - *United States Agency for International Development*

INTRODUCTION

A. BRIEF ANALYSIS OF THE SELF-EVALUATION PROCESS

A.1. Self-evaluation team members

The composition of the self-evaluation steering committee responsible for the Self-Evaluation Report (SER) was decided by the Rector. The committee is formed by eleven members, namely a general coordinator, six faculty members, the administrator of social services, two technical support staff, and one student.

General Coordinator	Luís Carrilho Gonçalves	Vice-Rector
Faculty Members	Paulo Vargas Moniz	President of the Faculty of Exact Sciences
	Vitor Cavaleiro	President of the Faculty of Engineering Sciences
	Luís Lourenço	President of the Faculty of Social and Human Sciences
	Isabel Neto	Associate Professor of The Faculty of Health Sciences
	João Canavilhas	Assistant Professor of The Faculty of Arts and Letters
	Abílio Silva	Assistant Professor
Social Services	Manuel Raposo	Administrator of Social Services
Administrative Staff and Technical Support	Pedro Esteves	Rectory Staff, Public Relations Service
	Pedro Cabral	Faculty Staff, The Faculty of Health Sciences
Students' Union	Rui Travassos	Representative of the Students' Union

A.2. Collaboration with other structures and individual elements

The Steering Committee assembles contributions from the Rectory, the Faculties, the Services and from the Students' Union (AAUBI), enabling a better assessment of the Institution as a whole and to devise ways and processes of qualitative improvement in the management of activities. The recruitment of qualified members from the University's matrix structure has allowed the discussion and appraisal of relevant assessment issues within the faculties, departments, and degree committees, as well as across services and Scientific-Pedagogic councils. Internal advertising via radio, television, and the on-line newspaper was also carried out by the Faculty of Arts and Letters. An online website (<http://www.ubi.pt/AVI>) was also created for advertising purposes. With increased self-awareness the Faculties, Departments, services, and the Academy have elaborated a final appraisal by means of a SWOT analysis, thus completing the assessment of the entire University.

A.3. Report discussion across the Institution

Following the report made by the EUA delegation on 19 December 2007, the analysis, interpretation, and discussion of the guidelines began in January 2008.

The plan of activities until April and the composition of the steering committee were decided in a meeting on 10 January. Presided by the Vice-Rector, the steering committee held weekly meetings, monitoring and supporting the processes across the Faculties, Services, and Student's Union. After defining the structure of the report, sources of information were identified to gather and organise data (Academic Services, Social Services, Financial and Patrimony Services, Coordinators of Centres and R&D Units, etc). Within the steering committee a writing subcommittee was formed, presided by the Vice-Rector, Professor Luís Carlos Carrilho Gonçalves. From March onwards the steering committee elaborated a synthetic SWOT analysis, to be used by the several Faculties, services, and Students' Union, mapping new indicators to be included in the SWOT analysis. Members of the committee consulted all bodies (teaching staff, non-teaching staff, and students) on the draft of the self-evaluation report and on the SWOT analysis, and drew on suggestions to improve the work already carried out by the committee. Throughout April the self-evaluation report and the SWOT analysis were concluded. The necessary appendixes and annexes were also formatted to complete the process.

A.4. Positive aspects and difficulties

The University has in the past prepared similar reports for various assessment processes. However, it is the first time that the assessment is institutional, which dictates a widening of a University's global and strategic scope. The following positive aspects are highlighted:

- Reconsidering management and decision processes across the entire University, so that specific internal rules create a positive balance in terms of autonomy and help to meet the defined objectives and programmes.
- Having the opportunity through an external institutional assessment to reflect and know better the obstacles and difficulties in implementing the University's strategic decisions.
- The importance of contributions from internal and external agents and the influence of that factor on the University's development and a better self-knowledge for purposes of change and adjustment.

Difficulties naturally arise from the decisions taken in order to best arrange the self-evaluation report; from the need to make the adequate information reach all those intervening in the teaching-learning-assessment process, in services, and in research; and from the level of intervention elicited to supplement contributions and encourage active involvement, to be faithfully conveyed by the report.

B. INSTITUTIONAL CONTEXT

B.1. Brief historical overview

The preliminary steps towards what UBI is today were taken in the 1970s, when the IPC was created (1973). In that decade the city, dubbed the “Portuguese Manchester” for its longstanding tradition in the wool manufacturing industry and for the vitality and quality of its textile production, had been hard-hit by an industrial crisis: large and small factories showed signs of great debility eventually leading to shutdown, with disastrous social and economic consequences for the region. In this context, and fuelled by initiatives of the Committee for Regional Planning of Cova da Beira, the idea of creating an institution of higher education in the region arose, enabling the regional population to continue studies beyond secondary-school level without needing to relocate, in the majority of cases permanently. Following publication of Law no. 402/73 of 11 August in the frame of the Veiga Simão¹ Reform, which fostered the expansion and diversification of Higher Education, the IPC was created and in 1975 hosted its first 143 candidates in the Textile Engineering and Administration and Accounting degree programmes. Six years later, in July 1979, the institution was converted into IUBI (Law no. 44/79, of 11 September). The conversion into IUBI was made official in 1986 (Law no. 76-B/86, of 30 April). The first Rector of UBI was Professor Cândido Manuel Passos Morgado, who would remain in office from 21 August 1980 to 19 January 1996, and would be succeeded by the present Rector, Professor Manuel José dos Santos Silva.

B.2. Geographic position

UBI is located in the city of Covilhã. The city is geographically situated 270 km from Lisbon, 240 from Oporto, and 350 km from Madrid in Spain. Among its most noteworthy physical features are the proximity to the city centre and the ongoing restoration of old buildings of high historical, cultural, and architectural interest. Historical landmarks of the city are preserved and simultaneously revitalised as spaces oriented to teaching and research. The construction of the IPC had previously begun with the restoration of the former facilities of the Headquarters of the Hunters Battalion 2 at the Pombaline Real Fábrica dos Panos, of foremost architectural interest, located in one of Covilhã’s traditional factory clusters near Ribeira da Degoldra. During the conversion works in 1975, underlying archaeological structures were discovered, formerly belonging to the former dyeing factories of the Real Fábrica dos Panos, an important wool manufacturer built under the ordinance of the Marquis of Pombal. After two archaeological interventions and wide research, the structure of what was to be the main site of UBI’s Wool Manufacturing Museum was created and the museum opened to the public in 1996. The former factory buildings at the South entry of Covilhã became the logical logistical solution, and the physical expansion of the Institution continued. This brought also great benefits for the city in terms of urban planning and environmental impact, enabling the salvage of derelict buildings or ruins which were a significant part of Covilhã’s industrial heritage. This has made UBI a unique case among Portuguese universities. The most emblematical buildings include: the Convent of St. Anthony, at Pólo II, hosting the Rectory; the Melo e Castro Family Palace; the buildings of Fábrica do Rato, Fábrica do Tapete, Fábrica do Moço, Fábrica Paulo Oliveira, Empresa Transformadora de Lãs; the Chapel of St. Martin, a Romanic building of the 12th century listed as a Building of Public Interest, housing UBI’s Catholic religious service. The former residence of the Mendes Veiga Family was also acquired and after a conversion project today hosts the University’s Main Library. In the 1990s the University began to expand northwards, along the Ribeira da Carpinteira, and Pólo IV was created. In 2006 the Faculty of Health Sciences at Pólo III was inaugurated, completing the implementation of the Medicine programme infrastructure.

B.3. Regional and national labour-market situation

On the whole, the job market is presently adverse. An unemployment rate as high as the current 8% (approx.) had not been reached for many years. Unemployment rates are also significant among university graduates (39000 unemployed graduates are registered at the Institute for Employment and Professional Qualification). On the other hand, the average length of time for graduates to find employment is lesser than among non-graduates (almost by half). Among graduates different situations are observed:

- Medicine graduates have guaranteed automatic professional admission to hospitals and health centres immediately after graduation. Until recently this was also the case with the remaining healthcare professions (nurses, physiotherapists, etc.). Presently that is no longer the case, as those market sectors have become saturated, if not yet problematic;

¹ Minister of Education from 1970 to 1974

- Economics and Management graduates generally find employment, in most cases within a period of 6 months after graduation. This is largely attributable to recruitment by financial institutions (banks), auditing companies (many multinational), accounting offices, and even self-employment (though the Ministry of Higher Education has stated that there are many unemployed among Accounting, Management, and Administration graduates, especially from private universities and Polytechnic Institutes);
- graduate jobseekers from the several branches of engineering rapidly find employment, with the exception of the sectors under crisis (textiles) and those most severely affected by globalisation and Chinese competition (such as those with low-standard manufacturing and low added value);
- Teaching-oriented degrees for basic and secondary school levels face some difficulties in finding employment (Mathematics, Sciences, History, Foreign Languages and Literature), as the State is no longer absorbing these graduates;
- others such as graduates in Human Resources, Marketing, International Relations, Social Service, Sociology, Philosophy, Psychology, Design (at some private universities), and Childcare graduates (almost always featuring first) have some difficulties in finding vacancies in the job market (except the most accomplished, who do manage to find alternatives).

This describes the overall national scenario, made worse by the fact that companies are still undergoing cost-reduction processes, incorporating new technologies, introducing innovations (in production, etc.), in an attempt to increase total multifactorial productivity (TFP) and to stay afloat in a highly competitive and globalised world.

At a regional level, the situation is somewhat worse as the crisis affects traditional sectors such as textiles and clothes manufacturing (Covilhã), and intensive labour industries such as cabling in Guarda and Castelo Branco.

A recent MCTES/MTSS study (February 2008) on employment-seeking in Portugal, published by the GPEARI, reveals the following (Annex C, tables C.1 and C.2):

- In December 2007 Portugal had a total of 38 795 unemployed university graduates;
- of the 5 regional territory units (NUTS II) in continental Portugal, the North has 41.3% of the total unemployed, the Centre (where UBI is located) has 26.1%, and the Lisbon region has 24.7%;
- The study fields with the highest national rates of graduate unemployment are: entrepreneurial sciences, at 16.2%; teaching degrees and education sciences, at 15.8%; social and behavioural sciences, at 13%; technical engineering and similar training at 8.4%, humanities at 6.8%, health at 6.2%, ...
- Higher education programmes with the largest number of unemployed graduates are: psychology, social service, nursing, design, law, international relations, education, economics, and geography.
- From the GPEARI study it may be inferred that UBI graduates are not yet severely affected, since almost all study programmes at UBI are anchored in areas of knowledge with low unemployment statistics (Annex A, table C.3).

B.4. Number of Faculties and Research Units/Laboratories

UBI comprises Faculties and Centres which endeavour to meet the University's goals in teaching, researching, and service provision to the community. The present Faculties are: Exact Sciences, Engineering Sciences, Social and Human Sciences, Arts and Letters, and Health Sciences (Appendix I). The university's statutes envisaged the creation of the Information Technology Centre (CI), the Centre for the Studies of Regional Development, (CEDR), the Centre for Teaching and Learning Resources (CREA), and the Heritage Study and Protection Centre (CEPP). Subsequently, two interdepartmental units were created: the Optical Centre and the Wool Manufacturing Museum. In collaboration with UBI's Faculties and Departments, R&D units have been funded by the FCT (Foundation for Science and Technology) during multiannual programmes and others created by the departments, which in turn can apply to FCT funding (Appendix I). All departments are well-equipped with laboratorial or workshop facilities (Appendix VII, table VII.3) which likewise support teaching and learning processes, research, and service provision to the community.

B.5. Number of academic, administrative staff and students

On 31 December 2007, UBI had 432,80 ETI (Full-Time Equivalent) teaching staff, 335 administrative staff (Appendix V, tables V.2 and V.7) and 106 Social Action Services staff (Annex E, table E.1) and 6104 students (5053 undergraduates, 886 postgraduates at MPhil, MA, and MSc levels, and 165 PhD students) (Appendix IV, tables IV.1, IV.4, IV.10, IV.11 and IV.13).

B.6. Autonomy

Human and financial resources

The autonomy of the universities has until now been regulated by the LAU (Law 108/88 of 24 September) and by UBI's statutes as sanctioned by the Ministry of Science, Technology and Higher Education. Article no. 3 of the LAU decrees:

- 1- *Universities are collective persons of public law and have statutory, scientific, pedagogic, administrative, financial, and disciplinary autonomy.*

6- Organic units also have scientific, pedagogic, administrative, and financial autonomy, according to the University's statutes.

As regards funding, article no. 11 of the LAU ordains:

- 1- *The State must guarantee adequate funding to the Universities indispensable to their operation, within the limits of the budget available.*
- 2- *The right of the universities is acknowledged to be consulted on the definition of criteria for the State's budget allocations...*
- 3- *The universities prepare and propose their own budgets.*
- 4-

Though the LAU has allowed ample financial autonomy, the State has not been and is not presently capable of fully assuming its responsibilities, and the required operating funds have decreased over the past five years. The need to seek supplementary funding sources (fees, R&D contracts, private funding, and service provision) is a prospect for the future.

Capacity to set its own profile for teaching, research and innovation

In the context of scientific and pedagogic autonomy, articles no. 6 and 7 establish:

Article no. 6-1 - Scientific autonomy grants Universities the capacity to freely delineate, plan, and carry out research and additional scientific and cultural activities.

Article no. 7-2- The universities have full autonomy in designing study programmes and course curricula, in their choice of teaching methods and knowledge assessment processes, and in trials of new pedagogic experiments.

Public funding constrictions have caused an arrest in growth of teaching/learning-based activities, research, and innovation due to a shortage in human resources. While the concept of the University's autonomy as clearly defined by the LAU has been applied, this application was limited at a most crucial level, given the severe lack in human and financial resources. Notwithstanding, the University has proved able to heighten its profile in teaching/learning and innovating activities across the Faculties, which are all equipped with high-standard and cutting-edge Laboratories and facilities.

Capacity to set its own governing structures

The present governing structure is defined by the University's statutes, created and modified by the University Assembly.

It must be noted the LAU has been replaced by Law 62/2007 of 10 August, which establishes the new Juridical Organisation of Higher Education Institutions (Universities and Polytechnic Institutes). Throughout 2008 the creation of new statutes and regulatory systems will settle the adjustment of universities' structures to the new Law.

1. NORMS AND VALUES

1.1. GOVERNANCE AND MANAGEMENT

1.1.1. Target degree of centralisation and decentralisation

In the pursuit of its mission UBI is buttressed by a matrix organisation. Its current statutes define as its governing bodies the University Assembly, the Rector, the Senate, and the Administrative Council. Each in their own capacity and invested of duties established by the statutes must make the appropriate decisions to accomplish the mission and goals of the institution. UBI has exercised its autonomy in agreement with its governing statutes and with the LAU. However, regarding student entry via the national application process and other processes, the Ministry of Science, Technology and Higher Education (MCTES) has delimited not only the number of students for each study programme, but also allocations across the various fields of knowledge. Similarly, the MCTES has instated a yearly regulatory monitoring of programmes that qualify for State funding and a minimum number (*numeri clausi*) of students who must be admitted to a programme. Autonomy is not ostensibly at issue, as the University may decide to admit new students without the State's financial support. In the present context and over the past five years, this trend reveals that the annual public funding of the University is already insufficient to cover the operating budget (70 %). The sustainability of some fields of knowledge such as sciences, engineering sciences, and letters is compromised, and additional income from private funding is vital. As for ascriptions, by the Rector's proposal the University Senate approved regulation 45/96 of 1 January, regarding the administrative autonomy of the Faculties to authorise and make expenditures. The Executive Board or the President of the Faculty may authorise Faculty expenditures within the allocated and approved annual budget and planned expenditure in R&D projects, under the Faculty staff's scientific responsibility. Another financial constraint has been dictated by the MCTES regarding the annual budget balance. If the accounting balance from the previous year is higher than the budget balance, the University suffers the loss of the surplus. This situation hinders the Institution, dictates incoherent management practices and prevents a better distribution of funding in terms of mid-term strategic management goals. The University's autonomy as defined by its statutes and the LAU has been affected and can only be restored by a significant increase in external funding, such as fees; service contracts; management of related entities in compliance with the University's statutes and the LAU; FCT funding; and private funding of research projects.

1.1.2. Human resources and gender policies

Management of human resources is subject to legal regulations such as recruitment of teaching staff (ECDU) and progression in the public career. Eventual future application of individual contracts may allow the improvement and a greater malleability in management of the University's human resources. Non-discriminating policies are applied in all recruitment processes of human resources for teaching, research, and service provision.

1.2. ACADEMIC PROFILE

1.2.1 Target balance among teaching, research and other services

The University aims to consolidate teaching/learning activities, research, and services. Teaching/learning and research are the responsibility of teaching staff. Services are provided by teaching staff and technical staff. The number of teaching staff on the State's annual budget payroll is directly indexed to the student-teacher ratio for each UBI degree programme (*Ex: Medicine, 6:1; engineering sciences, 11: 1; social sciences, 20:1*) (Appendix IV, table IV.22). Over the recent years the University has focused on the development and efficiency of the teaching/learning process. Scientific areas such as sciences and engineering still show low success rates (i.e. the ratio between the number of approved students and the number of assessed students) which must be improved. The implementation of the Bologna process and the generalisation of student-oriented teaching/learning methodologies are goals to be met. Health Sciences degree programmes already operating under those methodologies substantiate better success rates (Appendix IV, tables IV.23 and IV.24). Another of the University's concerns has been to make available laboratorial spaces for trials, workshops, and tutorials, in an effort to optimise learning. This helps students to appreciate the importance of the practical and the know-how components beyond theory. A policy of teaching staff qualification has resulted in the increase in numbers of teaching staff holding PhD degrees, which in turn translates into a higher standard of learning/teaching processes. UBI's student population originating from the Beira Interior region (Castelo Branco and Guarda districts/municipalities) amounts to 40% of the total. The majority of students come from other regions in the country. The ability to attract students from other regions is a plus point that must continue to be monitored. Besides national students, UBI also attracts students from Portuguese-speaking countries, especially from the PALOP (Cape Verde, Guinea, S. Tomé, Mozambique, etc.) (Annex G, table G.1). The generalised launch in 2006/2007 of the 1st and 2nd Bologna study cycles may bring about a decrease in student numbers in the 1st cycle, as the majority of these degrees have been abridged. To reverse this effect the University must draw more students into the 2nd cycles, through the design of appealing study programmes and more effective advertising of its training and employability potentials. Another goal is greater financial balance. Where research is

concerned, the University has strived for the increase in numbers of teaching staff holding PhD degrees. The creation of research units through projects that qualify for FCT and European Union funding contracts (*yearly funding level of R&D - 2006 - 18%; 2007 - 13%*) has also been encouraged ([Appendix VI](#)). Drawing European students and students from Portuguese-speaking countries has been a permanent goal, enabled by study scholarships from research projects and also by the Erasmus programme in the context of the new 2nd study cycles. The funding of research units comes through projects and contracts with the FCT. Fostering economic activities and research units is deemed the only viable path for the University to follow, as it creates synergies between research and contract creation. The University is a member of the Parkurbis society, created to serve as an incubator for technology-based businesses. Parkurbis relies on the collaboration of researchers, capital funds, and UBI's teaching staff. 21 companies are based at Parkurbis, employing approximately 100 people, of which 97% are graduates. Out of those 21, 17 businesses are UBI spin-offs. Regional cooperation with the municipalities has proved a prolific collective effort towards regional development and the creation of employment opportunities which encourage highly qualified people to settle in the region. In terms of service provision to the community, the University has made valuable and high-standard contributions, generating external service contracts. A strong reliance on contract creation in the regional and national economy compels the University to pursue contracts in the international European context and in Lusophone countries. The CEDR (Regional Studies and Development Centre) generates added value for the services provided, and has spawned several support Divisions for industrial property, R&D projects, traineeships, and employment opportunities. There are also interdepartmental units (the Optical Centre and the Wool Manufacturing Museum) which design activities fostering University interaction and mobilising financial resources through projects and studies.

1.2.2. Academic priorities: emphasised teaching programmes and areas of research

Teaching programmes

UBI develops teaching programmes spanning most fields of knowledge apart from Law. Presently all 1st and 2nd study cycles conform to the Bologna model. The majority of 3rd cycles or PhD programmes already comply with the Bologna model and the remaining will continue to be adjusted throughout 2009. The shift to a student-centred teaching/learning paradigm is in progress across all fields. OBL systems allow setting up teaching programmes in the fields of Medicine, Biomedical Sciences, among others. Tutorial supervision will progressively be implemented in the 1st study cycle, where the lowest success rates are registered. The aim is to reverse those rates in the medium and long term. A digital platform supporting learning contents is available and can be used to develop contents supporting teaching-learning-assessment activities, laying the grounds for e-learning. The development of new and more effective teaching-learning methodologies requires greater financial support, in order to secure sustainable success and longer, application/trial periods compatible with the various fields of knowledge. The funding of didactic programmes by the MCTES through programme-contracts proves insufficient both in quantity and in duration. The University will continue to support didactic programmes and content projects, in an effort to adjust teaching/learning activities to the Bologna model.

Areas of research

Research areas are defined primarily according to teaching areas. The specialisation needs of teaching staff in the areas supporting teaching and 2nd-cycle speciality programmes are also vital for the development of research areas. In these and other fields of knowledge teaching staff group transversally, forming research units which apply to FCT funding. The University seeks to develop strategic research areas, and wherever possible to co-finance with other R&D programmes, fostering the development of a critical mass in those areas (health sciences, textile and paper materials, renewable power, bionic systems). Research units operating at UBI are funded by the FCT. Their assessment, which determines the continuity of funding, is made externally in agreement with MCTES policy and carried out by the FCT.

1.2.3. Policy or preferences regarding certain academic approaches

UBI is committed to promoting the complete adjustment of the study programmes for the 1st, 2nd, and 3rd degrees to the Bologna process in a coherent manner throughout the next 4 years. The increase of the academic success rate is relevant for the 1st and 2nd cycles ([Appendix IV](#)). UBI regards the challenge of student-centred learning-teaching-assessment as a priority, and acknowledges that human endeavour and students' working hours, measurable through the ECTS system, must be converted into knowledge, skills, and abilities. UBI considers that the emphasis on self-learning is a challenge for higher education learning-teaching-assessment processes, and a model of sustainability for the employability of its graduates. UBI promotes the training of its teaching staff in the most effective teaching-learning methodologies, such as e-learning, OBL, PBL, and cooperative learning, and seeks to monitor their applications in core scientific areas for development. UBI continues to develop its laboratories and workshops fostering experimental training in relevant fields of knowledge in order to impart the know-how, to

perfect technological instruments, and to take the maximum benefit from existing infrastructure in an innovative way.

1.3. ACADEMICALLY-RELATED ACTIVITIES: GOALS FOR RELATIONSHIP TO SOCIETY AND INVOLVEMENT IN PUBLIC DEBATE

UBI pursues its aims privileging a symbiosis between research and teaching, simultaneously developing interaction with the non-academic community, namely through service provision. Cooperation with enterprises and public organisations has been increasing. UBI has always favoured links with companies, and additionally has helped to create structures such as the CIEBI, and the Cybercentre, the first to open nationwide. Recently, in a partnership with a group of entities of strategic importance for the economical development of the region, it was one of the founding members of Parkurbis. UBI's opening up to and interaction with the regional community have recently been reinforced by the creation of two new structures: the GAAPI and the CFIUTE. Among a highly diversified range of activities must be highlighted the organisation of several cultural activities, seminars, professional training courses, as well as service provision in consultancy, technical, logistical, and documental support in several regional institutions. UBI aims to continue fostering training in a life-long learning logic, seeking to attract new audiences (over 23s, unemployed and employed), and to offer opportunities for continuing studies, new skills acquisition or redirecting professional careers. UBI will upkeep its policy of refurbishing and preserving the textile industrial heritage of Covilhã, making the most of human and material resources in the Wool Manufacturing Museum and the development of international activities in the context of the Translana project. Through partnerships with local and regional authorities and entities, UBI will promote cultural dynamism in the facilities available to that effect, complementing and increasing the existing cultural offer.

1.4. FUNDING: INTENDED RELATIONSHIP TO FUNDING AGENCIES

Presently the University is financed mainly through direct public funding from the state budget (almost 62% in 2007). The amount allocated by the government to all higher education institutions is calculated through a formula considering the number of students and the costs of the specific education area. The final amount takes into account other quality-related factors of the institutions. As funding from the public budget decreases, expenses related to the University's added value, which are not accounted for in the budget definition, are increasingly difficult to cover. The University must raise the amount of external R&D funding, and also the diversity and quantity of specialised services provided to the community, which will enable different activities in the University, and contribute to central costs. The adoption of a full-cost accounting system is crucial so that all eligible costs can be accounted for and financed by alternative sources.

1.5. TARGET BALANCE IN TERMS OF LOCAL, REGIONAL, NATIONAL, AND INTERNATIONAL POSITIONING

As stated in the governing statutes, UBI has significantly fostered development in the region, and by nature and vocation serves the wider national community, promoting national and international cooperation. In this regard, it prioritises contact with Portuguese-speaking and European countries, through cultural, scientific, and technical exchanges with its counterparts. On a local and regional level, UBI aims, on the one hand, to continue to enhance the levels of qualification of the community through the design of new training programmes; and, on the other hand, to encourage entrepreneurship and the local economy, and to provide technology transfer and services. On a national level, UBI seeks to secure its position in the context of higher education, standing out for its innovative edge and for the quality of its teaching and research, as well as for differentiation. On an international level, UBI aims to become involved in more EU R&D research programmes and initiatives, to develop partnerships with high-rank international institutions, and to strengthen cooperation with Portuguese-speaking countries, namely Brazil and the PALOP.

1.6. OTHER INSTITUTIONAL GOALS

The University is a public institution of higher education surrounded by a community and training people at the highest level to work for that society. In turn, the community expects of the University a helpful response to its challenges, a fostering of development, and solutions for problems and concerns. The University also anchors the community's scientific, technical, social, and economic development. This interrelation implies several dimensions and responsibilities towards the surrounding community. The increase in out-reach activities at the service of the community is expected and will translate into the creation of companies or other entrepreneurial activities. In turn, this will strengthen economic and social relations, and generate greater sustainability in relational dynamics as well as confidence in the future.

1.7. INTEGRATION OF THE THREE FUNCTIONS – TEACHING, RESEARCH AND SERVICE TO SOCIETY – AND PROMOTION OF SYNERGY BETWEEN THESE AREAS IN THE UNIVERSITY'S MISSION

The university endeavours to perform its three functions - teaching/learning, research, and service provision to the community - in a multidisciplinary way. This multidisciplinary approach is favoured over an established bent on highly narrow expertise. The more transversal and interdisciplinary degree programmes, organised and taught in curricular units or modules, will allow a better integration of disciplinary fields and an interrelation between strategic and non-strategic areas (e.g. Biomedical Sciences, Design, Political Science and International Relations, Sports Sciences). The design of projects transversal to the knowledge of subjects in demand by society encourages cooperation between teaching staff, researchers, and specialists who promote synergies between study programmes and improve performance of the several groups. The promotion of expertise programmes aimed at optimising performance in professional activities generate more assets, which in turn will encourage the diversification of knowledge and training in organisations/companies. The updating of knowledge through short-duration programmes also allows the advancement of teaching staff through research and the necessary contact with society. Other synergy factors include the setting-up of laboratories, workshops, and other workspaces in the University shared by transversal areas and which may be used for teaching/learning, research, and service provision by teaching staff and students. The development of a critical mass in strategic areas of knowledge (science, engineering, health sciences, arts, entrepreneurial sciences, humanities) determines the grouping of teaching staff and researchers from different faculties into multidisciplinary R&D units. The University encourages teaching staff, researchers, and technicians to partake in workgroups geared towards cooperation with companies and the community (Industrial Property Support Office, Research Project Support Office...). It has been deeply involved with the surrounding community and society as a whole, assessing and solving arising problems. The organising structure of the 2nd and 3rd cycles will also allow the joining of teaching, research, and the study of problems related or presented by the community. Additionally, it continually promotes technology-based entrepreneurial activity through the design of adequate study programmes and the offer of courses in all study cycles. The dynamic offer in training and information transferred to the students will represent an invaluable gain in terms of learning and perfecting skills in each field.

2. Organisation and activities

2.1. GOVERNANCE AND MANAGEMENT

2.1.1 Analysis of management practice

UBI is a public university under the MCTES governed by the applicable statutes regarding financial, administrative, scientific, pedagogic, and disciplinary autonomy. The University develops its activities according to a matrix organisation based on educational programmes, research, or service provision. The management structure of the University is defined in its statutes, complying with the Constitution and Legislation on Universities' Autonomy (Appendix II). The University statutes have been approved by the University Assembly, where all bodies of the University are represented, either by election or by inherence of their capacity. The main duties of the University Assembly are: electing the Rector from among the professors in tenure of the University and effectively in exercise of functions, and altering the University Statutes when changes are proposed. Besides the Rector, the Senate is the main decision maker in the University, approving proposals related to the University's human, financial, and physical resources, and approving the main strategic definitions. All University bodies are represented in the Senate. The Rector is aided by Vice-Rectors and Pro-Rectors. The Rectory defines the strategic objectives of University to be approved by the Senate, and is responsible for ensuring that all University procedures are in compliance with the legal framework and internal regulations. Further, it is its mission to analyse external conditions (opportunities and threats), the preparation of prospective proposals and the promotion of external conditions favourable to University's objectives. The Rectory also supervises the academic, financial, and administrative management of the University. The Administrative Council is formed by the Rector, who presides, the three Vice-Rectors, the University's Administrator, the Social Services' Administrator, a representative of the Students' Union, and the Head of the Accounting Division. Its main decision duties refer to the administrative, patrimonial, and financial management of the University, in accord with the legislation applicable to financially autonomous institutions. The definition of the scientific and pedagogical policy of the University falls under the responsibility of the Scientific Council and of the Pedagogic Council. The Scientific Council comprises all PhD members (Teaching Staff and Researchers) and has a Coordinating Committee overseeing the main scientific activities of University. Its composition is proportional to that of the Departments and Faculties. The Pedagogic Council is formed by representatives of Professors, Assistants, and Student members of all Faculties. The Advisory Council is presided by the Rector and among others comprises outstanding individuals from the community appointed by the Senate, and former Rectors of University (the Assembly not being active). The Faculties are the organic units through which the University develops its activities. These Units are formed by related Departments that will collaborate to adequately uphold the scientific and pedagogic policy of the University (Appendix I). These

were created to maximize the rigorous management of human resources and activities in teaching, research and service to the community.

Selection and promotion of academic and administrative staff

Academic and administrative staff members are appointed centrally. Their numbers are monitored by the University within the ceilings defined by the MCTES, considering that the University's budget must cover both staff costs and general costs, leaving a margin for operating costs. Progression in the academic career is established by the ECDU, as is the distribution of vacant positions of associate and full professorship within the University. This distribution is made by the Scientific Council and approved by the Senate in the scientific areas according to size and research growth. It should be noted that 7% of these vacancies were kept and managed by the Rector considering strategic needs such as reinforcement of strategic areas or development of new ones. Progression in the academic career is regulated at a national level, juries being formed by full professors from the study field in the University and a number of external full professors representing the field in which the competition is being held. In this competition, both internal and external candidates can compete at a national level. Usually the quality research production prevails over other criteria such as pedagogic and management work. There is also the possibility of recruiting academic staff outside the formal academic career for non-permanent and specific purposes such as invited teaching staff and specialists, for limited time periods. Postdoctoral fellows may also offer valuable collaboration to the existing academic staff, sharing expertise for a limited period of time in a specific area. The number of technical and administrative staff is also defined by the Rector taking into account the needs of non-teaching staff for each organic unit and also considering ceilings defined by the MCTES. The administrative staff career structure and progression is defined by the regulations of the Public Administration, new posts being advertised nationwide by public call, and candidates ranked by a jury. The University Administrator may propose new vacancies according to different sectors and the needs of organic units, being managed by the Rector in agreement with the financial resources and strategic goals of the University.

Selection of students

The selection of regular students (undergraduates) is made through a national selection process, based on a ranking of students' marks and their preferences in University/degree programme. The MCTES defines the number of vacancies for each degree taking into account the proposal from the University. The proposal is primarily submitted by Departments and approved by the Scientific Council and the Senate in agreement with a proposal from the University, decided by the Rector after a proposal from the different Departments. Despite the process of selection being national and beyond the University's control, policies are in place to attract more and better candidates at the moment of deciding their future. Each year UBI promotes events such as "UBI's Open Days," when for three days students from the region and beyond have the opportunity to take part in several activities in the different Departments of the University. Beyond that, several visits to local and regional schools are made by teaching staff of the University and there is also some participation in fairs for the promotion of UBI study programmes. From abroad the University hosts students from the PALOP, through scholarship awards, and from other European countries (ERASMUS programme). Students of technical areas from all over the world can apply for traineeships at the university's research units, under IAESTE. For candidates returning to studies (over 23s) the University decides annually the number of places to be offered and the internal examinations that will be required to rank them. The selection of postgraduate students is made according to the Bologna system, and students may be recruited at an international level, admission to postgraduate programmes being determined by UBI's internal regulations.

Funding issues

The overall annual budget application plan is prepared by the Rector in agreement with the Administrative Council, and subsequently is approved by the Senate. This plan includes the estimate of the following year's public budget, the forecast of contributions from student fees, the estimate of salaries and of general operating expenses. Provision for special strategic programmes and a margin left to be distributed across scientific research activities is also considered. This plan is elaborated in September/October for the following civil year after the budget is known by August/September. Later in February/March, as soon as the previous accounting year is closed, the detailed budget distribution is prepared and published. It should be noted that the total funds managed by the University are mainly from the Public Budget (60% in 2006 and 62% in 2007; Appendix VI, table VI.1) that may primarily take into account expenses such as salaries or the maintenance of infrastructures. The remaining is distributed to the Faculties and other Services for operating costs or investments. Presently the public budget cannot entirely support the total staff costs, which is forcing the University to use private funding to support those expenses.

Academic activities (teaching and learning, research)

Within the scope of teaching/learning activities, the University organises and imparts undergraduate programmes (1st cycle), leading to the degree of "licenciado", and postgraduate programmes (2nd and 3rd cycle) leading to the

master and doctoral degrees. UBI also organises and imparts programmes conferring certificates. The University organizes its programmes according to the ECTS. Study programmes are delivered in Portuguese. Occasionally in postgraduate/master programmes and by teaching staff's choice courses may be taught in English. Allocation of hours and duties among the teaching staff is proposed by the Department Board and approved by the Scientific Council. In order to improve learning outcomes, UBI applies student-centred teaching methodologies and special modules where practical simulations take place. UBI has always given great emphasis to research activities arising from the development of education areas and by initiative of teaching staff and researchers. The development of research and the newly-acquired knowledge are incorporated into the teaching programmes, at all levels (1st, 2nd or 3rd cycles).

Development of entrepreneurial activities

The development of entrepreneurial activities has an important role in activities serving the community carried out by the University. Parkurbis, which fosters technology-based companies involving researchers, teaching staff, and University funding, is probably the best example of the University's entrepreneurial activities. Presently there are 21 micro firms already set up at Parkurbis, 17 of which are UBI spin-offs. Many UBI degrees already comprise courses with total or partial entrepreneurship issues and contents.

Research policies

On a first approach, research policies in the University were dictated by the study fields and degrees imparted by UBI, which developed initial research areas. After that, research organised itself around research units that can be interdepartmental comprising staff from different organic units. Research units are autonomous in terms of scientific policy, and are mostly dependent on assessment and financing by the FCT, being organised by a coordinator, and research groups formed to organise and conduct research in specific fields.

2.1.2 Students and external stakeholders' involvement in institutional governance

The University has a representation of students in its institutional governing bodies in accordance with the statutes. Student representatives come from elected lists and others from elected members of the Students' Union. They take part in the University Assembly (53 representatives of all Faculties out of a total of 130), in the Senate (15 representatives and the President of the Students' Union out of a total of 52), the Pedagogic Council (10 out of 26), the Administrative Council (President of the Students' Union) and Advisory Council. In addition, they are represented in different bodies of the organic units, for instance having one representative in the Executive Council of each Faculty. External entities are also represented in the Senate, namely the Mayor of Covilhã or other specialists from other Universities.

2.1.3 Adequacy of human resources, human resource policy and practice to current and future needs

UBI is a young university whose origins date back to 1986. It began by recruiting highly-qualified teaching staff, both in Portugal and from Eastern European countries (e.g. Poland or Russia), at the same time it hired young graduates. The latter entered the academic career, in agreement with the ECDU (pedagogic and scientific qualifying tests, master and PhD degrees). In December 2007 around 61 % of UBI's teaching staff held PhD degrees, distributed into the Full Professor, Associate Professor, and Assistant Professor categories (Appendix V, table V.4). Presently, the majority of teaching staff admitted in the late 1980s and 1990s has already obtained their PhD degrees and is between 35 and 50 years old. Another change over the years was the fact that PhD supervision at UBI has progressively moved from external supervisors to UBI supervisors, as a result of the increase in the PhD-holding critical mass. Presently teaching staff recruitment, which has been drastically reduced over the last few years, privileges PhD degree holders in areas well defined by the University. The new staff members pursue their already advanced research at UBI. On the other hand, their age is now higher, which does not contribute to the rejuvenation of staff's average age years. It is expected that between 15 to 20 years the University will face difficulties related to the aging of the teaching staff, a central problem to be solved then or before. Presently, the number of academic staff is adequate to UBI's needs. Promotion of staff follows the ECDU stipulations. As stated before, the University only manages the opening of tenure vacancies. The number of non-teaching staff has increased over the past few years, particularly due to recruitment of non-permanent staff and to contracts with the IEFP (Appendix V, table V.7). The present instability of public career entry and progression, which are now frozen, does not allow the most adequate staff management, forcing UBI use to contracts with the IEFP to make up for staff shortage. It must be noted that the ratio between teaching and non-teaching staff in December 2007 was of 1.29 (432,8 being teaching staff - ETI and 335 non-teaching staff). The current instability of new student entry, namely in fields like engineering, science, and letters, and the decrease in funding to the University makes it difficult to chart UBI's future needs. Multiannual funding is also compromised as the University cannot guarantee its multiannual strategic management.

2.1.4 Gender policy implementation

The university implements non-discrimination policies in all recruitment processes in the context of the necessary resources for teaching, research, and services, selecting and promoting their staff regardless of gender. By policy in all public calls juries are obliged to establish selection criteria based on objective facts exclusively related with the necessary qualifications to the vacancy advertised.

2.1.5 Involvement in inter-institutional cooperation at regional, national and international level

The university is located in the region of Beira Interior and is pivotal to regional development. Strong cooperation links with various sectors of activity on a national level are crucial to reinforce that position. Some examples of such cooperation are the strong relation with the region's Hospitals and Healthcare Centres, which are crucial for the development of the teaching of Medicine and Pharmacy and for the implementation of new research areas. Additionally, UBI is a member of Parkurbis, which entails a close proximity to the entrepreneurial tissue and with AFTEBI in the area of post-secondary school training. On a national level UBI is located at a plainly peripheral area, remote from the national decision centres. Cooperation with other national universities and research centres allows the creation of links crucial to the positioning of UBI as a reality reaching beyond the region of Beira Interior. On an international level UBI takes part in a number of community programmes such as LLL/Erasmus, Leonardo da Vinci, INTERREG, TEMPUS, EU R&D Framework Programmes, IAESTE, and several Integrated Action programmes (Luso-Spanish, Luso-British, Luso-French, and Luso-German) with several other countries. Special emphasis should equally be given to cooperation with Portuguese-speaking countries (CPLP), especially African countries (PALOP). All these cooperation activities fulfil UBI's vow as explicit in its statutes to serve the Portuguese community as a whole and to promote national and international cooperation, promoting regional dynamic and innovation environment.

2.1.6 Adequacy of management policies to the mission and goals

The qualification of the University's teaching staff has been progressively achieved through the financial support of PRODEP, INVOTAN/NATO, the Calouste Gulbenkian Foundation, USAID and FCT programmes. PRODEP had a multiplying effect as it allowed the University to replace teaching staff entering PhD programmes, thus ensuring teaching-learning activities. Holders of PhD degrees advance in the academic career according to the ECDU, which is regulated by the MCTES. To that end and in a balanced way, the University makes public calls for each area, taking into account that teaching staff from other universities may apply, as well as other external candidates. Due to a decrease in the number of new students applying to some scientific areas (Sciences, Engineering, Letters), the University has initiated a process of non-renewal of contracts with invited teaching staff. Presently in areas where the number of PhD holders is still insufficient, contracts with invited teaching staff are signed for the period of one year and are non-renewable. Teaching staff recruitment needs are ascertained by the Scientific Council's internal analysis, considering the *number of teaching staff/number of students* ratio per scientific area, determined by the MCTES, and the global and annual teaching load of each department (a standard value for teaching being 9 to 12 hours per week). Flanking the gradual implementation of the Bologna process, the University has organised courses and training programmes with the aim of improving the pedagogic quality of teaching staff and raising awareness to new methodologies in teaching/learning. However, it must be noted the pedagogic outcomes and efficiency of university teaching staff has not traditionally been carried significant weight against other criteria considered for advancement in the academic career. For the admission and progression of University non-teaching staff similar legal limitations apply to those of teaching staff. There is a public call for a given vacancy and a jury assesses CVs and ranks candidates. Additionally, there is exceptional legislation regarding the conversion of University staff which allows them to enter the public career without the usual bureaucratic complexities. UBI's staff members have been appraised annually by the SIADAP since 2005. This integrated system enforces the definition of goals for each member of staff and assessment of results at the end of each year, attributing a classification. The University also signs individual contracts with non-public service persons, a more flexible and manageable system. The University requires more financial resources to accomplish its regional, national, and international mission. The instability caused by the insufficient availability of those resources and made worse by the fact that it is not possible to transfer financial balances from one year to the next, makes impossible a coherent, demanding multiannual strategic management of financial resources. UBI's strength lies in the spirit of its mission and of its teaching and non-teaching staff and students, which will enable it to overcome this bleak moment in higher education politics.

2.2. ACADEMIC PROFILE

2.2.1 Analysis of research and educational approaches

Research developed at UBI begins with the teaching staff's freedom and autonomy allowing the incorporation of their knowledge in the teaching process. In the development of research processes, and in order to secure financial support, teaching staff and researchers are integrated in FCT-funded research units, thus achieving some

organisational and operational stability according to the goals established and activities to be developed over the years of funding (3 to 5 years). Strategic research areas are defined according to three basic principles: the existence of a critical mass of PhD-holding teaching staff and researchers; the demands of the community and also of the University to develop knowledge in those areas and to train future PhDs; the perspective that those areas will be integrated in national and international research policies, supported by financial resources (e.g. health sciences, aeronautics, bioscience, energy renewal, entrepreneurship, etc.). External and internal research funding through research units has generated benefits in terms of quantity and quality (Annex D, table D.1), has had a positive impact on teaching-learning processes by the updating of teaching staff, and has significantly improved the standard of infrastructure and equipment supporting research and teaching. Over the last five years there has been considerable improvement in research due to a significant increase in the number of teaching staff integrated in research units, the transversal nature of the research groups and fields of knowledge, and the scientific and technical production. The development of research projects with more applied objectives and that may foster the development of applications in the short and medium term determines the creation of spin-off processes, which following analysis of the project proposal may be supported by Parkurbis. As for educational areas, UBI has sought to organise teaching-learning-assessment programmes in a coherent manner, focusing on the community's needs and giving access to new audiences (over23s, students with level IV training - CET). In 2006 UBI began the adjustment of all its degrees and programmes to the Bologna process. The implementation of those processes in the 1st, 2nd, and 3rd cycles is a priority for the entire university. UBI is gradually implementing a self-learning policy, having created learning contents for the digital database to support learning in fields where difficulties have been greater. It is thought that by improving the self-learning component in the degrees the institution promotes the sustainability of UBI graduate employability. Wherever possible, the University supports the insertion of modules taught by external participants which are relevant for the scientific and technical learning and training of students. UBI degrees include a significant experimental/workshop component in relevant fields of the core curriculum. This orientation is important for future graduates and reflects the belief that "paper and pencil" activities in society are better performed with technological supports and that it is necessary for students to use those instruments in a compatible, intuitive way. UBI has invested financial resources in its infrastructure so as to make this asset available to students in their learning and training process.

2.2.2 Analysis of educational programme design and organisation of research activities

Educational programme design

The Bologna process at UBI has elicited a more adequate framing of 1st- and 2nd- cycle programme design. The introduction to a new educational programme is made by a group of teaching staff from one of more departments, who bring to the attention of President of the Department or of the Faculty the arising opportunity for their field. A multidisciplinary committee is appointed to design the programme and to elaborate a proposal to be submitted to the different bodies. Once the educational programme file is organised, external entities may be consulted as to timeliness and strategies to be adopted. The overall proposal is analysed and discussed in the Department Scientific Council presiding over the core curriculum and is then forwarded to the Faculty's Scientific-Pedagogical Council. The final document is discussed and approved by the Pedagogic Council, the Scientific Council, and finally the University Senate. In the design of study programmes entities may intervene with which the University has collaborative protocols in teaching, research, and service provision. This process usually unfolds informally and allows from the beginning a survey of opinions and sensibilities regarding the new study programmes. In the adjustment to the Bologna process the strategy adopted for the 1st cycles was to have strong learning and training component in the basic sciences and for the core curriculum to include a minor. For the 2nd cycles the strategy adopted was to create specialities and a wider offer of majors, so that students may build their study programme in a way which is more compatible with their own learning and training objectives. The Rector has also occasionally requested the elaboration of study proposals contemplating a long-term strategy (Medicine, Architecture, Health Technologies), which after analysis and discussion follow the same process.

Organization of research activities

Research activities reflect the development of teaching areas and are brought forward by teaching staff and researchers' initiative. The development of research activities and the newly-acquired knowledge are incorporated into the teaching programmes in the 1st, 2nd, and 3rd cycles. Teaching staff and researchers are grouped transversally, forming research units that qualify for application to FCT funding. Besides funding for research units, teaching staff and researchers also submit R&D project applications to funding via the FCT. The University also develops applied research activities with the financial support of private entities, with which a contract is signed, outlining objectives, means, and outcomes. Other research activities are developed by students supervised by teaching staff at the end of the 1st cycle, in the context of final project assignments and at the end of the 2nd cycle, in dissertations (theses) or final projects. The organisation of this set of activities is new to the University's structure, as the Bologna model is still being implemented. As a result there is still a mix of final-year student activities. In the same way that UBI's research units comprise teaching staff and researchers from other

Institutions, some UBI teaching staff and researchers are also members of research units of other universities. Membership requires the approval of the Departments and of the Rector. In these approved situations, the researchers' works are financed externally and are in closer contact with other research groups. Other types of funding are obtained annually through Integrated Action programmes (Luso-Spanish, Luso-British, Luso-French, Luso-German), which strive for the internationalisation of R&D group activities.

2.2.3 Adequacy of study programmes and research activities to the mission and goals

How study programmes reflect the mission and goals

Beira Interior, the region surrounding UBI, is characterised by an industry of small and medium companies, most representatively from the textile sector, and otherwise by a diversified service sector, with no clear signs of development or a trajectory. Textile Engineering and Paper Engineering study programmes at UBI have been discontinued for lack of candidates. The opening of new study programmes in the field of arts, such as Textile Design, Industrial Design, and Multimedia Design has helped to counter the effects of the low appeal of study programmes in the fields of technologies and engineering. The Portuguese job market in the field of arts is presently very dynamic and UBI's response has been timely, swift, and well succeeded in the design of the proposed degrees, with an emphasis on technical and technological components. Study programmes in Sciences, which are a fundamental support for the area of technologies and engineering, have registered a significant decrease in candidates over the past 3 years. Both nationally and internationally, unequivocal reasons for the present scenario are tied up with poor performance rates of primary and secondary teaching in the problem areas of mathematics, physics, and chemistry. The reversion of this critical situation may come about in a near future as a result of a saturation of the Portuguese job market in areas such as healthcare technologies and nursing, which will induce students to seek less profession-oriented areas with wider and available professional perspectives, such as technologies and engineering, where there is currently a significant lack of graduates. A feasible short-term change that other European universities are already undergoing is the opening of study programmes in applied sciences or of an even more applied nature, involving the use of IT and other interdisciplinary components (mathematics, physics, chemistry, biology, electronics, graphic methods, biomechanics, ...), with the aim of offering less taxing 1st cycles compared to the classic degree structures. Study programmes in teaching areas and also in the fields of letters and languages have had a significant decrease in numbers over the past 3 years. Their sustainability is at issue if the overtly cost-reducing policy of the MCTES remains unchanged. Over the last 10 years there has not been in these areas a policy of monitoring graduates that private and public universities qualified for the job market. The excess of graduates with narrow and profession-oriented training profiles combined with the stagnation of the State's employment offer has resulted in the current crisis scenario. The University can make a difference by creating more general 1st cycles and leaving professional qualification or specialisation for the 2nd cycles. In the field of social and human sciences, study programmes have evolved towards a timely adjustment to the job market and to a greater permeability and flexibility of requirements for admission to the University. Student admission to public universities has been monitored more closely over the last 3 years. Despite this, in fields such as Psychology and Sociology the job market is nearing saturation. Notwithstanding, these study programmes are not profession-oriented and allow graduates to follow more diversified professional paths and to adjust themselves to the market's demands. The fields of communication sciences and arts have been a success since the beginning of the first degrees (September 1989 - Communication Sciences; September 2000 - Multimedia Design). For many years in Portugal Arts degrees were almost exclusively profession-oriented and taught at inferior professional levels or up to level IV. New universities, including UBI, have successfully challenged that tradition, competing with classic and traditional universities over the sway of study programmes, as is frequent in the higher education system. The field of health sciences is relatively recent at UBI (September 2001). Its development was based on a strategic plan, considering the job market's demands, the modernisation of healthcare systems, the appeal of the study field among good students, and the settlement of graduates in the region. The innovative teaching methodologies used, the specific features of the new study programmes, the development of a link to the national and regional healthcare system through hospitals and healthcare centres have resulted in the success of study programmes in this area. With the implementation of the Bologna process, UBI will gradually become more open to the community, according to the different areas. It will also become more flexible on what concerns admissions to the University. Candidate audiences will become more diversified as the University endeavours to secure its sustainability, to be renowned for the quality of the programmes it offers, for the highly demanding standards it upholds, and for offering the students a campus life with all the elements of a good working and studying environment.

How research activities reflect the mission and goals

It was previously mentioned that research activities stem from the development of teaching areas. The need of a higher specialisation standard of teaching staff in the context of study programmes of the 2nd cycle also improves the development of research areas. As a *new* university (founded in 1986), UBI has had to develop PhD programmes both internally with the support of other Portuguese and foreign universities, and by sending teaching staff to other Portuguese and foreign universities. The mission was to raise the training standard of UBI's teaching staff in study

programmes designed for the fields of sciences, engineering, social and human sciences. As such, research activities began to develop more intensively after the return of teaching staff and researchers now holding PhD degrees. To this followed UBI's ongoing strategy of qualification of teaching staff, compatible with the degrees of BA (1st cycle), Master (2nd cycle), and PhD (3rd cycle) which the university aimed to offer. With the growth in number of PhDs and in research outcomes, teaching staff and researchers group into research units in an interdisciplinary and transversal way. These support structures currently serve different purposes: to gather teaching staff and researchers, to create a manageable organisational structure supporting researchers, and to organise application processes necessary for research projects and for the unit itself with the aim of drawing FCT funding, thus securing its sustainability and stability. In certain study fields, the arrival of PhDs from other universities has promoted a faster grouping of researchers. The latter were joined by professionals who in the course of their activities initiate other research projects and extend the group, spawning research units. There are 11 funded research units currently operating (Appendix I), 7 of which are from the fields of science, technologies, and engineering, 2 are from the fields of social and human sciences, 1 from communication and arts, and 1 from the health sciences. In the university there are other research structures without autonomous or FCT funding, such as the Centre for Social Studies, the Centre for Jewish Studies, and the Centre for Human Language and Bio Technologies. The development of the University's links to the exterior has also been aided by the opening of the 2nd-cycle (former 'Mestrados') and 3rd-cycle (former 'Doutoramentos') programmes to persons outside UBI linked to enterprises, public entities, Polytechnic Institutes, and Universities. In these postgraduate study programmes the research assignments are dissertations for Master degrees and theses for PhD degrees. This allows a widening of the internal network of research structures and raising the level of research outcomes from the groups and units. At the same time it raises the offer and diversity of postgraduate study programmes with repercussion in the community and in the levels of skills acquisition in different fields of knowledge (Annex B). When fully implemented, the Bologna process will catalyse a new generation of researchers, as 2nd-cycle degrees cause research activities to begin earlier.

2.2.4 Promotion of synergy between teaching, research and service to society

UBI's matrix organisation allows the creation of projects and study programmes of a transversal and interdisciplinary nature, granted that human barriers of *territoriality and inflexible jurisdiction of fields of knowledge* are overcome.

Teaching activities develop throughout 1st-, 2nd-, and 3rd- cycle study programmes. The organisational scheme of those activities consists of modules or curricular units, for whose coordination the teaching staff member is responsible in agreement with applicable regulations. The global study programme is coordinated by a Programme Director. Teaching staff from different departments and even faculties collaborate in study programmes conferring degree titles. A degree in Electrotechnical Engineering involves teaching staff from Mathematics, Physics, Chemistry, Electromechanical Engineering, Management and Economics, and Sociology Departments. This collaborative effort in teaching is a highly positive feature, though not yet explored to its full. It aims to offer students a multifaceted vision of science and knowledge. However, a weakness that must be tackled is the difficulty in coordinating programmes in harmony with the autonomy of teaching decreed by the ECDU. The University also offers other study programmes that do not confer degree titles and that provide expertise in a field, with the aim of improving professional performance (for example, the taught curricular units of the 2nd cycles). Teaching staff from several departmental areas collaborate in this kind of study programmes. However, it is necessary to develop more synergies between people in areas that the University aims to develop (e.g. Workplace Hygiene and Safety, Documental Sciences). Short-duration programmes (30 to 60 hours) with the aim of updating knowledge and of raising the standard of the previous level of learning are practical tools to interact with the surrounding society and community. These programmes are sought by graduates already working or by others wishing to redirect their academic background. CFIUTE is the internal entity coordinating these programmes. It has been UBI's policy to provide it with facilities adequately equipped for laboratorial experiments, computing lab simulations, other workshop activities, stage arts,... Many of these facilities were designed and configured as multi-purpose spaces, i.e., they are used for teaching/learning, for experimenting, for know-how acquisition, for simulation, for research, and for service provision (e.g. Optical Centre, Hydraulics Laboratory, SIG Laboratory, Textile Workshops, Paper Laboratory, Multimedia Centre - CREA, Plateau, Laboratory of Clinical Skills, Energetics Laboratory, etc.). The design of workspaces for teaching staff, researchers, and students has improved internal collaboration among teaching staff and between teaching staff and students. At postgraduate levels (2nd and 3rd cycles), some curricular units base the teaching-learning-assessment process on problems raised by companies. In these cases, cooperation with society is always welcome and encouraged. It is also possible for students to choose the type of final project so that they can develop it in an enterprise with which agreements have previously been signed. The Traineeships and Professional Opportunities Office is the internal structure co-responsible for the coordination of demand for recent graduates. The university offers postgraduate programmes where part of the practical training is supported by collaborating regional institutions (hospitals, health centres, laboratories, companies, etc.). Throughout student training, guest teaching staff from the professional areas take part in research processes with PhD staff from the relevant research units, thus creating mutually beneficial interaction. According to each area, the topics of dissertations and theses in many cases involve studies of regional and national industrial processes and/or technical problems. In these situations links between the University and the community

are reinforced, through teaching, researching, and service provision activities, in a synergetic way for all participants. In collaboration with the Universities of Coimbra and Aveiro, Technology-Based Entrepreneurship postgraduate programmes have been offered, with the aim of fostering skills acquisition in this field. The original programme design (by North Carolina State University) envisages the elaboration of a project geared from the start towards the creation of a business grounded on sustainable ideas and processes which may in the future be financially supported. Successful funding applications have resulted from the collaboration between teaching staff, researchers, and students and the project and research support office, as well as the registration of patents as the outcome of research and development activities. The University has strongly promoted the community and region over the past twenty years, fostering the creation of associations (such as AFTEBI, CIEBI, Beira Baixa Digital, ESTER, CEVALOR); partaking of capital in societies geared towards economic and social development (such as Parkurbis, Parkurbis Incubator); supporting through studies and qualified people with technical skills the recovery of new goals, challenges, and needs; internally developing the refurbishment of urban buildings (former textile factories); adapting them to the University's functions and goals. Presently UBI is regarded by the agents of change and development as a regional anchor that must be effectively supported and freed of financial constraints, so that it may focus all its endeavour, knowledge, and skills on the core business of a European University.

2.2.5 Language policy and activities to attract international students

UBI promotes the mobility of teaching staff and students by means of financial resources from research projects, research units, European programmes such as Erasmus, IAESTE-related entities, cooperation agreements between Universities, and cultural agreements between States. As for UBI's language policy, there are no specific requirements in foreign language proficiency for teaching staff or students. Teaching staff's foreign language proficiency is compatible with each member's level and field of specialisation. English proficiency is the single linguistic requirement in existing agreements with foreign universities in contexts of research, teaching staff, and student exchange. The University therefore welcomes the adoption of English as a second language in the 2nd cycles, which is planned for the next 2 to 3 years, granted adequate preparation of teaching staff within the fields of their curricular units. This process will attract more international students. Throughout the school year, teaching staff, students, and non-UBI members can attend language courses at the Language Laboratory, run by the Department of Letters. Foreign students are offered courses in different proficiency levels of Portuguese as a foreign language. Besides these year-long Portuguese language courses, UBI offers intensive Portuguese language courses for Erasmus students who plan to come to Portugal to study (4-week courses twice a year). These intensive Portuguese language courses are activities developed by UBI to attract more foreign students, in which it has been successful (Appendix IV, tables IV.18, IV.19 and IV.20). UBI has signed agreements (besides Erasmus protocols) with Universities from other countries, which promote teaching staff, researcher, and student mobility. The present financial plan includes UBI student traineeships in European countries. Most non-European foreign students at UBI come from official Portuguese-speaking countries. Financial support between States allows the permanence of this influx. Poland and Spain are the European countries with which exchange is the most prolific. Spain's proximity and linguistic affinity strongly favour student exchange. The number of Polish visiting students is explained by a strong cooperation which started in 1990, with the arrival at UBI of Polish teaching staff and the subsequent development of international relations with Poland's Technical Universities. UBI is a member of IAESTE, supporting traineeship programmes in countries all over the world. Through this programme UBI sends and receives students for professional traineeships in R&D units or in companies that offer traineeships to IAESTE.

2.3. ACADEMICALLY-RELATED ACTIVITIES

2.3.1 Research and technology transfer, continuing education, regional and community service, and ways of promoting synergy (e.g., structure, people, processes) between these activities

Research and technology transfer

Besides research units, UBI has research and technology transfer support offices. The creation of the GA-API, which comprises the G-API and the OTIC, has contributed to a better fruition of UBI's R&D potential. On the one hand, the levels of UBI's partaking in R&D projects funded by national and EU programmes and initiatives have risen. On the other hand, ties to enterprises were reinforced by means of R&D projects tailored to their needs. The GA-API aims to encourage and arrange the application of technological and research projects to funding programmes. The G-API organises the registration of patents and prototypes. The University has R&D contracts with national and international companies (Siemens, Microsoft, Texas Instruments, among others), which reflects the effort towards the acknowledgement of its research and technology transference. UBI's membership at Parkurbis and the standard of the research it develops has made possible the creation of technology-based enterprises. As for textile and paper materials UBI offers excellent and unique laboratorial facilities for tests and analyses. In these areas there is a strong link between textile industries and the relevant technological centres, as well as with cellulose and paper industries, through the elaboration of contracted projects, and research. UBI is partner in a protocol signed between the MCTES and the prestiged North-American Carnegie Mellon University in the field of Information

Technologies and a prospective collaboration with Harvard University in the field of Medicine is currently under study. For the development and transference of technology in the field of telecommunications UBI has a delegation of the Institute of Telecommunications (Associate Laboratory) with 5 researchers.

Continuing education

UBI has notably contributed to the increase in qualification levels among the regional population. This can be verified not only at a 1st-cycle level but also at the postgraduate level (specialisation and master programmes), mainly oriented to the specialisation of professionals. UBI has been implementing a policy of drawing new audiences through post-secondary level training programmes (CET) which allow entry into the job market or the attendance of preliminary 1st-cycle study programmes. UBI offers courses for students and citizens over 23 years old who wish to prepare for the selection tests for entry into University, in an effort to widen access. There is also the possibility of enrolling in UBI courses as extension courses and there are several free-option curricular units. In this context, courses taught at the Language Laboratory must be highlighted. Both opportunities are available to UBI students and to the community. Equally important are the conferences, seminars, and workshops organised at UBI, which are always open to the community, and also the On-Line Library of Communication Sciences (BOCC). The CFIUTE was created to foster the professional qualification of the active population, and offers programmes such as MATLAB training courses (maths software); CAD/INVENTOR training courses (computer-assisted design); RHINOCER 3D training courses (geometry courses); Ethics courses for engineers (OE); gas networks project design courses; SIG courses (geographic information systems). Other professional training programmes are offered by the faculties, such as the FARBEIRA programmes, accredited by the Pharmaceutical Society (OF - Ordem dos Farmacêuticos) for the training of pharmacists, or those on Thermal Behaviour of Buildings accredited by the Engineers Association (OE-Ordem dos Engenheiros).

Regional and community service

Since its foundation one of UBI's goals has been the high qualification of technical professionals and their settlement in the region, and as such its first degree programmes were Textile Engineering and Business Managements, reflecting a strong connection to the local and regional economy. So as to further contribute to local and regional economic dynamism, UBI has followed a strategy of fostering entrepreneurship, both in the programmes it offers and in its links to the business environment, through its membership in structures like the CIEBI and Parkurbis. At a cultural level, UBI has also contributed to the preservation of the centuries-old local textile industry heritage, through its Wool Manufacturing Museum/Archive. To help new graduates find employment or professional traineeships and interacting with the job market, the university has a Traineeship and Professional Opportunities Office (GAAPI and OTIC) and a UNIVA. In the course of its activities, the university's Multimedia Centre serves the community and has produced audiovisual contents for enterprises, schools, municipalities, and other entities. The role of UBI's Centre for Social Studies (CES) must be highlighted for its services and interaction with the community.

2.3.2. Student Support Services

The SASUBI grant scholarships and housing in university halls to students with confirmed financial needs. They also manage the university's cafeterias, snack-bars, canteens, sports facilities, and medical support in the areas of general practice, family planning, and nursing. In terms of teaching-learning-assessment, the International Relations and Programmes Office/Immigrant Student Support Office promotes and supports student and staff mobility (exchange periods/traineeships), according to the university's internationalisation policy. The entry of final-year students and new graduates' entry into the job market is facilitated by the Traineeship and Professional Opportunities Office and UNIVA (the latter also promoting employability). Many of the extension and cultural activities are promoted by the Students' Union, AAUBI Student Sections, and cultural groups sponsored by the Rector and/or bodies of the Faculties or Departments.

2.3.3 Adequacy of academically-related activities to the mission and goals

In terms of research and technology transfer, the University's structure is able to provide internal and external solutions (*Strength*). The business environment and service provision to the local and regional community, mainly involving small and medium companies, do not yet afford sufficient financial resources for R&D activities (*Weakness*). As for lifelong learning, as previously stated the University develops formal and informal 1st- and 2nd-cycle activities, CET, language courses, professional qualification programmes accredited by professional societies (*Strength*). The local and regional community has responded to these lifelong learning challenges by enrolling into the programmes, improving professional and linguistic skills and updating knowledge (*Strength*). As for service provision to the community, the University has adequate structures on scientific, technological, cultural, and innovation levels (Departments, Laboratories, and Workshops, the Wool Manufacturing Museum, the CIEBI, the

Multimedia Centre - CREA - the Laboratory of Clinical Skills,...) (*Strength*). The local and regional communities have required studies, projects, and support in cultural programmes, though dynamism in this sphere is still lacking (*Weakness*). The University has a wide and solid structure that allows the development of scientific, technical, cultural, and innovation services to the community. The community views the University as an anchor for the development of its activities, though the surrounding economic structure does not yet show the adequate dynamism to stimulate the University's potential.

2.3.4 Ways and extent of ensuring cooperation between students and academic staff

The new Bologna teaching-learning-assessment model in higher education has shifted the focus to students' learning. This means that new methods must be applied in order to optimise teaching-learning outcomes. The teacher-student relation is vital in this context. The self-learning process promoted by the University relies on close cooperation between teacher and student. The information gathered by the students in e-learning content databases or from other sources must be complemented and maintained by teaching staff. The tutorial support programme (RAT - Regime de Apoio Tutorial) is being implemented more exhaustively in the 1st cycle, as the transition from secondary-school into higher education takes time and should be assisted. Qualified teaching staff closely monitors undergraduates' requirements and concerns. The quality of that support is often crucial to decrease drop-out rates, entailing the cooperation between students and teaching staff. The Faculty of Health Sciences has a goal-oriented teaching-learning system, buttressed on students' self-learning activities, guided by the tutorial support programme. Each degree has its student section, which allows the organisation of extension activities apart from lectures, such as seminars, conferences, and other fitting events with the support of the Faculty and the Department, the Programme Director and teaching staff, in an environment of mutual cooperation. Also with students' collaboration, short expertise programmes are offered in preparation for future professional activities: (CAD courses, radio and TV reporting, gas network design programmes, medicine programmes). Teaching staff encourage students to become involved in international networking in the course of the degrees, besides the LLL/Erasmus programmes, and support the organisation of those activities. Students are also officially represented in the several bodies of the University, such as the University Senate, the Faculties' Executive Boards, and the Pedagogic Councils of the University and of the Faculties. The Student's Union (AAUBI) is their representative association, fostering sports, cultural, and student welfare activities. Many sports and cultural activities rely on student/teaching staff collaboration. As an example, the rugby team's coach is a teaching staff member and UBI's choir's conductor is also a former teaching staff member.

2.4. FUNDING

2.4.1. Total budget and percentage allotted by the state or other public authorities, by student fees, and by private sources

The total budget allocated to the University in 2006 and 2007 was:

- For 2006: 38.729.133 €, from which 56, 3% was state current funding; 13,7% was student fees and services to the community; 18,9% was from research contracts and other contracts; 7,1% was the surplus from the previous year; and 4% was state investment plan.

- For 2007: 35.701.326 €, from 56,7% was state current funding; 18,8% was student fees and services to the community; 12,2% was from research contracts and other contracts; 7,0% was the surplus from the previous year; and 5,3% was state investment plan.

The state budget, namely the budget per student has been decreasing every year (in 2006, 5390 students and a cost of 4048 € per student; in 2007, 5479 students and a cost of 3694 per student). The University has tried to overcome this situation by increasing its own income (fees and services) or spending more money from this income (Appendix VI, tables VI.1 and VI.6).

2.4.2. Percentage of earmarked state budget allocation

The State allocation is a lump sum where the public budget is concerned. The budget for investment (plan investment - *investimentos do plano*) in buildings, laboratories or big equipments is earmarked following the plan submitted every year. The level of financing is directly related to the contractual terms agreed. There are also other contract programmes with MCTES under specific objectives like technological programmes (CET), Mathematical programmes, information technology programmes.

2.4.3. Centrally controlled budget

The budget finance management at UBI is centrally controlled. There is only one Administrative Council. Costs of human resources, functioning and maintenance, water, electricity and telecommunications, among others, are centralised through the administrative council. The remaining budget is decided in a meeting with the Rector, based on the yearly budget presented by the President of each Faculty.

2.4.4. Distribution criteria and amounts allotted to Faculties and Departments

The allocation of financial resources across the Faculties is based on the number of PhD teaching staff, the number of students in curricular units under the responsibility of the Departments within the Faculty, and on the scientific-pedagogic areas it comprises. After amounts have been allocated, each Faculty assembles the Presidents of the Departments in order to distribute financial resources and to set up partnerships for the acquisition of costly equipment. In accord with the Senate's ruling (45/96 of 1 January), the Executive Board or the President of the Faculty may authorise expenditures within their approved budget. Payment of expenditures is always made centrally. These expenditures refer to the normal operating costs of the different degrees in each Faculty, and include bibliography, scientific exchange, consumables, minor equipment, etc. Additionally, the Executive Board or the President of the Faculty authorises expenditures in research projects under the responsibility of teaching staff pertaining to the Faculty's Departments.

2.4.5. Allocation procedures within the University

The allocation of financial resources across the Faculties is based on the number of PhD teaching staff, the number of students in curricular units under the responsibility of the Departments within the Faculty and in the scientific-pedagogic areas it comprises. Each Faculty defines its criteria for the allocation of financial resources across the Departments. In specific cases where costly equipment acquisition is justified, departments arrange ways to purchase them collectively. In these situations and granted availability, the Rectory may support the group of departments with more specific financial resources.

2.4.6. Budget percentage available to implement new initiatives

The allocation of financial resources to the Departments is made by the Executive Board and by the President of the Faculty, after consulting the relevant Department Presidents. At the meeting where the budget is approved and allocated, it is also settled whether or not there are financial resources from the original budget which should be channelled to new initiatives, such as scientific exchange, the acquisition of shared equipment, more targeted advertising of the degrees across secondary schools, study visits, extension activities, etc. Upon the Rector's proposal and approval by the Administrative Council, the University establishes the financial amounts to be allocated to new initiatives such as the improvement of teaching-learning-assessment (EAA) and the University's services. Some programme-contracts also entail the allocation of the University's own financial resources in order for the project to be approved and initiated (approximately 25% of the project's eligible cost).

2.4.7. Full costs of research and teaching activities

The University's Accounting conforms to the Official Public Accounting Plan (POCP), which evolves gradually so that UBI is able to define its cost centres and adequately assign them to the relevant University's structures. In terms of teaching-learning-assessment, the cost per student is fairly established by degree/area (in a minimum/maximum interval). In the social sciences it is between 3400 and 3700 €; in the exact and engineering sciences it is between 5000 and 5500 €; in medicine it is between 10000 and 11000 €. Since most teaching-learning-assessment activities are secured by full-time teaching staff, the overwhelming majority of which have exclusivity contracts, their cost amounts to between 60% and 80% of the University's total costs, i.e., the global costs of education, research, and service provision to the community. As for R&D activities, UBI cannot yet determine their full costs, as research is funded by the FCT and refers only to financial resources supporting grantees, the development of projects not including researchers' salaries (as they are teaching staff), equipment to be acquired, etc. The University is applying analytical accounting components to adjust its public accounting and to determine the full costs of all its activities. In fact, it may be considered that a realistic overview of the full costs of UBI's research should contemplate a double of the amounts currently allocated to R&D projects.

2.4.8. Perceived strengths and weaknesses of funding

In the geographic area and in the community with which the University is most closely linked with, traditional economic activities are based on an intensive manual labour industry. Service activities are more recent and dynamic, but not yet sufficient to create sustainability in the mid term. After stabilising over the last 3 years (2004 to 2007), the number of students in the 1st and 2nd cycles has risen by 8% in 2007/2008, creating expectations of a rise in fee funds. Promotional activities are planned to advertise UBI's image as an academic institution which guarantees quality training and study programmes with good employability perspectives to its potential candidates. The development of research units to attract more national and non-national researchers increases the critical mass, heightens competitiveness, and improves outcomes. Service provision to the community relies critically on the region's economic and social situation. The present context does not favour an increase in financial resources from these activities.

Strengths and weaknesses of the University's financial activities may be synthesised as follows:

<u>Strengths of Funding</u>	<u>Weaknesses of Funding</u>
<ul style="list-style-type: none"> - Appeal of Bologna-model degree programmes - Sustained increase of 1st- and 2nd- cycle students - Ability to cooperate with the community (service provision, technology and knowledge transfer, spin-offs, short-duration technological training) - Adequate and controlled cost structure - New technology-based, short-duration study programmes for the updating of knowledge and skill acquisition 	<ul style="list-style-type: none"> - Strong reliance on public funding - Decision-making skills and abilities of the intermediate management structure - Internal culture in drawing funding - Excessively inflexible and complex legislation

3. QUALITY PRACTICES

3.1. INTERNAL QUALITY RESPONSIBILITY SHARED ACROSS THE UNIVERSITY

From its early stages the university has fostered a culture of quality in all its study programmes and activities, in the pursuit of its stated goals and missions. Quality certification of study programmes has been progressively introduced since the introduction of self-assessment of public university degrees. Teaching-learning-assessment-related activities are structured in the following way: each study programme has a Programme Committee and a Programme Director who coordinate and monitor the teaching-learning process and ensure its level and quality; the President and the Scientific Committee of the department imparting the core curriculum areas provide the human and material resources and coordinate the programme's management structure, as well as of related ones (e.g. Civil Engineering and Architecture degrees are imparted by the Civil Engineering and Architecture Departments, Economics, Management, and Marketing programmes are imparted by the Management and Economics Department, etc.). Each Faculty has a Scientific-Pedagogic Council, formed by a Pedagogic Committee and by a Scientific Committee, which coordinate the scientific and pedagogic policy of the degrees offered by the Faculty (UCP). The University's Scientific and Pedagogical Council are responsible for the institution's global, pedagogical, and scientific policy. Guidelines for all faculties and respective programmes are decreed by rectoral dispatch. Each semester an online digital database makes available teaching quality assessment questionnaires (LINCE) on the following topics: pedagogic features of teaching (part A); pedagogic features of students (part B); pedagogic and institutional features (part C). After processing, the information is forwarded personally to teaching staff and respective Department Presidents (the processing of this information is not assigned to any specific office). There is also a questionnaire for teaching staff at the end of each semester, forwarded by the academic services. Handicapped students are a concern of the University, which strives to cater for special needs in all academic activities, despite the fact that many of its sites are public heritage buildings (which often complicates the required adjustments). The needs of immigrant students are also a concern of the University, and are accommodated by the International Relations and Programmes Office (GPRI). The University's indirect or direct student support services are in the process of becoming monitored and their internal administrative processes quality-controlled. The implementation of this monitoring process is expected in the near future, which means the certification of the quality system adopted by the services (Regulation NP EN ISO 9001:2000). According to the present legislation the University has in place a non-teaching staff assessment system (SIADAP), which aims to improve the quality of services and staff's progression in the public career.

3.2. INTERNAL QUALITY PROCESSES. EXPLICIT QUALITY STANDARDS. QUALITY CULTURE

The University has advertised European directives for the implementation of quality processes in higher education across departments and faculties, so that these concepts are internalised by teaching staff members. The University has not yet implemented the Standards and Guidelines for Quality Assurance (from ENQA) in the European Higher Education Area since the transition to the Bologna model is currently in progress and UBI has always followed internal regulations aiming for quality and designed for quality control. Processes for the internal implementation are at different stages. In the teaching-learning-assessment process it is implemented, though requiring ongoing adjustments, updating, and systematic analysis, as is the case with the new Bologna challenges. In research, quality assurance is paramount, as is shown by the publication of articles in refereed reviews and papers presented at international conferences, the funding obtained by research projects, and the external evaluation of research units. Scientific and technical services to the community prove more difficult to appraise, as not all areas provide services to the community in a continued and sustainable way. As for internal services, quality certification will soon be

applied to all administrative processes within the university. Standard quality regulations for teaching-learning-assessment are established by the University via rectoral dispatch no. 28/2006 and are named General Regulations for Knowledge Assessment. This document establishes: the way of designing timetables for the various cycles; the tutorial support system; continuous and periodical assessment; class summaries; criteria for knowledge assessment and attendance of curricular units; control of student attendance; specific teaching-learning-assessment conditions for student-workers and Student Union representatives; exam planning; final mark assignment; precedence regulations, and transition to the subsequent curricular year. This rectoral decree was previously discussed at the relevant bodies, i.e. the Pedagogic Council, the Scientific Council/ Coordinating Committee, and the University Senate, where it is formally approved. As a rectoral dispatch, it is widely publicised across the departmental and Faculty structures, as well as online for easier access by teaching staff and students. Research activities and their organisation have been introduced above. All research projects are previously evaluated by committees external to the University, which judge its quality and funding merit. Research units are assessed every 3 to 5 years by external international committees. The continuity of the research unit depends on funding, which is only allotted if the unit proves its quality or is rated Good or higher. Where lack of quality or poor FCT-rating is found, an internal restructuring process unfolds, supported by other research units and departmental structures. For the monitoring and internal and external consultation of teaching staff, researcher, and 2nd- and 3rd-cycle student research outcomes, the THESIS website has been created to host articles and scientific papers previously refereed by reviews or conference editorial boards. The process is still at its early stages, though it will be compulsory in the near future. In global terms, we may consider that the University's quality culture is in place. Only as such would it have been possible to establish a University founded in 1986 with an already considerably wide scope of disciplinary fields and with 61 % of staff holding PhD degrees (Appendix V, table V.4). It is now necessary to implement a systemic quality culture to produce benefits in a shorter term.

3.3. ADEQUACY OF RESOURCES AVAILABLE TO SUPPORT INTERNAL QUALITY PROCESSES

Over the last five years the decrease in available public funding has compromised the creation of autonomous support structures to launch quality processes and has decelerated related internal and external activities. As a result, the University does not have its own internal structure for monitoring and supporting internal quality processes. The information available is still fragmented across several administrative structures (academic services, administrative services, faculties, departments, and research units). A structure will be created to process the significant information available, to monitor quality processes in an integrated way. Evaluation questionnaires regarding the pedagogic features of teaching, the students, and the institution are quite useful, as the volume and substance of the information collected over the years are great and diversified. However, a structure must be created to further scrutinise the studies, infer results, analyse consequences, and to define policies to fix weaknesses, improve strengths and new perspectives to tackle the threats and opportunities of circumstances external to the University.

3.4. AVAILABLE INTERNAL QUALITY PROCESSES.

3.4.1. Teaching activities

The University does not have an integrated and global support system for quality processes in teaching activities. In an effort to meet Bologna and European higher education goals the academic calendar is organised bearing in mind the following principles: temporal sequencing of activities; extension of the period devoted to teaching-learning-assessment activities (17 weeks), privileging desirable continuity and proportion of the student's workload; a final exam period of two weeks and a choice between two alternative exam dates; exceptional exam period of one week in September for final-year students. (Annex F). The Programme Director coordinates and monitors the teaching-learning process and ensures its level and quality. At the end of the academic year the academic services provide programme directors with the statistics on success rates (ratio between the number of approved students and the number of assessed students - A/Av) by course, by academic year, and by degree (Appendix IV, IV.23 and IV.24). This information is assessed by each Programme Director and by the Programme Committee, who suggest measures to be adopted to improve results and solve any arising critical situations in the following year. At the end of each semester the teaching staff member responsible for the curricular unit organises a file for the curricular unit including: the assessed programme contents; the teaching methodologies used; the approved and applied assessment criteria, the required and recommended bibliography, exams and assignments included in the assessment process. The Departments are responsible for the organisation of such files for each curricular unit, and these are available for students and teaching staff to consult. A copy of each file is forwarded to the academic services for the records and archive. A project is now being developed to digitalise all this information. In the last month of each semester teaching assessment and pedagogic features questionnaires (A), student questionnaires (B), and institutional questionnaires (C) are made available online for students. Questionnaires are replied to online and their global results may be viewed by the students. Upon analysis syntheses of the results are sent to the relevant Programme Directors and Department Presidents. Questionnaire A results are mailed to the teaching staff member

in charge of the curricular unit, who will analyse the opinion that students have of their teaching. In 2009 the questions in these surveys will be adjusted to the new paradigms that the Bologna process dictates along its gradual implementation (Annex H). An internal rating of the University's Departments is now in at an experimental stage, taking into account the results of assessment made by the students in questionnaires A (pedagogic features of teaching) and relative to each teaching staff member. The greater the number of positive student replies ("totally agree" [TA] and "agree" [A]) -, the greater the programme's TA+A percentage, and the highest the mark obtained by the teaching staff member, which means the greater their influence on the overall improvement of their Department's rank. The criterion for ranking of Departments in the context of questionnaire A is the total sum of teaching staff members who obtained TA+A > 55% (Annex H). In the context of curricular units and how success rates are calculated, units that show a success rate lower than 60% are considered critical units. In this situation the Programme Director may call for a supplementary exam period in September, in order to improve results. The University's study programmes have been appraised by the *National Evaluation Council* (CNAVES/CAFUP) over two 5-year periods. Each degree has been twice evaluated externally by External Committees. To carry out these evaluations, self-assessment reports were elaborated based on a national guideline document. A two-day visit by the External Evaluation Committee allowed discussion with heads, teaching staff, non-teaching staff, and students, as well as a close inspection of laboratories and workshops, general and specific equipment, and of the quality of the facilities. In some areas, such as engineering study programmes, every 3 to 5 years there is an accreditation enquiry by the OE (Engineering Association), similar to the one applied by the *National Evaluation Council*, but focusing on the future practice of professional activities. Presently all engineering degrees at UBI are accredited by OE.

3.4.2. Research activities

Research activities and arising units are subject to an internal assessment process, as they will only obtain funding if their results meet or surpass the goals established by the funding entity, whether the FCT, the EU, or other. Each research unit has a coordinator who elaborates an annual summary report to be analysed centrally. Regular meetings with the coordinators of research units, close proximity, and nearly permanent contacts allow assessing their development. The University triennially divulges a brochure with the outcomes of research activities and the outputs of research units, for the purpose of general internal and external assessment (Annex D, Table D.1).

3.4.3. Student performance

The assessment of student performance is carried out each semester, every academic year, through markers produced by the academic services, such as enrolment numbers, drop-out rates, number of years to complete a degree. This information is made available to Programme Directors and the Department Presidents, for assessment and subsequent adoption of measures. The University's drop-out rates are considered high in the first two years of the degrees, especially in Science and Engineering degrees. The number of years that a student takes to complete their degree varies according to the scientific area. Across the University the percentage of degree completion within a period equal to the duration of the degree is inferior to 60%. UBI is developing an observatory for UBI graduates' employability based on a questionnaire sent out to graduates, so as to know their paths after leaving the university.

3.4.4. Administrative processes

A document management and follow-up system is operating on a Workflow/GSE digital database across Faculties, Departments, Centres, and Services. This integrated system allows digital registration, control, and management of documents incoming and outgoing documents and internal processing. Additionally, the digital platform allows management of processes and deadlines to be gradually implemented. In collaboration with the Accounting and Patrimony Division the University's Information Technology Centre has created an IT application - SIGUBI - which serves to improve management and rationalises acquisition of goods and services from the exterior as well as their internal movement. The system is at an experimental stage. Also available from UBI's site is the information on the various University services and the credentials of staff responsible for their management. The academic services' databases comprise all the relevant student information, and students may login with a password to access it (e.g. final marks, exam dates, dates for registering for exams, fee payment, lecture timetables). Administrative processes are undergoing a reorganisation aimed at guaranteeing satisfaction of its most important customers and other stakeholders, as well as continually improving services. The goal is to obtain quality certification for the academic services, documentation services, the GA-API, and all UBI management and administration support services. Quality certification is made according to regulation NP EN ISO 9001:2000. The assessment of UBI's non-teaching staff is carried out annually through the SIADAP.

3.4.5. Entrepreneurial activities

The success of entrepreneurial activities undertaken by teaching staff, UBI graduates, and undergraduates is patent in the number of spin-offs created and in those already converted into start-ups through Parkurbis. Funding obtained via spin-offs and by start-ups is a marker of the quality of entrepreneurship activities developed with the support of the University. UBI continues to promote technology-based entrepreneurship activities through specific postgraduate programmes and by incorporating in study programme curricula courses based on these contents. The change in recently-graduate attitude and arising social motivations are factors to be taken into account in study programmes, with impact on change, intervention, and social responsibility.

3.4.6. External relations

External relations with European, Brazilian, and PALOP universities have been successful, meeting the established goals and offering positive outcomes. A marker of that development is the establishment of protocols and cooperation networks in teaching-learning-assessment research, and support to service provision. Based on protocols with European Universities with renowned experience, UBI has solicited support and collaboration towards the development and improvement of specific study programmes, where UBI does not yet have a sufficient PhD critical mass. Examples of this kind of cooperation are study programmes in the fields of Arts, Film Studies, and Letters; in the fields of Architecture, Civil Engineering, and Medicine. With the PALOP countries, UBI has developed and supported postgraduate programmes as well as studies and services. (Annex G, Table G.2).

3.4.7. Monitoring of the extent to which teaching, research and service to society are integrated

As previously mentioned, the University does not have an integrated system of global support for teaching-learning, research, and service provision activities. Teaching-learning-assessment activities are monitored by the Programme Directors and by the Department Presidents. Research activities are externally assessed by the FCT. Service to society is endorsed by the University and falls under the responsibility of the departments, in scientific, technical, and cultural terms. These activities are normally established by contracts, with explicit goals and expected outcomes. Scientific, technical, and pedagogical supervision of non-university but post-secondary school Level IV (ISCHED) programmes are undertaken by the University. The Association for Technological Training (AFTEBI) promotes the programmes. Teaching-learning, organisational, and service provision activities are integrated in this cooperation. A contract with the Polytechnic Institute of Macau (located in China) to assess a 1st-cycle study programme must also be highlighted, as well as the design of a 2nd-cycle study programme in the same field. Again, assessment and service provision activities are integrated. LLL/Erasmus students in the 1st and 2nd cycles are continually supported by learning agreements between the Universities. For this exchange to take place a bilateral agreement between the Universities must be signed previously. Here also can be seen the integration of teaching-learning-assessment and service provision activities are integrated.

3.5. ACTIVITY EVALUATION FREQUENCY AND EXTENT OF DATA COLLECTION

Assessment of activities is carried out in differentiated periods, according to their nature. Teaching-learning activities are assessed each semester every academic year. Research activities are internally assessed each year and externally assessed every 3 to 5 years. Service provision to the community is analysed annually and incorporated in UBI's activity report. The amount of information depends on the length of time deemed adequate to obtain a representative sample. In teaching-learning-assessment activities the amount of information is greater given the direct involvement of students.

3.6. USE OF INTERNAL QUALITY PROCESS OUTCOMES IN DECISION-MAKING AND STRATEGIC PLANNING

The University's analysis of self-assessment regarding the quality of activities in teaching-learning-assessment, research, and service provision has almost invariably been positive, but much remains to be done to integrate the several processes of internal self-assessment. Short-term goals are the creation of a more referential marker, and a greater development of the abilities of observatories. Only when these are accomplished will it possible to incorporate the results of self-assessment in medium-term strategic planning and to consolidate the accurate choice of indicators and of the scale used for its numerical expression.

3.6.1. Teaching quality

The results of teaching-learning-assessment activities are analysed by the Programme Director and by the respective President of the Department imparting the core curriculum, which take the necessary measures to correct arising anomalies. Problems with pedagogic features of teaching are tackled informally. Success and drop-out rates are assessed by the Programme Director in the Pedagogic Committee of the Faculty, and adequate measures are taken. Recurring situations in individual cases add to the internal cost of the University and show a

fault in the teaching-learning-assessment monitoring system (e.g. low success rates in a curricular unit). A more careful analysis of this type of situation may help to detect student corporate attitudes as opposed to the efficiency of the teaching staff member's performance. Teaching staff's pedagogic performance has not been taken into account in terms of progression in the academic career. This means that in a few cases teaching-learning-assessment activities have been underrated in the teaching staff member's academic advancement. Results of the LINCE evaluation by students of the teaching-learning-assessment activities show global positive outcomes as determined by the ratio RADE (*Assessment Ratio of Teaching-learning*), i.e., in 2005 the rate was 76,7%; in 2006 it was 69,65%; and in 2007 it was 70,5% (Annex H, table H.1).

3.6.2. Research quality

The assessment of research units is carried out externally by specific committees. Upon assessment, their funding may be continued or discontinued.

3.6.3. Administrative quality

The University is regularly (every 2 to 3 years) audited by specialised companies for an assessment of financial and management processes. Recommendations stemming from the audits are taken into account by the administrative management and their respective processes. Widespread use of a workflow/GSE digital database and of an external acquisition IT system (SIGUBI) is being promoted with the aim of improving the quality of the information flow and of the acquisitions system. Adjustments are gradually introduced for the database to meet the established goals. University staff's training needs are established by the Directors, who collectively detect those needs and programme training sessions throughout the year. The University promotes regular meetings (every three months) with the Service Directors, to uphold uniformity and normalisation of procedures. Services most exposed to the public have a complaint book, the analysis of which allows the promotion of quality. UBI's non-teaching staff is assessed annually in conformity with the SIADAP. To comply with quality norms in public administrations, the University's administrative services are currently applying to quality certification under regulation NP EN ISO 9001:2000 (Quality Management: Requisites).

4. STRATEGIC MANAGEMENT AND CAPACITY FOR CHANGE

4.1. RESPONSIVENESS TO THE DEMANDS, THREATS AND OPPORTUNITIES PRESENT IN THE EXTERNAL ENVIRONMENT

The University's matrix organisation into Faculties and Departments allows the creation and development of study programmes with interdisciplinary strategies. Based on their autonomy and Faculties being structured into Departments and areas, they are able to establish specific strategies in harmony with the University's global strategy. The University's strategic management must be supported by reliable external and internal markers and based on a good relation between planning and strategic vision. The University responds adequately and responsibly to solicitations with deadlines, as has normally been the case with all MCTES-related situations, short-notice demands by the DGES, adjustment of degrees to the Bologna process, lack of answers in contexts of change. Considerable instability in the definition of the medium-term higher education policy (the last 10 years of higher education in Portugal have been of near self-management) elicited from the University a more responsible attitude towards its internal stakeholders. Market demands in certain fields (arts, communication, industrial engineering) were anticipated by the University at some risk, by the creation of new degree programmes without in-depth studies by the OCES (Observatory of Science and Higher Education) to support such decisions. The search for opportunities brought by the widening of teaching-learning and research areas and the increase in the number of PhD holders was accomplished in due time as an internal response to the challenges and as an external response to society's competitive environment. The University is not sufficiently responsive to external threats. There is a delay in internally acknowledging threats, both in qualitative and quantitative terms, as well as in devising solutions to face threats or avoid their intrusion in the University. It is the case with public funding via the MCTES, whose annual reduction has not yet unequivocally dictated that the university make up for lost income by resorting to other sources (private entities, foundations, research, contracts). There are also cases of extremely rapid changes that do not leave enough time for the University to formulate a fitting response or to define a compatible strategy. Presently we are witnessing a period of steeply declining applications for Sciences, Engineering, and Letters degrees. UBI must persuade teaching staff, departments, and faculties to adopt more wide-ranging, flexible, and appealing 1st-cycle study programmes. Other difficulties in eliciting responses are related to departments' and faculties' intermediate management. These stem from an ingrained corporate bent in face of quality-oriented goals which disrupt internal routines and strategies. Financial incentives might help to accelerate responses, simultaneously creating synergies between people and structures with internal goals and people and structures with institutional goals. Presently that practice proves impossible. The global SWOT analysis will additionally reveal other parameters by which the University may devise more adequate responses to changes in the external environment. Regardless, it seems that flexibility, compatibility, scope, differentiation by outstanding quality,

appeal, and internationalisation, among others, are features that the university must project to the exterior and that must overlap the types of change (structure, market, training, trend).

4.2. INVOLVEMENT OF REPRESENTATIVES OF THE EXTERNAL COMMUNITY IN THE UNIVERSITY'S STRATEGIC MANAGEMENT

According to the University's statutes, only two bodies may include in their composition members from outside the University: the Advisory Council and the University Senate. The Advisory Council (article 29 of the Statutes) seeks to promote "links between the University and the community's economic, social, and cultural sectors." However, it was never established as such. The University Senate is an internal governing body (article 7 of the Statutes) where teaching staff, non-teaching staff, students, and "[up to 8] individuals of acknowledged merit in the community's cultural, social, economic, and scientific domains" (article 16) take part. Current external members of the Senate are the Mayor of Covilhã, Professors from other universities with which UBI closely collaborates, and a retired General of the Portuguese Air Force (former Chairman of the Joint Chiefs of Staff of Portugal). Whenever necessary, the Rectorate assembles workgroups as informal councils with the aim of discussing ideas present in strategic documents and of generating more knowledge on future strategic guidelines for the University. In other universities these workgroups are formed as supervising bodies for integrated development plans (workflow platform, e-learning, Bologna process, the creation of the Medicine degree).

4.3. ADVANTAGES OF THE UNIVERSITY'S AUTONOMY

The Law of University Autonomy clearly states in article no. 3 that universities have statutory, scientific, pedagogic, administrative, financial, and disciplinary autonomy. The new law for the juridical regime of higher education institutions (Law no. 62/2007 of 10 September) establishes in article no. 11 that public Higher Education Institutions enjoy statutory, pedagogic, scientific, cultural, administrative, financial, patrimonial autonomy regarding the State (this new Law will frame the future statutes of the university, in construction throughout 2008). The University's autonomy must be effective, in the context established by the Law and in terms of financial sustainability that the State must grant Public Universities. As such, the University must have the freedom to administer its annual financial balances and to manage its funding on a multiannual basis. The University must have sufficient financial capacity and ability to promote new research programmes or to support other areas to improve their performance. The University must secure financial stability in order to reassess its study programmes, to apply its knowledge, and to invest in human and material resources, according to the strategic development plan and management of its mission. The organisation of service provision to the community relies on the region's economic development. The University's autonomy loses meaning if the surrounding economy is not able to request services of the University. The development of study programmes conforming to Bologna may generate a greater influx of students, resulting from a greater flexibility and the set up of programmes, increasing financial income. To grant sustainability and some stability, the University's budget requires an increase in student fee contributions, which presently is not possible.

4.4. EXPECTED CHANGES TOWARDS THE UNIVERSITY'S AIMS

The University expects the dynamisation of the local and regional economy to result in a stronger link to the business sphere and in a strategic promotion of entrepreneurship. It expects that the surrounding region will develop towards an economy of knowledge, attracting technology-based businesses, and generating spin-offs at Parkurbis by its training, researching, and innovating capacity. The University further expects that its research activities will attract more and better researchers and thus generate R&D projects and draw funding with the aim of lending greater sustainability and stability to the University. A significant increase is expected in national and international applicants to 1st and 2nd cycle degrees ministered by the University, with greater emphasis on degrees from Sciences, Engineering, and Letters. The University expects knowledge acquired in national and international study programmes to result in a growing internationalisation of its activities and its partaking in international networks or consortia with Universities with which there is closer affinity in teaching-learning and research. The University further expects to become increasingly intervening as an anchor of knowledge, research, and innovation in the regional economy and surrounding region, by associating with pro-active entities in the creation of wealth and exploration of endogenous resources (natural environment, energy, water, health, culture). Finally, the University of Beira Interior expects a growth in strategic cooperation between Universities from the Central Region of Portugal and from the neighbouring regions of Castile, Leon, and Extremadura in Spain, aiming at the economic, social, cultural development, and the revitalisation of the University Cross-Border University Network (Pólo Universitário Transfronteiriço).

4.5. IMPROVING THE MATCH AND SYNERGY BETWEEN THE CURRENT AND FUTURE MISSIONS AND GOALS AND THE ACTIVITIES (STUDY PROGRAMMES, RESEARCH ACTIVITIES, SERVICE TO SOCIETY)

The University requires adequate public funding for operating costs of teaching-learning, research, and service provision to the community, which is not presently the case, causing instability for future plans and strategies. The

implementation of the Bologna process across all study programmes will allow a greater permeability to society, more flexibility, and a more adequate response to the market's demands in terms of employability and a more effective link to the regional and local entrepreneurial and economic tissue. Internationalisation of a greater number of activities will be achieved by UBI's integration in thematic networks and by association with international consortia. This will induce a closer proximity between teaching staff and researchers, and create a direct link to renowned knowledge centres, spurring research and teaching-learning activities. Increased cooperation between the Universities of the Centre of Portugal and neighbouring Castile and Leon and Extremadura, in Spain, will foster staff and student exchange and generate tighter links for launching common study and research projects, merging interregional and cross-border interests. A more cooperative attitude towards Portuguese-speaking countries will attract more 1st- and 2nd- degree cycles, and afford opportunities for the development of shared projects in teaching-learning, in research, in service to society, in innovation, and in university members' mobility. The development of cooperative university initiatives and activities with Spain and Portuguese-speaking countries has no language barriers, which is a significant factor for growth. To make the University an anchor of knowledge, research, teaching-learning, and service provision to society means to reinforce autonomy, to legitimate the demands for increased public funding, to gain stability in the medium term, to be a pivotal and responsible social agent in the transition to an economy of knowledge and innovation.

4.6. ROLE OF QUALITY MONITORING AND QUALITY MANAGEMENT IN THE DEVELOPMENT OF CHANGE

The University has a digital database which divulges adequate information and simultaneously enables management of communications and underlying processes (workflow platform/GSE, SIGUBI, financial documents). Another crucial digital database for the University's activities comprises contents of curricular units and curricular modules of the study programmes (1st- and 2nd- cycles), with the aim of developing and changing systems and teaching-learning-assessment methodologies (from the classic systems to e-learning-based systems). Assessment of teaching by the students is a relevant component for monitoring teaching practice and ensuring the teaching-learning-assessment process (LINCE). The management of this process must be improved and the information gathered and processed, to be made available for all internal and external stakeholders. As regards the administrative component, after a period of auditing and learning, the University will be certified in the near future according to regulation NP EN ISO 9001:2000 (Quality Management Systems - Requisites), through an external process. The monitoring of markers and processes is the most adequate way of raising quality standards. At the same time it is necessary for departments, faculties, services, and staff to resolutely commit to meet the efficiency levels, goals and outcomes expected by the administration in teaching-learning-assessment and in research-innovation. To reward all the structures and people that meet or surpass goals and show positive results for the University, and to penalise those that do not meet the goals and contribute negative results for the University: this path may facilitate a more credible and transparent quality management, bestowing a sharper and more responsible meaning. The desired change in the University's internal practices and policies will only come about if staff members understand the goals and mission of the university as a mutual partnership between themselves and the institution. The SWOT analysis allows a better assessment of how teaching staff, non-teaching staff, and students perceive the University as an institutional whole.

5. CONCLUSIONS

The University suggestion for the university's Special Focus was related to "Faculties of Exact Sciences and Engineering Sciences and their Departments - Teaching, Learning and Research in order to develop synergies between both; to attract more, better and new students from Portugal and abroad (namely from Portuguese-speaking countries); to define a strategy that can be applied for an internal improved and dynamic cooperation between professors, staff and students; to plan what can be a good response from the UBI structure, in Engineering and Science fields of knowledge, in the near future".

The development of possible answers that can be given to all these questions are expressed throughout the Institutional Evaluation Report (IER) namely in sections 1.7, 2.2.4, 2.2.5, 2.3.1 and 3.4. As it is pointed out and clarified through the report it can be summarised three limitations to amplify the cooperation and synergies inside University: one of the limitations is the decrease of public funding; other can be addressed to the several and simultaneous changes of the educational policies in higher education; other is due to the Teaching Staff Statutes (ECDU) in the way that do not promotes the cooperation in the processes of teaching-learning-assessment-research; and finally the Higher Education Policy in the last 10 years doesn't take into account the enough flexibility of big development differences between New Universities (as UBI and others) and the establish ones (as Coimbra, Lisbon and Oporto Universities).

5.1 SWOT ANALYSIS

The SWOT analysis was developed throughout the University teaching staff, staff and students. Also the Faculties, Departments, Research Units, Services and Student Union were associated to the different discuss meetings. The reflections sorted out were inserted in the initial draft document producing the written document in the report. This concentrated form of presenting the SWOT analysis has been decided by the Steering Committee in order to get a better vision and overview for each topic (UBI, Funding, Organisation and Management, Education, Research, Cooperation with Society, Staff, Infrastructure and Legal and political Framework). For each topic the factors were organised in first for tangibles ones and in second for non tangibles factors.

Table 5.1 - SWOT ANALYSIS UBI

<u>Strengths</u>	<u>Topic</u>	<u>Weaknesses</u>
<ul style="list-style-type: none"> - Contribution towards the enhancement and historical reconstruction of the city and its buildings - Mission-minded spirit of the University's teaching staff, non-teaching staff, and students - Proximity of the University's head staff to teaching and non-teaching staff and students - Positive balance in teaching-learning-assessment, research, and service provision activities - Experience in the definition and adoption of institutional and political strategies (teaching, research, service to society, internationalisation, innovation,...) - Ability to draw students from other regions preserving the <i>numeri clausi</i> system (1st cycle) - Good internal and external environment for studying, reflecting, and student academic experience. - Atmosphere among students with a sense of belonging - Strong institutional image and credibility in the region 	UBI	<ul style="list-style-type: none"> - Difficulty in establishing a nationwide renowned profile - Effective lack of an Advisory Council - Difficulty in attracting students with above-average abilities, interests, and motivation - Geographical location in a peripheral region of the interior
<ul style="list-style-type: none"> - Centrally-controlled governance and budget - Merit awards and scholarships to the most accomplished students by degree and school year 	Funding	<ul style="list-style-type: none"> - Strong reliance on public funding - Insufficient public funding - Need to create incentives for distinguishing the best service, the best department, the best faculty,... - Lack of consistent organisational support to undergraduate programme student clusters - Some financial difficulty in recruiting the adequate human resources
<ul style="list-style-type: none"> - Recent digital database facilitating document circulation and communication (Workflow/GSE) - Adequate dimension of the University for effective management - Useful and adequate organisational matrix - Adoption of a development strategy in harmony with the requirements and implementation of the Bologna process - Timely planning of the academic calendar and of school timetables, with emphasis on students' time management - Increased mobility of students and staff through a network of international agreements, contacts, and partnerships (protocols, Erasmus, IAESTE,...) - Support services for teaching staff, researchers, and foreign and immigrant students (GPRI, GRICES, Luso-American Foundation Office,...) - Significant decrease in bureaucracy by making services available to students online through digital databases such as the online academic services - Support to graduate entry in the job market (Traineeships and Professional Opportunities Office - GESP, NIVA) 	Organisation and Management	<ul style="list-style-type: none"> - Temporary physical constraints in some faculties (Social and Human Sciences, Arts and Letters) - Difficulty in implementing a cooperative and collaborative culture among services and departments - Insufficient internal communication among staff - Insufficient strategic planning in some areas/spheres - Insufficient and complex management structure - Excessive number of bodies in the University's structure and management, with overlapping of duties. - Quality-control integrated system not yet fully implemented and lack of adequate response to arising problems - Limited intermediate management structures and decision-making ability - Decision-making with inconsistent follow-up - Need of an observatory for employability of graduates (1st and 2nd cycles)

Table 5.1 - SWOT ANALYSIS UBI (continuation)

<u>Strengths</u>	<u>Topic</u>	<u>Weaknesses</u>
<ul style="list-style-type: none"> - Good working environment for teaching staff and good conditions for the practice of teaching and research - Teaching-learning-assessment privileging experiments, abilities, skills, know-how, ... - Interdisciplinary activities using laboratories, centres, interdepartmental units, and workshops - Study programmes adjusted to Bologna and with adequate curricula - Quantification of student workloads by the ECTS - Quality of teaching-learning-assessment and a good relation of proximity between students and teaching staff - Study programmes with clear identity of the core curricula integrating study areas and teaching staff from several departments - Entrepreneurship curricular activities incorporated in study programmes (1st and 2nd cycles) - Online assessment by students of the pedagogic features of teaching and of institutional features (LINCE) - Student appraisal index of teaching-learning-assessment activities above 70 % - Ability to create and develop transversal and multidisciplinary teaching projects (1st, 2nd, and 3rd cycles) - Diversified offer of study programmes - Publishing service for master dissertations and PhD theses in book and e-book form - Development of activities to raise awareness for a culture of quality - Contribution to a reversal of the graduate and non-graduate (textile sector) unemployment cycle through UBI's repercussion in the region 	Education	<ul style="list-style-type: none"> - Insufficient ties with former alumni - Pedagogic concern of teaching staff in promoting students' academic success - Insufficient quality-control through instruments and methodologies - Need of quality assurance in training and study programmes - Low success rates in the first two years of the 1st cycle - Critical survival rates in some fields of knowledge - Need of quality assurance in training and study programmes - Occasional English-taught lectures in the 2nd cycle - Small number of foreign students - Lack of adequate preparation for the challenges and demands in higher education (autonomy, self-study, workloads, university attendance, ...) - Adjustment of programmes not flexible enough for market demands (night programmes, study programmes, core curriculum, calendar,...)
<ul style="list-style-type: none"> - Adequate scientific productivity in R&D units - R&D units with funding and "Very Good" and "Good" ratings 	Research	<ul style="list-style-type: none"> - Small number of undergraduates involved in R&D activities - Some difficulties in recruiting PhD staff for research units - Difficulty in drawing students into PhD programmes - Lack of external acknowledgement of research
<ul style="list-style-type: none"> - Above-average quality of life enjoyed in the city and in the University, allowing teaching staff and researchers to focus on their main activities - Good employment rates among graduates - Strong development of sports and cultural activities by students and the Students' Union - Nationwide renowned 1st-cycle and postgraduate study programmes - Growth in admissions of new audiences (over 23s), in lifelong learning and training accreditation - Significant involvement in activities serving society (training, services, studies and projects, technology transfer, spin-offs,...) - The University as a prospective anchor of development and knowledge in the Beira Interior region - Economic, social, cultural, and innovating impact on the region - Externally acknowledged quality in service provision - UBI contracts for the pedagogic, scientific, and technological supervision of post-secondary school study programmes (CET) 	Cooperation with Society	<ul style="list-style-type: none"> - Difficulty in establishing a nationwide image profile
<ul style="list-style-type: none"> - Good working environment for teaching staff and good conditions for teaching practice and research - Young, experienced, and qualified teaching staff - Continued improvement of human resources through the design of adequate programmes - Cooperative collaboration between teaching- and non-teaching staff 	Staff	<ul style="list-style-type: none"> - Fragmentation and excessive internal competitiveness between teaching staff and researchers - Precarious contracts of University staff (sense of non-belonging)

Table 5.1 - SWOT ANALYSIS UBI (continuation)

<u>Strengths</u>	<u>Topic</u>	<u>Weaknesses</u>
<ul style="list-style-type: none"> - High-quality facilities and venues - Well-dimensioned laboratorial and workshop facilities distributed across the University - Good student and staff hall and canteen infrastructures - Excellent documentation service facilities with easy access (day and night) and good bibliographical resources - Information technologies structures with adequate quality distributed across the University 	Infrastructure	<ul style="list-style-type: none"> - Temporary physical constraints in some faculties (Social and Human Sciences, Arts and Letters) - Unequal use of the e-learning database by the departments, teaching staff, and students as a means of learning - Low effective workability of the digital Workflow/GSE database
	Legal and Political Framework	<ul style="list-style-type: none"> - Inadequate student/teaching staff ratios in some Bologna-structured study fields

<u>Opportunities</u>	<u>Topic</u>	<u>Threats</u>
<ul style="list-style-type: none"> - Forming consortia among higher education institutions in the region with the aim of improving performance and results - Ability to provide advanced training and its settlement in the surrounding region (designers, engineers, managers, doctors, teachers,...) 	UBI	<ul style="list-style-type: none"> - Possible shutdown of degrees in UBI strategic areas - Decrease in public funding affects the University's autonomy
<ul style="list-style-type: none"> - Creating programme-contracts - Diversification of accessible funding sources (7th EC Framework, OREN, Foundations,...) - Continuous development of the surrounding region 	Funding	<ul style="list-style-type: none"> - Difficulties in compensating for the decrease in public funding through own income or other resources - Need to raise fees without a correlative increase in social support for students - Dangerous decrease in public funding of higher education without clear criteria and consequent budget restraints - Public funding of 2nd cycles not guaranteed in the medium term
<ul style="list-style-type: none"> - Ability to attract a higher number of foreign students (Erasmus, IAESTE, ...), also from the Community of Portuguese-Language Countries (Community of Portuguese-Language Countries/ African Countries of Official Portuguese Language) and Luso-descendants 	Organisation and Management	
<ul style="list-style-type: none"> - Student selection by the University in the 2nd and 3rd cycles - Greater flexibility of 1st- and 2nd-cycle curricula enabled by the adjustment of degrees to the Bologna model - Student selection by the University in the 2nd and 3rd cycles - Stimulating the polyvalence of learning and knowledge for research and the job market - Generalist 1st-cycle study programmes - Raise student training standards beyond secondary-school level - Opening to new audiences and offer of other lifelong formal and informal learning and training programmes (PROALV) - Cooperation with and admittance of students from the Community of Portuguese Language Countries and from the African Countries of Official Portuguese Language 	Education	<ul style="list-style-type: none"> - Shift of focus to quantity (number of graduates) of University outputs in detriment of quality - Restrictive 2nd-degree offer due to the decrease in public funding - Low success rates at the secondary-school level and high drop-out rates - Student outward mobility in Higher Education Institutions (HEI) - Insufficient ability to attract students to sciences, technologies, and engineering
<ul style="list-style-type: none"> - Improve articulation of teaching-learning-assessment activities with R&D activities to obtain increased external funding 	Research	<ul style="list-style-type: none"> - Insufficient duration of funding to R&D units to allow devising medium-term strategies with periodic assessment - Perspective of decrease in R&D activities due to the overload in teaching-learning-assessment activities (1st and 2nd cycles) due to the decrease in public funding

Table 5.1 - SWOT ANALYSIS UBI (continuation)

<u>Opportunities</u>	<u>Topic</u>	<u>Threats</u>
<ul style="list-style-type: none"> - Ability to adjust study programmes to the job market - Emerging challenges of a greater opening of Higher Education Institutions to the exterior - Response of the University to demands of society and commitment to obtaining results - Reinforcement of transborder cooperation with the Universities of Castile, Leon, and Extremadura, in Spain (Universities of Leon, Valladolid, Salamanca, Extremadura) - Reinforcement of other international collaborations 	Cooperation with Society	<ul style="list-style-type: none"> - Demographic decline expected to worsen - Low cultural and educational development of the surrounding region - Economic development of the surrounding region and of the country insufficient to absorb graduates in several areas (engineering, sciences, economics, management, design, humanities, ...) - Low Gross Domestic Product of Beira Interior (surrounding region), below the national average
<ul style="list-style-type: none"> - New activity assessment processes through the SIADAP and improvement of staff performance 	Staff	<ul style="list-style-type: none"> - Risk of insufficient training for University staff - Limits to recruitment of new staff hinder the development of more activities and compromise quality - Low relevance of teaching-learning-assessment activities for progression in the academic teaching career (ECDU) - Lack of long-term central government policies for higher education
	Infrastructure	
<ul style="list-style-type: none"> - New law of the juridical regime (62/2007 of 10 August) which decrees the creation of new statutes and new ways of devising strategies for the future - Assessment of institutions and accreditation of study programmes by the new Assessment and Accreditation of Higher Education Agency 	Legal and Political Framework	<ul style="list-style-type: none"> - Lack of regulation by the central government of higher education - Limited autonomy and highly inflexible and overregulated legal frame - Excess of available study programmes in overlapping technological areas - Unfair competition between Universities based on highly differentiated factors of development and geographical location

5.2 ACTION PLAN

The action plan takes into account the weakness factors described in the SWOT analysis and presents key areas of future intervention and actions for remedy of weakness. In this process the Institution's strengths and the identified opportunities were indicators for the departure.

Infrastructure - Continue the physical implementation of Faculties and all the digital supports for better workability and teaching-learning-assessment-research and service to society.

Human resources (teaching staff and staff) - Readjust resources in accordance to the ratios student / staff; promote belonging; relevance of political change of ECDU and new relation between teaching staff and University.

Cooperation with society - Continue the opening of the university to society; reinforce the transborder and international cooperation; commitment to demands and results connected to demands of society.

Research - Involve under-graduate students; longer research activities in duration and outcomes and visibility; diversify funding sources; regroup researchers around research centres / units; optimize the access to national and international funding frameworks.

Education - flexible programmes for market demands; cooperative intensively with CPLP/PALOP; increase success student ratios and tutorial and cooperative teaching staff; ties with alumni students; support polyvalence of learning and knowledge for research and the job market;

Organisation and management - cooperative and collaborative culture; communication, strategic planning and less complexity inside Institution; improve decision-making and graduates employability for outside vision.

Funding - diversify funding sources and other incomes; guaranty of 2nd cycle public funding; develop contract-programmes with MCTES and regional and national networks; increase fees of study programmes.

UBI - continuous developing of UBI and regional territory; attract better students through marketing academic environment and prizes; maintain the study programmes/degrees and improve quality assurance.

5.3 FINAL REMARKS

The Institutional Evaluation Report (IER) is a result of an intensive and hard work of the Steering Committee and all the people that has been involved since the beginning in this objective - to have a synthesis report and an overview analysis of the University of Beira Interior.

The reflections of Steering Committee must be analysed as having the support of teaching staff, staff and students and as a reinforced of the institution unity. This group can constitute a permanent council to monitor the implementation of measures suggested and its organisation and act as diffuser agent promoting internal reflections at all levels.

The Steering Committee believes that this process of institutional evaluation permitting research, self-assessment and identification of factors that legitimate a strategic management environment will help University of Beira Interior moving in the future in the right direction.