

**INSTITUTO PORTUGUÊS DE ADMINISTRAÇÃO DE MARKETING  
(IPAM), MATOSINHOS, PORTO, PORTUGAL**

***EVALUATION REPORT***

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## FOREWORD

### 1. The concept of the EUA Institutional Evaluation Programme

#### 1.1 The philosophy

Following two successful conferences on the theme of *quality and evaluation*, the Permanent Committee of the then CRE (Conférence des Recteurs), which became EUA (European University Association) in 2001, decided in 1993 to offer its then 500 member universities the possibility to be reviewed so that their strengths and weaknesses in the area of quality management and strategic development might be assessed.

The central mission of the Institutional Evaluation Programme (IEP) of EUA is to strengthen the strategic steering capacity of higher education institutions and to enhance their autonomy and their accountability to the public.

Through this Programme, EUA wishes to offer an external diagnosis provided by experienced university leaders and experts coming from different higher education systems in Europe and beyond. This diagnosis should address the quality assurance procedures and the role of the main actors in the university's daily decision-making processes. It should be a tool for institutional leadership preparing for change. The EUA/IEP is not intended to provide the university with a blueprint for its development; rather the review process is a consultative one or, in Martin Trow's terminology, an "*external supportive review*"<sup>1</sup>.

Through an evaluation of higher education institutions in the context of their specific mission and goals, the EUA/IEP actively supports higher education institutions in fulfilling their public mission by providing recommendations on the full range of their activities (research, teaching and learning, and service to society) and on their institutional organisation, processes, policies, structures and culture. These supportive recommendations are based on European and international good practices.

By reviewing institutions in different countries, EUA hopes to disseminate examples of good practice, validate common concepts of strategic thinking, and provide shared references of quality that will help member universities to re-orient their strategic development, thereby strengthening the quality of European higher education institutions. Specifically, the review aims at helping the universities derive the following benefits:

- An increased awareness, across the university, for the need to develop an internal quality culture.
- An increased capacity for setting and implementing strategic goals.
- An effective complement to national quality assurance procedures through the use of peers and an improvement-orientated approach.

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<sup>1</sup> M. Trow: "Academic Reviews and the Culture of Excellence", Studies of Higher Education and Research, 1994/2.

## 1.2 The methodology

The methodological instrument of the Programme focuses on the universities' capacity to change, including their strategic planning and internal quality monitoring, and examines if all the preconditions are assembled to make each institution more adaptable and responsive to the changing higher education environment at the local, national, European and international level.

More specifically, the EUA institutional evaluation methodology is guided by four central strategic questions, as follows.

- What is the institution trying to do (and why)? This (twofold) question refers to the vision, mission and aims of the institution. A clear strategy is important in order to decide on priorities, strategic objectives and the means to reach these objectives;
- How is the institution trying to do it? The evaluation investigates the way in which the institution attempts to fulfil its mission in terms of organisation, governing structures and processes;
- How does the institution know it works? This question points to the necessity of having sound quality arrangements in place. The evaluation team looks at the institutional policies and practices regarding quality and other relevant processes in terms of actors, structures and procedures;
- How does the institution change in order to improve? This is a key question for EUA's institutional evaluations. It is the institution's capacity for change and improvement that allows it to deal with a fast-changing environment and to respond to evolving needs.

The EUA/IEP is committed to fostering continuous improvement and adheres to good international and European practices, such as the European Standards and Guidelines (ESG) for Quality Assurance in the European Higher Education Area. Currently, the EUA/IEP is undergoing an external evaluation conducted by ENQA in accordance with the ESG.

## 1.3 The history

In 1994 the Universities of Göteborg, Porto and Utrecht commissioned the then CRE to develop the methodology for the quality review programme and to test it in their institutions. This *pilot phase* of the International Institutional Quality Review was completed in January 1995. Central to the process is a set of *guidelines* developed by Professor Frans van Vught, then Director of the Centre for Higher Education Policy Studies (CHEPS) at Twente University, and Don Westerheijden, also of CHEPS. In 1995-96 a second *experimental* review round took place with the participation of ten universities located in western, central and Eastern Europe. The experiences of the first two years led to minor adaptations in the programme, and the 1996-97 round was the first one in the *«full-grown» CRE Institutional Evaluation Programme*, with 13 participating universities. To date a total of **191** universities have participated in the EUA/IEP (including the academic year 2007-08), seven of which are located in four Latin American countries and one in South Africa. The remaining **183** universities are distributed among **35** European countries and **24** of these institutions have already undergone follow-up evaluations as well.

## **2. System evaluation of Portuguese higher education by EUA/IEP**

Over the past few years, and in addition to the individual institutional evaluations, EUA/IEP has begun to conduct “coordinated evaluations” at the national or regional level in which all universities or a sample of institutions are evaluated. Since 2001, the IEP has reviewed all universities in Serbia, Bosnia Herzegovina, Ireland, and Slovakia and a number of institutions in Catalonia, Greece and Portugal. These evaluations are usually funded by a governmental agency.

Each institution is first evaluated individually followed by an overall general evaluation. The major goal of the system evaluations is to identify the systemic conditions that would serve to increase the dynamic of change in institutions and strengthen the anchoring of the national higher education systems to Europe.

In Portugal a system-wide extensive, independent, voluntary and objective review of higher education institutions (universities and polytechnics, public and private, and their units) is being conducted by the EUA/IEP following international criteria and paying special attention to governance mechanisms, access rules, institutional autonomy, funding, internationalisation, and other relevant higher education policies. The Ministry for Science, Technology and Higher Education (MCTES) has facilitated institutional evaluations for up to ten Portuguese institutions per year, as determined on a voluntary basis, that wish to gain institutional evaluation experience and to have an international supportive evaluation by EUA/IEP aimed at improving management practices and quality assurance procedures. The review of individual institutions follows EUA/IEP’s standard practice for institutional review. It also includes some additional objectives which in simple terms are:

- to identify the overall positive characteristics, development status and opportunities available for improvements;
- to examine governance and management systems with suggestions for improvements;
- to explore institutional capacity for adaptation, development and change;
- to learn how students – including non-traditional students – are recruited, life long learning is facilitated, and the knowledge-base of the Portuguese population is improved;
- to examine student exit routes including types, relevance and utility of available qualifications;
- to make recommendations that foster the institution’s rationalisation and diversification.

The EUA/IEP reviews of individual institutions are complemented by two other recent evaluation exercises of higher education in Portugal. Firstly, the European Association for Quality Assurance in Higher Education (ENQA) reviewed the accreditation and quality assurance practices of Portuguese tertiary education<sup>2</sup>. Secondly, an OECD review of the tertiary education system and policies<sup>3</sup> has examined the performance of Portuguese tertiary education by reference to other OECD countries and provided recommendations for its improvement<sup>4</sup>.

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<sup>2</sup> ENQA: “Quality Assurance of Higher Education in Portugal”, ENQA Occasional Papers, Helsinki, 2006.

<sup>3</sup> OECD: “Reviews of National Policies in Education: Tertiary Education in Portugal”, Paris, 2007.

<sup>4</sup> A significant difference should be identified between the system evaluations made by OECD and the

These overall, system review exercises are designed to ensure that the tertiary education system in Portugal gains maximum benefit and input from comprehensive evaluations by teams of experienced international experts and that procedures and processes are in place and can be benchmarked against best international practice. The results from all these complementary exercises are expected to form part of a broader initiative by the Portuguese government.

### **3. Institutional evaluation of the “Instituto Português de Administração de Marketing” (IPAM) in Matosinhos**

In November 2007, the President of the “Instituto Português de Administração de Marketing (IPAM)”, Prof. Ferrão Filipe, requested an institutional evaluation by the European University Association (EUA) for the one of the three schools forming the IPAM, namely the one situated in Matosinhos, Porto (IPAM-M). This evaluation has been undertaken by EUA in the framework of its Institutional Evaluation Programme, as part of the above mentioned system evaluation of Portuguese higher education.

The Steering Committee of the EUA Institutional Evaluation Programme appointed, as members of the evaluation team for IPAM-M, the following:

- Regis Ritz, former Rector, Université Michel de Montaigne - Bordeaux, France, as chair;
- Dennis Anderson, former President and Vice Chancellor, Brandon University, Canada;
- Katja Kamšek, student, University of Ljubljana, Slovenia; nominated by the European Student Union (ESU);
- Dionyssis Kladis, professor, University of the Peloponnese, Greece, former Secretary for Higher Education in Greece, as secretary.

The preliminary visit and the main site visit to IPAM-M took place in April and October 2008, respectively.

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coordinated evaluations made by EUA/IEP. While OECD evaluates directly the whole higher education system at the national level, EUA/IEP’s evaluation results from the synthesis of the parallel individual institutional evaluations conducted in a restricted period of time and under concrete and visible terms of reference and on a voluntary basis.

## INTRODUCTION

### 4. The evaluation process

#### 4.1 Outline of the two visits

In keeping with the framework of the EUA Institutional Evaluation Programme, the institutional evaluation of IPAM-M consisted of several phases. First, the evaluation team received a 20-page *self-evaluation report (SER)* with informative appendices. The SER provides a good illustration of the current situation of the school and its development over the last few years. The SER was produced by a self-evaluation group, chaired by the President of IPAM, Prof. Ferrão Filipe, and under the coordination and supervision of the Director of IPAM-M, Dr. Daniel Sá. The self-evaluation group coordinated the overall self-evaluation process as well.

Upon receiving the SER, the evaluation team made a *preliminary visit* to IPAM-M on 14-16 April 2008 to get acquainted with the school and to help clarify important or delicate issues arising from the SER. The *main visit* of the evaluation team took place on 6-8 October 2008. During the two visits, the evaluation team had the opportunity to discuss the situation of IPAM-M with many of its actors and with the main stakeholders, including:

- the leadership, with members of the teaching staff and with students from both academic and executive study programmes;
- members of the Management Board of IPAM;
- members of the pedagogical and the scientific boards of IPAM-M;
- members of the administrative staff, and especially with persons in charge of quality, financing, internationalisation, and research;
- outside partners, (representatives of public authorities and other stakeholders); and
- members of the Student Union.

During the two visits, the evaluation team had also in-depth discussions with the President of IPAM, Prof. Ferrão Filipe, and the Director of IPAM-M, Dr. Daniel Sá, as well as with the self-evaluation group. All these meetings and discussions were efficiently organised by Dr. Daniel Sá, who was in parallel the liaison person between IPAM-M and the evaluation team.

The evaluation team, therefore, had the opportunity to meet a broad spectrum of actors at IPAM-M. At the same time, it had the opportunity to glean the views of the external partners regarding the school and their relations with it.

On the last day of the main site visit, the chairperson of the evaluation team, Professor Regis Ritz, presented the team's *oral report* to an audience consisting of the President, the Director and members of the teaching and administrative staff of IPAM-M, as well as external partners. The oral report constitutes the basis of the present *evaluation report*, which also results from all written information collected during the review, interviews with various IPAM-M members and external partners and the evaluation team's observations during the two visits.

## **4.2 Outline of the review**

The evaluation team would like to express its sincere thanks to the President of IPAM, Prof. Ferrão Filipe, and the Director of IPAM-M, Dr. Daniel Sá, for the efficient preparation and organisation of the two site visits which provided the evaluation team with comfortable and effective working conditions. The evaluation team is also grateful for the generous hospitality provided by IPAM-M. It was indeed a pleasure to work in the friendly atmosphere extended to all the people involved.

During the meetings, the evaluation team had the opportunity to interview many leading members of IPAM-M, professors, researchers, members of the administrative staff and students. All interviewees were open in expressing opinions and providing facts. They actively participated in lively discussions with the evaluation team, presenting their views about the quality culture within IPAM-M, the vision and the mission of the school and its dynamics for change and improvement, its current situation (including constraints and opportunities) and its future prospects.

As mentioned in the SER and as was further explained during the meeting with the self-evaluation group, the preparation of the SER resulted from a process which was confined to the small self-evaluation group; the process was not widely disseminated and sufficiently publicised within the school. However, it is apparent that the self-evaluation process had a strong positive effect helping the school to acquire better self-knowledge through collection of important institutional data and subsequent publication of these data and related commentary in the SER.

Nevertheless, the evaluation team appreciated the work done in the SER and considered it as informative, adequately documented and a fairly complete report. At the end of the first visit the evaluation team asked for additional information, mainly concerning governance and budget issues, but also issues related to quality management, internationalisation and the long-term strategic plan of the school. IPAM-M provided the requested additional information in the agreed time.

As mentioned in the SER, and as was explained by the members of the self-evaluation group, both the production of the SER and the overall self-evaluation process, together with the related SWOT analysis, constituted a rewarding exercise for those involved, enhancing their awareness and self-knowledge of features and issues relating to IPAM-M. The evaluation team believes that the SER, once augmented by the additional information requested, presents a realistic view of the school and this is very satisfactory because it is not easy to write a report in a period of change such as the current one, when the wind of change is blowing on higher education in Portugal. The evaluation team considered the SER as an honest and critical analysis of the situation.

### **4.3 Outline of the evaluation report**

The EUA Institutional Evaluation Programme is concerned with assessment and improvement of the existing mechanisms and processes for strategic management and quality assurance and, in that context, with the assessment and the improvement of the capacity of the HEIs to adapt to the rapidly developing higher education environment in Europe and the world. Although the IEP process does not involve a direct, in-depth review of the institution's quality of teaching and research activities, it assesses whether or not these matters are part of the overall quality culture of the institution.

In this context, the evaluation team's task is to scrutinise the mechanisms existing in the reviewed institution for quality assurance and its capacities for strategic change. This evaluation report, therefore, emphasises the current strengths and weaknesses regarding the capacity for change and expresses a number of recommendations that may be taken into account in the future development of IPAM-M. Of course, this evaluation report should be read in conjunction with the SER of IPAM-M and with the corresponding additional information that was provided to the evaluation team. Furthermore, the comments are based on two intense and rather short visits: one two-day preliminary visit and one three-day main visit. The evaluation team also collected a significant amount of information on the Portuguese higher education system, but it is not possible for the analysis to go into such details. The comments and recommendations, therefore, will be confined mostly to major issues of concern to the structures and procedures within IPAM-M. The recommendations appear in separate paragraphs in the text of the evaluation report. A summary of recommendations is presented at the end of this report.

## 5. The national and institutional context

### 5.1 Higher Education in Portugal

Higher education in Portugal is regulated by Law No. 62/2007 which came into force on 10 September 2007, setting out the details of what institutional autonomy will mean for Portuguese HEIs.

In Portugal, higher education is organised into a binary system consisting of university and polytechnic institutions, which are either public or private. The two sectors are distinguished by the degree of their vocational and professional orientation. Universities are high-level institutions delivering Bachelor [*licenciado*], Master [*mestre*] and Doctoral [*doutor*] degrees, whereas Polytechnics are high-level institutions delivering Bachelor [*licenciado*] and Master [*mestre*] degrees. Regarding research, Polytechnics are required to conduct research that is applied in nature and which has a vocational or professional outlook. Universities, by contrast, undertake both basic and applied research.

Higher polytechnic education in Portugal has been in existence since 1986. According to Article 7 of Law No. 62/2007, the polytechnic education institutions “*are high level institutions oriented towards the creation, transmission and dissemination of the professional culture and knowledge, through the articulation of the study, the education, the oriented research and the experimental development*”. The polytechnic sector includes the polytechnic institutes (Polytechnics) and polytechnic schools which are not integrated into polytechnic institutes; the latter may either be integrated into a University or remain as independent, non-integrated polytechnic schools.

The following Tables 1 and 2 illustrate the basic statistical data regarding higher education in Portugal<sup>5</sup>.

Table 1  
Number of higher education institutions in Portugal

Distinction according to ownership	University education		Polytechnic education	
	Universities	University schools non-integrated into Universities	Polytechnic institutes	Polytechnic schools non-integrated into polytechnic schools
Public	14	5	15	15
Private	14	33	2	54
TOTAL	28	38	17	69

<sup>5</sup> The data in Tables 1 and 2 have been taken from the National Bologna Report for Portugal for the two-year period 2005-2007, which was submitted to the Bologna Follow-Up Group in December 2006 by the Ministry of Science, Technology and Higher Education (General Directorate for Higher Education).

Table 2  
Number and percentage of students enrolled in 2005-06

Types of institutions	Number of students	Percentage of students related to total	Percentage of students related to various groups
<b>Public higher education</b>	<b>275.961</b>	<b>75,0%</b>	<b>100,0%</b>
University education	171.575	46,6%	62,2%
Polytechnic education	104.386	28,4%	37,8%
<b>Private higher education</b>	<b>91.973</b>	<b>25,0%</b>	<b>100,0%</b>
University education	61.754	16,8%	67,1%
Polytechnic education	30.219	8,2%	32,9%
<b>University education</b>	<b>233.329</b>	<b>63,4%</b>	<b>100,0%</b>
Public	171.575	46,6%	73,5%
Private	61.754	16,8%	26,5%
<b>Polytechnic education</b>	<b>134.605</b>	<b>36,6%</b>	<b>100,0%</b>
Public	104.386	28,4%	77,5%
Private	30.219	8,2%	22,5%
<b>TOTAL</b>	<b>367.934</b>	<b>100,0%</b>	—

It should be noticed, however, that although the university sector was predominant in 2005-06 with 63,4% of the whole higher education student population, it shows decreasing trends in the period between 1997-98 (71,3%) and 2005-06 (63,4%), while during the same period the polytechnic sector shows increasing trends from 28,7% in 1997-98 to 36,6%<sup>6</sup>.

## 5.2 The profile of IPAM-M

IPAM Matosinhos (established in 1984) is one of the three private independent polytechnic schools that comprise IPAM, the other two being IPAM Lisbon and IPAM Aveiro, established respectively in 1987 and 1989. In 2002, a fourth school – European Faculty of Marketing Management (FERAM) – was created in Recife, Brasil. Thus, IPAM can be considered an umbrella entity for the three independent polytechnic schools in Portugal and the fourth school in Brasil. The owner of IPAM is Ensigest ([www.ensigest.com](http://www.ensigest.com)), which is a profit-making company offering educational services at various levels (higher education and secondary/primary education).

The three schools comprising IPAM in Portugal are legally autonomous. As explained in the SER, the autonomy of the three schools is mixed. Each school has its own statutes, regulations

<sup>6</sup> Observatory of Science and Higher Education: “Evolution of the number of students enrolled in higher education by district and NUTS II, 1997-98 to 2005-06”, 2007.

and management bodies, but, at the same time, important matters are centralised; for example, the schools' mission, strategic guidelines, and some operational areas are discussed, defined, and implemented under the scrutiny of a management board and with the oversight and direction of Ensigest.

On the other hand, there is a high degree of autonomy for each separate school regarding the definition of the teaching, research and innovation models, the management of technical, human and financial resources, and the organisation of the management model and monitoring system. Regarding governance and management, each school has its own Director, but there is one single President for IPAM as a whole who is responsible for all schools. Given the above structure, it has to be underlined that the present evaluation was requested by IPAM-M and, therefore, the current evaluation report refers only to IPAM-M.

IPAM-M is located in Matosinhos, a town with approximately 160.000 inhabitants integrated into the Greater Porto area, which includes over two million inhabitants. Porto and the surrounding area of northern of Portugal are second to the Lisbon area in respect to quantitative measures of economic performance and development activity. Porto is an area characterised by a strong entrepreneurial system that comprises a number of companies operating in the traditional manufacturing sectors (shoes, textile and furniture) and in the service sector. As IPAM operates in three different geographical areas, the three schools cover the entire country. The area of influence for IPAM Matosinhos begins below Porto and extends northward to the frontier with Spain, covering all the coastal area and the interior of northern Portugal.

IPAM Matosinhos is a niche higher education institution focusing primarily on the marketing discipline. It offers two types of courses: academic and executive. In the academic category, the school offers one course in technological specialisation ("Shop Management")<sup>7</sup>, two 1st cycle programmes ("Marketing Management" and "Consumer Sciences"), and one 2nd cycle programme ("Marketing Management"). Furthermore, two new 2nd cycle academic programmes ("Consumer Behaviour" and "Services and Client Management") have been approved by the Ministry since the second visit of the evaluation team to IPAM-M.

It should be noted that, although universities essentially have full autonomy for the creation, delivery, suspension, or cancellation of degree programmes, the polytechnics are more tightly regulated. They must submit all proposals for new academic programmes, or the suspension or cancellation of existing programmes for approval to the Ministry of Science, Technology and Higher Education (General Directorate for Higher Education). Therefore, a significant time lapse can occur between an initial proposal for change in academic programming and receipt of the Ministry's decision. Such delays obviously compromise the ability of polytechnic institutes and schools to respond in a timely fashion to community needs and market changes.

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<sup>7</sup> The technological specialisation programmes (cursos de especialização tecnológica), with 60 to 90 credits, are considered short first cycle vocational programmes and are classified in level 4 of ISCED. See National Bologna Report for Portugal for the two-year period 2005-2007.

In the executive programmes category the school offers 23 courses in the areas of Marketing, Communication and Commercial Management, divided into five different levels or typologies: advanced, improvement, development, specific areas and international<sup>8</sup>.

According to the SER, IPAM-M had more than 850 students supported by 52 teachers and 20 collaborators in the academic year 2007-08. It was also supported in all three IPAM schools by 15 collaborators in the management and administrative areas. In our meetings we were also told that the number of students in the two other IPAM schools in the academic year 2007-08 was 700 in Lisbon and 350 in Aveiro. With regards to the qualifications of teachers, the SER refers to 10 teachers holding a PhD in 2007-08. However, in our meetings we were told that this number has already increased to 19 in 2008-09, some of who, however, are only part-time.

The above figures should be considered in connection with the requirements for teaching staff to be fulfilled by polytechnic institutes and polytechnic schools according to the Law:

- One professor with PhD or one specialist degree holder for each 30 students;
- At least 15% of teaching staff shall be PhD holders on a full-time basis;
- At least 35% of teaching staff shall be specialist degree holders who may equally be awarded a PhD.

The time-limit in which these requirements have to be fulfilled is defined to be 18 months from the coming into force of the Decree-Law which shall regulate the awarding of the specialist degree. However, this Decree-Law has not been published so far and, therefore, the time has not started to run yet.

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<sup>8</sup> It should be noticed that the executive programmes are initiated by the three schools of IPAM, but they operate independently of them owning a separate identity. This means that the executive programmes are not considered part of the formal higher education structure in Portugal. Furthermore, the executive programmes should not be confused with corporate education which in fact consists of programmes that are tailored to the needs of a company.

## **MAIN FINDINGS OF THE REVIEW**

### **6. Introductory remarks**

IPAM Matosinhos is a specific case of HEI; it is a private polytechnic school non-integrated either to a University or to a Polytechnic. In that sense, it is an independent polytechnic school. But, at the same time, it is closely linked to two other polytechnic schools (IPAM Lisbon and IPAM Aveiro) with similar characteristics, forming together IPAM, which operates as the umbrella entity for these three schools (and for other educational units as well) without being considered a separate higher education institution in itself. In other words, in the list of Portuguese higher education institutions there are three IPAMs (in Matosinhos, in Lisbon and in Aveiro) and not one central IPAM.

This organisational structure makes IPAM Matosinhos (and the whole IPAM entity) a unique case in the Portuguese higher education. Of course, this uniqueness offers advantages of flexibility in governance and management and facilitates good cooperation and inter-relationship among the three schools under the coordination (and supervision) of the central IPAM. But, on the other hand, it makes it difficult for the external reviewer to clearly understand the way this structure operates.

The evaluation team had therefore to deal with a more or less complex structure and operation; and its task was made even more difficult because it had to review and evaluate only one separate, yet interrelated part of this structure, i.e. IPAM Matosinhos.

A second uniqueness regarding IPAM Matosinhos, and IPAM in general, relates to the fact that the three IPAM schools are the main providers of higher courses in marketing management in Portugal. And it should be noted that IPAM Matosinhos is indeed the first one among the three IPAMs to offer this kind of course (since 1984). This second uniqueness is again an advantage and opportunity for IPAM-M, but it also entails specific tasks to improve the study field, both in teaching and in research.

In the following chapters of the present evaluation report, the main findings of the review will be presented and analysed. In the beginning (chapter 7), the evaluation team presents its own approach on the major strengths and weaknesses of IPAM-M, while in the following chapters, the most important issues will be analysed, the analysis being followed by the consequent recommendations. This analysis will be restricted to four issues, which are the most important for the improvement and further development of IPAM-M according to the views of the evaluation team. These are the issues concerning governance and management (chapter 8), human resources (chapter 9), research (chapter 10) and internationalisation (chapter 11). The general issues concerning strategic planning and management, quality culture and capacity for change will be analysed later, in a separate section of this report (chapters 12, 13 and 14).

## **7. Major strengths and weaknesses**

IPAM-M conducted its SWOT analysis in the context of the self-evaluation process and a summary of the results of this SWOT analysis is included in the SER. In the present chapter of the evaluation report, the evaluation team emphasises the major strengths and weaknesses that it could identify from its own point of view. Most of these points will be analysed later, while IPAM-M has already considered most of them in its SWOT analysis. We simply list here our own approach.

### Major strengths

- The uniqueness of IPAM-M (and of the whole IPAM structure), as already mentioned earlier, is perhaps its major strength. This uniqueness applies both to the organisational structure and to its niche programming focus – academic and executive courses in marketing. As a result of this specialised focus, the employment rate among IPAM graduates is extremely high.
- The cooperative culture existing inside the school among the staff, together with their very good relationships with the students.
- The good links with the external community (regarding both local authorities and the business environment).
- The interactive teaching and learning methodology (the good practice of the SIM platform: Sala/Classroom – Internet – Market).
- The concern continuously to improve and expand the study programmes, both academic and executive.

### Major weaknesses

- The problem with qualifications of the teaching staff
- The lack of a concrete research policy
- The inadequacy of physical resources, especially those related to facilities
- The lack of a long-term strategy

## **8. Issues concerning governance and management**

As mentioned, earlier, IPAM is a private institution, run by a parent company, Ensigest, a profit-making company. This private dimension, compared to a public one, encourages independence and autonomy; it is a rather small institution that can make decisions quickly. It is very pro-active – not only re-active – and it can anticipate changes. No doubt, such flexibility and responsiveness are real strengths.

The governance structure of IPAM is interesting. There is a President for the IPAM as a whole, who also acts as President for each one of the three schools, and furthermore there are three Directors, one in each school, who are responsible for the everyday running of the schools. At the top of this governance structure, there is a Management Board, on which all schools are represented together with the owner (Ensigest). This Management Board is the central governance body for IPAM and it meets once a week (with the help of ICT facilities). The evaluation team understands and underlines the positive dimension of such a corporate

structure. At the same time, it appreciates the recent creation of a national/centralised IPAM scientific council which is certainly meant to foster greater cohesion and coordination of programmes among the three IPAM schools. In that sense, the evaluation team can praise the governance of IPAM, and its good local management in IPAM-M, which are well adapted to the immediate environment and which, above all, rely on a specific IPAM culture based on good understanding between teachers and students, on informal and easy relationships; for the evaluation team's view, this culture should be attributed to a family-like spirit or rather a good team spirit.

In order to maintain all these various and central elements, so specific to IPAM, the evaluation team makes its first recommendations No. 1 and 2 as follows:

**Rec 1:** The evaluation team recommends that a clear balance should be kept between the national dimension of IPAM and the local specificity of each school; this may be achieved through a regular functioning of the various representative councils, (pedagogic and scientific), an effective participation of students in the pedagogic board, and complete transparency concerning the budget and resource allocation. While realising that there is a need for the centralisation of certain activities and functions, the evaluation team encourages IPAM to keep a balance that ensures the autonomy of each school; the autonomy of each school is considered a strength; it allows initiatives that will benefit, centrally, the whole of IPAM.

**Rec 2:** In order to bring fresh ideas and new practices into the governance of IPAM, the evaluation team recommends the creation of an advisory board made up of marketing specialists, business leaders, visionary personalities from Portugal (including IPAM's most prominent alumni) and prominent individuals from abroad and regularly convened for consultancy.

Another remark, regarding governance and management structures, is that IPAM, as a private corporate entity has access to capital to invest rapidly and significantly in programmes and infrastructures; such investments will strengthen IPAM and the schools and should provide significant returns.

## **9. Issues concerning human resources**

The level of qualifications of the teaching staff in IPAM-M is among the most serious problems that the school faces. As mentioned earlier (chapter 5.2, last paragraph) currently there are 19 PhD holders (mainly with a part-time status) among the more than 50 members of the teaching staff. The evaluation team considers this proportion too low for a polytechnic school, if it wants to improve continuously and stand as a leader in its scientific field. The school has to work towards improving qualifications of teaching staff. And this is a necessity, not only because of the requirements set by Portuguese Law to increase the number of PhD holders among the teaching staff in the polytechnic institutes and independent schools, but mainly because higher qualifications (at a doctorate level) mean higher academic standards, greater spirit of innovation and creativity, enhanced capability for basic and applied research, greater attractiveness and, overall, greater success as a HEI.

Of course, the Law's requirements put pressure on the school to ensure opportunities for its teaching staff to improve their qualifications through doctorate research. However, and since the need for highly qualified teaching staff is substantial, this pressure should not be perceived by IPAM-M as a constraint, but rather should be viewed as an opportunity.

Indeed, IPAM-M has stated in the SER that the qualifications level of teaching staff was one of their main concerns. They consider the new Law to be a great opportunity rather than a threat. This means that IPAM-M sees the change of this problematic situation as a challenge to be faced efficiently. However, this opportunity must be handled in a timely, efficient and effective manner. It will indeed require a significant investment over a sustained period of time to support existing teachers (and retain them) and at the same time to attract new teaching staff from outside (Portugal and abroad), all to be done in a highly competitive market for academic staff. The three key words related to academic staff development should be: develop, attract, retain.

The evaluation team strongly believes that the Law requirements not only compel IPAM-M to enhance academic staff credentials, but affords an opportunity to strengthen academic and research programmes at IPAM-M, thereby positioning the school to be a leader among private polytechnic institutes in Portugal in embracing an active research policy, as will be described in the next chapter. In short, enhancing academic qualifications is one of the school's major challenges and it should be one of its major priorities.

In that sense, the evaluation team makes the following recommendation No. 3:

**Rec 3:** The evaluation team recommends that IPAM-M defines a human resources policy to help its existing teachers and new faculty carry on successfully their research programmes and doctoral studies and successfully defend their PhD theses. This policy should be backed up by a significant financial investment to compensate teaching release time, balanced workload or any other means to create good working conditions for teachers/researchers. IPAM should seize the opportunity to distinguish itself by voluntarily supporting its teachers in acquiring PhD credentials and pursuing research work. The whole institution will benefit from this dimension of research policy.

## **10. Issues concerning research**

Research is a key issue for the polytechnic sector as well, notwithstanding the difference in orientation between the university and the polytechnic sector (for example, HEIs in the polytechnic sector are not authorised to offer 3rd cycle programmes and cannot grant PhD degrees). This research role is clearly stated in the Portuguese Law (Law No. 62/2007, Article 7) in its reference to the mission of the polytechnic sector of higher education: "*The polytechnic institutes are high level institutions oriented towards the creation, transmission and dissemination of the professional culture and knowledge, through the articulation of the study, the education, the oriented research and the experimental development*".

In that context, and apart from the need to improve the qualifications of its teaching staff, IPAM-M has to improve also its own research environment and its own research culture; in other words, it has to build its own research profile. Furthermore, and given the strong connection between research and teaching in HEIs – no proper teaching without proper research – the right balance should be kept between practice and theory, between case-studies and concepts, between basic and applied research. And, furthermore, students should get gradually involved in on-going research activities. Last, but not least, and since IPAM is a unique institute in marketing management in Portugal, it has to play a key role with respect to research in that field.

The need for more PhD qualified academic personnel is one prerequisite for the above objectives to be achieved, but this is not enough. It is quite clear to the evaluation team that IPAM-M needs a research policy; and this should be an important part of its strategic plan. This brings the evaluation team to its following recommendations No. 4 and 5:

**Rec 4:** [Concerning strategy]

The evaluation team recommends that IPAM-M needs to establish a long-term research policy, integrated into its overall strategic plan, setting clear goals and agreed priorities. This strategy should include the policy for improvement of teaching staff qualifications, which is a prerequisite for establishing a research culture. Furthermore, and given the connection between the three schools comprising IPAM, the establishment of a joint long-term research strategy for all IPAM schools should be considered as well.

**Rec 5:** [Concerning the permanent research activities]

The team recommends the creation of a central Research Centre (one centre for the three IPAM schools, which may result from a transformation of the already existing Institute for Development and Marketing Research (Instituto para o Desenvolvimento e Investigação em Marketing = IDIM). This Research Centre will have a permanent staff complement (both researchers and administrative staff) and will be directed by a teacher/researcher assisted by a research council and with its own annual budget. This Centre will define a strategic research policy and encourage the development of and participation in common research programmes, joint programmes, European programmes in cooperation with other HEIs. It will define with the teachers/researchers areas or fields of study, projects of applied research, and provide sufficient seed-money to help finance research initiatives and original programmes. It will also define a publishing policy and an award/prize system to promote research activity and disseminate research results.

## **11. Issues concerning internationalisation**

In the modern European higher education landscape, internationalisation has to be one of the core issues in the strategic planning of a HEI. Both from the SER and from all the meetings with key actors in IPAM-M, it is clear to the evaluation team that IPAM-M has to build its international profile properly and improve it continuously. This is a necessity that corresponds to the desire of IPAM-M to be recognised as a leading school of marketing in Europe. IPAM

should improve, therefore, its attractiveness outside Portugal, regarding both international students and international teachers and researchers. This means that it has to invest more in its international programmes. In other words, IPAM-M has to improve its internationalisation capacity significantly. And it is in this context that the evaluation team makes the following recommendation No. 6:

**Rec 6:** The evaluation team recommends the following with respect to internationalisation:

- IPAM-M should increase the mobility of its students, teachers, administrators through existing European and international programmes based on reciprocity;
- IPAM-M should increase its networking with universities and polytechnics abroad and develop more contacts and exchanges, beyond the Lusophone countries;
- IPAM-M should develop a language policy to invite its students and staff to learn foreign languages and be open to other cultures in their European diversity;
- IPAM-M should recruit new teaching staff from abroad whenever this is possible in order to benefit from other experiences and increase the international spirit and dimension of the school;
- IPAM-M should create joint degrees at master level with HEIs abroad and participate in research programmes with European HEIs.

All these actions should be part of a medium-term strategic plan for internationalisation, which should be integrated in the general strategic plan of IPAM-M. What the evaluation team considers vitally important is that internationalisation should become part of IPAM-M culture and spirit.

## THE CAPACITY FOR CHANGE

### 12. Strategic management

The first methodological question in the EUA Institutional Evaluation Programme is “What is the institution trying to do (and why)?” and refers to the vision, mission, and aims of the institution, and its mid- and long-term strategies. This question, together with the second one - “How is the institution trying to do it?” -, forms the process through which the institution draws up its strategic plan. The third question - “How does the institution know it works?” - deals with the quality culture that dominates the overall functioning of the institution. And, finally, the fourth question - “How does the institution change in order to improve?” - defines the operation of change as such and identifies the capacity of the institution to transform its vision and mission into appropriate strategies and operational plans to be implemented within reasonable timeframes.

In this chapter of the evaluation report, we shall deal with issues concerning strategic management, i.e. with issues related to the first two methodological questions, while in the next two chapters we deal with issues concerning quality culture and operation of change respectively. All major issues covered in the three chapters of this section should be considered as aiming jointly to enhance the capacity of IPAM-M for change.

As stated in the SER, the vision of IPAM-M, as being the first marketing school in Portugal, is to be one of the *best* marketing schools in Europe – to be “*The Marketing School for Business*”. This is an ambitious vision, which requires a strategic plan in both mid-term and long-term perspectives in order to be achieved.

The SER emphasises a number of directions for future developments; through the processing of developing it, IPAM-M personnel have acquired a better self-knowledge thanks to the collection of data, information, facts and figures on the school. At the same time, it should be mentioned that IPAM-M is accustomed to defining annual plans each year, taking into account a number of changes, innovations and adaptations mainly in relation with budget building. These practices are useful; they represent good mirrors for the school and all its actors and partners.

However, the time has come to change these mirrors into windows and open these windows onto new vistas, new perspectives and new grounds. To change to this new reality, it is necessary to define – beyond the yearly plan – an action plan for the coming years in order to widen the school’s vision and state precisely its objectives, aims, and goals for the future.

This is an exacting and challenging task; it takes a long time to define at all levels the priorities, the great orientations for the next five-ten years. It should be a bottom-up planning process, in which all actors and partners should be involved – leadership, teaching and administrative staff, students, and stakeholders. It is not just a series of ideas, it is a challenging work based on a wide consultation and it must be fundamentally project-centred.

This task represents the best way to answer the first two of the four above-mentioned central IEP questions. And this brings the evaluation team to the following recommendation No. 7:

**Rec 7:** The evaluation team recommends that IPAM – each school first and then at a coordinated, national level – define a clearly stated and formulated strategic plan with a medium term (3 to 5 years) or even with a long term (10 years). This plan, which has to be produced in a bottom-up approach and attitude, will describe in detail the new developments/projects concerning new programmes, new ways of teaching, opening of new areas in the field of teaching and learning, research, and internationalisation. The strategic plan should also contain the means and methods to reach the objectives set. And, furthermore, a permanent structure and a systematic procedure should be established in IPAM (both at central level and at the level of each school), which will continuously monitor not only the implementation of the strategic plan, but also the validity of the objectives.

The evaluation team would like to make the following complementary remarks with respect to the above recommendation:

- Diversification is indispensable for private institutions in the coming years;
- IPAM has constantly and regularly grown over the past years; it will continue to grow, therefore, it needs a strategy, it needs a plan;
- It is indeed indispensable that private institutions prove their dynamism and will to grow in an efficient way. It is a matter of survival in the Portugal context;
- Such a strategic plan will increase participation and a sense of belonging and commitment among teachers, students, and administrative staff. They will support their school all the more as they know it better and appreciate its development policy;
- IPAM-M has the necessary expertise; it teaches corporate development, project management, and strategic growth; therefore, it simply has to apply to itself the methods it teaches; this is something that should have been done a long time ago;
- Today, strategic planning and development policy are a very common practice in European HEIs; and Governments often encourage higher education institutions to adopt such practices as they always lead to quality and quality assurance.

Nevertheless, and irrespective of the establishment of appropriate structures and procedures, the efficiency of the strategic management in a HEI is affected greatly by the way in which a clear strategic perspective dominates the functioning of its leadership and of its governance, decision making and management collective processes. This means that all respective bodies should be in a position to take strategic decisions, i.e. decisions that will improve the strategic goals of IPAM and its schools. And, moreover, an important task for the leadership is to *inspire* and to *lead* the community in the context of such strategic perspectives.

### 13. Quality culture

The term “quality culture” defines the overall attitude of a HEI which focuses on the concept of “quality” and which, thus, applies to issues like quality assurance, quality assessment, and quality improvement. In building a quality culture, it is necessary to go beyond data, figures,

statistics and quantitative elements, to deal with the qualitative dimension. Quality is a central element in European higher education today and it has assumed a key role in the Bologna Process; every country participating in the Bologna Process is committed to establishing its own national quality assurance system by 2010 according to the “*European Standards and Guidelines for Quality Assurance in Higher Education*” (ESG). The ESGs were adopted by the European Ministers in Bergen in May 2005, and have significantly strengthened the European perspective on and the European context for quality assurance in higher education.

In parallel, EUA actively encourages its member universities to implement their own internal quality assurance mechanisms and to develop a quality culture shared among universities throughout Europe. As stated in the Berlin Communiqué (2003), “*in consistency with the principle of institutional autonomy, the primary responsibility for quality assurance in higher education lies with each institution itself and this provides the basis for real accountability of the academic system within the national quality framework*”. This statement is further specified in the London Communiqué (2007) with a new statement: “*Since the main responsibility for quality lies with HEIs, they should continue to develop their systems of quality assurance*”. It is a task therefore for every European HEI to develop its own structures and procedures to ensure genuine quality assurance.

A great number of HEIs have established internal quality structures (offices, services or agencies); they act as internal evaluators, intent on defining the level of quality of teaching, learning, research, services to students – indeed all of the components of the institution (from communication to library, from budget to computer facilities, etc.). All quality evaluators base their work on well established indicators, metrics and analyses that are defined at the European level in the form of the abovementioned ESGs.

The evaluation team notes with satisfaction that IPAM has already been assessed by the Chartered Institute of Marketing (CIM) and that it has received a professional accreditation to join the European Association for Management. These are promising indicators for a quality culture. Furthermore, IPAM Matosinhos has announced its intention to create such a quality office; a teacher has already been appointed to be in charge of this office; this is a strong initiative and excellent pioneer work. The next recommendation No. 8 of the evaluation team is linked to the need for further improving and strengthening this initiative.

**Rec 8:** The evaluation team supports the initiative of IPAM-M to create a quality office and further recommends that this office should soon be in full swing based on the European Standards and Guidelines; its mission should be to define clearly with all people concerned the mechanisms and tools necessary to succeed in that endeavour. This quality office should be respectful of IPAM culture and at the same time should open its doors to quality experts from other agencies in other countries in order to exchange best practices. The result of the quality analyses should be widely disseminated in the school as the best way to foster, through better knowledge of the institution, a sense of belonging, a spirit of collegiality, a stronger identity.

Furthermore, the evaluation team would like to make the following complementary remarks with regards to above recommendation:

- Many HEIs, thanks to the data collected, create a log-book, an updated document (accessible to everyone) on the reality and the performance of the institution;
- Quality culture does not start and end only with structures and procedures; every individual enrolled in institution has also responsibility to replace non functional or poorly functional practices with the ones that bring better and more effective and efficient results that contribute in improving the overall quality;
- Quality culture is not bureaucracy but a spirit allowing, among other things, the sharing of success stories and failures that need correction;
- Quality culture is not the result of recipes but again a spirit, a dynamism, a reason to take pride in one's school (strong identity perceived from outside);
- This internal practice of evaluation should be complemented by external evaluations (by EUA, national or European agencies). The combination of the two – external and internal quality assurance procedures – will create coherence and convergence, a justified desire to improve and change in a world of competition, to take pride in achievements.
- The establishment of systematic internal quality culture processes in IPAM-M should be related to the strategic management processes and help in the assessment of both the implementation rates of the strategic plan and the validity and feasibility of its objectives.
- The creation of a new quality assurance agency by the Portuguese government is a strong initiative that will contribute to the improvement of quality culture in all the country's HEIs.

One last specific point that the evaluation team wishes to raise regarding quality assurance is the procedure of assessment of teaching and courses by the students. This process is quite common in most European countries. Students have the opportunity – and also the obligation – to evaluate both the courses and the teachers by anonymously filling a questionnaire. The evaluation team is aware that students' questionnaires are already in use in IPAM-M. However, it seems that there is room for further improvement of the process. To that end, IPAM-M should pay increased attention to the teaching evaluation process and should foster its effectiveness and reliability. The teaching evaluation process should be carried out with the proper methodology and with a visible impact on the improvement of teaching, and should be integrated into the overall internal quality assurance process.

#### **14. Capacity for change**

##### ***The general perspective***

In addition to the quality assurance issues, the EUA Institutional Evaluation Programme focuses on the ***capacity for change***. The reason for this is a widespread conviction that European HEIs are exposed to increasing ***demands*** from society and the labour market, and in many countries they are also exposed to growing ***competition*** from other institutions of higher education.

If the HEIs do not seize the initiative themselves and show their capacity for change and their adaptability to radically new conditions in an era of mass higher education, then there may be ***risks*** that threaten even the important core academic values, which, undoubtedly, all associated with HEIs want to preserve.

HEIs have always had, and still have, the twofold duty of *defending* traditional values and of *leading* society into new areas (and new eras). There have been periods in their very long history, during which HEIs were too successful as defenders of the traditions at the price of *isolation* from society and petrification. But fortunately enough, we can also look back to times when HEIs were in many respects true centres of *innovation*.

The capacity for change requires firstly the identification of all the factors requiring change, and the features and the content of the changes needed. Secondly, it requires each HEI to determine its own mission in conjunction with the changes needed and to set its priorities. Thirdly, it requires determining the strengths and weaknesses of each HEI with respect to its own identity and characteristics and to the existing external conditions. Finally, it requires an efficient mechanism to continuously assess the course of each institution towards its objectives, towards the changes required. What we have to ask ourselves is whether or not the traditional organisation and leadership of a HEI will be capable of fulfilling its task at the beginning of the 21st century.

The evaluation team wants to stress that *the capacity for change is a sine qua non condition for a HEI in a modern society*. The capacity for change requires that the institution have clear mission, inspired vision and realistic objectives. It also requires effective strategic planning and the establishment of a quality culture. Furthermore, it requires tools such as action plans and also results and good performances. These are the internal requirements. There are of course external requirements as well. These have to do with resources (both financial and human), with the legislative framework and the relationship between HEIs and the state (autonomy), which has to encourage and support the institutions in strengthening their capacity for change, and, finally, with the relationship between HEIs and the society at large following the principle of the public responsibility for (and of) higher education and research, and the quest for real accountability.

Apart from these internal and external requirements, the capacity for change requires, above all, inspiration. It requires inspired, motivated and determined people. It is extremely important to realise that elements of strategic planning do not themselves change HEIs. Changes in institutions have to be driven by people: staff and students and an inspired leadership making sure that the actions in the action plans are in progress and that the expected results are reached.

### *The specific perspective of IPAM Matosinhos*

IPAM has already proved many times its capacity to change quickly, if not radically. The evaluation team had the opportunity to realise that the will of change is strong in IPAM-M; its motivation to meet the new challenges is evident; the evaluation team could already feel and see important changes between the preliminary visit and the main site visit. For example, the implementation of basic elements of the Bologna Process indeed has been quick and radical. It is interesting to note here that some students and teachers think it was a little bit too quick and radical...

The development of new programmes in the second cycle of studies is proof that IPAM-M can adapt to the new conditions and adopt new directions. The idea of diversifying the programmes is central; the implementation of new training methods and more student-centred and competence-centred processes is essential. Evidently, in many fields IPAM-M is doing well and the evaluation team is impressed by the many actions and projects started, expressing a real academic dynamism. The evaluation team wishes to encourage IPAM-M to keep going, to develop, to implement a number of quality decisions or moves. In that sense, the evaluation team makes the following last recommendation No. 9, referring to some specific steps that IPAM-M could make in order to enhance its capacity for change.

**Rec 9:** The evaluation team recommends that IPAM-M should keep improving the following actions:

- Development of the students career service in order to facilitate students' employment and employability; that is to encourage students to develop transferable skills such as computer literacy, foreign languages, communication skills;
- Development of a permanent relationship with former students (alumni) in order to establish an efficient network of firms and enterprises for internships and jobs in Portugal and abroad;
- Development of a strong policy of e-learning with a view to creating new teaching and learning methods for distance education;
- Further development of executive programmes, by focusing on those that are attractive and meet the needs of the market world;
- Further development of lifelong learning (LLL) programmes, attracting new publics and training them in the spirit of LLL and helping workers and managers to adapt to the 21st century challenges. In doing this, IPAM-M should seek to work with new stakeholders and partners and, notably, with public organisations and municipalities;
- Development of a programme to improve the building facilities and the working conditions of the school. The existing building is considered as a barrier to efficient training. IPAM-M deserves attractive buildings corresponding to the attractiveness of its programmes and its high reputation.

## **CONCLUSIONS AND RECOMMENDATIONS**

### **15. Conclusions**

It is clear to the evaluation team that IPAM-M is at a crossroads. On the one hand, it has to further elaborate its own profile and to further strengthen its unique position in Portugal, and on the other hand, it has to face the challenges of the emerging European Higher Education Area and the radical and on-going changes in the Portuguese higher education. Therefore, IPAM-M has to develop a clear strategy responding to these challenges and, simultaneously, activate its basic working tools for the effective and efficient implementation of this strategy and build a strong quality culture within the school.

It is in this context, then, that the evaluation team tried to approach the work done so far by IPAM-M, its achievements and its plans, but also its strengths and its weaknesses. It is in that context also that the evaluation team made its analyses and presented its recommendations throughout the whole present evaluation report.

The key conclusions can be summarised in the following few words. IPAM-M is a unique HEI, and this uniqueness is its major strength. IPAM-M is doing well in most of its functions and has created a dynamic environment inside the school and a dynamic relationship outside with its external environment. IPAM-M needs not only to keep on this road, but also to speed up and further strengthen and improve its position. However, simultaneously, IPAM-M has to face its major weaknesses, which include lack of a concrete and effective research policy, a low number of highly (PhD) qualified teachers and researchers, and inadequate infrastructure and facilities. The last point to be mentioned in these conclusions is the need of IPAM-M to develop and implement a long-term strategic plan, which will consolidate the vision of the school, capitalise on its strengths, and take the necessary steps to mitigate or eliminate its weaknesses.

## **16. Summary of recommendations**

Before concluding this evaluation report, we summarise here the main recommendations, as they have appeared in the different chapters of the text.

### **Issues concerning governance and management**

**Rec 1:** The evaluation team recommends that a clear balance should be kept between the national dimension of IPAM and the local specificity of each school; this may be achieved through a regular functioning of the various representative councils, (pedagogic and scientific), an effective participation of students in the pedagogic board, and complete transparency concerning the budget and resource allocation. While realising that there is a need for the centralisation of certain activities and functions, the evaluation team encourages IPAM to keep a balance that ensures the autonomy of each school; the autonomy of each school is considered a strength; it allows initiatives that will benefit, centrally, the whole of IPAM.

**Rec 2:** In order to bring fresh ideas and new practices into the governance of IPAM, the evaluation team recommends the creation of an advisory board made up of marketing specialists, business leaders, visionary personalities from Portugal (including IPAM's most prominent alumni) and prominent individuals from abroad and regularly convened for consultancy.

### **Issues concerning human resources**

**Rec 3:** The evaluation team recommends that IPAM-M defines a human resources policy to help its existing teachers and new faculty carry on successfully their research programmes and doctoral studies and successfully defend their PhD theses. This policy should be backed up by a significant financial investment to compensate teaching release time, balanced workload or any other means to create good working conditions for teachers/researchers. IPAM should seize the opportunity to distinguish itself by voluntarily supporting its teachers in acquiring PhD credentials and pursuing research work. The whole institution will benefit from this dimension of research policy.

### **Issues concerning research**

**Rec 4:** [Concerning strategy]

The evaluation team recommends that IPAM-M needs to establish a long-term research policy, integrated into its overall strategic plan, setting clear goals and agreed priorities. This strategy should include the policy for improvement of teaching staff qualifications, which is a prerequisite for establishing a research culture. Furthermore, and given the connection between the three schools comprising IPAM, the establishment of a joint long-term research strategy for all IPAM schools should be considered as well.

**Rec 5:** [Concerning the permanent research activities]

The team recommends the creation of a central Research Centre (one centre for the three IPAM schools, which may result from a transformation of the already existing Institute for Development and Marketing Research (Instituto para o Desenvolvimento e Investigação em Marketing = IDIM). This Research Centre will have a permanent staff complement (both researchers and administrative staff) and will be directed by a teacher/researcher assisted by a research council and with its own annual budget. This Centre will define a strategic research policy and encourage the development of and participation in common research programmes, joint programmes, European programmes in cooperation with other HEIs. It will define with the teachers/researchers areas or fields of study, projects of applied research, and provide sufficient seed-money to help finance research initiatives and original programmes. It will also define a publishing policy and an award/prize system to promote research activity and Disseminate the research results.

**Issues concerning internationalisation**

**Rec 6:** The evaluation team recommends the following with respect to internationalisation:

- IPAM-M should increase the mobility of its students, teachers, administrators through existing European and international programmes based on reciprocity;
- IPAM-M should increase its networking with universities and polytechnics abroad and develop more contacts and exchanges, beyond the Lusophone countries;
- IPAM-M should develop a language policy to invite its students and staff to learn foreign languages and be open to other cultures in their European diversity;
- IPAM-M should recruit new teaching staff from abroad whenever this is possible in order to benefit from other experiences and increase the international spirit and dimension of the school;
- IPAM-M should create joint degrees at master level with HEIs abroad and participate in research programmes with European HEIs.

**Issues concerning strategic management**

**Rec 7:** The evaluation team recommends that IPAM – each school first and then at a coordinated, national level – define a clearly stated and formulated strategic plan with a medium term (3 to 5 years) or even with a long term (10 years). This plan, which has to be produced in a bottom-up approach and attitude, will describe in detail the new developments/projects concerning new programmes, new ways of teaching, opening of new areas in the field of teaching and learning, research, and internationalisation. The strategic plan should also contain the means and methods to reach the objectives set. And, furthermore, a permanent structure and a systematic procedure should be established in IPAM (both at central level and at the level of each school), which will continuously monitor not only the implementation of the strategic plan, but also the validity of the objectives.

### **Issues concerning quality culture**

**Rec 8:** The evaluation team supports the initiative of IPAM-M to create a quality office and further recommends that this office should soon be in full swing based on the European Standards and Guidelines; its mission should be to define clearly with all people concerned the mechanisms and tools necessary to succeed in that endeavour. This quality office should be respectful of IPAM culture and at the same time should open its doors to quality experts from other agencies in other countries in order to exchange best practices. The result of the quality analyses should be widely disseminated in the school as the best way to foster, through better knowledge of the institution, a sense of belonging, a spirit of collegiality, a stronger identity.

### **Issues concerning capacity for change**

**Rec 9:** The evaluation team recommends that IPAM-M should keep improving the following actions:

- Development of the students career service in order to facilitate students' employment and employability; that is to encourage students to develop transferable skills such as computer literacy, foreign languages, communication skills;
- Development of a permanent relationship with former students (alumni) in order to establish an efficient network of firms and enterprises for internships and jobs in Portugal and abroad;
- Development of a strong policy of e-learning with a view to creating new teaching and learning methods for distance education;
- Further development of executive programmes, by focusing on those that are attractive and meet the needs of the market world;
- Further development of lifelong learning (LLL) programmes, attracting new publics and training them in the spirit of LLL and helping workers and managers to adapt to the 21st century challenges. In doing this, IPAM-M should seek to work with new stakeholders and partners and, notably, with public organisations and municipalities;
- Development of a programme to improve the building facilities and the working conditions of the school. The existing building is considered as a barrier to efficient training. IPAM-M deserves attractive buildings corresponding to the attractiveness of its programmes and its high reputation.

## **ENVOI**

Coming to the end of this report, the evaluation team feels the need to express once again its sincere thanks to the people of IPAM Matosinhos for the excellent arrangements provided to make its two visits a challenging and delightful, although intensive, experience. At the same time, the evaluation team wishes to thank IPAM-M for the generous and overwhelming hospitality.

It has been a great pleasure and a stimulating experience for the evaluation team to be introduced to IPAM-M during this specific and crucial period both for the Portuguese higher education, but, also, for higher education in Europe at large. It has also been a privilege and a sheer joy for us to meet so many enthusiastic and highly committed people. We wish to point out the openness and positive atmosphere of the discussions with the academic staff and the students and say how much we appreciated it.

The evaluation team has been positively impressed by the commitment and engagement of all people in IPAM-M, especially its leadership. The evaluation team is convinced that the initiatives undertaken by the leadership of IPAM-M are driving the school in the right direction and strongly encourages the leadership to continue on this course.

The evaluation team strongly believes that IPAM Matosinhos can work on an ambitious programme for the coming years. Its potential is great indeed and in defining an efficient development policy, IPAM-M can become a model for IPAM as a whole and for private polytechnic institutes in Portugal.

IPAM-M is a young and dynamic institution. The evaluation team appreciates the strength and the will of IPAM-M and simply urges it to go ahead, keeping in mind that it has to work in a European context and in a Bologna Process context, in which the main key issues for HEIs are: governance, quality, employability, internationalisation, research. These words are already part of IPAM-M's development policy and should remain as such.

Our recommendations are intended to be our own contribution to the process of change and to help IPAM-M take advantage of the opportunities, and to cope with the threats existing along its route to the future. At the same time, our report aspires to function as an inspiration for the school as a whole, but more specifically for all those people, students and staff, who have a concern for its future.

And we offer these last words: The abbreviation IPAM could also be considered as standing for the following four words: **Inspiring-Performing-Adapting-Maturing**, which, in our perception, express the present and the future of IPAM.