STRATEGIC PLAN

2025

Lusófona University

ENSINO LUSÓFONA | UNIVERSIDADE LUSÓFONA

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This document presents the main strategic development guidelines of Lusófona University for the period 2021/2025. The university's strategic plan for the period reflects a rapidly changing contextual environment and an internal environment that, more than adapting and reacting to this situation, wants to be itself a driving force for the system's transformation. Today, higher education institutions must rethink themselves as a whole: to rethink their mission and purposes within the so-called "knowledge triangle" and to look at their objectives in a much broader and transformative manner, including in those objectives different dimensions ranging from teaching to research, from services to community intervention. More traditional distinctions between educational institutions or research institutions can no longer be applied in a context where the mandate of all HEIs includes a clear focus on the development of research and innovation activities, and where economic pressure on the HEIs' structure with a growing volume of costs associated with new activities that did not exist in the past, such as, for example, the accreditation, force HEIs to think about their business models far beyond the mere provision of teaching services.

Ten challenges to our future

Over the next five years, Lusófona University must evolve as a teaching, research, innovation and culture institution. In order to do this, it must clearly define its priorities in each of these domains and enhance the emergence of more agile organizational structures that facilitate its adaptation to a new national and European context.

The time horizon of this strategic plan is influenced by a set of external factors, which are simultaneously **challenges and opportunities** for the implementation of this plan, but also factors that generate uncertainty. The ten core challenges we have identified are:

1 – Implementation of the European Education and Research Agenda 2025 – by 2025 the European Union will implement a new agenda in the field of education and science associated with the consolidation of a European teaching and research area, where, in addition to the emergence of the concept of "knowledge square", which extends the mission of HEIs to the active provision of services, there is a clear focus on different areas or programmes, such as micro-credentials and European Universities, to which our planning

must respond in order to consolidate Lusófona University as an active and recognized teaching and research institution in the teaching and research European space;

2 – Sustainability – the implementation of the so-called European "green deal" and the growing weight of the UN sustainable development goals in our society force our planning to consider the search for more sustainability in our institution and our activities as a challenge and a core objective to be consolidated through the implementation and subsequent certification of an Environmental Management System;

3 – Political and legal framework – in a national context in which the weight of the state in the higher education sector is very significant and in which public policies over the past few years have been characterized by a vision that attributes to private education a smaller and supplementary role in the system, the ever-present uncertainty about the policies that will be followed in this time frame is a challenge to any strategic planning exercise in Portugal;

4 – Demography – The expected demographic evolution in the period is detrimental to any institution operating in the educational area since a reduction in the total number of young people in the eligible contingent to attend higher education is expected. The improvement in the completion rate of secondary education, the possibility of attracting international students to the Portuguese higher education, as well as the creation of a new access route for students from dual vocational and artistic certification courses equivalent to secondary education, are all factors that may potentially mitigate this problem.

5 – Investment – the growth in the level of demand of all those who attend higher education and the increase in legal and regulatory requirements require an increased capital effort that must be ensured through a growth in the return generated by the organization and the capacity to attract funding, in particular for R&D activities.

6 – Quality policies – the evolution of higher education in Portugal in the last decade was characterized by the emergence of a fully new framework for the assessment and accreditation of institutions and their programmes. Over the next five years, institutions will be faced with increased demands, namely with regard to the accreditation of third cycle programmes and training in innovative distance models, as well as the

emergence of a European framework for the accreditation of joint European degrees, which includes a very important set of new opportunities for the development of higher education institutions.

7 – Institutional cohesion in a post-COVID context – the consequences of the COVID-19 pandemic are yet to be fully assessed, but the disruptive effect that the pandemic had in many activity areas is undeniable. In the particular case of education, the consolidation of distance learning models allowed institutions to continue their activity in an adverse context, but poses huge challenges to the future cohesion of institutions, which must, in the coming years, strengthen their institutional cohesion policies in order to guarantee the loyalty of audiences that lost an important part of their connection to the intuitions during this period.

8 – Attracting and retaining talent – the demands of an increasingly complex legal and regulatory framework and the challenges of internationalization and the strengthening of R&D activities force the consolidation of more active and ambitious policies for attracting and retaining talent.

9 – Transfer of knowledge and connection to the community – in the context of the above mentioned "knowledge square", the transfer of knowledge and the development of activities that strengthen the connection to the community acquire a growing importance for institutions, which must increasingly develop more activities in this context.

10 – Artificial intelligence and innovation – the exponential growth of artificial intelligence applications will profoundly transform our society and our organizations in the coming decades. In parallel, other innovations such as voice technologies will also have effects on the teaching and learning processes. Whether through the potential for innovation that these technologies have or through their application in teaching and learning contexts, higher education institutions must be prepared to take advantage of the opportunities that these technologies hold and their transformative capacity.

Four commitments to our future

The implementation of this plan and the future development of the University must be ensured through the institution's commitment to four core thematic areas for the future development of the University. These areas must respect the institution's legacy and strengths, while simultaneously responding to a changing context, which includes the complex challenges mentioned above, and taking advantage of the opportunities for greater growth and future success that are available to us. These four thematic areas that will converge in this plan axis are:

- **Diversity, equality and inclusion**: Lusófona University as a school open to the world;

- **Excellence in teaching and research**: Lusófona University as a multidisciplinary and dual institution that clearly defines its strategic focus areas, betting on those in which it manages to be more competitive and better fulfils its mission of contributing to the scientific, cultural and economic development of Portugal and the Lusophone space;

- **Internationalization**: Lusófona University as a school guided towards internationalization, either through the development of European degrees or through the attraction and retention of international students, mainly from Portuguese-speaking countries;

- **Institution at the service of its audiences and the community**: Lusófona University as a university that offers an increasingly engaging and positive experience to all its students, teachers and employees, permanently contributing to the enrichment of the community to which it belongs.

Accelerate to grow – a university that works across the entire knowledge triangle

Over the next five years, Lusófona University has to transform itself from a comprehensive institution, with an activity mainly focused on higher education that confers a degree, to become an institution that operates not only in teaching but also in research, innovation and in culture. The scarcity of resources and the complexity of the environment recommend that this transformation not be carried out globally and simultaneously for the entire institution, but rather concentrated in a phased manner in different areas of intervention or fields of knowledge. The answer to each of the questions listed in Figure 1 will be given through a set of specific activities provided for throughout this strategic plan and their respective implementation.
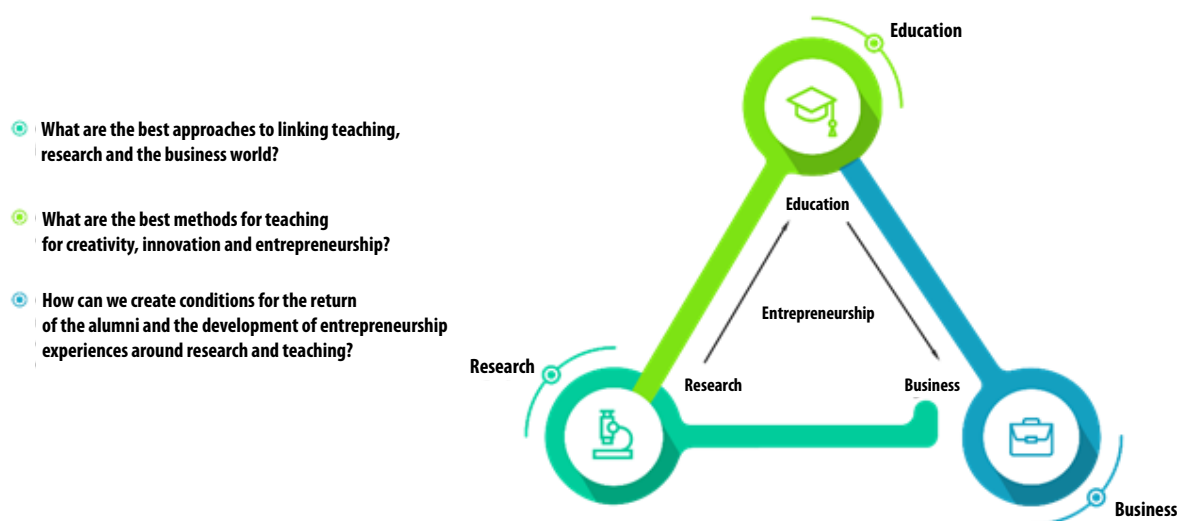

Figure 1 - The knowledge triangle along which the University must operate

The development of activities that articulate teaching, research, business and connection to the community in order to respond to each of the challenges already mentioned must be complemented by permanent attention to the effective impact that these same activities can generate in the university's sustainability and in the society where it operates, seeking that all actions provided for in this plan simultaneously transform the institution in order to increase its competitiveness; and responsive and demand-driven in order to ensure the already mentioned impact and sustainability. Figure 2 illustrates this balance between teaching, research, the business world and connection to society and the anchoring of all actions to be developed under this plan to these three dimensions.
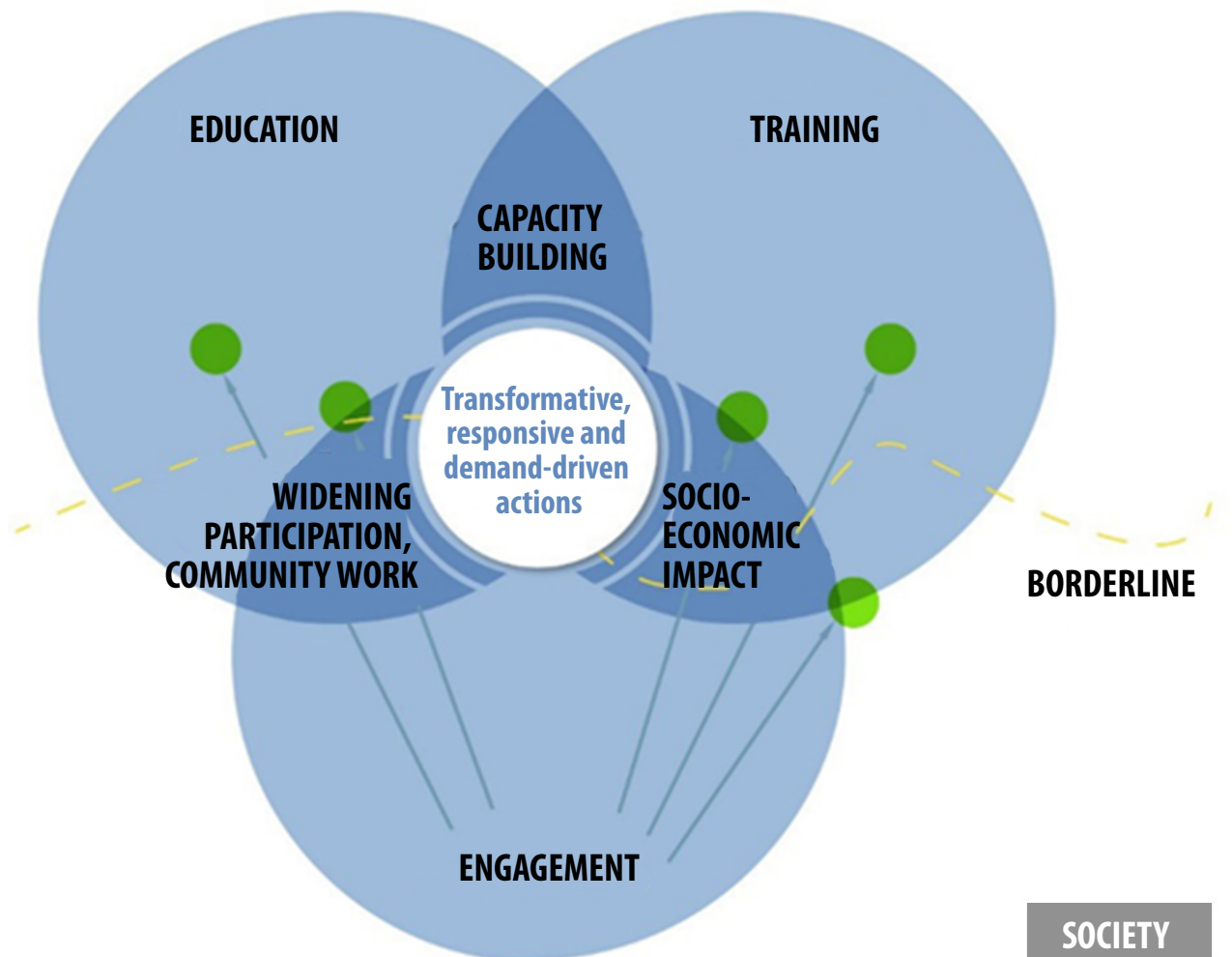
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Figure 2 - The articulation between teaching, research and connection to society as the objective

of the actions of the strategic plan 21/25

To materialize its strategy for the period 2021/2025, the University has defined 3 action axes that are articulated with the thematic areas listed and group the different specific actions provided for in this plan, as well as the definition of the objectives associated with them. These 3 action axes are represented in Figure 3 as aggregating elements of the several actions described below. Each of these action axes corresponds to a specific set of actions that are detailed in the following sections of this document. In order to guarantee the effective implementation of this plan, the number of actions planned for each thematic axis is reduced. This should not be seen as a sign of lack of ambition or vision, but rather as an indicator of the objectivity that presides over this strategic plan.
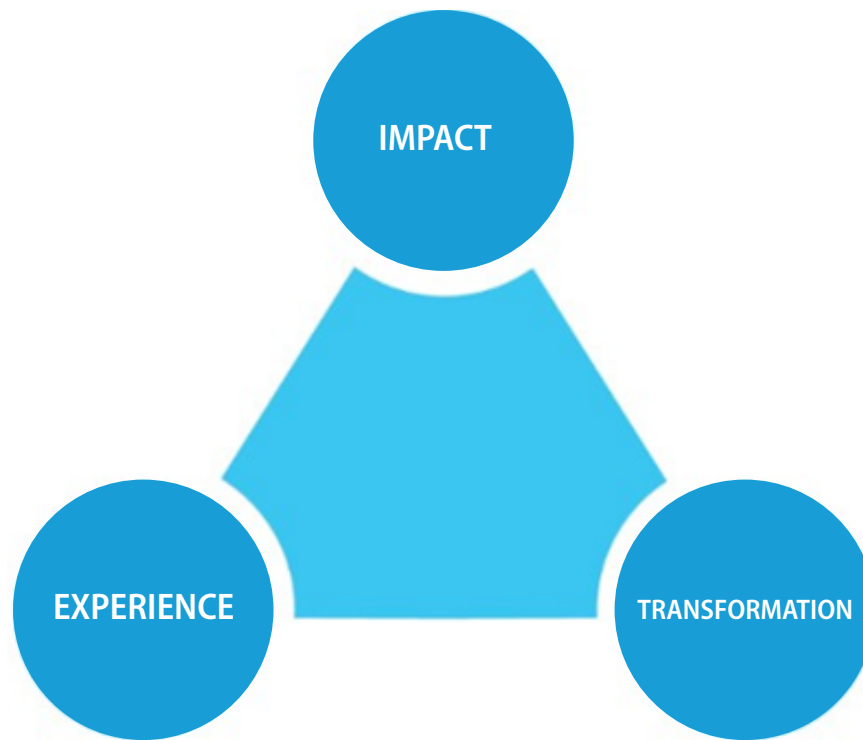
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Figure 3 – Action axes of the strategic plan 21/25

Transforming the experience that we offer our students and employees…to increase our impact on society!

The definition of the specific actions underlying this strategic plan was preceded by an analysis whose conclusions are summarized in the SWOT analysis in Figure 4. These conclusions include all those contextual, transactional and internal elements that were identified as central to the inventory of the organization's internal strengths and weaknesses, but also the opportunities and threats that it faces externally in the time horizon for the implementation of this plan.

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Figure 4 – Results of the SWOT analysis for the strategic plan 21/25

This plan was designed based on three axes:

- **Transformation** - transforming the organization through a more flexible and student- and employee-centred organizational model. Transforming the experience that we offer through digital solutions that promote greater efficiency and simplicity in the administrative processes;

- **Experience** - improving the students and employees experience through more effective support mechanisms and the creation of more opportunities for participation and involvement with the institution, whether for students or employees;

- **Impact** - increasing the impact of research and innovation activities carried out by the university by promoting a thematic agenda that concentrates efforts and resources/increasing the university's impact on companies by

stimulating the creation of new lifelong training opportunities and by promoting a vocational training agenda based on micro-credentials/increasing the university's impact on society by launching new degree programmes that correspond to effective responses to training needs, and strengthening the existing programme portfolio, in particular through the creation of new professional master's programmes and the strengthening of investment in distance programmes.

An agenda for transformation

A) TRANSFORMING THE STUDENT'S EXPERIENCE… TRANSFORMING THE ORGANIZATION.

Objective: to develop services focused on student support in order to increase their satisfaction and loyalty through the creation of more agile and flexible organizational structures.

Action i: creation of a single service called ASU – Academic Services Unit, which, under the existing Academic Management Planning and Control Department, will concentrate all services to students, divided according to the areas of intervention and phase of the student's relationship with the institution.

Action ii: creation of the "student manager" who accompanies the student throughout their entire career in the institution. Between 2021 and 2025, efforts will be concentrated on creating these managers for 1st cycle students, with SATA (Technical administrative support service) being responsible for accompanying 2nd and 3rd cycle students;

Action iii: creation of a mentoring program across the institution in order to improve educational efficiency and student satisfaction. The involvement of staff teachers as tutors will be decisive for the success of this process.

B) TRANSFORMING THE EMPLOYEE'S EXPERIENCE (TEACHER; RESEARCHER; ADMINISTRATIVE ASSISTANT) … TRANSFORMING THE ORGANIZATION.

Objective: to increase the capacity to attract and retain talent.

Action i: implementation of new technological solutions to support the relationship with employees and process management, including a new intranet, new project management solutions and R&D activities and new decision-making support tools.

Action ii: creation of the Quality Management, Talent and Institutional Development Department, which will ensure all talent management processes, including competitions and career promotion, quality management processes and will lead prospective institutional development processes. Considering the strategic importance of this area for the institution's overall quality, the existing services in the quality management area, among others, will be assigned to this new service unit.

Action iii: implementation of the "career staff space" to create physical and logistical conditions for the permanence in the institution of all career staff teachers.

C) TRANSFORM THE ORGANIZATION…IN ORDER TO RESPOND TO THE CHALLENGES OF THE FUTURE

Over the next five years, the university needs to increase its operational efficiency through better governance. This means strengthening the existing decision-making and accountability model, ensuring that the core role of the founding body in defining financial decisions is balanced by the role of the different bodies in the institution that are responsible for the academic decisions. This involves strengthening the management model of the different organizational units as entities with reinforced autonomy, but also with reinforced responsibilities for budgetary and administrative management in order to improve process efficiency and a student-centred approach. In addition to this, a set of service units under the board shall focus their activity on improving the students and employees' experience and increasing the process efficiency.

Action i: substantially increase the capacity to attract and manage research funding by aggregating the dispersed services that exist in this area around ILIND;

Action ii: optimize and decentralize budgeting processes, making each organizational unit responsible for the annual execution and making DGPA responsible for implementing an effective budgeting process at the academic level, promoting the accountability and improving the competitiveness.

Action iii: rethink the organizational model based on the relationship between: the service's target audience; intervention area of the service and those responsible for providing the service, promoting the development of an agile matrix structure with effective separation between transversal reporting and control services allocated to the founding body and operational services allocated to the HEI.

Action iv: place the articulation between teaching, innovation and research at the heart of the university's mission, promoting the transformation of all organizational units into teaching, research and community service units, articulated around a common agenda and topics. In parallel, it is vital to improve the classification of existing R&D units, ensuring at least 4 units with a classification of "Very Good", or higher, in the FCT 2023/2024
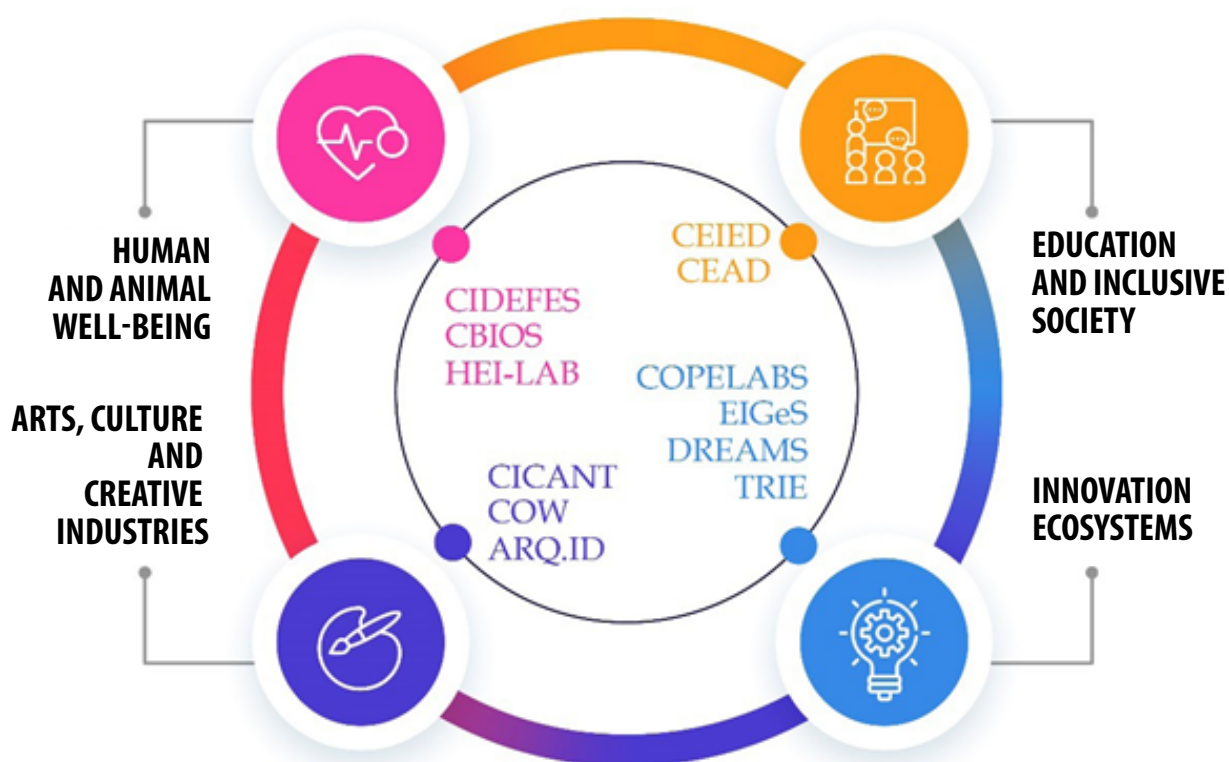

Figura 5 – Áreas estratégicas de desenvolvimento I&D

Action v: creation of one or more interface centres that could be certified as COLABs in order to promote synergies between research and innovation. The objective is for the university to participate in at least 2 COLAB by 2025.

In line with the objectives that preside over the development of a European Education Area and a European Research Area for Research and Innovation, Lusófona University intends to transform itself in this period by integrating these two agendas according to its specific resources and means, focusing on 4 major areas where it believes it can strengthen its competitiveness. The identified areas are represented in Figure 5: human and animal health and well-being; inclusive education and society; art, culture and creative industries and innovation ecosystems. In defining this agenda, the existing internal competences were considered, defined in Figure 5 through the identification of the various research units in the HEI, or in which it participates, and which are expected to be subject to assessment by the FCT – Fundação para a Ciência e Tecnologia (Foundation for the Science and Technology) in 2023, the clusters defined under pillar 2 of the Horizon Europa programme, and the United Nations sustainable development goals.

These strategic areas should have a mobilizing and aggregating effect on the competences that exist in the several research units and organizational units, which can and should act transversally throughout this agenda, thus promoting interdisciplinary and collaborative models that are vital for the evolution of the institution as a whole.

An agenda for improving the experiences we offer

A) MORE EXPERIENCES FOR STUDENTS

Objective: to develop original and innovative models to promote student satisfaction

Action i: development of the **entrepreneurship** programme "Academia Lusófona para a Inovação" (Lusófona Academy for Innovation) involving students in different types of actions, including training in soft skills; and boosting entrepreneurship, strengthening for this purpose the role of the "Play" incubator;

Action ii: creation of new forms of **teaching-learning experiences** with strengthening of distance learning methodologies; dynamization of Lusófona X MOOCs platform; and creation of a micro-credentials programme.

Action iii: strengthening the **mobility** at all levels of education, with particular focus on the implementation of the "European Universities" programme in which the university is deeply involved as leader of a consortium, and for the full implementation of the EWP – Erasmus Without Paper protocol and the ESC – European Student Card.

Action iv: development of actions to connect with the community through volunteer programmes that strengthen the effective involvement of students, teachers and other employees, in close connection with partner entities within the scope of the development of the institutional policy established for social responsibility

B) MORE EXPERIENCES FOR THE ALUMNI

Objective: to improve alumni's loyalty and relationship with the institution

Action i: support in job creation with strengthening of EVA (Internships and Active Life) and creation of a support program for the presentation of entrepreneurial projects that integrate alumni from different areas;

Action ii: creation of a "Lusofóna young researcher" scholarship program aimed at integrating a minimum of 25 newly graduated Lusofóna graduates per year into R&D projects at the university.

Action iii: strengthening of mobility at all levels of education, with particular a particular focus on the implementation of the "European Universities" programme in which the University is deeply involved as leader of a consortium. The objective is to have 25% of the university's students and employees in 2025 to participate in mobility actions. In this context, it is very important to develop new forms of mobility, namely remote mobility, short-term mobility and mobility in a research context.

C) MORE EXPERIENCES FOR THE EMPLOYEES

Objective: to improve the capacity to attract and retain talent

Action i: creation of a service unit responsible for the entire process for the recruitment, training, integration and retention of teachers and researchers;

Action ii: creation of a building with an area specifically dedicated to the work of teachers and researchers who are part of the university's career staff, called "career staff space".

Action iii: strengthening of mobility and support to the internationalization of the teaching staff and researchers in order to have 15% of the teaching and research staff in mobility in 2025.

Action iv: improve the services available to employees, namely through the implementation of an employee portal and new tools to support project management.

An agenda with impact

In the period 2021 to 2025, Lusófona University should strengthen its impact on the community and on society. The impact of the university's activity results primarily from the volume and quality of the results of its teaching, research and connection to the community activities. In order to achieve this, specific actions must be carried out in the following areas:

OFFER OF NON-DEGREE AND DEGREE DIPLOMAS:

- Creation, in the period, of at least 3 new Erasmus Mundus European Master's Degrees;

- Creation of two pilot degrees under the new status of "European degrees"

- Consolidation of the creation project of the European University FILMEU – European University for Film and Media Arts;

- Creation of a training program based on the micro-credentials model that will support its own lifelong training catalogue that should represent a minimum of 10% of the university's annual revenues;

- Creation of 3 new courses in the distance learning model;

- Accreditation of 5 new degrees in different innovative and in need areas, such as criminology; fashion design; data sciences or ergonomics;

- Creation of 5 new professional master's degrees, primarily in the business sciences and information technologies areas;

- Investment in new areas of training in the areas of human and animal health and well-being;

- Creation of 3 new 3rd cycle programmes

VOLUME AND QUALITY OF RESULTS FROM R&D ACTIVITIES:

- Assessment with a minimum rating of "very good" of, at least, 4 research units in which the university participates;

- Substantial increase in the university's body of researchers and their productivity;

- Participation in, at least, 2 colab in the period;

- Participation in a consortium for competition in one of the two KICs (Knowledge and Innovation Communities) to be opened by the EIT (European Institute of Innovation and Technology) in the period;

- Funding of, at least, 3 erc scholarships in the period;

- Funding of, at least, 1 e+ large scale project in the period;

- Development during the period of a R&D activity that guarantees a financial return corresponding to a minimum of 10% of the institution's annual revenues. This involves implementation in partnership or as leaders of more than 50 projects in the period in different funding programs such as Horizon Europe, Erasmus +, P2027, Creative Europe, among others;

- Increased capacity to transfer knowledge and produce innovation with a higher TRL (Technology Readiness Level) in order to increase the institution's capacity for innovation;

- Increase by 100% in the period the volume of publications indexed in international peer-reviewed journals produced by the university's researchers.

TRAINING EFFICIENCY, LABOUR MARKET INSERTION OF GRADUATES AND TEACHING RESULTS:

- During this period, the institution must increase its training efficiency and consequently its volume of graduates, promoting at the same time more and better mechanisms for following up on their professional path;

- During this period, the institution must continue to pursue a path for the improvement of the teaching and learning conditions it provides, either through the constant improvement of spaces and equipment or through investment in technology to support teaching or through the promotion of mentoring and support programmes that increase the academic success.

- Improving training efficiency involves, at the same time, the creation of more conditions for student mobility; better pedagogical training for teachers and strengthening of inclusion policies in order to guarantee a more diversified and inclusive institution.

CONNECTION TO THE COMMUNITY:

- Increase in the volume of service provision activities, namely in the areas of technology transfer, specialized training and specialized consultancy, with a special focus on areas related to the institution's R&D centres;

- Streamlining the existing incubator and strengthening the start-up support program;

- Creation of a service unit oriented towards the provision of accommodation services for students aimed at international students.

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The group of actions and guidelines defined in this strategic plan correspond to specific objectives designed with a single purpose, that of allowing Lusófona University to continue to consolidate its growth in the 2021-2025 period, and to accelerate its capacity to transform the community to which it belongs, and contribute to its scientific, cultural and economic development.