INSTITUTO POLITECNICO DE CASTELO BRANCO

IEP EVALUATION REPORT

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1. Introduction: purpose of the EUA Evaluation

The EUA has a strong international reputation in quality assurance and strategic review having undertaken evaluations or visits to some 250 higher education institutions in 34 countries during the past fourteen years or so. The purpose of the evaluation of Instituto Politécnico de Castelo Branco is to contribute to the advancement of its strategic management and to its organisational development, and to enable the Polytechnic Institute to strengthen its capacity to anticipate and address change. In its deliberations, the EUA Team has assessed and focused on the Polytechnic Institute’s strategic context and priorities and has used this as a basis for making recommendations for the future.

2. Process and methodology

Following a request from the President of Instituto Politécnico de Castelo Branco, the Steering Committee of the EUA Institutional Evaluation Programme appointed a team for the institutional quality evaluation of the Polytechnic Institute. This team was composed of:

- Professor Régis Ritz, former President, Université Michel de Montaigne, Bordeaux, France, as Chair;
- Professor Sokratis K. Katsikas, Dept. of Technology, Education, and Digital Systems, University of Piraeus, and former Rector, University of the Aegean, Greece;
- Luc Van de Velde, Vice Chancellor, Erasmushogeschool, Brussels, Belgium;
- Ligia Deca, Chairperson, European Students’ Union, Brussels, Belgium;
- Professor Jethro Newton, Dean of Learning and Teaching, University of Chester, UK, as Secretary.

The team undertook a preliminary visit to the Polytechnic Institute from 1st June to 4th June, 2008, and the main visit from 9th November to 12th November, 2008.

The EUA methodology is guided by four central strategic questions. These questions, which ensure that quality is examined in its wider institutional context, are:

- What is the university trying to do?
- How is the university trying to do it?
- How does the university know that it works?
- How should the university change in order to improve?

In accordance with the EUA methodology and guidelines, and in advance of the preliminary visit, the Polytechnic Institute sent a 29-page Self-Evaluation Report (SER) to the EUA team. The SER, compiled and authored by the Self Evaluation Group, coordinated by Professor João Ruivo, Vice President, and supported by Dr Ricardo Batista, senior staff member, Central Services,
analysed the Polytechnic Institute's context, norms and values, its quality management and quality assurance arrangements, as well as its strategic management and capacity for change. The SER also included the SWOT analysis undertaken in preparing the self-evaluation report. The SER was accompanied by annexes containing detailed data on students, staff, teaching, finances, scientific research, and services and infrastructure. An annex containing information on legal statutes as they apply to Portuguese higher education institutions, including polytechnics, was also provided. The EUA team appreciated the work done in the SER and the accompanying documentation, and found them to be of great assistance in enabling them to undertake their deliberations.

For its main visit, the Team requested some additional information and documentation regarding the Polytechnic Institute's strategic and financial planning; quality management and quality evaluation; student evaluation and feedback; internationalisation; human resources policy; and matters relating to new statutes and the operation and remit of new governance structures and committees. Some additional data, and further clarification on a number of matters, was also requested. These requests related to issues discussed during the preliminary visit but which were not fully reflected in the SER. This additional information was provided in advance of the main visit and covered the issues identified by the EUA Team in an extremely thorough and helpful manner.

During its two visits, the EUA team held discussions with a wide variety of persons, both from inside and outside the Polytechnic Institute community. During these meetings the EUA Team was able to discuss a very wide range of issues linked to the ongoing development of the Polytechnic Institute, and the role of governance, strategic planning, and quality management and evaluation in this. Members of the Team made visits to each of the Polytechnic's Schools and campuses, and were also pleased to be able to visit the recently opened facilities of the Dr Lopes Dias School of Health. The EUA Team would like to put on record the open manner in which they were received across all parts of the Polytechnic Institute and the fruitful discussions which characterised the team's meetings.

The individuals and groups who met with the EUA Team included:
- the President and Vice President of Instituto Politécnico de Castelo Branco;
- members of the Self-Evaluation Group established for the EUA review process;
- School Directors;
- Members of the Permanent Commission;
- Presidents of Pedagogic and Scientific Councils;
- central university staff involved in policy making and planning, and with responsibilities _inter alia_ for: Quality and Strategic Planning; Human and Financial Resources; IT strategy; Mobility and International Relations/International Office; Social Action Services;
- the Quality Policy Team;
- staff with responsibilities for e-learning;
• staff involved in research, and knowledge transfer and entrepreneurship activities;
• staff and students from the Schools of Agriculture; Management; Technology; Education; Applied Arts; and the Dr Lopes Dias School of Health
• student representatives, including all Presidents of School Students’ Unions;
• representatives of the Polytechnic Institute’s external stakeholders and partners.

The EUA Team would like to thank the President of Instituto Politécnico de Castelo Branco, Prof.ª Ana Maria Baptista Oliveira Dias Malva Vaz, for the welcome and hospitality provided during their two visits. The members of the team would also like to express their gratitude to the Polytechnic Institute’s former Vice President, and Self-Evaluation Coordinator for the Preliminary Visit, Professor João Ruivo, and to Professor Antonio Moitinho, Director of the School of Agriculture and Self-Evaluation Coordinator for the Main Visit. Both visits and all meetings were efficiently and pleasantly arranged by the Polytechnic Institute’s Self-Evaluation Group that also acted as a very effective liaison group between the institution and EUA. Special thanks are offered by the team to Dr Ricardo Batista for his excellent work in ensuring the smooth running of all aspects of the process. The team would also wish to record their thanks for the excellent work of the translation staff for the two visits: Ana Sofia Marcelo, Andreia Martins, Gabriela Nunes, Isabel Oliveira, Roberto Monteiro, and Ricardo Batista.

3. Mission, vision and general context

Instituto Politécnico de Castelo Branco was established as a public higher education institution, by Decree-Law, in December 1979. It is part of the national network of Portuguese university and polytechnic institutions. The Polytechnic Institute’s norms and values incorporate the general principles and mission of Portuguese higher education, whilst also articulating the vision developed during the period of governance of its current President. The Polytechnic Institute’s mission is ‘to train professionals with elevated technical-scientific capabilities and to promote the Institute’s integration into the scientific and technological community’, whilst also ‘fomenting the mobility of individuals and knowledge in the context of an increasingly globalised and international society’. This mission is complemented by a vision to be recognised for ‘educational and research excellence’ and as a ‘stimulator of regional development’. In its SER, the Polytechnic Institute emphasises its desire to achieve a balance between teaching, research, and the provision of services to the student and to the regional entrepreneurial community.

The EUA Team learned that notwithstanding the Polytechnic Institute’s achievements to date – in terms of education, infrastructure, facilities, and as a prominent regional provider of education, training, and applied research – there is a clear recognition by the institution of a need for a programme of institutionalisation and organisational change. In seeking to achieve its vision
and mission, the Polytechnic Institute faces a period of transition, and a new phase of development and change. A process of institutionalisation and centralisation of key systems, guidelines, procedures, and leadership arrangements has been initiated, all of which are appropriate to this phase of development. This proactive approach is recognised by the EUA Team as being of paramount importance. Furthermore, the Polytechnic Institute’s drive towards achieving greater organisational cohesion and effectiveness is being undertaken in a context of wider changes in higher education at national level, particularly in terms of governance and quality assurance. In its SER, the Polytechnic Institute makes explicit its desire to be viewed as a dynamic institution that is open to these challenges. From its meetings with a wide and representative cross-section of the Polytechnic Institute’s academic community, and on the basis of its deliberations, the EUA Team fully endorses this perspective.

4. Governance, management, and strategic planning

Governance, management and the national policy context

The planning, coordination, governance, and policy making for higher education in Portugal come under the aegis of the Ministry of Science, Technology and Higher Education. The Minister is advised by a Higher Education Coordination Council (CCCES), established in 2007. In 2007, legislation was passed setting out new arrangements for the governance and institutional autonomy of Portuguese higher education institutions. Each higher education institution has been required to bring its statutes into line with the new law. During the visit to the Polytechnic Institute, the EUA Team learned that the Institute’s proposals for new statutes, focusing on new governance arrangements, administrative bodies, and deliberative councils, had recently been approved and had been published by central government on 6th November, 2008.

Public higher education institutions such as the Polytechnic Institute are self-governing. Although, like other polytechnics, the Polytechnic Institute requires approval from the Ministry for the introduction of new programmes of study and for modifications to existing ones, and depends significantly on the national budget for funding, in other respects, as a public higher education institution, it has statutory, administrative, financial, pedagogic, and scientific autonomy. Moreover, as is indicated in the SER, in recent years the Polytechnic Institute has increased its capacity to generate its own revenues.

For the purposes of governance and executive management, the President is the Polytechnic Institute’s senior authority and its official representative. The powers of the President include the development of the Polytechnic Institute’s mission, vision, and strategic plan, preparation of budgetary proposals, and responsibility for human resource and financial management. According to its new statutes, the Polytechnic Institute’s governance organs, or legislative and executive agencies, will comprise: the General Council; the President; and the Management Council. Under this new dispensation the powers of the General Assembly, presently responsible for making arrangements for electing the
President, are to be subsumed by the newly constituted General Council. This body, acting more as a governing council than hitherto, will be chaired by an external stakeholder. In contrast to its predecessor body, which included student representation from all organic units, the new Council allows for four student representatives. It will assume most of the powers and duties of the outgoing General Council, which is chaired under present arrangements by the President and includes in its membership the Vice President and Directors of all organic entities.

In turn, the existing Administrative Council, which at present has executive level remit for budgetary, financial, and investment matters, and has an important decision-making role, will be replaced by the new Management Council, to be chaired by the President. The Management Council will be charged with administrative and financial management, and with management of human resources and the estate. The Permanent Commission of the existing General Council presently advises that body on strategic matters. Chaired by the President, and including the Vice President and Directors of all organic units in its membership, it will disappear under the new arrangements. In the new arrangements, in addition to changes in the level of student representation, the ex-officio representation for Directors on the principal organs of governance will be discontinued. All teaching staff, up to and including the level of Director, will, though, be eligible for election to the new General Council.

In common with the organisational arrangements of other polytechnics, the Schools, as organic units of the Polytechnic Institute, enjoy a degree of relative autonomy. Each School is required by law to have a Scientific Council and a Pedagogic Council. The former, membership of which is by election, acts as the School’s decision-making body. It includes teachers and researchers, and is responsible for School strategy, curriculum development, and proposals for collaboration. The remit of the Pedagogic Council, which acts as a consultative forum for staff and students, has equal staff and student representation and is more operational in its focus.

In addition to the new governance arrangements, the Polytechnic Institute has chosen proactively, as a self-governing higher education institution, to establish new consultative or deliberative organs. These have wider representation than the governance bodies. Two committees are to be established, each of which will include the Directors of the Schools and Presidents of the Scientific and Pedagogic Committees as ex-officio members, along with student representation. The Academic Coordination Council will deal with the creation and discontinuation of courses and research units; determine the criteria for the recruitment and deployment of teachers; articulate the academic calendar; consider proposals from schools' scientific and pedagogic councils; and draw up proposals for teaching strategies. The new Quality and Evaluation Council will coordinate and plan all internal and external evaluation and accreditation arrangements; develop norms and procedures for evaluation and quality; exercise oversight of all completed evaluation processes and reports; and provide advice to the President on measures to improve institutional performance. A third consultative organ - the position of Defender of the
Student - is also to be established. The appointee will promote, and act on behalf of, the broad range of student views, needs, and interests.

These major changes in governance and management, and the new reforms and legal requirements to which the Polytechnic Institute is responding, signify a wind of change. This phenomenon, and the challenges it brings, is now common throughout Europe. In the view of the EUA Team this represents a good opportunity for the Polytechnic Institute to make further progress and to improve even further. The members of the Team were encouraged to note, from its various meetings with senior managers and teaching and administrative staff, that the Polytechnic Institute is well disposed to seizing this opportunity.

The EUA Team formed the view that, in taking forward the new governance arrangements, and in implementing the new statutes, councils and consultative bodies, every effort should be made to achieve the necessary balance between clear and authoritative leadership from the top structures, and cooperation and involvement of the wider academic community. This will entail dialogue with all actors and interested parties, including external partners and stakeholders, and students. The EUA Team were impressed and encouraged to learn of the determination of senior managers, in central positions and in organic units, to work together to make the new governance arrangements work and to overcome the inevitable challenges associated with changed institutional arrangements. The EUA Team also recognised the pivotal role that the new President will play in establishing this balance and complementarity between the executive and consultative structures, and between central structures and the Schools, and also in creating cohesion between the six Schools.

The Team would also wish to emphasise the complementary need for an effective communication strategy to ensure that new organisational structures and functions are open, transparent and fully understood, and that decision making is effectively disseminated. The work of the central administration will also be important in this respect. On the basis of the foregoing, in their recommendations, the EUA Team encourages the Polytechnic Institute to make good progress with the establishment of the various new executive and administrative bodies, and deliberative councils, in order to secure an efficient, confident, and effective transition to the implementation of the new statutes.

**Strategic planning**

Instituto Politécnico de Castelo Branco’s academic organisation is structured into six Schools, or organic units. At the time of the evaluation visit there were some 5000 students, and a total of 373 teachers and 265 non-teaching staff. Together, the Schools offer a range of undergraduate (first cycle) programmes, and a modest but steadily growing number of masters (second cycle) programmes. The Polytechnic Institute also delivers a range of other education and training programmes, often delivered on a short course basis. The course portfolio is largely vocational, and designed to meet local, regional, and national needs in employment, business, industry and the professions. The institution has over 100 agreements and protocols, predominantly regional, covering
applied research, internships, and provision of services, together with a range of international arrangements with universities, scientific institutes, and foreign companies. The Polytechnic Institute's organisational structure also includes two other organic units – the Social Action Services, and a Regional Centre for Studies and Development (CEDER) – along with structures to promote research and community support.

However, as the Polytechnic Institute acknowledged, the location and distribution of the institution's constituent elements is not without its problems. Alongside the centrally located main administrative services, the Polytechnic Institute's academic activities are distributed across two other sites in the town of Castelo Branco, where the Schools of Education, and Technology and Health, are located, two sites for Agriculture and Applied Arts on the outskirts of the town, and a campus for the School of Management some 40 kilometres distant in Idanha-a-Nova.

It was evident to the EUA Team that the distributed nature of the Polytechnic Institute's portfolio of activities signified one of the principal challenges that it is addressing – that of organisational cohesion and effectiveness. This challenge is manifested in ways other than its multi-site organisation. The SER noted that one of the historical weaknesses that the Polytechnic Institute is now addressing is its dispersed administrative and planning structures. This has had an inevitable impact on arrangements for strategy, finance, budget and resource allocation, and human resource planning. For example, until as recently as 2008 organic units enjoyed a relatively high degree of autonomy in terms of budget management and resource-related activities.

The EUA Team learned that the Polytechnic Institute has recognised the need to introduce greater transparency into its budget formation and resource allocation and monitoring processes, and that its Administrative Council has been proactive in this regard. During 2008, accounting arrangements were entirely centralised and the Polytechnic Institute now has one central budget that covers all organic units, with oversight being exercised by the Administrative Council. Under this arrangement, there is in-built flexibility to allow for local needs to be discussed and addressed more collegially with each School. In their meetings with Directors, the EUA Team were interested to learn that these, and other initiatives designed to achieve greater organisational consistency, cohesion and effectiveness, had their broad support as senior managers.

The view was put to the EUA Team by the Polytechnic Institute that, when compared to universities, polytechnics in Portugal were historically under-funded in relative terms, and that this challenge was further compounded for polytechnics located in the interior region. While noting this, the Team formed the view that the degree of financial and scientific autonomy enjoyed by the Polytechnic Institute, together with new national frameworks being defined for the sector by the Juridical Regime for Higher Education Institutions (RJIES), were seen as providing a climate of potential opportunity for further growth. Though, like other polytechnics, it depends significantly on national funding (some 75% of its budget), the EUA Team learned of a range of ways in which
the Polytechnic Institute was planning to promote growth and additional income. In addition to using protocol agreements and applied research as a basis for generating additional revenue, the Polytechnic Institute’s strategic planning seeks to improve the diversity of courses, to capture new market segments (such as students over 23 years), to add more technical courses to the portfolio, and to increase the number of students enrolled on second cycle programmes. While wishing to encourage this positive orientation, the EUA Team formed the view that if it is to realise these ambitions, the Polytechnic Institute will need to make further progress in firmly embedding a transparent and corporately owned approach to budget formation, resource allocation, and income generation.

The various initiatives that the Polytechnic Institute has been pursuing in recent years to address the challenge of achieving greater organisational effectiveness, have coalesced around a programme of centralisation. In addition to the developments in finance and resourcing, already noted, this programme has also entailed: greater centralisation of administrative functions and procedures; a more centrally-driven approach to strategic planning; and the development of an organisational quality management system. The latter is discussed in section 5. This centralisation programme has been mission-driven since, as the SER indicates, if the Polytechnic Institute is to respond creatively and innovatively to the needs of a knowledge-based society, then it requires a coherent and effective organisational structure and culture.

The centralisation of administrative functions has been informed by a desire to streamline, regroup, and integrate all organisational and functional services and management and administrative bodies, and to thereby improve organisational cohesion. As the SER describes it, these elements had hitherto been scattered over the different organic units. Procedures, regulations, and management arrangements have all been subject to greater centralisation. This has been supported by the production of new guidelines and norms, all discussed and agreed with organic units and their Directors prior to implementation and to communication to the wider organisation. These procedures and guidelines, covering legal, finance, human resources, international relations, communication, and other matters, have been drawn together in a central manual available to all teaching and non-teaching staff through the institutional intranet. This is designed to assist staff in working more efficiently in matters of an organisational nature.

The Polytechnic Institute has, since 2002, progressed various activities in the area of strategic planning and development, exploring and using several methodologies. The Permanent Commission, reporting to the General Council, has played a key role in these strategy development processes. All School Directors are members of each of these bodies and have therefore been involved in all developments and decision making. The EUA Team saw a number of documents which illustrated the Polytechnic’s approach to strategic policy and planning. Through use of the Balanced Scorecard method, the institution’s mission, vision and values were refined, and several ‘strategic vectors’ were identified. These strategic vectors – improvement of teaching quality, promotion of research and partnership, and training for
entrepreneurship – have been used to develop a strategic map and to define policy directions. An annual planning process has been developed, centred on the use of a Framework for Evaluation and Responsibility (QUAR) approach. In this approach each School and service uses a template for reporting purposes, in which local level strategic goals and objectives are specified, and a series of indicators used for assessing performance. The use of the Balanced Scorecard approach has prompted the development of Activity Reports and Activity Plans. These plans and reports have been used as evidence to support verification of the quantitative indicators in the QUAR reports. The QUAR reports are used to measure and evaluate the annual performance of Schools and services.

As the SER indicates, these approaches to strategic planning have been developed to address the problem of institutional fragmentation. Through documentation provided, including the SER, and through discussions in various meetings with Polytechnic Institute staff, the EUA Team learned of a range of initiatives. These illustrate how developments in the area of strategy development and planning have contributed to efforts to build a common identity across all organic units and to reduce the previously dispersed approach to service delivery and the use of resources. The summary provided of the 2009 institutional level Activity Plan further confirmed this to the EUA Team as it contains a set of strategic objectives, each designed to contribute to a cohesive strategic approach on a number of key fronts: internationalisation; community links; consolidation of postgraduate teaching; and improvement in research and staff qualifications.

In reflecting on the developments outlined, the EUA invites the Polytechnic Institute to continue its actions in support of centralisation and organisational cohesion. The Team believes that this will contribute to the development of a stronger sense of corporate identity, and a cohesive academic community across all Schools and organic units. The role of the President is pivotal to striking the right balance between central leadership and local level involvement and responsibility.

In making this progress, the EUA Team views the development of the new strategic plan, and the refinement of institutional mission, as an excellent opportunity to widen the institution’s vision and open new windows. As will be recognised by the Polytechnic Institute, development of the new strategic plan will require wide consultation and the involvement of the whole institution, staff and students at all levels. It will also be essential for an increased role to be found for external partners and stakeholders, to enable the regional dimension to be clearly defined and provided for. In addition to setting out well defined medium and long term aims and priorities, this strategic document should also describe the means whereby the strategy will be delivered. The EUA Team advises that this should be a ‘live’ and not ‘static’ document that is subject to review and revision. In support of this, the EUA Team also encourages the Polytechnic Institute to continue with its work to make institutional management and decision making processes more open, and to secure greater transparency in finance, resourcing and budgetary matters. The EUA Team believes that these will be essential ingredients of successful delivery of the strategic plan and achievement of corporate aims.
In considering the area of strategic planning holistically, the EUA Team formed the view that the Polytechnic Institute would be advised to focus more sharply on a few key strategic areas, and to reduce the number of initiatives that it currently pursues. In order to further facilitate initiatives to support institutional cohesion and effectiveness, the EUA Team strongly encourages the Polytechnic Institute to put in place a five-year strategic plan which is clearly focused on the new mission and the principal organisational objectives. This strategy should be underpinned by set of supporting strategies in key areas (finance, quality, research, learning and teaching, human resources, and international development).

5. Quality assurance, quality management, and quality culture

Developments in quality management and quality assurance provide a further manifestation of the Polytechnic Institute’s focus on institutionalisation, the modernisation of administrative arrangements and service provision, and the strengthening of organisational cohesion and effectiveness. In their deliberations, the EUA Team distinguished between two dimensions of ‘quality’: those initiatives being progressed by the Polytechnic Institute to enhance organisational and administrative quality; and those arrangements relating to academic quality assurance.

Organisational quality management initiatives

From their reading of the documentation provided, and during meetings with various groups of staff, it appeared to the EUA Team that the preparation of the SER for the purposes of the Institutional Evaluation Programme had been a profitable exercise for the Polytechnic Institute as an academic community. The opportunity to comment on the SER had been made widely available, with participation at all stages. Similarly, the SWOT analysis undertaken as part of the process of building the SER had also been completed through an iterative process, with each School also undertaking its own analysis. The EUA Team formed the clear impression that the priorities and messages contained in each document were widely recognised and identified with by individuals and groups who met with the team, and that the priorities of Schools and organic units were accurately reflected there. The EUA Team learned that in engaging in these processes of self-evaluation the Polytechnic Institute was able to draw on experience, gained in recent years, of evaluation undertaken for the purpose of meeting the external directives of ADISPOR (Association of Portuguese Polytechnic Institutes) on courses and academic provision, and evaluation undertaken for the internal review of services using the CAF (Common Assessment Framework) method.

The Polytechnic Institute states in its SER that the quality management systems it is implementing in relation to organisational and administrative quality, are being developed to enable it to achieve organisational objectives and strategies relating to continuous improvement in its services. Integral to the overall organisational quality management initiative is the development of a
quality manual based on the Integrated Management and Evaluation System for Public Administration (SIADAP) approach. The SER indicates that it is hoped that by involving each organic unit in this approach a contribution will be made to the improvement of organisational culture. The EUA Team learned that the implementation of a quality management system will also enable the Polytechnic Institute to meet a perceived strategic need to obtain certification and accreditation for its key services. This, in turn, will make the Polytechnic Institute more attractive to industry, business, and external customers and stakeholders – regional, national, and international. The SER identifies a number of examples of cooperation that illustrate how the Polytechnic Institute has been able to extend its sphere of influence in this regard.

In 2007, to underpin its organisational quality management initiatives, and to facilitate achievement of the objectives described, the Polytechnic Institute created a Planning, Evaluation and Quality Office. The Office, whose team incorporates elements from each organic unit, has recently concluded a process of self-evaluation of the Polytechnic Institute’s services using the CAF method. The latter initiative has been adopted on the recommendation of the European Public Administration Network (EPAN). In using the CAF method, use was made of a questionnaire, designed to obtain improvement proposals from staff. The ‘Quality Team’ has also taken the lead in the Polytechnic Institute’s initiatives in support of the adoption of the ISO 9001: 2000 standard and system of quality management. This has complemented the use made of the CAF method.

In line with the other organisational quality initiatives described, the adoption of ISO 9001 has also been prompted by a desire to improve the impact of services on customer satisfaction and to obtain external recognition for this. This process of continuous improvement is being extended beyond the system of quality management per se, to include the promotion of standards and norms for Environmental Protection (ISO 14001:2004), Safety and Health at Work (OHSAS 18000/NP 4397:2001), and Social Responsibility (SA8000). The implementation timescales for each project is likely to be 9 months, though the implementation sequencing timetable has not yet been confirmed.

In October 2008, to highlight the Polytechnic Institute’s quality policy and the particular focus on the ISO 9001: 2000 quality management approach to service improvement, the President issued a leaflet to all staff and students, in which the key principles that the institution is pursuing were identified. In a number of the EUA Team’s meetings with staff of the Polytechnic Institute, and from the Team’s reading of the SER and other documents, it was evident that the overall quality management approach is being used for the purpose of building a quality culture across all activities. The Team also heard the view expressed that the aspect of quality culture is as important as the quality management frameworks themselves. This is a view that the Team would fully endorse, and would encourage the perspective that the Polytechnic Institute’s institutionalisation programme can be used for the purposes of developing a quality culture. In reflecting on these developments in the area of organisational quality the EUA Team strongly recommends that the University continues to
make progress with initiatives to secure the successful institutionalisation of quality assurance, underpinned by a culture of continuous quality improvement.

**Arrangements for academic quality assurance and evaluation**

In 2007, in addition to the new arrangements for governance and the requirement to implement new statutes, new legislation was passed on quality assurance in higher education. This was followed by a government decree on the establishment of a new national quality assurance agency (Agência de Avaliação e Acreditação do Ensino Superior – AAAES). The agency will be responsible for the regular evaluation and accreditation of HEIs and their programmes of study, and for oversight of the incorporation of Portuguese higher education quality assurance into the wider European quality assurance system. The decree included amongst its reference points the European Standards and Guidelines (ESG, 2005). The agency will work to foster a culture of internal quality assurance in Portuguese HEIs, with an expectation that they will work towards meeting the requirements of the Bologna Declaration (1999) and the Bologna Process.

The SER describes how, under the directives of ADISPOR, from 2000 to 2006 the Polytechnic Institute carried out course evaluations of its academic programmes. Recommendations were addressed at the level of the School in which the course was delivered. The EUA Team learned of a number of procedures and practices designed by the Polytechnic Institute for the purpose of evaluating academic quality. Under an arrangement that has been in place for four years, each course, and each teacher’s pedagogical performance, is evaluated each semester. The Team were also informed that School Directors present reports on School academic activities to the School’s Scientific Committee. All teachers also present a report on their scientific, pedagogic, and research activities. The Pedagogic Committee of each School also plays a role in course evaluation, based primarily on the use of questionnaire feedback on teachers and courses. Other arrangements the Polytechnic Institute has introduced to assure the quality of teaching include the appointment of course directors who have a coordinating role in respect of the operational aspects of course organisation and delivery. A scheme has also been introduced for improving the qualifications and research profile of teachers.

The EUA Team notes these arrangements and procedures and also recognises that there is awareness on the part of the Polytechnic Institute of the need to move beyond the present situation, and to respond to the various external developments. The focus of ‘organisational’ quality initiatives is being extended to encompass teaching. Moreover, in some of their discussions with teaching staff, the Team also noted an acknowledgement that current arrangements for academic quality monitoring, review and evaluation needed to be strengthened and extended. The Team’s view is that this should include a change from the current focus on procedures for quality evaluation – with the reliance on questionnaire feedback – towards a broader emphasis on quality assurance and quality monitoring. At present, there is no overarching body or committee above the level of the organic units, with a specific remit for oversight of academic quality and standards, and supported by transparent vertical lines of
reporting and accountability. The EUA Team took the view that a wider, overarching academic quality assurance framework needs to be evolved. This would complement the framework being developed for organisational quality, would extend across all Schools and programmes, and would draw together and integrate the various elements and procedures developed to date. The current coordinating role of course director might also be extended and developed into a cross-institutional quality network covering all courses.

From their reading of the documentation provided, from meetings with staff at all levels, and from the perspective they developed on the present stage of development and challenges faced by the Polytechnic Institute, the EUA came to the view that the institution would be served well by striking a good balance between what might be termed 'organisational quality' initiatives, drawn from the world of industry, and its framework for 'academic quality'. In view of this, the Polytechnic Institute may wish to consider whether its organisational quality approaches, e.g. ISO 9001, are appropriate for application to teaching, the learning experience, and academic courses. While such approaches can readily be applied to administrative services, and to business-facing and customer-facing processes, the EUA Team took the view that perhaps the notion of 'customer' does not apply readily to students as learners. Indeed, in contrast to the task of meeting 'customer' needs, the purpose of a university is to engage in activities which lead to the transformation of students as 'learners'.

In formulating their views, the EUA Team recognises that the work on academic quality assurance represents a challenge for the Polytechnic Institute. But it is a challenge that the Team believes is accepted by the institution as being necessary for the purpose of meeting national requirements for external accreditation, and also for addressing the implications of wider European developments. Accreditation requirements will have an impact at both programme and institutional levels. Consequently, the Polytechnic Institute's framework for academic quality must be fit for all purposes, internal and external. A suitable starting point for this work is to engage more fully with the European Standards and Guidelines (ESG), and also to explore further the quality enhancement implications of the Bologna Process.

The EUA Team firmly believes that, having established an Office for Planning, Evaluation, and Quality (PEQ), and with the formation of an entirely new Quality and Evaluation Council (QEC) imminent, the Polytechnic Institute has the necessary mechanisms available to it to enable early progress to be made in this work. The composition and remit of the QEC, including as it does institutional oversight for quality evaluation, and responsibility for preparing for both the internal and external aspects of accreditation, makes it ideally placed to provide the necessary leadership and direction. It can also exercise an overview of the performance of Schools. In turn, in the view of the EUA Team, if the remit of the PEQ Office were extended to include processes for academic quality assurance, including annual and periodic monitoring and review of courses, as well as processes for organisational quality management, then it too will be well placed to contribute to this work.
The EUA Team welcomes the establishment of the new Quality and Evaluation Council and recommends that this new body considers how a broader based approach to quality – covering both organisational and academic quality – might be established, with procedures for academic quality assurance to include a procedure for the self-critical annual review of each academic programme. In addressing this recommendation the EUA Team believes that the Polytechnic Institute will make good progress towards the institutionalisation of quality assurance and establishing itself as a cohesive, self-critical academic community with quality systems that demonstrate a good balance between both internal and external dimensions. Members of the Team also believe that this will contribute much to the Polytechnic Institute’s broader aspirations towards developing and embedding a quality culture that reflects the distinctiveness and identity of the institution.

**Student representation and involvement in quality processes**

The students whom the members of the EUA Team met indicated awareness of the IEP programme and the SER. A number of arrangements are in place at the Polytechnic Institute for student representation and involvement in institutional processes. The Team were informed that student representatives had been provided with opportunities to contribute to and comment on the SER and had been part of the process of its development. Students are represented at School level by Student Associations and at institutional level by the Student Federation. Students were involved in the committee processes for changing the Polytechnic Institute’s statutes in accordance with the new higher education legal framework. Students will also be represented in the new governance structures, with four elected representatives of the Student Federation joining the General Council – a reduction from the current representation of one student for each of the six Schools. This reduction was a matter of concern on the part of students whom the EUA Team met. A student nominated by the Student Federation will join the new Academic Coordination Council, and new Quality and Evaluation Council, respectively.

The EUA Team learned that under existing arrangements students had the opportunity to raise issues and to provide feedback at both the General Council and the General Assembly. There is no student representation on each School Scientific Committee, the Schools’ decision-making body. As equal members of Pedagogic Committees, however, they are able to use this consultative forum raise issues regarding curriculum matters, timetabling, facilities management, teaching and assessment, and any concerns raised by fellow students. Student representatives can also make their views known to Scientific Committee on issues within the remit of those bodies, and all proposals to that body are progressed initially through the School Pedagogic Committee. These present arrangements for student involvement and representation School level will continue under the new dispensation.

When the EUA Team enquired with students about their knowledge of and involvement in wider organisational initiatives for quality, such as ISO 9001, and any opportunities they may have to contribute, they revealed no awareness of these quality processes. This particular lack of opportunity for involvement
was also confirmed by members of the Polytechnic Institute’s ‘Quality Team’. In view of the interest and enthusiasm displayed by the various groups of students with whom the EUA Team met, and their positive disposition towards the organisation as a whole, it appeared to the members of the Team that students are able to contribute to the broader dimension of initiatives to strengthen the institution’s quality culture. Accordingly, the EUA Team recommends that there is scope for the Polytechnic Institute to maximise opportunities for involving students more fully in quality processes and quality initiatives.

Student evaluation and feedback

The EUA Team noted that opportunities were made available for students to provide feedback on their experience through anonymised questionnaires. These centrally-devised forms were distributed each semester at School level and enabled students to give ratings, on a five-point scale, of their teachers’ performance, their own performance, and also the learning environment. It appeared that there was no space on the questionnaire for students to add qualitative comments or suggestions. Although the EUA Team were informed that reports are completed on the information received, during a number of meetings held with students a mixed picture emerged on the degree to which the 'loop' was being closed on issues raised, and on the consistency with which students were provided with feedback on actions taken as a result of issues they had raised or the feedback they had provided. While some students commented to the Team that the questionnaires have an impact and lead to change and improvement in teaching, others indicated that while they feed comments up, little or nothing is fed back down to them, or that nothing changes following feedback. In the latter case, it appeared that students may not know if their evaluations of their teachers have had any impact on, for example, pedagogy or course content.

In broad terms however, the EUA Team formed the view that the Polytechnic Institute and its teachers are sensitive and responsive to student views, and that informal arrangements mean that, often, issues are addressed without waiting for questionnaire feedback. Nevertheless, the Polytechnic Institute may wish to take steps to assure itself that all aspects of the student evaluation process are adhered to consistently across all Schools, subjects, and courses.

The EUA Team wishes to place on record the marked degree of pride in their Polytechnic Institute shown by students during meetings with members of the EUA Team. The Team also received confirmation from external partners and stakeholders, of the employability of Polytechnic Institute students, their attractiveness to employers, their achievements at regional and national level, and the extent to which their competencies, skills and training were valued by the wider society.

6. Developments in learning and teaching

The EUA Team learned in some detail of developments taking place at the Polytechnic Institute in approaches to learning and teaching. A key element in
this change process was the curriculum re-structuring and re-design associated with meeting some of the requirements of the Bologna Process. The Team learned that while these changes are beginning to be embedded in some curriculum areas, in others the change had been relatively recent. Some first cycle courses had yet to produce their first graduates. To support such change it was noted that, in addition to staff-related advice and support a number of activities, such as seminars, had been provided to raise awareness amongst students.

The EUA Team were re-assured to note the importance attached by the Polytechnic Institute to the student learning environment. The Team also noted that more general changes in teaching and learning methods and approaches were being progressed, some of which pre-dated the Polytechnic Institute’s ‘Bologna initiative’. For example, the SER and other documentation prepared for the EUA Team placed particular emphasis on e-learning, and the use being made of the ‘Virtual Campus’ – the University’s virtual learning environment (VLE) – to support and enhance learning and teaching. Students and staff whom the EUA Team met provided examples of their positive experiences in making use of this capability for academic purposes. The EUA Team was also interested to learn that each School had identified an academic member of staff with expertise in e-learning and learning technology to assist and advise colleagues on approaches to technology enhanced learning. The Director of the School of Education had been appointed to a cross-institutional position in e-learning to provide leadership and coordination in this area. All of this is to be welcomed. There is no doubt that there is a climate of awareness of the shift that is underway at the Polytechnic Institute towards more student-centred approaches. This was referred to on a number of occasions by staff and students as a shift in emphasis from ‘teaching’ to ‘learning’. Students provided examples of improvements in guidance and support.

Nevertheless, from their meetings with staff and students, and from their reading of the documentation provided, the EUA Team formed the view that the Polytechnic Institute still has progress to make in engendering new skills, practice, and knowledge to support the implementation of new teaching and learning methods and fresh approaches to curriculum design. There remain as yet untapped opportunities to ensure that all of the action lines of the Bologna Process are pursued. It appeared to the EUA Team that understanding of these opportunities remained somewhat uneven across the institution. This represents an ongoing challenge for the Polytechnic Institute and its Schools in terms of staff development.

It also points to the desirability of an institutional strategy for learning and teaching. In meeting such challenges and supporting fuller engagement with and adoption of pedagogic reforms, the EUA Team invites the Polytechnic Institute to consider practices used in other European HEIs. For example, the nomination of a Bologna promoter with a comprehensive understanding of the full Bologna agenda, or developing an in-house Bologna network with representation from each School. The EUA Team were particularly interested in the opportunity presented in these matters by the new consultative and committee arrangements. Given the terms of reference and composition of the
new Academic Coordination Council (ACC), and the remit for academic matters of the present Scientific and Pedagogic Councils, whose Presidents are all members of the ACC, it appeared to the EUA Team that the establishment of the new Council is very timely. Accordingly, while progress made in areas such as e-learning (Virtual Campus) is welcomed, the EUA Team encourages the Polytechnic Institute to review and consider whether the new Academic Council has an important role to play in providing leadership and direction for Scientific and Pedagogic Councils in further facilitating pedagogic development and the enhancement of academic practice and student centred learning.

The curriculum change and portfolio development undertaken to date is viewed positively by the EUA Team, and the Polytechnic Institute is to be congratulated on the work it has done in this area. The SER provided clear indications of the Polytechnic Institute’s intentions in improving the diversity of the courses offered, of capturing new market segments and publics, and in offering technical courses. There is also an acute awareness in the SER of the particular regional demographic challenges that are to be faced, and also the level of competition from other HEIs. In support of its aspirations the Polytechnic has centralised its course promotion strategy. Also, each School’s strategic goals, as set out in annual QUAR plans, illustrate the strategic emphasis placed on exploring possibilities for the development of new courses. From the meetings held with Polytechnic Institute senior managers and academic staff, and with external stakeholders, it was clear to the EUA Team that market contacts are good, both regionally and nationally, and that use was being made of appropriate employment and market data to assess market needs. The Team also noted, through meetings and through documentation provided to them, that priority was being attached to both the employability of the Polytechnic Institute’s graduates and to their future employment.

These are all important elements of the regional agenda of meeting stakeholder requirements, and of the emphasis on employability and employer awareness that is integral to Bologna curriculum reform. The examples that the EUA Team heard of external stakeholder input into course content and course development are to be commended. Nevertheless, the EUA Team advises the Polytechnic Institute that, as it diversifies and innovates in the range and type courses it offers, it should pay particular attention to the emphasis it places on generic skills development for students (in communication, IT literacy, languages, and so on), and to the importance of both tracking and stimulating market demand. In reflecting on the foregoing matters, the EUA Team notes the progress made by the Polytechnic Institute in curriculum change, and would encourage further progress towards open approach to the development of new courses, in response to the challenges of Bologna, regional needs, and stakeholder requirements.

The EUA Team also discussed other dimensions of portfolio planning and pedagogic development with the Polytechnic Institute. As is evident from both the Bologna Process and wider European trends, such as the EU Lifelong Learning Charter, higher education institutions are increasingly expected to address the lifelong learning and widening participation agendas. As a consequence, while encouraging the Polytechnic Institute in its initiatives to
develop new courses, to attract new publics, and to introduce new methods, the EUA Team urges it to ensure that its social role in serving the community is extended as well as its academic role. This has implications in terms of lifelong learning and social equity, but also in terms of enterprise and bringing fresh blood and new forms of training to small and medium enterprises (SMEs). More broadly it means a stronger focus for the Polytechnic Institute on identifying and meeting regional and local companies' continuing professional development (CPD) needs and the needs of external partners. Regional and national networks, including links with alumni, are of increasing importance.

The EUA Team believes that in achieving this broadening of horizons the Polytechnic Institute will need to strengthen and extend its human resource strategy and staff development and training programme beyond the current emphasis on staff qualifications, important though that is. Meeting these challenges requires that staff development arrangements and institutional learning and teaching strategy align much more directly to wider European trends in higher education. Given these considerations, and in reflecting on their meetings with staff and external stakeholders, the EUA Team recommends that, in its academic and pedagogic planning, particular attention is paid by the Polytechnic Institute to the lifelong learning and widening participation agendas, and to the professional updating, training, and enterprise requirements of stakeholders in industry, business and commerce.

7. Research and Knowledge Transfer

In common with all other Portuguese polytechnics, the Polytechnic Institute is not funded at national level to undertake fundamental research. In view of this, any research income that is generated is obtained through links with universities, under protocols established as a result of Polytechnic Institute staff being linked to university research centres and the competitive funding processes in which they are involved. The EUA Team were informed by staff of the Polytechnic Institute that the national situation is beginning to change, as some polytechnic consortia bids for research funding from the national agency, in the area of ‘pure’ research, have been successful. Nevertheless, the broader picture of the financing of research at the Polytechnic Institute is that there is no central budget for research per se, and any such activity at the level of the School is mostly supported through the budget allocated to Schools for the purpose of supporting teaching and other activities.

In addition to the challenges of funding research activity, although a doctoral degree is increasingly required of teaching staff, polytechnics are not permitted to develop doctoral degree programmes. As the SER indicates, this places a constraint on one of the key strategic vectors of the Polytechnic Institute's academic profile – 'the promotion of research by means of national and international partnerships' – since many staff are young and their research is determined for the most part to the need to obtain a higher degree. As a consequence, their research tends to be linked to the university research centres at which they undertake doctoral studies.
The EUA Team learned, however, that the legal situation as it applies to the polytechnic system is changing and that the RJIES (Juridical Regime for Institutions of Higher Education) anticipates that institutes such as Instituto Politécnico de Castelo Branco will increasingly develop applied research. While constraints on the Polytechnic Institute remain – for example in the creation of centres of excellence with a regional and national profile – a relatively more favourable climate is emerging in which it can pursue its strategic aims in applied research fields, and in knowledge transfer activities. Aims relating to these activities are clearly evident in institutional-level strategic documents, and in School annual QUAR plans, seen by the EUA Team. The importance of such applied research to the Polytechnic Institute is fully recognised by the EUA Team, as is the contribution it can make to the enhancement and renewal of courses. For the EUA Team this reflects the Humboldtian principle of ‘no teaching without research’, and ‘no research without teaching’, which is essential for all higher education institutions.

From their reading of documentation provided, and from meetings with staff and with external partners and stakeholders, the EUA Team formed the clear view that the Polytechnic Institute is building appropriate external links that form a good basis upon which to make progress in applied research and knowledge transfer activities. These links – regional, national and European, with universities and with business and industry – can be extended even further. In this, units such as the Centre for Languages and Culture, the Sector for Support for Regional Development (SADER), and involvement in the national Centre for Studies in Natural Resources, Environment and Society (CERNAS), are all illustrative of the potential of existing structures for growing future activity, especially in applied research. Of the 100 or so agreements already established at regional and national level, a number are in applied research fields. The role played by CEDER in promoting partnerships and project links in specialised research and services at regional level is a particularly significant one. Its activities cover the development of strategic alliances, the promotion of knowledge transfer opportunities, and the creation of new enterprise projects. In this it works closely with the Polytechnic Institute’s Schools and Directors.

Alongside the activities and structures described, the SER also notes that many research projects are developed outside these formal structures, through various inter-institutional, national, and international initiatives in which individual members of staff are involved. The EUA Team also learned that each School’s Scientific Council has the autonomy to define the research and development policy and strategy for the School. This led the Team to the view that perhaps this signalled a relatively laissez faire tendency in this key area of institutional policy.

On the basis of this the members of the EUA Team consider that, if improvement and capacity building in research are to be realised, a more centralised steer and coordinated approach to research is needed, similar to the institutionalisation that the Polytechnic Institute is progressing in its other activities. The EUA Team believes that the mechanisms for achieving this are already available. The terms of reference of the new Academic Coordination Council encompass the activities of research units and suggest that that body
can play a key role in exercising institutional oversight of research activities, particularly since the new consultative committees are designed to contribute to the strengthening of organisational cohesion. Also, it appeared to the EUA Team that, given the positive role played to date by CEDER, its remit might be broadened to enable it to play an even wider role in the coordination of research activity across the institution.

The EUA Team learned that in support of the Polytechnic Institute's strategic ambitions, a high priority is being attached to staff research qualifications. In 2006, the Permanent Commission launched a programme for Advanced Training to support staff completing higher degrees. This enables fees to be met and for arrangements to be made to reduce the teaching load of staff undertaking research in this way. It appeared to the EUA Team that this prioritisation seemed to be serving the Polytechnic Institute well, with increasing numbers of teaching staff completing doctoral studies. This is an area of strategic importance since, according to a higher education legal decree of 2006, graduate and Masters' degrees can only be offered if a higher education institution's staff are appropriately qualified in the appropriate areas of study. Of these, the majority are required to be qualified to doctoral level, or classified as specialists in those areas. The EUA Team learned that the minimum threshold established by law, which the Polytechnic Institute's courses must meet by 2012, is for at least 15% of staff to be qualified in this way. This is also a critical matter in the context of the new national quality accreditation agency, which will be empowered to recommend withdrawal of approval for any course which falls below this threshold.

While commending the Polytechnic Institute for putting in place a programme to support the achievement of this benchmark, and its determination to meet this target, the EUA Team would encourage the Polytechnic Institute to set its own threshold well above the 15% standard set for them at national level. This will benefit not only the individuals concerned but also the wider research agenda of the Polytechnic Institute and its organic units. In this regard, the Team would urge the Polytechnic Institute to take particular note of the importance of keeping its staff policy in this area under constant review. Indeed, the Team formed the view that this policy should be underpinned by a fully developed human resources strategy that helps to facilitate the Polytechnic Institute's broader research ambitions – such as growing research teams, creating research centres, growing its applied research capacity, and thereby generating more research income. In the view of the EUA Team, this course of action is a priority since it will not only enable the Polytechnic Institute to carry on its existing good work, but will also enable it to take it further. Given that the Polytechnic Institute is prioritising staff research and research in applied fields, the EUA Team recommends that this should be clearly reflected in and driven by a clearly defined institutional research strategy and strong central coordinating arrangements, and also supported by institutional staffing policy and human resources strategy.

The EUA Team learned of other aspects of the institutional research story that merit attention, including the emphasis being placed on multi-disciplinary research. The SER highlights this as an important element of the Polytechnic
Institute's desire to address the relative weakness it perceives, as identified in its SWOT analysis, in capitalising fully on its scientific and research potential. This was also an area drawn to the Team's attention by teaching staff, groups of whom placed emphasis on their desire to situate their research in cross-curriculum, cross-faculty, and inter-disciplinary research within the Polytechnic Institute, and aspiring to creating conditions favourable to developing their own research groups and research centres in applied fields. In a similar vein, other staff pointed to the opportunities for submitting knowledge transfer projects for funding within European frameworks.

The EUA Team would concur with the importance of this growing emphasis being placed on both the inter-disciplinary and multi-disciplinary dimension of research, and the European and international dimension of scientific cooperation. The Team also recognised, and discussed with staff, the challenge faced in staff moving to a situation where they sever their links with universities in an effort to grow research activity, and perhaps research centres, at the Polytechnic Institute. It was apparent however, that in areas such as CERNAS, this process was already underway. In the view of the EUA Team, the development of an institutional research strategy would quicken this process. The EUA Team wishes to encourage the further development of interdisciplinary research initiatives, inter-faculty projects, and also European and international initiatives, and recommends that arrangements to support and facilitate this continue to be strengthened and reviewed.

8. International and wider European dimension

The importance attached to the International and wider European dimension by the Polytechnic Institute since its establishment some 28 years ago can be illustrated in a number of ways. This includes the various agreements and protocols with foreign companies, international organisations, and universities, and collaboration in study exchanges and internships through EU mobility programmes and the ECTS diploma supplement, together with joint educational and scientific projects and activities. The EUA Team was informed that these links and activities were very much part of the modern profile the Polytechnic Institute wishes to develop. In developing this profile, the use made since 1992 of European COMETT, Erasmus and Leonardo da Vinci mobility programmes, for students and staff, the participation in trans-national research and study programmes, such as Comenius and Lingua, the development of joint international courses, and strong links with former Portuguese colonies, have all played an important part, as has the increasing level of engagement with the Bologna Process. The Polytechnic Institute also regards internationalisation and Europeanisation as important in terms of contributing to regional development.

In support of this activity the Polytechnic Institute's International Relations Office, together with each of the School International Coordinators, make an important contribution across a range of areas. This includes the provision of School-based language courses, preparations for incoming and out-going Erasmus and da Vinci mobility, preparation of learning agreements, and links
with relevant national and international agencies and networks. Since 2004, the Polytechnic Institute has itself contributed to the financing of mobility, for staff and students, and annually sets aside a sum of money for this purpose. The EUA Team were informed that increasing the level of mobility would be impossible without institutional financial support, and that this is viewed by the Polytechnic Institute as one of a number of constraints on extending its European activity. Other constraints noted by the EUA Team included the challenge of finding suitable and affordable links for students, and reconciling the need for staff to complete doctoral studies with the need to enhance language skills and become more mobile internationally.

Though noting these challenges, the EUA Team firmly believes that studies and contact abroad, for both students and staff, is indispensable today and is beneficial in so many ways. Members of the Team formed the view that this perspective is shared by the Polytechnic Institute. From their meetings with students it was evident to the EUA Team that the prospect of opportunities for increased levels of mobility was viewed very positively. Indeed, the view was expressed to the Team by students that one positive advantage of increased teacher mobility would be that this would improve the quality of teaching and learning. In endorsing this view, the EUA Team would also add that there are similar advantages to be gained through the mobility of non-teaching, administrative staff. From this, the Team formed the view that a sustainable approach to exchanges and mobility was needed, informed by a clear policy. The EUA Team acknowledges the constraints facing the Polytechnic Institute in its efforts to secure greater mobility of both students and staff, but would recommend that a policy is developed to act as a driver for this activity, supported by clear arrangements for monitoring and review at executive level.

In noting the various manifestations of the Polytechnic Institute's international, and especially its European, aspirations and activities, the EUA Team noted the distance yet to be made in the area of language provision and language policy. For higher education teachers this is especially important since it links to the ability to work and to network on the wider European stage. The EUA Team learned that, since 2007/2008, the Polytechnic Institute is one of only a small number of institutions to be approved to deliver EILC Portuguese courses, and its Centre for Languages and Cultures currently makes provision for incoming Erasmus students. During 2008, the provision was extended and the costs met by the Polytechnic Institute.

An effort is also being made to introduce English language provision in all of the Polytechnic Institute’s Schools. To date, for four of the six Schools, the EUA Team was informed that this is a mandatory subject in some courses. The aspiration is to achieve this in all courses across the Polytechnic Institute. A proposal is also being developed to establish postgraduate courses where the language medium is English, thereby attracting more of an international recruitment. However, the EUA Team learned from groups of students that, in their experience, foreign language provision was insufficient, but was a need that had been growing each year. Some students expressed the view that the constraints on opportunities to study English, over a maximum of two semesters, might contribute to relatively low student mobility. In view of these
findings, to support and strengthen the Polytechnic Institute’s international and European aspirations, the EUA Team strongly recommends that a language policy be developed, without delay, and that this should focus on incentivising and enhancing both student and staff language capabilities.

During meetings with the EUA Team, in the documentation prepared for IEP evaluation, and in its strategic papers, the Polytechnic Institute has made clear its European and international dimension. Though relative to Polytechnic Institute’s ambitions the level of activity in some of these areas is at present modest, nevertheless the EUA Team would strongly encourage the Polytechnic Institute in its aspirations, particularly in the wider European sphere. There are many opportunities to participate in programmes, networks, seminars, and discussions. If the Polytechnic Institute’s identity is to be promoted and secured on the wider international stage, these opportunities should be pursued in a focused and planned manner. To assist it in establishing its standing beyond the immediate region, the EUA Team proposes that the Polytechnic Institute may wish to consider the establishment of an Advisory Board, incorporating external representation and involvement of international authorities, to act as an advisory forum on the wider dimension of organisational change and development, and to stimulate networking and engagement with European and international trends, developments, and debates.

The EUA Team formed the view that the establishment of such a Board would strengthen the link between the immediate regional context and the broader international dimension. The networks and external links already established by the Polytechnic Institute will assist in the process of creating such a Board, which might meet on one or two occasions each year. It should include international figures with appropriate experience and reputation, as well as national people with a suitable profile in the Portuguese context, including former students, all of whom might act as consultants and advisors on issues that are of strategic importance to the Polytechnic Institute. The EUA Team believes this will contribute to the Polytechnic Institute’s vision, and provide an important window on future direction and development.

9. Recommendations

The recommendations of the EUA Team relate to matters which have a direct bearing on the development of the Polytechnic Institute’s capacity for taking forward successful change.

* Governance, management, strategic planning

- The EUA Team encourages the Polytechnic Institute to make good progress with the establishment of the various new executive and administrative bodies, and deliberative councils, in order to secure an efficient, confident, and effective transition to the implementation of the new statutes;
In order to facilitate initiatives to support institutional cohesion and effectiveness, the EUA Team strongly encourages the Polytechnic Institute to put in place a five-year strategic plan which is clearly focused on the new mission and the principal organisational objectives. This strategy should be underpinned by a set of supporting strategies in key areas (finance, quality, research, learning and teaching, human resources, and international development).

Quality assurance and quality culture

- The EUA Team strongly recommends that the University continues to make progress with initiatives to secure the successful institutionalisation of quality assurance, underpinned by a culture of continuous quality improvement;

- The EUA Team welcomes the establishment of the new Quality and Evaluation Council and recommends that this new body considers how a broader based approach to quality – covering both organisational and academic quality – might be established, with procedures for academic quality assurance to include a procedure for the self-critical annual review of each academic programme;

- The EUA Team formed the view that there is scope for the Polytechnic Institute to maximise opportunities for involving students more fully in quality processes and quality initiatives.

Development of Learning and Teaching

- Progress made in areas such as e-learning (Virtual Campus) is welcomed, and the EUA Team encourages the Polytechnic Institute to review and consider whether the new Academic Council has an important role to play in providing leadership and direction for Scientific and Pedagogic Councils in further facilitating pedagogic development and the enhancement of academic practice and student centred learning EUA Team formed the view that there is scope for the Polytechnic Institute to maximise opportunities for involving students more fully in quality processes and quality initiatives;

- The EUA Team notes the progress made by the Polytechnic Institute in curriculum change, and would encourage further progress towards on open approach to the development of new courses, in response to the challenges of Bologna, regional needs, and stakeholder requirements;

- The EUA Team also proposes that, in its academic and pedagogic planning, particular attention is paid by the Polytechnic Institute to the lifelong learning and widening participation agendas, and to the professional updating, training, and enterprise requirements of stakeholders in industry, business and commerce.
Research: research policy in applied fields

- Given that the Polytechnic Institute is prioritising staff research and research in applied fields, the EUA Team recommends that this should be clearly reflected in and driven by a clearly defined institutional research strategy and strong central coordinating arrangements, and supported also by staffing policy and human resources strategy;

- The EUA Team wishes to encourage the further development of interdisciplinary research initiatives, inter-faculty projects, and also European and international initiatives, and recommends that arrangements to support and facilitate this continue to be strengthened and reviewed.

International and wider European dimension

- The EUA Team acknowledges the constraints facing the Polytechnic Institute in its efforts to secure greater mobility of both students and staff, but would recommend that a policy is developed to act as a driver for this activity, supported by clear arrangements for monitoring and review at executive level;

- To support and strengthen the Polytechnic Institute's international and European aspirations, the EUA Team strongly recommends that a language policy be developed, without delay, and that this should focus on incentivising and enhancing both student and staff language capabilities;

- To assist it in establishing its standing beyond the immediate region, the EUA Team proposes that the Polytechnic Institute may wish to consider the establishment of an Advisory Board, incorporating external representation and involvement of international authorities, to act as an advisory forum on the wider dimension of organisational change and development, and to stimulate networking and engagement with European and international trends, developments, and debates.
10. Envoi

The EUA Team wishes to thank the Polytechnic Institute for the excellent arrangements for made in preparation for its visits and in support of the work undertaken by the Team, and also for the generous hospitality extended by the Polytechnic Institute and its staff. As has been noted at various points in this report, the Polytechnic Institute is in transition and faces a period of transformation and structural change. It has been a great pleasure to discuss with staff, students, and external stakeholders, the strategic challenges now facing the Instituto Politécnico de Castelo Branco, and the opportunities available for meeting these. The Team hopes that the Polytechnic Institute finds its comments and suggestions helpful and supportive in its planning for the future. We believe that the Polytechnic Institute has great potential, not least in the good spirit of its staff, and is well placed to achieve its future goals and aspirations, and we wish the institution well in its next stage of development.