EFMD accreditation for international business schools
## LIST OF ACRONYMS

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<td>ILO</td>
<td>Intended Learning Outcome</td>
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Important Notes

1. **Privacy**
All individuals participating in the EQUIS process must respect the confidentiality of the information available to them. The only information in the public domain is the list of EQUIS accredited schools along with the period of accreditation.

All members of the EQUIS decision-making bodies, peer reviewers and EQUIS advisors are required to sign a Confidentiality Agreement (see Annex 22) and confirm that there is no conflict of interest with the school concerned (see Annex 23.) The school should inform the EQUIS Office when it is aware of any conflict of interest for any of the proposed EQUIS advisors or Peer Review Team members.

EQUIS ensures the anonymity and confidentiality of data provided to EFMD and processed in the framework of the EQUIS accreditation system. Any reporting of business school trends uses aggregate data to ensure no individual school data is identifiable.

Learn more about EFMD privacy policy at [https://efmdglobal.org/privacy-policy/](https://efmdglobal.org/privacy-policy/).

2. The **EQUIS Core Document Package** is available for download on the [EFMD website](https://efmdglobal.org) and consists of:
   1. EQUIS Standards & Criteria
   2. EQUIS Process Manual
   3. EQUIS Process Manual Annexes

The EQUIS documents are revised periodically at the beginning of each calendar year, and it is the responsibility of the school to always use the latest version of the document.
ANNEX 1

EQUIS Application Form
Annex 1: EQUIS Application Form

The EQUIS Process Manual – Annexes
Organisation: ...........................................................................................................................................................

Department: ............................................................................................................................................................

Address including Post/Zip Code: ................................................................................................................................
..............................................................................................................................................................
..............................................................................................................................................................

City and Country: ....................................................................................................................................................

Telephone: .................................. Fax: ..............................................

VAT Identification Number (please provide for invoicing purposes): .................................................................
(see art. 5 of General Terms and Conditions on previous page)
ANNEX 2

EQUIS Datasheet
The DataSheet is intended to provide succinct factual information about the school that allows it to be assessed against the Eligibility criteria. Data about the university, when applicable, should be limited to that strictly necessary to understand the school. Descriptions should be clear, concrete, concise and compelling. There should be many more facts and data than opinions. EQUIS will trust the data provided at this stage since it will be checked at a later stage, if applicable. The document will be limited to 16 pages. All information must be included in the 16 pages; links to additional documents are inadmissible. Appendices on multi-campus operations and collaborative provision should only be included if applicable. Tables 8, 9 and 10 as well as Appendices 1 to 3 do not count against the page limit.

For schools applying to EQUIS for the first time, it should be noted that no additional information provided by the school besides that contained in the DataSheet will be conveyed to the EQUIS Committee. Once eligible, the school should submit an updated DataSheet together with the Self-Assessment Report.

For schools applying to EQUIS for re-accreditation, this DataSheet should be completed when starting the re-accreditation cycle; an updated DataSheet should be submitted together with the Self-Assessment Report.

School and Contact Information

The term “school” is used in the EQUIS process to designate the entity that is applying for EQUIS accreditation, whether it is a free-standing business school or a faculty, school or department within a university.

Name:
Address
Website:
EFMD membership status:
☐ Full
☐ Affiliate
☐ Date of EFMD membership application:

Name of parent Institution (if any):

Contact Information:

<table>
<thead>
<tr>
<th>Head of School</th>
<th>EQUIS Project Leader (if different)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
</tr>
<tr>
<td>Tel:</td>
<td></td>
</tr>
<tr>
<td>Email:</td>
<td></td>
</tr>
</tbody>
</table>

General Description of the School

Institutional Aspects: Indicate whether it is a public or private institution, whether it is a free-standing business school or a faculty, school or department within a university.

• 1:
• 2:
• 3:

Year of founding and most significant historical events up to date:

Non-core Activities: Please list any non-core activities of the school and indicate if and how they complement and support the school’s core activities. Provide tangible information.

Campus Locations: Please list all the school’s campus locations (see Process Manual Annex 20) and mark the headquarter campus (if any) by checking the box. If you list two or more campus locations, then you need to fill out Appendix 2 (Multi-Campus Operations) as well.

Management Education Activities not managed by the applicant school: Please describe any activities related to management education organised under the umbrella of the parent institution which are not managed by the applicant institution itself.
Organisation and Internal Management System of the School

Describe current internal organisation (divisions, centres, institutes, etc.) including main committees, key academic and administrative positions – often best expressed diagrammatically. Explain also the main decision-making processes

Institutional Autonomy and External Governance System

Strategic and Operational Autonomy: Describe the extent of the autonomy of the school and limits imposed by legislation, regulations, parent institution or resource availability, with particular reference to financial control, academic authority for programmes, quality assurance and authority for appointing, promoting and rewarding faculty. Indicate whether limits represent just theoretical or practical restrictions.

External Governance: Explain how external governance is organised and how external governance bodies (e.g. Governing Board, University-Level Executive Committee) are exercising authority over the school.

The Degree Programme Portfolio

Using Table 8 at the end of this Datasheet, describe the school’s portfolio of degree programmes within the principal segments: Bachelor, Generalist Master, Specialised Master, Doctoral Programmes, other postgraduate programmes such as MBAs. Please, fill out Table 8 first.

Total number of full-time degree students in the school: 0
Total number of part-time degree students in the school: 0
Total number of full-time equivalent (FTE) students in the school:

(School should specify the methodology for calculating the FTE student number for their PT students. For FT students, EQUIS uses 1 FT student = 1 FTE student.)

MBA Programmes For MBA programmes, provide the following additional information about participants:

Table 1: MBA Programmes’ Participant Experience

<table>
<thead>
<tr>
<th>Programme Name</th>
<th>Average years of experience</th>
<th>Number of participants with less than 2 years of experience</th>
</tr>
</thead>
</table>

Name of the Selected Programme: (not applicable for schools going through Special Re-accreditation) The EQUIS process not only takes an overview of the programme portfolio and the management thereof but it also reviews one sample programme in depth as a check on the effectiveness of the overall programme portfolio management. The school should name three of its major programmes and check them in the Table of Degree Programmes (Table 8) (but no programmes abroad) such that there is a variety of programme types, e.g. an undergraduate (Bachelor), a pre-experience postgraduate (e.g. specialist Master), a post-experience postgraduate (e.g. MBA) programme and a doctoral (PhD) programme. The proposed programmes will be approved by the EQUIS Office. One of these programmes will be chosen as the selected programme by the EQUIS Committee. In case of re-accreditation, the previously selected programme should normally not be suggested. Schools entering a re-accreditation cycle and holding an EFMD Programme Accreditation have a choice regarding the assessment of the Selected Programme (see Annex 28 of the EQUIS Process Manual).
The term «faculty» designates the academic staff. Provide a readily understandable picture of the quality and quantity of the academic human resources available to the school. If you believe that it is extremely difficult to fit your faculty into the typology below, use your own classification and typology preceded by a clear description of the qualifications, experience and dedication that apply to each type. Occasional speakers are not considered faculty, even if academically qualified. Definitions are given below.

Table 2: Faculty (unless specified – FTE – numbers relate to headcount)

<table>
<thead>
<tr>
<th>Core Faculty</th>
<th>Indicator for the School</th>
<th>Indicator for the School</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Female</td>
<td>Total</td>
</tr>
<tr>
<td>Number of academic staff members</td>
<td>0</td>
<td>Number of core faculty with foreign professional or study experience</td>
</tr>
<tr>
<td>Number of staff members by academic rank (e.g. full professors, associate professors, etc.):</td>
<td>0</td>
<td>Ratio FTE students / FTE core faculty</td>
</tr>
<tr>
<td>Full professors</td>
<td>0</td>
<td>Core faculty hired in last 3 years (FTE)</td>
</tr>
<tr>
<td>Associate professors</td>
<td>0</td>
<td>Core faculty departed in last 3 years (FTE)</td>
</tr>
<tr>
<td>Assistant professors</td>
<td>0</td>
<td>Total number of adjunct faculty</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
<td>Full-time equivalent (FTE)</td>
</tr>
<tr>
<td>Number holding a doctoral degree</td>
<td>0</td>
<td>Full-time equivalent (FTE)</td>
</tr>
<tr>
<td>% of female core faculty</td>
<td>0.00%</td>
<td>Visiting professors in current year</td>
</tr>
<tr>
<td>% of core faculty holding a doctoral degree</td>
<td>0.00%</td>
<td>Number from foreign institutions</td>
</tr>
<tr>
<td>Number teaching in executive education courses</td>
<td>0</td>
<td>Number from domestic institutions</td>
</tr>
<tr>
<td>Number of nonnationals</td>
<td>0</td>
<td>Teaching and research assistants - on short-term contracts</td>
</tr>
</tbody>
</table>

Notes:

1. Core faculty: Qualified academic staff employed on a permanent basis and for whom the institution is the sole or principal employer. Permanence is indicated by an open-ended contract or by a fixed-term contract of a minimum of 2 years.

2. Number of core faculty with foreign experience: Number of core faculty (excluding foreign only passport holders) with significant professional/work experience or study abroad (e.g. a complete degree) which entailed living abroad for at least 1 full year (i.e. not made up of part years).

3. Adjunct faculty: Teaching staff for whom the school is not the primary employer or who work for the school on a part-time basis under a permanent or an occasional contract.

4. Visiting professors in current year: Academic staff that are core faculty at another academic institution and visit the school to teach for a consecutive period of not less than 2 weeks.

5. In describing the size of the faculty, the “full-time equivalent” (FTE) is the total of faculty contract days divided by 5, assuming that 5 is 100% employment. For example, 5 faculty members with 3-day contracts would be the equivalent of 3 faculty members with 100% contracts. In this case, the headcount is 5 but the FTE is 3. The FTE is a useful indicator when a large percentage of the faculty have less than full-time contracts. The percentage of full-time employment refers to the number of contract days in the case of faculty members who are employed on a part-time basis. A four-day contract is thus the equivalent of 80%.

6. The ratio FTE students / FTE core faculty is calculated by dividing the number of full-time equivalent students by the number of full-time equivalent core faculty. Calculating the full-time equivalent for students is obviously a question of reasonable estimation. For instance, the total number of part-time students on a two-year executive MBA programme can be divided by two in order to approximate the full-time equivalent. The resulting ratio has, of course, to be interpreted in the light of other variables such as the contribution of a well-structured non-core faculty. However, the ratio is useful as an indicator to measure faculty sufficiency.
Subject or Teaching Areas or Departments

Explain in tabular form how academic staff are organised into departments or areas. Indicate the number of core and adjunct faculty allocated to each department/area.

Table 3: Departments/Areas and Faculty Allocation

<table>
<thead>
<tr>
<th>Department/Area</th>
<th>Core Faculty</th>
<th>Adjunct Faculty</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Headcount</td>
<td>FTE</td>
</tr>
<tr>
<td>Total</td>
<td>0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Non-Academic Staff

- Staff working in academic programmes or academic departments (FTE): 0.00
- Staff working in non-academic support areas (FTE): 0.00

Overview of the School's Research Activities

Provide compelling factual data on the quantity and quality of your school's research as viewed by EQUIS (see EQUIS Standards and Criteria). In the following table, please show the numbers of different outputs produced by core faculty over the past 5 years. Also, please complete Appendix 1.

Table 4: Research Output

Last year for which complete data is available ("Year t"):
If you want to provide data for academic years rather than calendar years, then t is the year the academic session starts.

<table>
<thead>
<tr>
<th>Research Type</th>
<th>Year t-4</th>
<th>Year t-3</th>
<th>Year t-2</th>
<th>Year t-1</th>
<th>Year t</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic research articles (peer-reviewed)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Research books or monographs (with distinguished publishers)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Practice-oriented research articles</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Papers in academic conferences (peer-reviewed)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Papers in professional conferences</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Other research publications (peer-reviewed)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Note: Only include authors who are core faculty members at the time of production

Faculty Workload: Please provide the average teaching load (on-load teaching only) per capita and year of core faculty and specify what percentage of their workload is allocated to research, learning and teaching, and service, respectively. You can specify up to five different workload models and what the criteria for assignment to each category are. Please, also enter the corresponding number of core faculty in each category.

Table 5: Core Faculty Workload Distribution

<table>
<thead>
<tr>
<th>Workload model</th>
<th>% allocated to research</th>
<th>% allocated to learning &amp; teaching</th>
<th>% allocated to service</th>
<th>No. of core faculty</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>
Executive Education

EQUIS does not require schools to have Executive Education activities. If the school does not run Executive Education activities, simply indicate why and give an indication if you have plans in this respect. If many members of your core faculty are independently involved in Executive Education while your school is not institutionally involved, it would be helpful to give some brief idea of the extent of this involvement. EQUIS includes degree programmes (e.g. Executive MBAs) in the School Degree Programme Portfolio rather than under Executive Education.

- ExecEd excluded by EQUIS Committee
- No ExecEd Activity

Table 6: ExecEd Activity

<table>
<thead>
<tr>
<th></th>
<th>Number of participant days</th>
<th>% delivered by core faculty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Programmes</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Tailored Programmes</td>
<td>0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Notes:

1. Please provide figures of the latest year for which data is available.
2. Number of participant days is calculated by adding up for all programmes: (Number of participants x Duration in days) + (Number of participants x Duration in days) + ...  
   Example: You have two programmes, one with 100 participants and a duration of 3 days, the other with 2 participants and a duration of 50 days. Then, the result is 100*3 + 2*50 = 400 and NOT (100 + 2)*(3 + 50) = 5,406.°

Organisation and Management of Executive Education within the school: Indicate how the Executive Education unit reports to and interacts with other units of the school. Describe briefly its internal management structure.

Programme Portfolio of Executive Education: Provide a brief idea of the weight of different programmes and activities: longer vs shorter term, online vs on-site vs blended, etc. Mention some of your most successful non-degree programmes. If non-degree programmes are delivered in collaboration with other institutions, then you need to provide further detail in Appendix 3 (Collaborative Provision).

Five principal national clients:

- 
- 
- 
- 

Five principal international clients:

- 
- 
- 
- 

° ExecEd excluded by EQUIS Committee
Online Learning

Describe how the school employs digital elements to enhance student learning (programmes, target group, learning platform, technology and tools, learning analytics). Illustrate the different formats in place (e.g. blended learning, hybrid learning).

Overview of the School’s Financial Management and Performance

Using Table 10 at the end of this Datasheet, provide summary information on the school’s financial situation for the past five accounting years as well as projections for the following three years. Financial data should be expressed in EUR (please provide the currency rate used for conversion from local currency). Explain the financial relationship with the parent institution or university, if applicable.

Please, fill out Table 10 first.

Financial Risks: Discuss the principal financial risks facing the school (incl. those emanating from the parent institution or university).

Describe the school’s risk management processes and activities:

National Standing

Describe the school’s positioning in the national environment, including its main competitors and the strategic group to which it belongs. Indicate at least two clearly defined areas of activity for which the school enjoys significant recognition for excellence.

Area of Recognition 1

Area of Recognition 2

Accreditation or Recognition by National and International Agencies

National

International

International Reputation

Provide factual evidence that the school is known and respected by institutions outside its home country.

Internationalisation

Provide factual evidence on the principal aspects of the school’s international dimension (faculty, student body, programmes, strategic alliances, international partners, etc.) that has not already been provided.

Ethics, Responsibility and Sustainability

Provide factual evidence on the school’s activities in areas of ethics, responsibility and sustainability (strategy, faculty, programmes, research, infrastructure, operations & administration, community outreach, etc.) that has not already been provided.
Overview of the Principal Links with the World of Practice

Provide factual evidence on the school’s interaction with the business community (including governance, relevance and impact, international scope) that has not already been provided.

Partners from the World of Practice: List the school's most important (up to 25) non-academic partners and describe their involvement in the school activities. A partner may be involved in several Interaction Groups or in various Types of Interaction. Hold down the Ctrl (Win) or Cmd (Mac) key to select multiple options. You can also list the same partner in several rows of the table.

Table 7: Partner Organisations' Interactions

<table>
<thead>
<tr>
<th>Partner</th>
<th>Type of Organisation</th>
<th>Interaction Group</th>
<th>Type of Interaction</th>
</tr>
</thead>
</table>

Facilities

Describe the dimension and quality of your campus(es) including residential facilities, library, databases, computer facilities, etc.
Table 8: Degree Programme Portfolio

<table>
<thead>
<tr>
<th></th>
<th>% of programme delivered by core faculty</th>
<th>Duration in months</th>
<th>Year in which programme started</th>
<th>Collaborative provision</th>
<th>Delivery of Online Learning</th>
<th>Does the programme require previous work experience? Yes/No</th>
<th>Primary language(s) of instruction</th>
<th>No. of currently enrolled students in all years of the programme FT / PT</th>
<th>No. of applicants this year</th>
<th>No. of students enrolled this year (new entrants)</th>
<th>No. of non-national students enrolled this year (new entrants) - not including exchange students</th>
<th>No. of incoming exchange students this year</th>
<th>No. of outgoing exchange students this year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Pre-Experience Master</td>
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<tr>
<td>Post-Experience Master</td>
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<tr>
<td>Doctoral Programmes</td>
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<td>Other</td>
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<td>GRAND TOTAL</td>
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</tbody>
</table>
Table 9: Distribution of non-national students enrolled this year (new entrants) - not including exchange students

For Bachelor, Pre and Post Experience Master programme segments, provide numbers for the top 3 most frequent home countries of non-national students. Please, fill out Table 8 first.

<table>
<thead>
<tr>
<th>Home Countries</th>
<th>No. of students</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other home countries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Pre-Experience Master</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other home countries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Post-Experience Master</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other home countries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>
Table 10: Summary Information on the School's Financial Situation

**Last year for which complete data is available ("Year t"):**
If you want to provide data for academic years rather than calendar years, then t is the year the academic session starts.

**Currency rate and date used for conversion:**
Example: 1 South Korean Won = 0.00070 EURO, Date 15 February 2024

<table>
<thead>
<tr>
<th>(All figures in 1000€)</th>
<th>Year t-4</th>
<th>Year t-3</th>
<th>Year t-2</th>
<th>Year t-1</th>
<th>Year t</th>
<th>Year t+1</th>
<th>Year t+2</th>
<th>Year t+3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources / Revenues, of which</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Bachelor / Undergraduate Programmes</td>
<td>0</td>
<td>0</td>
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<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Pre-Experience Master Programmes</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Post-Experience Master Programmes</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>MBA Programmes</td>
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<td>0</td>
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<td>0</td>
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<tr>
<td>Doctoral Programmes</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Executive Education</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Research Income</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Other Earned Income</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Endowment and Investment Income</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Subsidies (e.g. from government or parent organisation)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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</tr>
<tr>
<td>Knowledge exchange (e.g. Consultancy)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td><strong>TOTAL INCOME (in 1000€)</strong></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>Expenses, of which</td>
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<tr>
<td>Staff Cost</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
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<td>External Teaching and Teaching Support</td>
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<td>0</td>
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<tr>
<td>Marketing and Promotion</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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</tr>
<tr>
<td>Infrastructure-Related Expenses</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Interest Payable and Debt Servicing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Contribution to Parent Institution</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Other Expenses</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES (in 1000€)</strong></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Annual Surplus (in 1000€)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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</tr>
</tbody>
</table>
Appendix 1: Research Output (two last completed years)

**Academic Research:** List the names of academic journals and numbers of publications of the core faculty for the two last completed years. Journals should be ranked according to their relevance for the school (starting with 1 as the highest category). The same ranking number may be assigned repeatedly in order to create categories, either decided independently by the school or utilising an established national system.

Table 11: Academic Research Output Ranking

<table>
<thead>
<tr>
<th>Rank</th>
<th>Journal Name</th>
<th>No. of Pubs.</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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</tbody>
</table>

Ranks can be assigned to individual journals or journal groupings; publication numbers need to be provided for individual journals. Add rows as necessary. Use the Comment column to define rank categories further (optional).

**Practice-Oriented Research:** Provide summary statistics using the next four tables that describe the type, quantity and quality of the practice-oriented research of the core faculty for the last two complete years.

Table 12a: Practice-Oriented Research: Partnerships, Projects and Collaboration

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Source of Funding/Partner</th>
<th>Type of Project</th>
<th>Revenue (K€)</th>
<th>Duration (from...to)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

Table 12b: Actionable Insights

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Target Audience or Client</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>White papers</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Policy or legislation reviews</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Trade publications</td>
<td></td>
<td></td>
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<tr>
<td>Patents/IP Licenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Handbooks or books produced for practice</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Artefacts (e.g., software, frameworks or tools, ...)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Consultancy</td>
<td></td>
<td></td>
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<tr>
<td>Start-ups</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 12c: Dissemination

<table>
<thead>
<tr>
<th>Type</th>
<th>Target Audience or Client</th>
<th>Evidence of Reach (audience numbers, downloads, views, impressions, engagements...)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conferences, Colloquia or Congresses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keynote speeches</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Briefings (e.g., policy, legislation, industry, ...)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print media coverage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital media coverage</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 12d: Recognition of research from Practice

<table>
<thead>
<tr>
<th>Category</th>
<th>Source of Funding/Award</th>
<th>Revenue (K€)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Endowed chairs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joint research centres</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prizes, awards and honours</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix 2: Multi-Campus Operations

A campus is defined as a geographical location used for the regular and on-going delivery of degree or non-degree education even if the delivery itself takes place in temporary premises. Please refer to Annex 20 of the EQUIS Process Manual Annexes for further details on Multi-Campus Operations.

- Not applicable

Management and Oversight: Describe management systems as well as governance and quality assurance mechanisms established to manage the campus network (incl. coordination and resource sharing across campus locations).

Campus Activities: For each campus location, fill out the table below by adding figures available for the last completed academic or calendar year (add tables 13b, 13c etc. as needed).

Table 13a: <Name of location> (founded in: <Year>)*

<table>
<thead>
<tr>
<th>1. Programmes</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1. Degree Programmes</td>
<td></td>
</tr>
<tr>
<td>Degree Designation</td>
<td>Student FTE (all years)</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>Total</td>
<td>0.00</td>
</tr>
<tr>
<td>1.2. Executive Education</td>
<td></td>
</tr>
<tr>
<td>Programme Type</td>
<td>Number of Programmes</td>
</tr>
<tr>
<td>Open Enrolment</td>
<td>0</td>
</tr>
<tr>
<td>Tailored</td>
<td>0</td>
</tr>
</tbody>
</table>

2. Personnel

2.1. Faculty

| Core Faculty FTE | 0.00 | Non-nationals FTE | 0.00 |
| Adjunct Faculty FTE | 0.00 | With foreign professional or study experience FTE | 0.00 |
| Visiting Faculty FTE | 0.00 |  |
| Teaching/Research Assistants FTE | 0.00 |  |

2.2. Staff Support

| Academic Areas FTE | 0.00 |
| Non-Academic Areas FTE | 0.00 |

3. Host Organisation (if applicable) **

Institution | Nature of Legal/Contractual Relationship |
|---|---|

4. Campus Development

Briefly describe activities of further developing the campus location (if any):

* The campus infrastructure should be described in the section Facilities in the main part of the document.

** If the institutional partnership involves collaborative provision, then describe this relationship also in Appendix 3.

Establishment of New Campus Locations, if any: Describe current activities of establishing new campus locations.
Appendix 3: Collaborative Provision

Describe the collaborative provision of degree and non-degree education by filling out the table below for each partner (add tables 14b, 14c etc. as needed) (including partner institutions and the nature of the contractual/legal relationships). Note that collaborative provision refers to activities carried out in cooperation with other organisations (e.g. dual or joint degree awards, joint executive education offerings); partnership agreement for international student exchange do not have to be reported here. Please refer to Annex 21 of the EQUIS Process Manual Annexes for further details on Collaborative Provision.

☐ Not applicable

Table 14a: Collaboration for <Name of Programme>

Name of Partner Organisation: <Name>

<table>
<thead>
<tr>
<th>Duration:</th>
<th>Start:</th>
<th>Expected End:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal/Contractual Nature of the Agreement:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nature of Collaboration:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of students/participants that have successfully completed the programme since the start of the partnership:</td>
<td>Total:</td>
<td></td>
</tr>
<tr>
<td>Incoming: 0</td>
<td>Outgoing: 0</td>
<td></td>
</tr>
<tr>
<td>Partner's National Standing:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner's International Reputation:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner's Accreditation Status (if applicable):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Objectives for Next 5 Years:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Further information on Collaborative Provision, if this is deemed useful:**
ANNEX 3

EQUIS Fee Schedule
EQUIS FEE SCHEDULE
(2024)

The total fee for the EQUIS process is 65,600 € (5-year accreditation); 57,400 € (3-year accreditation) or 45,100 € (non-accreditation) for new applications submitted between 1 January 2024 and 31 December 2024. For accredited schools starting the reaccreditation process between 1 January 2024 and 31 December 2024, no Eligibility Fee will be due. The Fee Schedule at the time of the (re-)application remains valid throughout that cycle of the school’s accreditation process.

ADMINISTRATIVE FEES

Application Fee: 12,300 €
Invoiced upon receipt of the Application Form for Entry into EQUIS. This fee is also payable by schools entering a reaccreditation cycle.

Eligibility Fee: 12,300 €
Invoiced only upon a positive eligibility decision by the EQUIS Committee. This fee is charged only to schools in the initial accreditation cycle, not to those starting a reaccreditation cycle.

Review Fee: 20,500 €
Invoiced two weeks in advance of the Peer Review Visit.

Accreditation Fee
Invoiced only upon a positive accreditation decision by the EQUIS Accreditation Board.
➢ If (re)accreditation for 5 years: 20,500 €
➢ If (re)accreditation for 3 years: 12,300 €
➢ If non-accreditation: 0 €

The accredited schools have 2 options regarding the final payment:

Option 1: The above amount can be paid in annual instalments of 4,100 €.
Option 2: The above amount can be paid in a single payment.
EXPENSES

Travel, lodging and other direct expenses as incurred by EQUIS experts and peer reviewers are to be paid without delay by the school, on submission of receipts.

Peer reviewers are advised to book their flights at the earliest opportunity to minimise the costs to the school. Peer reviewers should ask approval from the school before ticket purchase, copying the EQUIS Office, and should endeavour to keep the costs as low as possible (a maximum of 6000€ is envisaged but cannot be considered as the norm).

CANCELLATION, POSTPONEMENTS, LATE PAYMENTS

Should the school decide to cancel or postpone the Peer Review Visit (PRV), the school will be liable for any non-refundable costs incurred by the peer reviewers at that time.

Any postponement, re-scheduling or cancellation of the PRV will require the payment of an administration fee of 1.500 € should this occur more than 6 months in advance of the planned PRV date. A fee of 5.000 € will be charged should this occur within 6 months of the scheduled PRV date.

In order to advance in the accreditation process, a school must be up to date in all its payments to EFMD.
ANNEX 4

Online Briefing Guide
ONLINE BRIEFING GUIDE

This document is aimed primarily at those undertaking an Online Briefing (OB) but may also be of interest to schools seeking accreditation.

The OB is an important part of the EQUIS application process, scheduled not later than three months after receipt of the Formal Application for Entry. It takes the form of a videoconference between a briefing expert from the EQUIS Office and the school.

1. Objectives of the OB

The goal of the OB is to:

➢ Ensure that the management of the school understands the EQUIS Criteria and procedures by presenting and explaining the EQUIS system.
➢ Undertake a preliminary assessment as to whether the school satisfies the Eligibility Criteria (see Section 3, Stage 4 of the EQUIS Process Manual).
➢ Conduct a pre-evaluation of the school to identify possible concerns or major obstacles to future eligibility or accreditation. To achieve this, it may be necessary to collect information about the school beyond that provided by the Entry Application Datasheet.
➢ Advise the school on its apparent standing as compared to the level of quality expected for EQUIS accreditation, particularly in relation to difficulties that may be encountered in certain areas.
➢ Perform a preliminary assessment of whether executive education should be excluded from the accreditation.
➢ Discuss the programme portfolio so that the briefing expert may make an informed recommendation on the Selected Programme.
➢ Help the school’s management to launch the EQUIS process internally by briefing members of the school and answering questions.
➢ Provide information and to answer any further questions about EQUIS.
➢ Guide the school’s management in setting up working parties to prepare the Self-Assessment Report (SAR) and to brief the EQUIS project leader within the school on how to manage the process effectively.
➢ Provide the basis for a short (maximum 3 pages) OB Report describing the school’s advisory needs, if any.
2. **Explanation of the EQUIS System during the OB**

The briefing expert ensures that the school understands the overall EQUIS process and the respective roles within the EQUIS Office, the EQUIS Committee, the EQUIS Accreditation Board, and the Peer Review Team. Both the founding principles of EQUIS and the EQUIS Criteria framework within which the assessment is made are explained, together with the expectations regarding the SAR and the organisation of the Peer Review Visit.

The OB is more than a technical presentation of the system; it provides an opportunity to motivate members of the school as they enter the EQUIS process. An important outcome of the OB is support for the head of school and the school’s management team in its effort to launch the process internally. From this perspective, the briefing expert should be able to answer the probable questions that will arise.

3. **Specifying the School’s Advisory Needs during the OB**

A further objective of the OB is for the briefing expert to assess the school’s potential advisory needs, therefore sufficient time must be allowed within the OB to cover all relevant issues and to ask for additional information beyond what is stated in the Entry Application Datasheet. It may often be necessary to suggest changes and additions that will improve the Eligibility Datasheet.

4. **Organisation of the OB**

The EQUIS Office will contact the school to organise the OB. The OB lasts between 2.5 and 3 hours. A typical OB schedule includes:

1. **Introductory session open to the main representatives and stakeholders of the school (approx. 55 minutes)**

   The briefing expert sets out the objectives of the OB and begins with an introduction to EFMD and Quality Services Department, under which the EQUIS Office falls (10 minutes).

   This is followed by a general presentation of the EQUIS process (35 minutes).

   The remainder of the session is devoted to questions from the audience (10 minutes).

   Participation is limited to a maximum of 25 participants, which may include, besides the school’s senior management, department heads, other directors, faculty, or staff.

   **Break (10 minutes)**

2. **Review of the Entry Application Datasheet and pre-evaluation (60 minutes)**

   This session will be held with the school's management team. Each person in the management team should have the Eligibility Datasheet at hand that will be reviewed during the session. It is recommended that this group attends the introductory session, too.
Break (10 minutes)

3. Process briefing and advice (30 minutes)

The briefing expert makes sure that the school has understood the EQUIS process and answers all questions that arise, summarises strengths and weaknesses in their eligibility, and advises on how to structure the accreditation project.

Participants of sessions 2 and 3 should be limited to a maximum of 5 persons to allow for productive exchanges and should typically include the head of school, the EQUIS project leader within the school, as well as three additional members of the school’s executive.

The school is asked to send the detailed schedule of the OB, including the names and positions of the participants in each meeting, the latest one week in advance of the briefing. The school also provides a video platform for the OB, using the solution of their choice, in agreement with the EQUIS Office. The virtual link will be included in the OB schedule.

Recording of the sessions is not permitted – this feature should be disabled when setting up the video link. The briefing protocols require that each participant connects individually from a computer with their own camera, use a headset and mute the sound when not speaking. All meetings and discussions should be conducted in English without the use of simultaneous translation.

5. OB Report

The OB Report is normally quite short, three pages at most. The template form (Annex 5) provides a framework for drafting the report. This report is sent to the EQUIS Office within two weeks. The EQUIS Office reviews and sends the report to the school within three weeks of the OB. In due course the report is sent to the EQUIS Committee to assist their deliberations on eligibility.
ANNEX 5

Online Briefing Report Form
ONLINE BRIEFING REPORT

Name of the school

Name of the briefing expert

Date of the Online Briefing: DD.MM.YYYY

A. Meeting schedule for the Online Briefing.

B. Remarks concerning the school that may complete or facilitate the comprehension of the datasheet.

C. Are there any apparent problems of governance?

D. Describe your assessment of satisfaction of the Eligibility Criteria:

1. EFMD Full Membership in good standing

2. Institutional Scope
   *(The report should also include information on non-core activities, if any, and the extent to which the school engages in these and how they support the school’s core activities)*

3. Excellent National Standing

4. International Reputation

5. Breadth of Activities

6. Core Faculty

7. EQUIS Standards & Criteria

   *The perceived ability to meet the EQUIS Standards & Criteria is the key factor for the EQUIS Committee in making the decision for eligibility. Has the school a reasonable prospect of satisfying the EQUIS Criteria within the two years of being declared eligible?
E. Developmental areas that the school should address:

F. School decision regarding optional Pre-Eligibility Advisory Service:

The school will proceed with the Application for Eligibility without the support of an EQUIS advisor.

The school will take advantage of the EQUIS Advisory Service with a minimum duration of 1 year.

Recommendations of the briefing expert:
1. *Should eligibility be granted?*
2. *What are the principal risks, if any?*
3. *Should executive education be included in or excluded from the accreditation?*
4. *Selected Programme (based upon the school’s list of proposed programmes in the datasheet)?*

Rationale for the recommendations:

Concluding remarks:
ANNEX 6

EQUIS Eligibility Progress Report Form
## EQUIS ELIGIBILITY PROGRESS REPORT

Name of the school: 

Date of eligibility decision: 

### Areas of Concern (AoCs):

<table>
<thead>
<tr>
<th>AoC</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
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<tr>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Due Date:</th>
<th>Day/Month/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted:</td>
<td>Day/Month/Year</td>
</tr>
<tr>
<td>Feedback Provided:</td>
<td>Day/Month/Year</td>
</tr>
</tbody>
</table>

*(Information above added by EQUIS Office)*

### Guidelines:
The school is expected to address the headings of each text box which are the areas of concern the EQUIS Committee raised, informing of developments. It is essential that all arguments are supported by factual evidence and that the effectiveness of developmental initiatives is evaluated on the basis of their tangible impact. Please provide 5 to 10 pages per AoC.

**AoC 1**: 

*Description of progress in the Area of Concern*

*Please mention general developments*

Add text here…

*Feedback from the EQUIS Office:*

**AoC 2**: 

*Description of progress in the Area of Concern*

*Please mention general developments*

Add text here…

*Feedback from the EQUIS Office:*

**AoC 3**: 

*Description of progress in the Area of Concern*

*Please mention general developments*

Add text here…

*Feedback from the EQUIS Office:*
1. Introduction to the EQUIS Advisory

The purpose of EQUIS Advisory is to provide support to the school in its pursuit of EQUIS accreditation. It is designed as an integral part of the EQUIS system to enhance the quality improvement achieved during the accreditation process. It is an optional feature of initial accreditations, namely, Stage 2 Pre-Eligibility and Stage 5 Self-Assessment and Pre-Review Advisory.

2. Objectives of the EQUIS Advisory

EQUIS Advisory is designed to assist schools initiating the EQUIS accreditation process in the interpretation of the EQUIS Standards, and in evaluating their readiness to enter the accreditation process or to proceed to the next stage in the process.

An EQUIS advisor provides support and advice so that the school can manage the accreditation process more effectively, produce documents with greater clarity and address development shortfalls in need of improvement before proceeding with the accreditation process.

Examples of advice that can be provided are:

- **Pre-Eligibility Advisory**: Identifying the further development steps required to satisfy the Eligibility Criteria.
- **Pre-Review Advisory**: Addressing any reservations attached to a positive eligibility decision and providing general developmental support.

3. Nature of the EQUIS Advisory

The EQUIS Advisory is an optional part of the accreditation process, provided upon request by the school, and is managed by the EQUIS Office. This includes matching advisory needs and the EQUIS advisor’s experience, the interaction between the applicant school and EQUIS advisor, and final reporting. EQUIS advisors are drawn from a pool of experts comprised of chairs and experienced members of Peer Review Teams (PRT) as well as (former) members of the EQUIS Committee and Accreditation Board. EQUIS advisors volunteer their time as a service to the EFMD community. A conflict-of-interest policy (Annex 23) ensures that EQUIS advisors distance themselves from the accreditation process beyond their assigned roles.

The EQUIS advisor’s role consists of:

1. Scoping the advisory needs of the school in terms of understanding the accreditation standards and the developmental requirements to manage the process successfully.
2. Providing input based on ongoing interaction with the school’s executive and accreditation team as well as its wider community; this normally includes on-site visits.
3. Submitting a Pre-Eligibility Advisory Evaluation at the end of the Pre-Eligibility Stage or a Pre-Review Advisory Evaluation at the end of the Self-Assessment Stage.

The Advisory Service will have a minimum duration of 9 months. EQUIS advisors will normally support the school during Pre-Eligibility (up to an equivalent of a maximum of four days of work) and Pre-Review (up to an equivalent of a maximum of six days of work). The school or the EQUIS advisor may wish to change after completing a stage, in which case the EQUIS Office will assign a different EQUIS advisor.

4. The EQUIS Advisory Process

Pre-Eligibility Advisory

a. The school submits its Formal Application for Entry into the EQUIS process (Application Form and Entry Application Datasheet).

b. The EQUIS Office schedules an Online Briefing (OB), which serves the purpose of informing the school community about the challenges ahead. It also helps to scope the school’s advisory needs. The outcome of the OB is summarised in the OB Report.

c. The EQUIS Office, upon request by the school, assigns an EQUIS advisor, who supports the school in its developmental efforts over a period of up to two years. The EQUIS advisor will write a Pre-Eligibility Advisory Evaluation which includes a recommendation for eligibility and sets out the principal strengths and potential risks from an EQUIS perspective. The document will be shared with the school and presented to the EQUIS Committee (EC), together with the Eligibility Datasheet, for the decision on eligibility.

d. The school submits the Application for Eligibility with the time of submission being ultimately determined by the school. It consists of the Application for Eligibility (i.e., a formal email indicating its plan for submission to the EC) and the Eligibility Datasheet. Pre-Eligibility Advisory is concluded when the school submits the documents for the EC. If declared eligible, the school has the option to advance to Pre-Review Advisory. If denied eligibility, the school can choose to immediately restart Pre-Eligibility Advisory which then has a minimum duration of two years. In any case, it is possible that the school or the EQUIS advisor may wish to end the cooperation at this time. If requested, the EQUIS Office will assign a different EQUIS advisor.

Pre-Review Advisory

a. A school that is declared eligible is expected to communicate its plans with respect to the rest of the EQUIS process within two months. This is done in the form of an email from the school indicating the time period in which the school is aiming to host the Peer Review Visit (PRV). Eligibility is normally valid for a maximum period of two years, within which PRV has to take place. Pre-Review Advisory normally runs over a period of maximum of two years.

b. The EQUIS Office, upon request by the school, assigns an EQUIS advisor, who supports the school’s self-assessment and preparation for the PRV with particular emphasis directed towards addressing any development shortfalls and reservations included in the Eligibility Letter (i.e., areas of concern or possible difficulties identified by the EC). EQUIS Advisory may involve commenting on parts or drafts of the self-assessment Report (SAR), as well as providing advice on the process of preparing the self-assessment and PRV.
c. In the special cases where the EC had decided to extend the eligibility period to four years, an assessment will be made by the end of year two, by the EQUIS Office, as to whether the school has made progress on the Areas of Concern (AoCs) expressed by the EC. To facilitate such an assessment both the EQUIS advisor and the school individually submit a report describing how the school has addressed the AoCs. This will be the Eligibility Progress Report (Annex 6). The school may continue the process with or without (the same or a different) EQUIS advisor.

d. The school’s submission of the SAR and accompanying materials concludes the EQUIS advisor’s involvement with the school. The EQUIS advisor separately submits a Pre-Review Advisory Evaluation, which will be shared with the PRT and with the school. It evaluates the developmental progress during the Eligibility Stage as well as strengths and remaining weaknesses from an EQUIS perspective.

If initial accreditation is achieved, then the school enters a process of Continuous Improvement (Stage 8).

A school failing to succeed in obtaining initial accreditation can immediately move back to Stage 2 of the EQUIS Process (Pre-Eligibility), but cannot reapply for eligibility within two years after the Accreditation Board (AB) decision.

5. Stages of the EQUIS Advisory Process

A. Getting started

▪ The first step in the advisory process is for both sides to agree to work together. The EQUIS Office intends to create a match so that the EQUIS advisor's professional background and experience fit with the school’s advisory needs.

▪ The EQUIS advisor assignment to an applicant school is always based on mutual consent. After the mutual consent, the EQUIS Office introduces the EQUIS advisor to the school.

▪ The EQUIS advisor receives all relevant background materials from the EQUIS Office to facilitate the advisory work. Specifically, these consist of
  - Pre-Eligibility: Entry Application Datasheet, OB Report,
  - Pre-Review: Eligibility Datasheet, Eligibility Letter. (In addition, the EQUIS advisor can request from the school the OB Report and the Pre-Eligibility Advisory Evaluation in case he/she was not involved in the Pre-Eligibility Advisory.)

B. Interacting with the school

▪ In the first conversations it is important to agree on a general roadmap, on how the EQUIS advisor intends to interact with the school. This involves planning campus visit(s) as well as other forms of interaction.

▪ The advisory work will require 3-4 days in Pre-Eligibility and 4-6 days in Pre-Review. The total scope of the EQUIS advisor's time commitment will be determined by the developmental challenges facing the school.
• The EQUIS project leader at the school will be the person interacting with the EQUIS advisor most frequently. Given the EQUIS advisor’s focus on institutional development, it is however equally important to have direct access to the head of school and the school’s executive team.

• The EQUIS advisor’s travel and out-of-pocket expenses will be covered by the school. The travel expense rules for peer reviewers apply here as well – see EQUIS Process Manual, Section 5 Subsection 4.2. and Annex 10.

C. Providing advice

• The role of the EQUIS advisor is to support the school’s institutional development. The EQUIS advisor plays an instrumental role in helping the school to define adequately its development priorities to meet or exceed EQUIS Standards.

• The advisory activities will always begin with scoping the school’s advisory needs. OB Report (Pre-Eligibility) and the reservations mentioned in the Eligibility Letter (Pre-Review) should be used as initial guidance. The EQUIS advisor should however also engage in an open dialogue with the school and try to discover other issues that need to be addressed while going through the accreditation process.

• Quality improvement is not only about addressing institutional weaknesses, it also involves making strengths even stronger and ensuring that they receive proper appreciation in the accreditation process.

D. Reporting

• The EQUIS advisor fulfils a dual role in the accreditation process. In addition to providing feedback and advice, the EQUIS advisor is also asked to evaluate the school. The Advisor assessment will be either received by the EC (Pre-Eligibility) or the incoming PRT (Pre-Review).

• The EQUIS advisor’s report will enable the EC/PRT to appreciate the strengths of the school but also to understand if the developmental issues are properly addressed as the school goes through the accreditation process.

• The EQUIS advisor receives a reporting template from the EQUIS Office, which is kindly asked to fill out. The report should be brief (2-3 pages for Pre-Eligibility reporting and 4-5 pages for Pre-Review reporting).

• The EQUIS advisor’s report should be submitted before the deadline specified by the EQUIS Office. This is essential for the school to proceed in the accreditation process as planned.
E. Managing conflict of interest issues

- The Advisory Service is voluntary. It cannot be combined with any form of paid consultancy work, even if the school requests it.

- The Policy on Potential Conflicts of Interest for EFMD Peer Reviewers and Advisors, which can be found in Annex 23 of the EQUIS Process Manual Annexes, applies.

Individual EQUIS advisors, once assigned to a school should not suggest or imply mutual areas of collaboration before a final decision on accreditation or reaccreditation has been reached by the AB.

6. Fees

The EQUIS Advisory is part of the accreditation process and is therefore covered by the EQUIS Fee Schedule. Advisors are not remunerated for their voluntary support to schools.

7. Further information

Further information on the EQUIS Advisory can be requested from key account manager (KAM) assigned to the school.
ANNEX 8

Pre-Eligibility Advisory Evaluation Form
PRE-ELIGIBILITY ADVISORY EVALUATION

Name of the school

Name of the EQUIS advisor

Date: DD.MM.YYYY

A. Background information (to be filled out by the EQUIS Office)

<table>
<thead>
<tr>
<th>Application for Entry:</th>
<th>DD.MM.YYYY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Briefing:</td>
<td>DD.MM.YYYY</td>
</tr>
<tr>
<td>Appointment of EQUIS advisor:</td>
<td>DD.MM.YYYY</td>
</tr>
</tbody>
</table>

B. Describe your interactions with the school
   Timing and length of on-site visit(s), other forms of interactions

C. Comment on the effectiveness of external and internal governance

D. Describe your assessment of the satisfaction of Eligibility Criteria
1. EFMD Full Membership in good standing
2. Institutional Scope
3. Excellent National Standing
4. International Reputation
5. Breadth of Activities
6. Core Faculty
7. EQUIS Standards & Criteria

E. Discuss tangible developments since the school's entry into the EQUIS process
F. Recommendations

1. Should eligibility be granted?

2. What are the principal risks, if any?

3. Should executive education be included in or excluded from the accreditation?

4. Selected Programme (based on the school’s list of proposed programmes in the Datasheet)?

Rationale for the recommendations:
ANNEX 9

Pre-Review Advisory Evaluation Form
PRE-REVIEW ADVISORY EVALUATION

Name of the school

Name of the EQUIS advisor

Date: DD.MM.YYYY

A. Background information (to be filled out by the EQUIS Office)

<table>
<thead>
<tr>
<th>Eligibility decision:</th>
<th>DD.MM.YYYY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment of EQUIS advisor:</td>
<td>DD.MM.YYYY</td>
</tr>
</tbody>
</table>

Reservations of the EQUIS Committee (if any):
- Reservation 1:
- Reservation 2:
- Reservation 3:

Inclusion or exclusion of executive education in / from the accreditation.

EQUIS Committee’s recommendation on the timing of the Peer Review Visit (if any):

B. Describe your interactions with the school

Timing and length of on-site visit(s), other forms of interactions

C. Describe your assessment of the continued satisfaction of Eligibility Criteria 1-5

D. Comment on the progress regarding the Reservations identified by the EQUIS Committee

1.

2.

3.
E. Comment on the school’s strengths and weaknesses regarding the EQUIS Standards & Criteria

The EQUIS advisor should highlight issues that warrant the Peer Review Team’s attention, ideally in a bullet point format and with only very brief explanations added. If appropriate, two lists for strengths and weaknesses, respectively, should be provided.

1. Context, Governance & Strategy
2. Programmes
3. Students
4. Faculty
5. Research
6. Executive Education
7. Resources & Administration
8. Internationalisation
9. Ethics, Responsibility & Sustainability
10. Connections with Practice
ANNEX 10

Peer Review Visit Guide
1. Introduction

This document elaborates on the outline given in the EQUIS Process Manual, Section 5. The guide is intended to inform both schools and Peer Review Teams (PRTs) on how to prepare for and conduct a Peer Review Visit (PRV).

2. Objectives of the PRV

The fundamental goal of the PRV is to assess the quality of the school’s activities against the EQUIS Criteria and to make a recommendation for consideration by the Accreditation Board (AB) with respect to the accreditation decision. A secondary objective is to fulfil an advisory role leading to suggestions for quality improvement and to offer the school the benefits of a strategic review.

To achieve these objectives, the PRT should seek to understand the strategy and operation of the school, eliciting further information through a series of meetings to facilitate the formulation of a comprehensive profile of the school and confirmation of the claims made within the Self-Assessment Report (SAR). In so doing, it is important to recognise the central ‘peer’ element of the process and as such the meetings throughout the PRV should be collegial, promoting a two-way exchange of information and views.

The success of the PRV rests on several conditions being met by all those involved in the process, especially:

- thorough preparation by the school through the production of a SAR and accompanying materials (Annexes, Online Document Repository (ODR) materials, Student Report, SAR Datasheet)
- careful reading of the SAR and accompanying materials by the PRT
- open discussions free of excessive formality between the PRT and the key stakeholders within the school, reflective of ‘peer’ review
- confidential treatment of facts and figures
- the presentation of confidential feedback and recommendations for accreditation in a professional manner, combining the requirements of the AB with an approach that respects the needs of the school as a client.

3. Composition of the PRT

The PRT is composed of four members holding senior positions in the world of management education or with substantial experience in this field. They will normally have different nationalities or work in different countries. Each PRT includes:

- The PRT chair: an academic (dean or equivalent) from a different country from the school being assessed.
• An academic representative (dean or equivalent) familiar with the local educational environment, whose role is to explain the contextual background of the school for the benefit of the PRT. Normally they will speak the language of the country. This applies to initial PRVs and is optional for reaccreditation PRVs.
• Another academic representative (dean or equivalent)
• A representative from the world of practice.

In the event of a PRT member being unable to attend at the last minute, the EQUIS Office will try to find an appropriate replacement. If this is not possible, the school will be asked to approve a PRT with only 3 members. There will never be a PRT with fewer than 3 members.

The roles and responsibilities of the various PRT members are set out in detail at the end of this guide.

Each PRT member is required to sign a Confidentiality Agreement with respect to the information provided to them in the context of the PRV, also stating their agreement to conform to the Conflict of Interest Policy (see Annex 22 and 23).

Peer reviewers volunteer their time and are unpaid for their role in the process but will claim reimbursement from the school for travel costs related to the PRV. The school should settle reimbursement claims within four weeks after receipt. The school will arrange and pay for accommodation for the PRV.

It is considered inappropriate for individual peer reviewers, once assigned to a school’s PRV, or for the school itself, to suggest or imply mutual areas of collaboration before a final decision on accreditation or reaccreditation has been reached by the AB. Prudence suggests that any such collaborations should not take place until at least 1.5 years after the accreditation decision.

4. Preparation for the PRV

4.1 Reading materials for the peer reviewers

No later than 6 weeks before the planned PRV, the school emails the following documents to each PRT member (and send in hard copy upon request):

Documents specific to the school under peer review:
1. SAR and Annexes
2. Student Report
3. SAR Datasheet

In addition, the school will prepare an ODR which should be made accessible to the PRT and the EQUIS Office at least 14 days before the beginning of the PRV. This contains more comprehensive documents and less essential materials, for example, electronic versions of faculty management handbook, course documents, examples of students’ work, case studies, research output, brochures etc. Guidance to schools on which documents to provide in the ODR can be found in Annex 14 to the Process Manual.
The following documents will be emailed to each PRT member by the EQUIS Office:

**In the case of initial accreditation PRVs:**

1. The Eligibility Datasheet
2. The Eligibility letter, highlighting any reservations that the EC noted regarding the application
3. The Pre-Eligibility Advisory Evaluation, for schools opting for Pre-Eligibility Advisory
4. The Pre-Review Advisory Evaluation, for schools opting for Pre-Review Advisory

**In the case of reaccreditation PRVs:**

1. The PRR from the previous PRV, as presented to the AB
2. The AB decision from the previous accreditation cycle
3. The Annual or Mid-Term Progress Report(s) of the school from the previous accreditation period, including the feedback of the EQUIS Office

**4.2 Study of the SAR by the PRT and the online preparatory meeting**

The PRT chair will schedule an online preparatory meeting approximately two weeks prior to the visit. Each PRT member must study the SAR carefully before attending this online meeting. The purpose of the online preparatory meeting is for the PRT members to introduce themselves and begin to discuss first impressions from the materials and the ODR. Any additional needs for data and information will be collected and communicated to the school. As an important starting point for discussion during this preliminary meeting, each PRT member should attempt to answer the questions listed below:

- Are all the areas covered by the EQUIS framework adequately addressed in the SAR?
- What further information is required?
- Is the SAR sufficiently self-critical and analytical?
- Is the school’s local context clearly explained?
- Are the school’s mission and strategy clear?
- Are the strategic aims satisfactorily translated into practice?
- Are the mechanisms for the strategic management of the school clearly visible from the SAR?
- Are the problems facing the school clearly formulated?
- Does the school clearly sketch out how it plans to deal with these problems?
- What preliminary assessment can be formulated against the main EQUIS Criteria?
- What are the key issues that will require careful analysis during the PRV?

By answering these questions, each PRT member is not tied to a final judgement but is simply forming a first impression based on the written information supplied. The programme of the PRV is put together in such a way that there will be many opportunities to investigate further these initial findings and consequently to confirm or refute them. The PRT chair may also discuss specific areas of interest and responsibilities of the team during the visit.
4.3 General logistics

The school is expected to make all necessary arrangements for accommodation and the local transport for the PRT members. PRT members may arrange their own travel, however many schools prefer to purchase tickets therefore PRT members and schools should agree the process between them. In principle, flights should be booked in economy class, but business class tickets are allowed in the following circumstances:

1. in a trip involving at least one flight lasting more than 5 hours, business class can be chosen for this flight and all its connecting flights.
2. in a trip involving several flights, all of them lasting less than 5 hours, if the time between the scheduled departure of the first flight and the scheduled arrival of the last flight to the final destination takes more than 8 consecutive hours including time spent in connecting airports.

Peer reviewers must book their flights at the earliest opportunity to minimise the costs to the school. Peer reviewers should ask approval from the school before ticket purchase, copying the EQUIS Office, and should endeavour to keep the costs as low as possible (a maximum of 6000€ is envisaged but cannot be considered as the norm). Any further variations in ticket purchase must be agreed by the school in advance. Schools under review are expected to cover the travel insurance of peer reviewers, where they are not covered by an insurance of their home institution. It is recommended that PRT members always buy flights with travel insurance. Travel expenses should be claimed from the school, copying additionally the EQUIS Office. If peer reviewers combine a PRV to the school with other professional activities, then it should be agreed on a fair cost splitting arrangement with the school.

Hotel accommodation should be of reasonable standard keeping in mind the travel schedule of the PRT members and should be close to the school. Unless exceptional circumstances exist (for example infrequent flights), schools should expect to cover the costs of 4-nights hotel accommodation for peer reviewers travelling for under 5 hours, and 5 nights for those travelling for longer than 5 hours. In the latter case, peer reviewers are advised to arrive two nights before the start of the PRV to overcome jet lag effects, if necessary. All extra expenses not related to the participation in the PRV will not be covered by the school.

Lunches should be rapid, involving a minimum of disturbance. There is a definite preference for on-site buffet lunches in the PRT Base Room (see below). The schedule will be very tight, so maximum use of the time is essential. Formal presentations and social events are to be avoided.

Table nameplates and lists of names, roles, preferably with head shots should be prepared for every participant in each meeting and distributed to the PRT at least one day before the visit begins.

Based on the EC decision, or the decision of the EQUIS Office in the case of re-accreditation, two PRT members will be asked to perform an assessment of another campus of the school, to take place prior to the visit of the main campus. If necessary, this will be arranged separately by the EQUIS Office.

5. Setting up the PRV Schedule

The school will propose a PRV Schedule to the EQUIS Office, which then checks it and passes it to the PRT chair for any comments and approval.
The PRV Schedule should include sessions on the listed topics indicated in the PRV Schedule Template (see Annexes 11 and 12). Deviations from this template may be proposed by the school to consider its specific circumstances or in cases of unusual scheduling difficulties, should be explicitly justified when submitting the draft PRV Schedule and will only be accepted exceptionally.

The proposed PRV Schedule must clearly indicate the timing and subject of each meeting as well as the names and titles of the participants so that the EQUIS Office and the PRT chair can evaluate the appropriateness of their inclusion.

The PRV should be scheduled from 9:00 to no later than 18:30 on Days 1 and 2, and from 9:00 to no later than 14:00 on Day 3. The PRT should be allowed sufficient time alone throughout each day to debrief after a series of meetings and to prepare for the forthcoming sessions.

For some meetings, the main panel will be broken up into two sub-teams to optimise coverage during the PRV (indicated with an asterisk in the PRV Schedule Template, see Annexes 11 and 12).

At the end of each session, i.e., before or just after breaks, it is important to have regular pauses to facilitate the PRT’s reflection evaluation, to ensure the PRT is on track to complete coverage of all the EQUIS Standards and is working steadily towards its final assessment.

As a general principle, the PRT should expect to see individuals only once unless they have more than one functional role. The sessions should not include too many participants to allow for meaningful discussions — a maximum number of 10 participants per session. It is important that the head of school be present on the first and last mornings of the PRV. Only the participants that are indicated in the agreed PRV Schedule are allowed to be in the meeting.

The school will propose a PRV Schedule and send it to the EQUIS Office no later than six weeks before the PRV. This draft is reviewed by the EQUIS Office, which, in collaboration with the PRT chair, may propose changes to the school. Schools should not send the draft PRV Schedule directly to the PRT chair or the members of the PRT at this stage. Once the EQUIS Office and PRT chair have confirmed the PRV Schedule, the school sends it to the PRT (copying the EQUIS Office) no later than two weeks before the PRV. Minor last-minute changes (names, times, locations) may be sent directly to the PRT. At the latest on the day before the start of the PRV, the school should send a Participant Directory with names, job titles, photos and a one-paragraph bio organised by session to the PRT (copying the EQUIS Office).

6. The Peer Review Visit

All meetings and discussions should be conducted in English without the use of simultaneous translation. Participants in the meetings are expected to be physically present; telephone or video conferences are normally not acceptable.

Serving coffee or snacks, taking photos or video, should be done either before or after meetings. Audio or video recording the meetings and feedback session is strictly forbidden.
6.1 Preparation for PRV meetings

It should be noted that the total time available for the PRV is extremely limited and that the PRT should make effective use of its time. Peer reviewers need to be conscious of the role of each particular session in the total process for the assessment. This means that:

- PRT members need to prepare for meetings and must therefore allow adequate preparation time ahead of the PRV (including participation in the online preparatory meeting).
- Having read the SAR, the PRT should request additional written information, when necessary, in advance of the PRV meetings to facilitate their evaluation.

6.2 PRT Base Room

The school should make available a Base Room for the duration of the PRV. This is the PRT’s meeting room where they will hold their discussions before, between and after the sessions. The room provided should:

- be spacious
- include a table for meetings
- possess a large table for laying out documents
- be equipped with a flip chart
- contain a computer or wi-fi access point for each individual PRT member
- be free from disturbance
- be near the room where meetings are held.

Conversations in the Base Room are confidential to the PRT. For this reason, schools should not send representatives into the Base Room while the PRT is meeting there. Confidentiality must always be respected.

6.3 Focus of individual PRV meetings

Evening before the PRV

Meeting 1: Briefing Meeting of the PRT

The evening before the first day of the PRV, the PRT will meet to make final working arrangements. It is essential that the team be alone for this meeting to discuss the following:

- any further issues that have come to light since the prior online preparatory meeting arising from the SAR and accompanying documents, including those in the ODR
- further identification of any supplementary information to be requested
- confirmation of the working methods and allocation of responsibilities within the PRT, in particular, specific writing assignments for the PRR to match interest and expertise; the PRT chair may also invite fellow team members to lead the discussion for some meetings
- review of the PRV Schedule and preparation for the meetings, e.g., allocation of PRT members in the case of parallel meetings.

A suitable place for this meeting is booked by the school, preferably, a separate meeting room in the hotel, or a quiet and isolated table in the hotel restaurant where they can have dinner and work undisturbed. The PRT will have confidential discussions which the school may not wish being overheard by outsiders.
The PRT chair should seek to establish the impressions of the other team members to identify further information that should be supplied by the school and to prepare the focus of each meeting.

**Day 1 of the PRV**

**Meeting 2: Initial meeting with the school’s executive committee**

The PRV should start with a meeting with the executive committee (i.e., senior management team) of the school.

This is the opportunity for introductions, confirmation of the PRV Schedule and arrangements for the PRV. The PRT can put on the table before the key representatives of the school the main areas they wish to focus on after reading the SAR and request any additional information.

This initial session is also an opportunity for the school to present its current situation, explain how it sees the future and outline the key challenges it faces.

Formal presentations are not expected, however, should the school wish to make such a presentation, it should NOT exceed 10 minutes and should not replicate content of the SAR.

**Note: For reaccreditation PRVs only, this meeting is extended in order to deal comprehensively with Areas of Development (AoDs) or Areas of Required Improvement (AoRIs).**

For schools previously granted 5-year accreditation, this session is to review the AoDs previously set.

For schools previously granted 3-year accreditation, this session is to review progress made in relation to AoRIs.

**Meeting 3: External Governance**

This meeting will involve representatives of the school’s governing body, including for example members of the university leadership or board of trustees. As the purpose of the meeting is to provide assurance of oversight of the school’s leadership (however that is organised) the participants should not be the same people as for the initial meeting.

**Meeting 4: Overall Programme Portfolio**

The meeting normally involves senior faculty responsible for learning and teaching, e.g., associate deans, directors of studies for undergraduate and postgraduate programmes, as well as relevant senior administrators.

This will be followed on Day 2 by an in-depth session on the Selected Programme.
Meeting 5: Executive Education

If the school conducts executive education (EE) and it has been included in the PRV, a meeting should be scheduled with representatives of client organisations and those responsible for the management of EE. For reaccreditations, the PRT chair, together with the PRT decides on the inclusion of EE. For initial accreditations, this is specified by the EC.

Meeting 6: Faculty Management

The purpose of the session is to allow the PRT to reflect on how faculty resources are managed in the context of the school. The participants in this session are usually senior academics with responsibility for faculty (dean, deputy dean or associate dean of faculty, department or subject area heads) but should not be the same persons present in the Meeting 10: Faculty (see below). EQUIS does not use a standard list of main subject areas; these areas depend on the school under review.

Meeting 7: Research

This meeting may include members of the school’s research committee, or research centre leads and individuals with leadership responsibility for research such as a deputy or associate dean.

End of Day 1

At the end of Day 1, there is the opportunity for an optional reception and buffet where the PRV can meet a wider selection of the school’s stakeholders. This should normally not last more than 1.5 hours, to allow the PRT members time to reflect on the implications of the meetings of Day 1 and, where necessary, further prepare for Day 2.

Day 2 of the PRV

Meeting 8: Selected Programme

The Selected Programme will be chosen by the EQUIS Office from a list of three programmes proposed by the school (typically major programmes) from the programme portfolio listed in the SAR Datasheet. Schools that hold an EFMD Programme Accreditation have a choice regarding the assessment of the Selected Programme (see Annex 28).

The Selected Programme meeting involves the individual programme management team, for example, the programme director, year group tutors and programme administrators. For the Selected Programme, some specific documents should be made available in the ODR (see Annex 14).

Note: After this meeting, time set aside for the PRT to review materials should be scheduled.

Meeting 9: Students

As a rich source of information, students can provide important insights into workload, the professionalism of faculty, the coherency of programmes, the clarity of aims and objectives,
the organisation of the curricula and the facilities. Faculty members do not attend meetings with students, to encourage free expression. A sufficiently representative number of students should be chosen and may be divided into two groups to be interviewed in parallel. A suitable size for each group of students is between 10 and 15. Students from very different programmes should not be mixed and the groups should involve students from the Selected Programme to provide more in-depth assessment. Finally, meetings with students should also involve those who were involved in writing the Student Report.

Meeting 10: Faculty

Meetings with faculty are conducted to discuss issues surrounding research, the design and delivery of programmes, and the overall management of the faculty. Exploration of any issues raised by students can also occur. A sufficiently representative number of faculty should be chosen and may be divided into two groups to be interviewed in parallel. The meeting groups should number between eight and ten faculty, divided by seniority or by length of service in the school.

Meeting 11: Finances, Resources and Control

The purpose of this meeting is to evaluate the financial performance, viability, and management of the school in addition to reviewing the professional resources (administration, marketing, facilities management) required for the school to meet its objectives.

For initial accreditation only – Meeting 11.2: Support Services

Where a PRV is for an initial accreditation, there is a meeting to review the professional resources and services available to the school. These would normally cover marketing, student recruitment and services, facilities, alumni and other professional colleagues in the school. Parallel meetings may be held to cover the various support functions.

Meeting 12: Connections with Practice and Alumni

The purpose of the Connections with Practice meeting is to give further evidence of the school’s connections with the business and management world and to assess the impact of such links on the school under review. Those attending the meeting should not be restricted to individuals holding management or governance roles within the school. Academic or administrative staff members from the institution do not participate in this session.

The purpose of the parallel session with representatives of the alumni network is to obtain evidence from these stakeholders that the school meets their needs, and that the school offers appropriate support to alumni activities for the benefit of both. Some of the alumni participating in this session may have graduated recently but others should be alumni that are now employed and may be at various stages of their professional careers. There will be no academic or administrative staff members from the school attending this session.

End of Day 2

At the end of Day 2, the PRT will re-group to work in a separate meeting room in the hotel before, during and after dinner. Prior to this meeting, each PRT member should, individually, complete a draft EQUIS Quality Profile Sheet (QP – see Annex 16). This form is then used as a basis for discussing the views of the PRT with respect to each assessment criterion of
each EQUIS Standard. The ensuing discussion, during and after dinner, leads to the formulation of the PRT’s preliminary assessment and recommendation for accreditation.

**Day 3 of the PRV**

**Site visit**
A short site visit allows the school to showcase its primary facilities, teaching and learning spaces, IT provision, social and student-oriented environments and any special resource features of the campus.

**Meeting 13: Final PRT Meeting**

The team will work to finalise its preliminary assessment and prepare the feedback for the school’s executive committee. Some of this time may be used for additional meetings at the request of the PRT.

**Meeting 14: Debriefing and Feedback to the school by the PRT**

The PRV concludes with a meeting with the executive committee. This session enables the PRT chair to make an initial, provisional summary of the PRT’s conclusions without disclosing the recommendation on accreditation. Around 30 minutes should be allocated for this meeting. It should be understood, however, that the final debriefing is not the occasion for renewed debate.

The debriefing provides the occasion for PRTs to distinguish between feedback provided informally and that to be contained in the more formal PRR.

**7. Interactions with the PRT**

It is inappropriate for the school to communicate with individual reviewers on review-related matters before, during, or after the PRV until the AB has taken the final decision. At no point shall peer reviewers divulge the content of their deliberations to school representatives or third parties.

In exceptional circumstances, PRTs need to schedule ad hoc meetings during the PRV, e.g., meeting with the head of school to communicate PRT concerns. Any such meeting should be attended by at least two PRT members to maintain transparency of the process.

The school is not expected to entertain the PRT during their visit. However, the optional reception and buffet at the end of Day 1 could be an opportunity to introduce the school’s external partners, connections with practice or alumni to the members of the PRT.

**8. Assessment during the PRV**

Over the course of the PRV, the PRT focuses on evaluating the school’s strategy and operations through the lens of the EQUIS Standards & Criteria (S&C). The PRV Schedule design should ensure full coverage of the EQUIS Standards; to assist the PRT with this task, an EQUIS Criteria Evaluation Form (CEF – see Annex 13) is provided to the team. Individual peer reviewers should be working towards the overall assessment and need to crosscheck
facts and complete the CEF. This form is intended to make the work much easier when summarising their findings and drafting the final PRR.

Throughout the PRV, the PRT should be working through a controlled process for refining their assessment of overall institutional quality and coming to a consensus decision on the recommendation to be made to the AB.

The stages involved in this process will be as follows:

1. Individual assessment and completion of documentation, using the CEF and QP described below and shown in full in Annexes 16 and 17.

2. Consolidation of findings in the final team debriefing meeting(s), including:
   - Agreement on the QP scoring
   - Development of a consensus view on the school’s performance with respect to the different criteria, as outlined in the CEF, particularly where performance is rated above or below standard or there is no obvious consensus
   - Agreement on the final recommendation on accreditation
   - Preparation for the debriefing of the school (oral report).

3. Debriefing of the school.

4. Preparation of the PRR.

Each of these stages is discussed in more detail below.

8.1 Individual assessment and completion of the CEF and QP

This will be an on-going process from the beginning of Day 1. PRT members should make use of the CEF (Annex 17) to help cover the issues in the EQUIS framework and evaluate the school in relation to them. The CEF is the working document that will help each PRT member build up their own personal assessment of the school. The items listed follow the order in which they appear in the corresponding chapter of the S&C, where a fuller explanation of the criterion will be found. Peer reviewers should refer to this document in case of doubt as to what is meant.

Peer reviewers will normally fill in their comments on the CEF as the PRV progresses through the first two days. It is especially important that this process is conducted rigorously, since the final PRR will be in large part a synthesis of the documents filled in by the different PRT members. Peer reviewers are, therefore, asked to write in each of the boxes full commentary describing what they have observed. It is not sufficient in building up a profile of the school just to respond with single adjectives or yes/no.

The CEF, duly filled in, should be given to the PRT chair at the end of the PRV.

Having completed their CEFs, each PRT member should also complete a QP (see Annex 16). This can be done throughout the visit and the QP should be largely completed before the PRT meets on the evening of Day 2 for the final team meeting. The PRT chair may need to set aside time for individual PRT members to complete the QP immediately before this meeting, where it will be an essential tool.
8.2 Consolidation of findings in the final team debriefing meeting

The PRT will meet alone, normally for several hours, to complete the documentation and to formulate their assessment and accompanying recommendations. This is best done on the evening of the second day, before and after dinner.

8.2.1 Agreement on the QP scoring

There are many different approaches adopted by different PRTs and individual PRT chairs, but experience shows that the use of a rigorous procedure for collecting perceptions facilitates consensus building that leads to effective and efficient decision-reaching. Central to this meeting are the CEF and QP, which are reference points for each PRT member to suggest and explain their own evaluations of the school in relation to the EQUIS framework.

Having completed the CEF, which allows each PRT member to describe the criteria of the EQUIS framework, the next stage is the evaluation of each of these criteria against the EQUIS Standard. Here, the QP is central, as it is used to record whether the PRT considers the school meets, exceeds or is below the standard on each criterion. This is useful to help the PRT reach a balanced assessment and also fulfils the school’s need for detailed feedback in the written report.

The QP summarises the key criteria for each chapter of the S&C. The items listed in the document correspond to those listed in the CEF, except that they are shorter in formulation.

The QP form requires the PRT to agree on one of four evaluations for each criterion, i.e.

Meets standard
The school satisfies the EQUIS Standard in this area as defined in the EQUIS Criteria Framework. Most positive assessments are expected to fall in this broad category. It is not to be interpreted as meaning that the school is mediocre or that it barely qualifies at a minimum level.

Above standard
The school demonstrates outstanding quality, well above the level required to satisfy the EQUIS Standard in this area, where it can be considered as example of “best practice” on an international scale.

Below standard
The school is judged to be below the threshold of the EQUIS Standard in this area.

N/A
Not considered applicable or relevant to the school concerned.

8.2.2 Development of a consensus view

Although the PRT may naturally be reluctant to do something that looks like ‘ticking boxes’, the rationale for this approach is that it encourages the peer reviewers to implement a systematic process to arrive at a consensus view. Since PRT members are likely to have divergent views on any number of criteria assessments, discussion of the diverse opinions is the process that brings a detailed discussion of the school to evidenced conclusion. The process is described next.
At the beginning of the final PRT meeting on the evening of Day 2, or immediately before, the PRT chair will invite the members of the team to make a personal evaluation by checking above standard, meets standard, below standard or N/A for each assessment criterion. The preferred procedure is for each PRT member to complete the document alone before any discussion has taken place on the assessment of the different items. It is only when each member has committed themselves to an initial judgement that the PRT chair opens the debate to work towards a common position that will be entered onto a single, consolidated version of the QP. This procedure will rapidly indicate where complete agreement exists among the PRT members and will also clearly reveal the areas that require careful discussion.

Once the PRT has reached a final agreement, one consolidated version of the QP will be produced. This will not be modified unless there are exceptional reasons for doing so. Any change will then require the explicit agreement of all PRT members. The document will be attached to the PRR and will be submitted to the AB. This will be considered as the PRT’s interpretation of overall compliance with the EQUIS Standards.

8.2.3 Agreement on the final recommendation

Once the QP has been completed, the PRT should then be able to agree on the final recommendation as to whether the school has met the standards for EQUIS accreditation. If they do not believe these have been met, then the shortfall must be fully defined, together with a clear statement as to the action necessary to meet the shortfall.

The PRT may recommend 5-year accreditation, 3-year accreditation, or non-accreditation. These recommendations must be clearly substantiated with reference to observations made in the CEF and to the assessment set out in the consolidated QP.

The PRT should base its judgement on its interpretation of the EQUIS Standards as set out in the S&C. This judgement should not be based on simple comparison with other institutions.

8.2.4 Preparation for the debriefing of the school (oral report)

After arriving at a consensus, the PRT chair should make an inventory of the topics to be treated in the oral presentation. A distinction can be made between a) the main findings that will form the basis of the written PRR and b) any critical comments that can be brought forward in the oral presentation because the subject matter is best communicated informally.

The PRT chair will then formulate the content of the oral debriefing, usually in the first part of the morning while the other members of the PRT conduct the scheduled meetings and the site visit. The PRT chair should go through this presentation with the whole PRT before delivering the final version to the school in the debriefing meeting.

8.3 Debriefing

The oral presentation at the end of the PRV plays a special role in the assessment process. With a great deal of time and energy having been invested by the staff of the school over a period of months, it is important that the feedback provides real value and ‘closes out’ the PRV in an appropriate way. Giving feedback is a skilled task, both for individuals and institutions. The rules for good practice that apply to feedback given to individuals are just as valid when applied to institutional feedback:
➢ Adoption of a positive, supportive, and constructive approach
➢ Concentration on the key messages that need to be delivered, not on the fine detail
➢ Presentation of the strengths as well as the weaknesses
➢ Early stressing of positive feedback to create the right climate
➢ Delivery of key points in a clear and concise manner
➢ Presenting more negative feedback in a constructive form that can be accepted
➢ Confirming understanding and acceptance of key development needs
➢ Suggesting alternatives for the way to deal with specific problems
➢ Allowing the recipients to identify the solutions
➢ Providing clear guidance on the necessary action for quality improvement where appropriate.

The debriefing also allows PRTs to distinguish between feedback provided informally and that contained in a more formal PRR. There are sometimes findings and conclusions that may not really be suitable for a more public PRR, yet the panel would like to make more critical (but constructive) statements about a particular aspect of institutional management. In these cases, the oral feedback can be used to formulate more strongly worded recommendations to the right audience and in the right place, e.g., the school’s main management committee.

The PRT chair should stress that the feedback represents a form of interim report, since some conclusions may be modified following a full consultation with their colleagues, including referral of some points to the Head of School. It is not appropriate at this point to divulge any recommendation that the PRT intends to make to the AB. Nor is it appropriate to engage in a discussion of the oral assessment. The school will have an opportunity to respond in writing once the written PRR is submitted for comment.

9. The Peer Review Report (PRR)

The PRR is the culmination of the assessment process and is an extremely important document not only for the AB but also for the school’s management team. The PRR will have considerable impact within the school so great care should be taken with the wording of key sections, especially where the comments are critical.

9.1 Producing the PRR

The PRR is created in the following steps:

1. Consolidating the comments from the PRT, and using the written summaries in the CEF and the minutes of the oral debriefing, the PRT chair writes up a first draft of the PRR and circulates it to the PRT for comment where each member is expected to provide input and comment on the draft.

2. The PRT chair amends the PRR, considering the comments received from the other PRT members, and sends the revised draft, including the consolidated QP (in a separate file), to the EQUIS Office.

3. The revised PRR draft is edited, formatted, and proofread by the EQUIS Office and submitted to the school. The editing process is to ensure that the PRR’s documents are complete, coherent and that arguments are well made to support the assessment.
in the QP and lead to the recommendation on accreditation and the areas of improvement. Sometimes the editing process leads to the draft PRR being returned to the PRT chair for clarification or amendment before it is sent to the school for comment.

4. The school responds to any factual inconsistencies or misunderstandings and returns it to the EQUIS Office normally within 10 working days. Following receipt of comments from the school, changes may be made with the approval of the PRT chair.

5. The final PRR together with the QP, and the SAR Datasheet are sent to the school (normally within 8 weeks from the date of the PRV). The school is requested to give its written authorisation for the report to be submitted to the AB.

6. The final PRR is submitted to the AB.

7. The PRT members receive the final version of the PRR when they are informed of the AB decision.

9.2 Formulating the PRR

When setting out the PRT’s assessment of the school against the EQUIS Criteria and its recommendation regarding accreditation, great care should be taken to ensure consistency between the three parts of the PRR: the conclusions written in the main body of the PRR, the assessment set out in the QP, and the recommendation regarding accreditation. The PRR should fully explain why a particular area has been rated above standard or below standard. The PRR must also fully explain the reasons that led the PRT to make its recommendation on accreditation.

The PRR should also provide suggestions that will be helpful to the school in planning its future development.

The PRR should be sufficiently extensive to provide enough evaluation of the school for the AB to be able to make a well-informed and rational decision and for the school to receive useful guidance on potential improvements.

9.3 Recommended format

(a different format exists for schools going through Special Reaccreditation or holding EFMD Programme Accreditation)

<table>
<thead>
<tr>
<th>Length: minimum 15 pages and maximum 25 pages</th>
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<tbody>
<tr>
<td>Table of Contents</td>
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<td>1. Introduction</td>
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<tr>
<td>1.1 Composition of the PRT</td>
</tr>
<tr>
<td>• name, position, and country of each reviewer</td>
</tr>
<tr>
<td>• any additional comments on the PRT</td>
</tr>
<tr>
<td>1.2 EQUIS-Related Background</td>
</tr>
<tr>
<td>• background on the visit: initial or re-accreditation, delay, eligibility reservations, etc.</td>
</tr>
<tr>
<td>1.3 Institutional Scope</td>
</tr>
<tr>
<td>• institutional focus of the accreditation: limitations and exclusions</td>
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</tbody>
</table>
1.4 Acknowledgements
   • organisation of the visit and flexibility of the school
   • acknowledgements
   • any general comments on the visit

1.5 Comments on the SAR and Online Document Repository materials

1.6 Comments on the Student Report

2. General Assessment
2.1 Executive summary of the report (1-2 pages)

2.2 Assessment of progress – in case of reaccreditations (1 page)
   • Areas of Development (for Schools with 5-year accreditation)
   • Areas of Required Improvement (for Schools with 3-year accreditation)
   • Other recommendations and suggestions in previous PRR or AB letter

2.3 Area(s) of Excellence – optional (1/2 page)
   • Description of any aspect of outstanding quality

3. Recommendation to the AB
   • for a period of 5 years, indicating areas where the school excels;
   • for a period of 3 years, describing the Areas of Required Improvement where the school has not yet fully complied with the EQUIS Standards of quality;
   • for non-accreditation, giving a detailed justification for this recommendation.

4. Detailed analysis following the S&C (10 pages)
   • based on the feedback of the peer reviewers following the visit and summarised in the consolidated CEF
   • succinct information to support the judgement of the PRT, particularly for issues rated above or below standard in the QP

Appendix 1: QP
Appendix 2: SAR Datasheet
Appendix 3: EQUIS AB letter with the latest accreditation decision (in case of reaccreditation)

10. Roles and Responsibilities

This section summarises the key areas of responsibility of the EQUIS Office, the school, the PRT, and the PRT chair.

10.1 Responsibilities of the EQUIS Office

- to consult with the school throughout the process
- to fix the timetable for the EQUIS assessment and to set the date of the PRV in liaison with the school
- to ensure adequate time between receipt of the SAR and the date of the PRV
- to designate the members of the PRT and to secure the necessary agreement from the school
- to brief the PRT on the requirements of the EQUIS assessment and to confirm receipt of SAR and accompanying materials
➢ to co-ordinate the compilation and finalisation of the PRR, in liaison with the PRT chair and the head of school, and its presentation to the AB
➢ to ensure that the EQUIS process evaluation forms from the school and the peer reviewers are completed
➢ to arrange for the safe disposal of all sensitive materials following acceptance of the report by the school.

10.2 Responsibilities of the EQUIS project leader within the school

➢ to coordinate the self-assessment process and the preparation of the SAR
➢ to ensure the timely production of the materials for the SAR, including Annexes and supporting documentation to the main report
➢ to distribute the final SAR and accompanying materials to the EQUIS Office at least eight weeks before the date of the PRV and to the members of the PRT at least six weeks before the date of the PRV
➢ to ensure the accessibility of the ODR and the availability of all required documents two weeks before the date of the PRV and until the AB have taken their decision (see Annex 14)
➢ to establish a PRV Schedule in collaboration with the EQUIS Office
➢ to reimburse all travel fees for the PRT within six weeks from the PRV
➢ to make the necessary practical logistic arrangements for the PRV, including local travel and accommodation
➢ to ensure adequate access to key stakeholders during the PRV
➢ to check the final PRR for factual inconsistencies
➢ to complete an EQUIS process evaluation form for schools and return it online to EQUIS Office.

Important: Formal communication between the PRT and the school should always be via the EQUIS Office or with the EQUIS Office in copy, both before and after the PRV.

10.3 Responsibilities of the individual PRT members

Before the PRV

➢ to consult with the EQUIS Office and PRT chair on the requirements of the PRV
➢ to prepare themselves about the objectives of the assessment and the criteria used by a careful reading of the EQUIS documents
➢ to read the SAR carefully and conduct a preliminary SWOT analysis against the EQUIS Criteria
➢ to make appropriate and timely travel arrangements in accordance with the guidelines given by the EQUIS Office
➢ to convey to the school and the EQUIS Office details of their travel arrangements and any specific requirements they may have regarding travel and accommodation
➢ to arrive the evening before the PRV earlier than 19:00 to participate in the briefing meeting of the PRT.

During the PRV

➢ to ensure adequate preparation for all PRV meetings
➢ to be present throughout the entire PRV
to fulfil specified and agreed responsibilities within the PRT, such as the provision of specialist expertise
➢ to be the main spokesperson for some sessions, as agreed with the PRT chair
➢ to document their own findings clearly enough to support the work of the PRT chair
➢ to operate in the spirit of consensus – after full and free discussion, the PRR will put forward one overall position of the PRT which will be an expression of collective responsibility.
➢ to hand in to the PRT chair all relevant documentation relating to their personal assessment (notably the CEF).

Following the PRV

➢ to liaise, if necessary, with the PRT chair and other peer reviewers to confirm the final decision on accreditation
➢ to contribute to the drafting of the final PRR
➢ to provide all requested documentation required for reimbursement of travel to the school
➢ to complete an EQUIS process evaluation form for peer reviewers and return it online to the EQUIS office
➢ to destruct all sensitive materials relating to the PRV following acceptance of the final PRR
➢ to avoid expressing any opinion or communicating the results of the assessment to any third parties

10.3.1 Role of peer reviewers from the world of practice

The practitioner dimension is afforded special importance in the EQUIS assessment, as reflected in the creation of two special chapters in the S&C devoted to Connections with Practice (Chapter 10) and Executive Education (Chapter 6). This dimension is not simply one of the criteria to be covered within an EQUIS assessment. In just the same way as Internationalisation, it is seen as an overarching framework for all the other chapters. Practitioner presence is also seen as an essential feature of the EQUIS accreditation process, through representation on the EC, AB, and participation in the PRTs.

The peer reviewer representing the world of practice plays a significant role in the PRT and provides a practitioner perspective within the process by paying special attention to the value of all processes and outcomes to the international business and management community.

10.3.2 Role of local peer reviewers

The local peer reviewer (initial accreditations) is familiar with the local educational environment and can explain the contextual background of the school for the benefit of the PRT. Such a peer reviewer is selected in agreement with the school.

The local reviewer or another member of the team will normally speak the language of the country.
10.4 Responsibilities of the PRT chair

Before the PRV

➢ to check, upon receipt of the SAR (including Annexes), Student Report and SAR Datasheet, if all documents are adequate and inform immediately the EQUIS Office of any inconsistencies or problem areas in the reports
➢ to approve the PRV Schedule
➢ to organise the online preparatory meeting with the other PRT members, minimum one week prior to the PRV, to prepare the PRV and discuss first impressions from the materials and the ODR.

During the PRV

➢ to brief the PRT members on the peer review process at the initial briefing meeting
➢ to be the main spokesperson for the PRT
➢ to ensure adequate preparation for PRV meetings
➢ to determine the delegation of lead responsibilities within the PRT
➢ to divide up sessions and responsibilities to individual peer reviewers
➢ to lead the PRT towards a set of conclusions during the PRV
➢ to ensure that the PRT members complete the assessment documents before the end of the PRV
➢ to hold a meeting of the PRT, usually on the evening of the second day, during which the team agrees on its conclusions and recommendation
➢ to run the debriefing for the school during the final meeting
➢ to inform urgently the EQUIS Office of any unusual incident that may disrupt the PRV.

Following the PRV

➢ to collect documentation made by the PRT relating to the satisfaction of the core criteria, theQP and the CEF
➢ to draft a first version of the PRR and circulate it to the other PRT members for comment
➢ to send the revised PRR draft within two weeks of the PRV to the EQUIS Office, which will then forward it to the school and invite their comments on the factual accuracy of the text
➢ to accommodate changes to the PRR where necessary, in consultation with the other members of the PRT, if appropriate
➢ to issue the final report to the EQUIS Office for submission to the school and the AB
➢ to complete an EQUIS process evaluation form for peer reviewers and return it online to the EQUIS Office.
ANNEX 11

Initial Peer Review Visit Schedule Template
Peer Review Visit Schedule

Template for Initial Accreditation Visits

Please see the EQUIS Process Manual Annex 10 for detailed guidance on the setting up of the Peer Review Visit Schedule and focus of the meetings.

**Evening before the PRV:**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>19:30</td>
<td>Meeting 1: Briefing meeting of the PRT</td>
</tr>
<tr>
<td></td>
<td>Dinner at hotel in private room for the PRT alone to set the visit agenda.</td>
</tr>
</tbody>
</table>

**Day 1:**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00-10:30</td>
<td>Meeting 2: Initial meeting with the school's executive committee 90 mins</td>
</tr>
<tr>
<td>10:30-10:45</td>
<td>Break</td>
</tr>
<tr>
<td>10:45-11:45</td>
<td>Meeting 3: External Governance 60 mins</td>
</tr>
<tr>
<td></td>
<td>Representatives of the school’s governing body, including for example members of the university leadership or board of trustees.</td>
</tr>
<tr>
<td></td>
<td>N.B. These should not be the same people as for the initial meeting.</td>
</tr>
<tr>
<td>11:45-13:00</td>
<td>Meeting 4: Overall Programme Portfolio around 1 hour</td>
</tr>
<tr>
<td></td>
<td>Associate dean(s) responsible for overall portfolio and programme directors.</td>
</tr>
<tr>
<td>13:00-14:00</td>
<td>Lunch</td>
</tr>
<tr>
<td></td>
<td>PRT alone for discussions.</td>
</tr>
<tr>
<td>14:00-15:00</td>
<td>Meeting 5: Executive Education 60 mins</td>
</tr>
<tr>
<td></td>
<td>Director of executive education programmes and support staff.</td>
</tr>
<tr>
<td>15:00-16:00</td>
<td>Meeting 6: Faculty Management 60 mins</td>
</tr>
<tr>
<td></td>
<td>Dean, deputy dean or associate dean of faculty, department or subject area heads.</td>
</tr>
<tr>
<td>16:00-16:15</td>
<td>Break</td>
</tr>
<tr>
<td>16:15-17:15</td>
<td>Meeting 7: Research 60 mins</td>
</tr>
<tr>
<td></td>
<td>Associate dean / director for research, members of the research committee.</td>
</tr>
<tr>
<td>17:30-18:30</td>
<td>Optional reception and buffet</td>
</tr>
</tbody>
</table>
Day 2:

09:00-10:30 Meeting 8: Selected Programme
Programme director(s) and administrators responsible for the programme.

10:30-10:45 Break

10:45-12:15 Review of programme materials
Reading time for the PRT.

12:15-13:15 Meeting 9: Students*
2 groups in parallel from different programmes, to be scheduled in related programme groups, including students from the Selected Programme and students who contributed to the Student Report.

13:15-14:15 Lunch
PRT alone for discussions.

14:15-15:15 Meeting 10: Faculty*
Randomly selected faculty members, different from the staff already met.

Group 1: Senior faculty
Group 2: Junior faculty

15:15-16:00 Meeting 11.1: Financial Management, Resources and Control
Managers responsible for budgeting, investments, funding, risk management and those responsible for other professional resources in the school (administration, marketing, facilities).

16:00-16:15 Break

16:15-17:15 Meeting 11.2: Support Services*
Group 1: Representatives of student support services – admissions, marketing, internships, international office, careers etc.
Group 2: Other support services – management of non-academic staff, ICT, facilities, etc.

17:15-18:15 Meeting 12: Connections with Practice and Alumni*
Group 1: Connections with practice – representatives of key partners and clients from the world of practice, advisory boards, etc.
Group 2: Alumni – representatives of the alumni network

In some cases, the school may also invite representatives from the world of practice and alumni to the optional reception at the end of Day 1

19:30 Dinner at hotel in private room
PRT meets separately to formulate its overall assessment.
Day 3:

09:00-09:45 Site visit 45 mins
Lecture halls, working group rooms, libraries, IT facilities etc.

09:45-12:00 Meeting 13: Final PRT meeting
PRT meets separately. May be used for additional meetings at the request of the PRT.

12:00-12:30 Meeting 14: Debriefing and feedback to the school by the PRT 30 mins

12:30-13:30 Optional buffet lunch

* PRT can be split into 2 sub-teams
ANNEX 12

Reaccreditation Peer Review Visit Schedule Template
Peer Review Visit Schedule

Template for Reaccreditation Visits

Please see the Annex 10 for detailed guidance on the setting up of the Peer Review Visit Schedule and focus of the meetings.

Evening before the PRV:

19:30  Meeting 1: Briefing meeting of the PRT
Dinner at hotel in private room for the PRT alone to set the visit agenda.

Day 1:

09:00-10:30  Meeting 2.1: Initial meeting with the school's executive committee  90 mins
10:30-10:45  Break
10:45-11:45  Meeting 2.2: AoDs/AoRIs meeting with the school's executive committee  60 mins
For schools previously granted 5-year accreditation: Review of the AoDs.
For schools previously granted 3-year accreditation: Review of progress made in relation to the AoRIs.
11:45-12:30  Meeting 3: External Governance  45 mins
Representatives of the school’s governing body, including for example members of the university leadership or board of trustees.
N.B. These should not be the same people as for the initial meeting.
12:30-13:30  Lunch
PRT alone for discussions.
13:30-14:45  Meeting 4: Overall Programme Portfolio  around 1 hour
Associate dean(s) responsible for overall portfolio and programme directors.
14:45-15:45  Meeting 5: Executive Education  60 mins
Director of executive education programmes and support staff.
15:45-16:00  Break
16:00-17:00  Meeting 6: Faculty Management  60 mins
Dean, deputy dean or associate dean of faculty, department or subject area heads.
17:00-18:00  Meeting 7: Research  60 mins
Associate dean / director for research, members of the research committee.

18:30-19:30 Optional reception and buffet

Day 2:

09:00-10:30 Meeting 8: Selected Programme
Programme director(s) and administrators responsible for the programme.
This meeting is not required for schools that hold an EFMD Programme Accreditation, see Annex 24.

10:30-10:45 Break

10:45-12:15 Review of programme materials
Reading time for the PRT.

12:15-13:15 Lunch
PRT alone for discussions.

13:15-14:15 Meeting 9: Students*
2 groups in parallel from different programmes, to be scheduled in related programme groups, including students from the Selected Programme and students who contributed to the Student Report.

14:15-15:15 Meeting 10: Faculty*
Randomly selected faculty members, different from the staff already met.
Group 1: Senior faculty
Group 2: Junior faculty

15:15-15:45 Break

15:45-16:45 Meeting 11: Financial Management, Resources and Control
Managers responsible for budgeting, investments, funding, risk management and those responsible for other professional resources in the school (administration, marketing, facilities).

16:45-17:45 Meeting 12: Connections with Practice and Alumni*
Group 1: Connections with practice – representatives of key partners and clients from the world of practice, advisory boards, etc.
Group 2: Alumni – representatives of the alumni network
In some cases, the school may also invite representatives from the world of practice and alumni to the optional reception at the end of Day 1

19:30 Dinner at hotel in private room
PRT meets separately to formulate its overall assessment.

Day 3:

Annex 12: Peer Review Visit Schedule (Template for Reaccreditation Visit)
<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00-09:45</td>
<td>Site visit</td>
<td>45 min</td>
</tr>
<tr>
<td></td>
<td>Lecture halls, working group rooms, libraries, IT facilities etc.</td>
<td></td>
</tr>
<tr>
<td>09:45-12:00</td>
<td>Meeting 13: Final PRT meeting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PRT meets separately. May be used for additional meetings at the request of the PRT.</td>
<td></td>
</tr>
<tr>
<td>12:00-12:30</td>
<td>Meeting 15: Debriefing and feedback to the school by the PRT</td>
<td>30 mins</td>
</tr>
<tr>
<td>12:30-13:30</td>
<td>Optional buffet lunch</td>
<td></td>
</tr>
</tbody>
</table>

* PRT can be split into 2 sub-teams
ANNEX 13

Supporting Information & Documents to be provided in the Self-Assessment Report or SAR Annexes
SUPPORTING INFORMATION & DOCUMENTS
TO BE PROVIDED IN THE SELF-ASSESSMENT REPORT or SAR ANNEXES

(also refer to the EQUIS Standards & Criteria)

Chapter 1: Context, Governance and Strategy

- History of the school (1-page summary table)
- Organisation Chart showing reporting lines
- Chart showing the Committee structure

Chapter 2: Programmes

- A list of international academic or non-academic partners with an indication of the type of cooperation (joint degree, student exchange, research collaboration, faculty exchange, course or programme delivery)
- A table indicating international student enrolment in the school’s various programmes over the past three years. If appropriate, cross-reference to Chapter 3 Students
- A table indicating student exchange flows in the school’s various programmes. If appropriate, cross-reference to Chapter 3 Students

Chapter 3: Students

- A table providing for each programme the numerical data about the selection and admissions process (applications, offers, enrolment, full-time equivalent in the case of part-time students)

  Note: If the school has filled out Table 8 in the accompanying SAR Datasheet completely, it is sufficient to insert a reference here: “Please, see Table 8 in the SAR Datasheet for this information”.

- A list of major employers over the past 5 years
- A table describing the outward and inward flows of international exchange students, with a breakdown by programme, by country of destination or by country of origin, by partner school, by length of stay for the latest, complete year
Chapter 4: Faculty

- A summary list of the core faculty indicating academic rank, highest degree, where degree obtained, nationality, subject area, date of appointment, percentage of full-time engagement in the case of contracts that are less than full time (i.e., 75%, 50%, etc.)

- A table showing faculty staffing levels over the past five years, including the number of new appointments and the number of departures for each year, with a breakdown by category or rank

- Distribution of the core faculty by academic department when appropriate

  Note: If the school has filled out Table 3 in the accompanying SAR Datasheet completely, it is sufficient to insert a reference here: “Please, see Table 3 in the SAR Datasheet for this information”.

- A table setting out for the current year the key statistics for the faculty (gender distribution, age distribution, nationality mix, number of PhDs, etc.)

Chapter 5: Research

- Numerical data on research outputs.

  Note: Refer to Table 1 of the EQUIS Standards & Criteria (Chapter 5) for examples of outputs and outlets. Table 1 is intended as a guide to help schools report the data required by EQUIS. Schools may use their own reporting format if it covers the same information.

- A table listing funds received from research grants, commissioned research or organisational research sponsorship over the past five years and financial support for endowed chairs, research centres and doctoral research

- If appropriate, details of any commercialisation projects resulting from the school’s research (e.g., software, frameworks or tools…).

Chapter 6: Executive Education

- Budgetary information with the breakdown of revenues by open and customised programmes for the past three years

- Data concerning the number and type of programmes offered, the number of participants, the number of training days, etc. This information should be presented in the form of a table

- A list of the school’s key clients in the field of executive education in the past three years
• A list of academic and non-academic partners with an indication of the type of cooperation (course or programme delivery, digital tool provision, skills development)

**Chapter 7: Resources and Administration**

• The school’s financial accounts (income statements, statement of financial assets and liabilities) for the last five years broken down by main activity area as well as the financial plan for the next three years. Financial data should be expressed in Euro (please provide the currency rate used for conversion from local currency)

Note: If the school has filled out Table 10 in the accompanying SAR Datasheet completely, it is sufficient to insert a reference here: “Please, see Table 10 in the SAR Datasheet for this information”.

**Chapter 8: Internationalisation**

• List of international academic or non-academic partners showing the nature of relationship such as student exchanges, research collaboration, joint programmes, course or programme delivery

• The Chapter on Internationalisation should include cross-references to tables included in other Chapters, notably as regards Students, Faculty and Research

**Chapter 9: Ethics, Responsibility and Sustainability**

• Brief description of policies and institutional projects in these areas

• Brief description of student-led projects in these areas

• Approaches to the assessment of ERS

• Examples of community outreach and public service activities

**Chapter 10: Connections with Practice**

• List of the school’s principal partners and clients from the world of practice indicating the nature of their relationships (the information must be presented in a sufficiently detailed form so that the strength and quality of interactions can be evaluated)

Note: If the school have listed its most important partners from the world of practice – together with their type of organisation, their interaction groups and their types of interaction in the accompanying SAR Datasheet, it is sufficient to insert a reference here: “Please, see section ‘Partners from the World of Practice’ in the SAR Datasheet for this information”.

• Details of funding when applicable
ANNEX 14

Documents to be provided in the Online Document Repository
DOCUMENTS TO BE PROVIDED IN THE ONLINE DOCUMENT REPOSITORY (ODR)

(also refer to the EQUIS Standards & Criteria)

Basic rules to consider when setting up the ODR are the following:

➢ All documents listed below should be made available in the ODR. In addition, lengthy documents and less essential material may be stored in the ODR instead of being inserted into the SAR or the SAR Annexes.
➢ The school, remaining the sole owner of the data, should provide easy access to the ODR (single access point, one login, one password). Access should be possible from outside the school and its home country.
➢ It should not be necessary to install any software.
➢ The documents should be structured and organised according to the ten Chapters of the EQUIS Standards & Criteria (see below). A user interface that allows easy navigation of the documents should be provided.
➢ The ODR should be accessible to the PRT and the EQUIS Office 2 weeks prior to the start of the review and until the EQUIS Accreditation Board have taken their decision.
➢ Schools are not allowed to track PRT members’ access to the ODR.

Underlined documents should be available in English

Chapter 1: Context, Governance and Strategy

• Documents describing the school’s strategic plans and related policies

• List of members in the school’s Governing Body or Advisory Board (indicating name, position, organisation, nationality, year of appointment)

  Double passport holders should always be counted as nationals, if one of the passports is the domestic one.

• Cyber Security Policy

• Risk Register

Chapter 2: Programmes

General Programme Portfolio

• Learning and teaching strategy (provide any available formal documents)

• List of programmes
• For each of the programmes:
  o Aims and objectives
  o Programme Intended Learning Outcomes (ILOs)
  o Curriculum structure and rationale
  o List of component courses

• **Descriptions of the overall assessment regime and grading system** and their relation to the programme ILOs (provide any available formal documents)

• Teaching evaluation questionnaires for completion by students

• Description or reports of regular programme reviews

• Code of Ethical Conduct or similar document

• **Description of the pedagogical initiatives or projects or innovations undertaken in the last 5 years**

Note that the word “Programme” refers to the overall degree, e.g., Masters in Marketing, and a programme normally consists of “courses” (sometimes known as classes or modules), e.g., International Marketing or Market Research. A programme set is a suite of degree titles which have a common structure and a common set of core courses and then blocks of specialist courses relating to the specific degree title.

**Selected Programme**
The term Selected Programme refers to the programme chosen for more intensive assessment during the Self-Assessment and Peer Review Visit Stages. For this programme, the documents listed below should be made available.

• **Programme structure document including:**
  o Programme objectives and overall ILOs
  o Rationale for the programme structure with a table or diagram showing how the component courses develop academic progression and lead to the attainment of the programme ILOs
  o Methods for measuring and evaluating results vs goals in relation to ILOs
  o Quality assurance

• **List of component courses including for each:**
  o ILOs
  o Syllabus
  o Rubrics

• **Descriptions of the assessment regime and grading system**

• **Access to online material regarding course organisation and delivery**

• **Teaching evaluations (summary) by students for each course**

• **Teaching materials and student work: six courses, three core (mandatory) and three electives should be selected for sampling and a folder for each course should be provided. Where possible, at least half the courses should be in English. For programmes without electives, electives should be replaced by more core courses.**
Teaching materials should be provided for each of the six selected courses to include the course notes or handouts, case studies, textbooks, journal readings, videos, projects, other online material.

Student work should be sampled based on mark or grade schedules or distributions (list of student names with marks or grades) within the six selected courses. Note that mark schedules must be provided for each of the six selected courses. For each of the same six courses selected above, the following student work should be provided:

- the assignments/exams set
- 6 graded samples of the major assignment (exam, dissertation, project report, etc.) for each course matching those assignments/exams and illustrating the range of achievement on the part of the students. The PRT needs to see the quality of the students’ work and of the assessment/feedback provided. These 6 scripts should include the highest mark, the lowest mark and 4 from close to the pass mark for the course (i.e., marginal scripts). If there are no failed papers, the sample should consist of the 2 highest and the 4 lowest marks or grades.

A sample of 12 graded final dissertations or internship reports (as appropriate, e.g., Masters theses, undergraduate dissertations or internship reports) should also be provided, with 3 each with the highest and lowest marks/grades and 6 with mid-level marks. Doctoral programmes as selected programmes should be supported with a broader sample of 18 final dissertations and a supplementary sample of publications documenting the doctoral students’ ability to get their doctoral research published.

Chapter 3: Students

- Documents relating to the selection process: information packs, application forms, sample of selection interview template, if appropriate, interview reports, test material, process documents, etc.
- Documents for incoming international students
- A description of the school’s alumni association, e.g., members, chapters, services, activities, events, donations, etc. in the past five years. Alumni directory, if available
- A table showing the profile of each student cohort within the school’s degree programmes (previous study, age, gender, percentage of international students, etc.). Also, indicate the average number of years of professional experience for MBAs
- A table for each programme detailing the job placement record of students graduating in the previous academic year

Chapter 4: Faculty

- Strategic plan for faculty management, development and promotion
- Copies of the faculty handbook or other documents setting out the missions, rights and responsibilities of the faculty
• CVs in English for all the core faculty members including publications over the past five years (recommended format: 2 pages of CV plus publications list)

**Chapter 5: Research**

• Examples of materials published (Articles, Books, Reports, White Papers, IP Licences, Policy Reports)

• Evidence of dissemination via and engagement with social, digital and print media, in English

• Any documents regarding research strategy, policy and processes, in English

• Up to 5 summary examples of the work of research centres, institutes, or collaborative projects, with a maximum of 750 words each, in English

• Membership of the Research or Scientific Committee

**Chapter 6: Executive Education**

• Documents on executive education strategy, policy and processes

• Materials describing the various programmes on offer

• The catalogue of public, open courses offered

• Examples of customised programme syllabi

• Examples of course material delivered to participants

**Chapter 7: Resources and Administration**

• Information distributed to students explaining the documentation facilities and services available

• Strategy and policies for management and development of staff, e.g., faculty/staff handbook, new employees’ induction pack, promotion process and criteria

• The school’s risk management guidelines, if available

• Marketing strategy/plan

**Chapter 8: Internationalisation**

• International strategy and policy documents

• Documents relating to provisions abroad and multi-campus operations
• Documents relating to online provision that specifically targets foreign markets, if applicable

**Chapter 9: Ethics, Sustainability and Responsibility**

• Representative selection of educational materials (syllabi, teaching materials, assessments, etc.)

• Representative selection of research outcomes (published articles, research project reports, etc.)

• School policies and reports relating to ERS

• Minutes of committee meetings dealing with ERS issues

**Chapter 10: Connections with Practice**

• Strategy and policy documents relating to the school’s connections with practice

• Evidence, if appropriate, of outputs from the school’s work with its major connection
ANNEX 15

Student Report Template
EQUIS - EFMD Quality Improvement System

**Student Report**

This report is intended to gather input from students of EQUIS applicant schools on issues of key interest in the EQUIS accreditation process. A further description of each criterion listed below can be found in the document entitled *EQUIS Standards & Criteria*.

The following questions should be discussed by a sufficiently large and representative group of students (rather than by a group of student representatives), minimum 15 to maximum 25 students, ideally coming from a selection of the school’s main programmes and, where appropriate, including some exchange students.

**Students should compile the report without any direct involvement of the school or its employees. Note that the school should only initiate the process.** Then, students should work on their own without detailed guidance or monitoring by the school or involvement of any other source of external support (i.e., no selection of students, no conducting of interviews or editing of the Student Report by the school). During the subsequent meetings with the Peer Review Team, the students should be prepared to attest to the independence of the process of producing the Student Report not having been infringed.

Please ensure that the overall report length does not exceed 20 pages.

**Name of the school**

**Participants**

*Please list the students who participated in the compilation of this report, including their year and programme of study, as well as whether they hold some student representative position.***

**Selection process**

*Briefly describe the selection process for the students who contributed to this report.*
1. GENERAL QUESTIONS

What are the primary reasons students say about why they chose the school?

As a general view, has the experience of the school met students’ primary expectations?

What do students say that they have really enjoyed at the school?

What do students think the school does particularly well?

What do students think could be improved?

2. SCHOOL AND ITS GOVERNANCE

How is your school perceived by prospective and current students? In your answer, please consider the following:

- The reputation of the school – *both at a national and international level*
- Match between these perceived factors and reality – *perceived factors that are not real and real factors that are not perceived*
- The choice of the school’s marketing tools and initiatives towards prospective students, and its effectiveness
- The key disciplines for which the school is particularly renowned

What formal and informal mechanisms exist for students to participate in the governance of the school and the quality assurance of its activities?

- Participation of students in governing and advisory committees
- Formal mechanisms for regularly providing feedback
- Channels for providing spontaneous feedback
- Effectiveness of student feedback and involvement in governance
- Extent and frequency of information on school objectives, activities and achievements

3. PROGRAMMES

Make a brief assessment of the programmes offered by the school in terms of:

- The coherence of the programme portfolio: is it clear why the school has selected the programmes it currently offers
- Whether there is clarity of intended learning outcomes
- The choice and effectiveness of learning methodologies commonly used
- Skills developed during the course of study (e.g., managerial/leadership, teamworking, presentation, digital/online skills)
- Practical, project-based work, internships, placements, and so on

What opportunities exist for students to evaluate the programmes they are taking and to provide constructive input into programme design or programme updating? How can they signal

- Repetitions in content across different subjects?
- Poor sequencing of subjects?
- Disproportion in relative length of subjects?
- Inadequate prerequisites for specific subjects?
- Inadequate teaching or poor instructors
4. STUDENTS

Please give an assessment of:
  o Clarity and adequacy of selection criteria
  o The overall quality of students that are following courses
  o The diversity of the students following courses

How well are students supported throughout their studies? Please consider
  o Access to operational information: schedule, syllabus, pedagogic materials, last minute changes, etc.
  o Counselling services
  o Individual learning support (tutorials, coaching)
  o Personal development
  o Careers advice
  o Number of students in classroom
  o Accessibility of professors

5. FACULTY

What is the student perception of the quality of the school’s teaching faculty (strengths and weaknesses)?
  o Are they well prepared for class?
  o Are they motivated?
  o Do they show competence for teaching in online learning environments?
  o Do they show actual concern for your learning?
  o Does their research or consulting have any impact on your learning?
  o Do they convey support for the school and its activities in the classroom?

Process and impact of student assessment of the quality of the faculty:
  o What teaching evaluations take place, are they well designed and what impact do they have?
  o How and how well are complaints dealt with?
  o What is the quality and speed of the feedback that students receive from their assessments?

6. RESOURCES AND ADMINISTRATION

How well do the school’s facilities support students throughout their studies?
  o Campus layout, accessibility in the city, parking, public transportation
  o Cafeteria/restaurant, common rooms
  o Auditoriums, classrooms, breakout rooms
  o Virtual learning environments and digital tools used for teaching
  o Residential facilities’ functionality and appearance
  o Information and documentation facilities, e.g., libraries, databases, etc.
  o Computer facilities and support
  o Administrative staff

7. INTERNATIONALISATION

Assess the extent to which the overall student experience is international in focus, for example:
  o International content of the programmes
  o International experience of faculty
  o Foreign visiting faculty (on-campus or virtual)
  o Availability of courses in different languages
- Student exchange programmes (on-campus or virtual), opportunities to study abroad
- Mix of national and international students

Support of an International Office
- Orientation to incoming international students and help with overall integration
- Help with accommodation
- Help with bureaucratic requirements, for example residence permits.
- Orientation and help to outgoing domestic students

**8. ETHICS, RESPONSIBILITY AND SUSTAINABILITY**

Describe the opportunities that exist for students to participate in extra-curricular activities and community outreach programmes with a focus on ethics, responsibility and sustainability. What is the consequent uptake of these activities by students?

To what extent does the school communicate the value of ethical, socially responsible and sustainable behaviour in the management profession? Does the school show practical concern for this behaviour on the part of students, faculty and staff while they are at the school?

**9. CONNECTIONS WITH PRACTICE**

How well connected is the school to the world of practice? How is this brought into the learning experience for students?

**10. OTHER**

In this section, students are free to address other issues that were not covered in the previous sections.
ANNEX 16

EQUIS Quality Profile Sheet
EQUIS QUALITY PROFILE SHEET

Name of the school:

Date of the Peer Review Visit:

The items listed in this Quality Profile Sheet (QP) are abbreviated versions of those set out in the EQUIS Criteria Evaluation Form. The numbering is identical in the two documents. For a full understanding of what is covered by each criterion, please refer to the document entitled EQUIS Standards & Criteria.

Meets standard
The school satisfies the EQUIS standard in this area as defined in the Criteria Framework. Most positive assessments are expected to fall in this broad category. It is not to be interpreted as meaning that the school is mediocre or that it barely qualifies at a minimum level.

Above standard
The school demonstrates outstanding quality, well above the level required to satisfy the EQUIS standard in this area, where it can be considered as example of “best practice.”

Below standard
The school is judged to be below the threshold of the EQUIS standard in this area.

N/A:
Not considered applicable or relevant to the school concerned.

Note
Decisions on accreditation by the EQUIS Accreditation Board (AB) are not based on counting the number of Above and Below ticks in the QP but on the arguments made within the Peer Review Report text particularly noting the key EQUIS Standards. While the QP covers all the EQUIS Standards, the key standards are more important to the AB than others. Therefore, it should not be expected that all the ticks in the QP carry equal weight in the AB’s discussions.
<table>
<thead>
<tr>
<th>Overall Quality Evaluation</th>
<th>ABOVE standard</th>
<th>MEETS standard</th>
<th>BELOW standard</th>
<th>N/A</th>
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<tr>
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<td>1.7  Current strategic positioning</td>
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<td>1.8  Strategic direction and objectives</td>
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<td>1.13  Connections with practice</td>
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<td>1.14  Digitalisation</td>
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<td><strong>Chap 2  Programmes</strong></td>
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<td>OVERALL PROGRAMME PORTFOLIO</td>
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<td>2.2  Quality of the programme management systems</td>
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<td>Level of internationalisation outside the home country</td>
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<td>8.7</td>
<td>International alliances and partnerships</td>
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<td>8.8</td>
<td>International connections with practice</td>
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</table>

**REPEATS OF ASSESSMENTS FROM OTHER CHAPTERS**

| 1.11 | Context, governance and strategy |
| 2.9  | Programme portfolio – international attractiveness |
| 2.10 | Programme portfolio – international outreach |
| 2.17 | Selected Programme – international relevance |
| 3.9  | Students                                      |
| 4.9  | Faculty                                       |
| 5.4  | International features of research           |
| 6.12 | Executive education                           |
| Chap 9 | Ethics, Responsibility and Sustainability |
| 9.1  | Strategy re. ethics, responsibility and sustainability |
| 9.2  | Internal management systems                   |
| 9.3  | Contributions to the wider community          |
| 9.4  | Community outreach activities (local and global) |
| 9.5  | Contribution to and from the world of practice |

**REPEATS OF ASSESSMENTS FROM OTHER CHAPTERS**

| 1.12 | Context, governance and strategy |
| 2.11 | Overall programme portfolio      |
| 2.18 | Selected Programme               |
| 3.10 | Students                        |
| 4.10 | Faculty                         |
| 5.5  | Research                        |
| 6.11 | Executive education             |
| 7.9  | Resources and administration     |
| 10.4 | Connections with practice       |

**Chap 10 Connections with Practice**

| 10.1 | Strategy relating to connections with practice |
| 10.2 | Customer orientation                  |
| 10.3 | National links to the world of practice |
| 10.4 | Ethics, responsibility and sustainability |
| 10.5 | International links to the world of practice |
| 10.6 | Impact of connections to the world of practice |

**REPEATS OF ASSESSMENTS FROM OTHER CHAPTERS**

| 1.13 | Context, governance and strategy       |
| 2.12 | Programme portfolio – relevance        |
| 2.19 | Selected Programme – relevance         |
| 3.11 | Students                               |
| 4.11 | Faculty                               |
| 5.2.2 | Practice-oriented research          |

*The shaded boxes in Chapters 8, 9 and 10 are a repeat from other Chapters.*
ANNEX 17

EQUIS Criteria Evaluation Form
This Criteria Evaluation Form (CEF) is intended to be a working document for peer reviewers to help them build up their assessment of the school during the review. It will also serve as a basis for the drafting of the Peer Review Report following the visit.

A fuller description of each criterion listed below can be found in the document entitled EQUIS Standards & Criteria, which should be read in conjunction with this checklist.

1. CONTEXT, GOVERNANCE AND STRATEGY

<table>
<thead>
<tr>
<th>1.1 Environment</th>
<th>COMMENTS</th>
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<tbody>
<tr>
<td>• Understanding by the school of the environment in which it operates</td>
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<td>• Legitimacy within the national environment</td>
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<tr>
<td>• Response of the school to an education market being reshaped by digital technologies</td>
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<thead>
<tr>
<th>1.2 Institutional status</th>
<th>COMMENTS</th>
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<tbody>
<tr>
<td>• Clarity of the school’s legal and institutional status</td>
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<th>1.3 External governance</th>
<th>COMMENTS</th>
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<tr>
<td>• Effectiveness of the school’s external governance system</td>
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<td>• Quality of the school’s relationship with its parent organisation or tutelary body</td>
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<td>• Input from external stakeholders into the governance system</td>
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<tr>
<td>e.g., Does the school have external Advisory Committees?</td>
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<th>1.4 Internal governance</th>
<th>COMMENTS</th>
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<tr>
<td>• Effectiveness of the school’s internal organisational structures and decision-making processes</td>
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<td>• Internal stakeholder involvement in the governance system (e.g., students, faculty, staff)</td>
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<tr>
<td><strong>1.5 Autonomy</strong></td>
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| • Degree of independence from parent body  
  o Does the school have reasonable control over its own destiny? |  |
| **1.6 Mission, vision and values** |  |
| • Appropriateness of the mission statement  
  • Coherent vision of the school’s future  
  • Strength of the school’s values and culture  
  • Shared sense of mission and vision throughout the school |  |
| **1.7 Current strategic positioning** |  |
| • Credibility of the school’s present positioning  
  • Understanding of the school’s competitive positioning in the market (e.g., strategic group)  
  • Realistic SWOT analysis  
  • Strategic and tactical role of online or blended forms of teaching |  |
| **1.8 Strategic direction and objectives** |  |
| • Clarity of the strategic direction for the future (e.g., long term goals)  
  • Definition of medium-term strategic objectives  
  • Match between strategic objectives and resources/constraints  
  o Is this credible? |  |
<p>| <strong>1.9 Strategic process</strong> |  |</p>
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<th>1.10 Quality assurance</th>
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<tr>
<td>Effective quality assurance mechanisms to monitor overall school performance</td>
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<td>Involvement of students in quality assurance processes</td>
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<thead>
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<th>1.11 Internationalisation</th>
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<tbody>
<tr>
<td>Integration of the international dimension into the school's governance, strategy and culture</td>
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<tr>
<td>Role of digitalisation in the school's internationalisation strategy</td>
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<tr>
<th>1.12 Ethics, responsibility and sustainability</th>
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<tbody>
<tr>
<td>Role of ERS in mission and vision</td>
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<tr>
<td>Explicit strategy in place, which is broadly communicated</td>
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<tr>
<td>Adequate resources allocated in support of strategy</td>
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<tr>
<td>Role of digitalisation in the school's ERS strategy</td>
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<table>
<thead>
<tr>
<th>1.13 Connections with practice</th>
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<tbody>
<tr>
<td>Integration of the corporate dimension into the school's governance, strategy and culture</td>
</tr>
<tr>
<td>Participation of practitioners from outside the school (business leaders, entrepreneurs, business-government policy developers) in its governance structures</td>
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<tr>
<td>Existence of an explicit policy for managing its interface with the world of practice relevant to the school’s mission</td>
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<tr>
<td>Role of digitalisation in the school’s connections with practice</td>
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### 1.14 Digitalisation

- The use of digitalisation as an integral, enabling factor
- Digitalisation strategy
- Cyber security protection

### 2. PROGRAMMES

#### OVERALL PROGRAMME PORTFOLIO

#### 2.1 Coherence of the school’s portfolio of programmes

- Fit with overall strategic objectives
- Balance of programme offerings at different degree levels
- Role of online and distance learning
- Balance of programme offerings with different delivery modes
- Measures of the impact of each programme on its target audience

#### 2.2 Quality of the programme management systems

- Quality of programme management and administrative teams
- Clear division of responsibilities
- Processes for allocating faculty to programmes
- School assessment of teaching practices and development done based on students’ and other stakeholders’ feedback

#### 2.3 Programme design

- Programme design and revision processes
- Appropriateness of objectives and intended learning outcomes (ILOs)
- Programme content and coverage (incl. knowledge, skills and competencies required in a digitalised world)
## 2.4 Pedagogic development and innovation

- Explicit policy regarding pedagogic development and innovation
- Processes in place for promoting innovation in teaching and learning
- Achievements in pedagogic innovation, including new courses, new education materials, and new learning and delivery methods
  - Number of new teaching-cases
  - Case Publications
- Collaboration and dissemination of pedagogic innovation
  - School’s initiatives and publications related to pedagogic innovation
  - Conference presentations, workshops, webinars, or other events focused on pedagogical research findings
- Evidence of resources available to support pedagogic innovation
- List of recognition and awards for teaching excellence received by faculty
- School assessment of long-term pedagogic innovation impact

## 2.5 Higher Education skills

- Integration of general education objectives
  - Conceptualisation
  - Data analysis
  - Critical thinking
  - … etc.

## 2.6 Acquisition of managerial skills

- Opportunities to develop managerial skills
  - Teamwork
  - Presentation skills
  - … etc.
- Opportunities for practical work, project-based work and internships within the programmes

## 2.7 Programme delivery
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<th>2.8 Student assessment</th>
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<tbody>
<tr>
<td>• Clarity of assessment methods and their links to ILOs</td>
</tr>
<tr>
<td>• Rigour of the assessment regime (including online assessment)</td>
</tr>
<tr>
<td>• Pass rates and completion rates appropriate to the degree levels</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2.9 Quality assurance systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Committee structures</td>
</tr>
<tr>
<td>• Approval processes for new programmes and programme revisions</td>
</tr>
<tr>
<td>• Monitoring teaching quality</td>
</tr>
<tr>
<td>• Monitoring of assessment processes</td>
</tr>
<tr>
<td>• Operational and periodic review</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2.10 International attractiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Positioning of the programmes in international markets</td>
</tr>
<tr>
<td>• Compatibility with other international systems, e.g., the Bologna reforms</td>
</tr>
<tr>
<td>• International content of the programmes</td>
</tr>
<tr>
<td>• Availability of courses in other international languages, e.g., English, Spanish</td>
</tr>
<tr>
<td>• Opportunities and acceptance of study abroad, e.g., through student exchange programmes or internships</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>2.11 International outreach</th>
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<tbody>
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<td></td>
</tr>
</tbody>
</table>
- Quality of international partners
- Joint programmes delivered with international partners
- Quality (assurance) of operations abroad, joint or franchised operations (where appropriate)

### 2.12 Ethics, responsibility and sustainability

- Adequacy of coverage in programmes’ design processes, curricular contents and assessments

### 2.13 Relevance of connections with practice

- Inclusion of perspectives from practice in the definition of learning objectives and into curriculum design
- Practitioner input into the programmes (learning objectives, curriculum design, etc.)
- Satisfaction of practitioners with school’s programmes and graduates
- Extent of practitioner input into the delivery of the school’s programmes
- Existence of joint programmes with practitioners (taught, online)

### SELECTED PROGRAMME

### 2.14 Programme design

- Definition of objectives and learning outcomes
- Programme content linked to ILOs
- Programme innovation
- Balance of academic and practical skills

### 2.15 Quality of students
- Quality of admission processes
- Quality of student intake

**2.16 Programme delivery**
- Quality of teaching
- Use of modern learning technologies

**2.17 Student assessment**
- Clarity of assessment methods and their links to ILOs
- Match of the academic depth and rigour of the assessment process with the level of degree being reviewed
- Quality of student work in:
  - Assignments and exams
  - Theses or project reports
- Pass rates and completion rates

**2.18 International relevance**
- International perspective (international mix of students, international mix of faculty, international content, study or work abroad opportunities/acceptance)

**2.19 Ethics, responsibility and sustainability**
- Adequacy of coverage in programme design, delivery and outcomes
- Appropriateness of ILOs and adequacy of coverage in assessments

**2.20 Relevance of connections with practice**
- Inclusion of perspectives from practice in the definition of learning objectives and into curriculum design
- Practitioner input into the programmes (learning objectives, curriculum design)
- Satisfaction of practitioners with school’s programmes and graduates
- Extent of practitioner input into the delivery of the school’s programmes
• Existence of joint programmes with practitioners (taught, online)

### 2.21 Quality assurance processes

• Approval processes for programme revisions
• Monitoring teaching quality
• Monitoring assessment processes
• Operational and periodic review

### 3. STUDENTS

#### 3.1 Target profiles, selection criteria and processes

• Appropriateness of target profiles
• Student admission and selection processes
  o How appropriate are the selection criteria?
  o How selective is the school?
  o What is the quality of the Admission processes?
• Match between intake profiles and the target profile for graduating students

#### 3.2 Quality of students

• Quality of incoming students
  o Motivation and commitment
  o Preparedness for the study programme
  o Diversity of backgrounds
  o Access for socially disadvantaged students

#### 3.3 Preparation for programme entry

• Processes used to prepare students in advance of their entry into their programme of study

#### 3.4 Support and counselling services
### 3.5 Personal and professional development

- Support for the personal development of students
  - Do the school’s programmes and processes encourage personal development?
  - Does the school help students to develop professionally?
  - Does the school have staff experienced in providing this type of support?

### 3.6 Career support

- Quality of the Careers office
  - What is the level of support provided to students to help define their career objectives and in their search for employment?

- Availability of detailed records concerning the placement of students in the job market

### 3.7 Career placement

- Appropriate level of entry into the job market for graduating students
  - Do employment opportunities meet students’ expectations?

### 3.8 Alumni relations

- Quality of the school’s relations with its Alumni
  - Does the school use the potential of its alumni base adequately?

### 3.9 Internationalisation

- Internationalisation of the student body
- Readiness of students to manage in an international context
  - How well does the school develop individuals as future international managers?
    - Managerial skills
    - Language skills
    - Inter-cultural skills
### 3.10 Ethics, responsibility and sustainability

- Policies to ensure and support a growing inclusive and diverse student body
- Integration into personal development
- School and faculty support for student engagement, including extra curricular activities

### 3.11 Connections with practice

- Influence of connections from the world of practice on student selection
- Extent of practitioners’ assistance with student related activities (monitoring, shadowing, company visits, organised events, etc.)
- Level of input from practitioners in advising students in career aspirations (corporate life, start-up advice, etc.)
- Extent to which student and graduate satisfaction with the input they receive from the world of practice is captured

### 4. FACULTY

#### 4.1 Core faculty sufficiency

- Size of the core faculty
  - Is the current size of the core faculty adequate for the number of students and the range of programmes?
  - Ratio of core faculty members to full-time students
- Profile of the core faculty
  - Coverage of the principal management disciplines
  - Adequate range of educational competences (including competences to teach online)
  - Adequate range of research competences
  - Gender mix
### 4.2 Quality of core faculty

- Qualification of the faculty
  - Doctoral qualification
  - Relevant business/professional experience
  - Research activity

### 4.3 Overall faculty mix

- Quality of the non-core faculty (part-time, adjunct, practitioners, etc.)
- Adequacy of total available resources including non-core faculty and practitioners
- Is there an appropriate balance in the distribution of teaching loads between core and non-core faculty?

### 4.4 Faculty management systems

- Faculty management systems
  - Are there formal processes for the management of the faculty?

### 4.5 Faculty recruitment and induction

- Recruitment policies and processes
- Induction processes

### 4.6 Faculty appraisal, review and promotion

- Appraisal and review policies and processes
- Clear promotion criteria

### 4.7 Faculty workload management

- Processes for workload allocation
- Appropriate balance between teaching, research and service to school

### 4.8 Faculty development
<table>
<thead>
<tr>
<th>4.9 Internationalisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Internationalisation of the faculty</td>
</tr>
<tr>
<td>• International visiting faculty</td>
</tr>
<tr>
<td>• International standing of the faculty</td>
</tr>
<tr>
<td>o Is the faculty of a sufficient quality to meet the international standards of management education?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.10 Ethics, responsibility and sustainability</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Integration into faculty development</td>
</tr>
<tr>
<td>• Adequacy of recognition and support provided by the school for faculty’s community and public engagement</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.11 Connections with practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Connections between the faculty and the world of practice (through consulting, executive education, board membership, etc.)</td>
</tr>
<tr>
<td>• Sufficiency of faculty exposure to the world of practice as it relates to their subject to ensure the professional relevance of the school’s programmes</td>
</tr>
<tr>
<td>• Engagement of practising managers as part of the faculty complement</td>
</tr>
<tr>
<td>• Extent of support in school’s policies with respect to consulting by individual faculty</td>
</tr>
<tr>
<td>• Level of faculty engagement in consulting</td>
</tr>
</tbody>
</table>

5. RESEARCH

5.1 Research strategy
- Describe the school’s overall research strategy and policy. Explain how the research agenda contributes to the strategic objectives of the school.

- Is there a clear research strategy and plan that identifies strengths and weaknesses and articulates the current and intended research positioning of the school?

- Describe the ways in which research has contributed to the accumulation of distinctive expertise within the school.

- What are the principal types of research conducted by the school?

- What does the school consider to be its competitive performance in terms of research, nationally and internationally?

- How are priorities established within the research strategy?

- What are the plans for future development of the school’s research?

- Describe any nationally organised research assessment schemes, such as the ERA in Australia or the REF in the UK.

- Are resources aligned with key outcomes?

### 5.2 Research activities

- Summarise the research conducted by the core faculty over the past five years.

- What strengths and weaknesses emerge from this data?

- What have been the significant trends during this five-year period? In what areas has progress been made? In what areas has output or its quality declined?

- What proportion of the core faculty can be considered active in research and intellectual activity?

- Describe the research activities of the non-core faculty to the extent that they contribute to the quality of the school’s
<table>
<thead>
<tr>
<th>Profile and to its ability to serve its chosen markets.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- What role does the school seek to have in relation to the increasing digital impact on research, business and society?</td>
</tr>
</tbody>
</table>

### 5.2.1 Academic research

- Describe the disciplines or areas of research of the school.
- What are the methods used to assess the quality of the school’s academic research output?
- What is the relative emphasis given to recommendations for academic research assessment such as those proposed by DORA or CoARA, for example?
- What is the relative emphasis given to citation indices (e.g., NCI, FWCI) or journal guides (e.g., AJG, ABDC list, FT 50 list, UTD journal list)?
- Describe the quantity and quality of academic research using the school’s assessment methods.
- Describe the school’s activities related to external funding applications for academic research projects.
- Describe external research income and funding for national and international academic research projects.
- Did the level of external funding for academic research projects grow in the last 5 years? If so, by how much?
- Describe the extent of faculty involvement in editorships, conference chairing, leadership roles in learned societies or scientific associations.

### 5.2.2 Practice-oriented research
- Describe any research activities run in collaboration with the world of practice (e.g. companies, policy organisations, not for profit organisations or entrepreneurs).

- Describe research activities that are supported by these groups.

- Indicate the type of support provided (e.g. financial resources, such as matching funds, financing research centres or doctoral research, or other resources, such as distinctive spaces, and interactions for knowledge exchange).

- Are there any joint research centres or endowed chairs?

- Is there any direct input from the world of practice into the work of the school’s research centres?

- How, if at all, does consultancy contribute to the school’s knowledge exchange?

- Are practitioners involved in the research outputs of the school (for example joint articles, reports, seminars, webinars, commercialisations, digital media contributions, start-ups, incubators & accelerators)?

- What is the number and quality of white papers and policy reviews, trade publications, patents, IP licenses, handbooks, and books produced for practice or the broader community?

- Provide factual data on the school’s involvement in industry, policy or governmental conferences, colloquia, congresses, briefings, and invited speeches.

- What use does the school make of digital, social and print media in its wider dissemination of practice-oriented research findings and what evidence is there of target audience engagement with these efforts?

- What evidence exists of the school’s impact on practice (e.g. demonstrated contributions to policy and legislation)?
### 5.3 Research management

<table>
<thead>
<tr>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe how research is organised within the school.</td>
</tr>
<tr>
<td>Is there a dean or director of research?</td>
</tr>
<tr>
<td>Is there a Research or Scientific Committee?</td>
</tr>
<tr>
<td>Are there self-standing Research Centres or Institutes within the school?</td>
</tr>
<tr>
<td>To what extent is the research agenda managed?</td>
</tr>
<tr>
<td>Describe how research is supported in the school.</td>
</tr>
<tr>
<td>Describe how research activity is integrated into the workload of individual faculty members.</td>
</tr>
<tr>
<td>What priority level is accorded to research?</td>
</tr>
<tr>
<td>How is research valued within the school?</td>
</tr>
<tr>
<td>How much time is allowed for research within faculty members’ workload?</td>
</tr>
<tr>
<td>What is the link between the faculty developmental budget and research policy?</td>
</tr>
<tr>
<td>Explain how research is internally funded, if at all (e.g. budgetary allocations, research incentives, sabbatical leave, faculty development initiatives).</td>
</tr>
<tr>
<td>How does the school support those faculty applying for external funding?</td>
</tr>
<tr>
<td>Describe the processes for monitoring and evaluating research.</td>
</tr>
<tr>
<td>What role does research play in the school’s recruitment, promotion and retention of faculty? What methods have been used to attract key research staff to the school in recent years?</td>
</tr>
</tbody>
</table>

### 5.4 International features of research
### 5.5 Ethics, responsibility and sustainability in research

- Summarise the contribution of the school’s research to its international dimension.
- Describe how the school manages its research to contribute to global thought leadership.
- Give details of faculty involvement in joint research with schools or colleagues in other countries.
- Describe the contribution of international academic visitors to enhance the research of the school.
- Describe the involvement of faculty in international research organisations and the extent to which faculty are engaged in international visiting appointments.

- Describe how the school actively promotes and integrates ERS into its research activities.
- Describe any of the school’s Centres, Institutes or Research Groups addressing ERS issues.
- Describe the fundamental principles of research integrity that underpin the research work of the school’s faculty. What policies, processes and mechanisms are in place to assure good practice in research activities, publication and dissemination of results?

### 6. EXECUTIVE EDUCATION

#### 6.1 Positioning within the school

- Integration of executive education (EE) into the school’s overall strategy and programme portfolio
- Integration of the EE activity within the school’s organisation chart and management systems
- Resources dedicated exclusively to EE
  - Teaching and admin. staff
  - On site facilities and digital tools
<table>
<thead>
<tr>
<th></th>
<th>Product portfolio</th>
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<tbody>
<tr>
<td></td>
<td>• Coherence of the EE portfolio</td>
</tr>
<tr>
<td></td>
<td>• Market positioning of the EE offer</td>
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<tr>
<td></td>
<td>o Understanding of market needs</td>
</tr>
<tr>
<td></td>
<td>• Underpinning key expertise</td>
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<thead>
<tr>
<th></th>
<th>Programme design</th>
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<tbody>
<tr>
<td></td>
<td>• Design process for open and customised programmes</td>
</tr>
<tr>
<td></td>
<td>• Programme delivery methods</td>
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</tbody>
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<thead>
<tr>
<th></th>
<th>Marketing, sales and customer relations</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>• Key areas of expertise</td>
</tr>
<tr>
<td></td>
<td>• Quality of the customer relationship management</td>
</tr>
<tr>
<td></td>
<td>• Distinction between customers as organisations and customers as individual participants</td>
</tr>
<tr>
<td></td>
<td>• Marketing</td>
</tr>
<tr>
<td></td>
<td>• Sales</td>
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<thead>
<tr>
<th></th>
<th>Digital integration</th>
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<tbody>
<tr>
<td></td>
<td>• Digital integration in the portfolio of programmes and services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Participant management</th>
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<tbody>
<tr>
<td></td>
<td>• Quality of participant management</td>
</tr>
<tr>
<td></td>
<td>o Selection</td>
</tr>
<tr>
<td></td>
<td>o Preparation</td>
</tr>
<tr>
<td></td>
<td>o Individualised support</td>
</tr>
<tr>
<td></td>
<td>• Understanding of the adult learning process</td>
</tr>
</tbody>
</table>

|   | Quality of open programmes |
### 6.8 Quality of customised programmes
- Ability to design and deliver programmes in collaboration with companies and organisations

### 6.9 Measurement of impact
- Measurement of the impact of learning on individuals and organisations

### 6.10 Faculty
- Adequacy of faculty resources (including both core and non-core faculty) available for EE
- Nature and extent of core faculty involvement in EE
- Effective management of faculty resources deployed in EE

### 6.11 Research
- Impact of the school’s research potential on EE

### 6.12 Internationalisation
- International development of EE

### 6.13 Ethics, responsibility and sustainability
### 7. RESOURCES AND ADMINISTRATION

#### 7.1 On-campus facilities and the learning environment
- Quality of the learning environment
  - Campus and buildings
  - Cafeteria and restaurant facilities
  - Student common room facilities
  - Adequacy of the auditoriums, classrooms, breakout rooms, etc.
  - Virtual learning environment and digital tools used for learning

#### 7.2 Financial performance
- Adequacy of the school's financial resources to achieve strategic objectives
- Financial viability of the school
  - Are there any major risks in the near future?

#### 7.3 Financial management
- Effectiveness of the school's financial management systems

#### 7.4 Risk management
- Effectiveness of the school's risk management activities
- Major risks threatening the school's viability in financial or academic terms

#### 7.5 Information and documentation facilities
- Adequacy of the information and documentation facilities (library, databases, research support systems, inter-library loan services, etc.)

#### 7.6 Computing facilities
### 7.7 Marketing and Public Relations
- Effectiveness of the school’s Marketing Strategy

### 7.8 Administrative services and staff
- Administrative staff
  - Overall quality
  - Human Resource policy
  - Management

### 7.9 Ethics, responsibility and sustainability
- Integration into infrastructure planning and management
- Integration into operations and administration
- Demonstration of the school’s advancing inclusion, respect for diversity and the well-being of all in its management policies
- School engagement in related staff training and development

### 7.10 Connections with practice
- Nature and extent of staff (academic and professional) support for the school’s strategy for connections with practice
- Extent of non-staff budgets to support the school’s strategy for connections with practice

### 8. INTERNATIONALISATION

#### 8.1 International strategy
- Well-defined strategy and policies for internationalisation
## 8.2 International positioning
- Level of competitiveness and recognition of the school in international markets

## 8.3 International dimension in the school’s governance
- Presence of an international dimension in the school’s governance system
  - Governing Body
  - International Advisory Boards

## 8.4 Resources allocated to internationalisation
- Funding
- International office/staff
- Director of international affairs

## 8.5 Level of internationalisation on the home campus
- Intercultural mix of students/exchanges
- Intercultural mix of faculty/visiting
- International perspective in its programmes and learning resources (incl. virtual student exchanges, online classes)
- International dimension in the school’s research and development activity

## 8.6 Level of internationalisation outside the home country
- Level of internationalisation outside the home country (exchange students abroad, faculty mobility, joint programmes, off-campus operations – both face-to-face and/or virtual)

## 8.7 International alliances and partnerships
- Quality of the school’s international academic partners
- International strategic alliances (e.g., joint programmes)
- Exchange programme network
- Participation in international networks

## 8.8 International connections with practice
## Existence of explicit strategy for connections with practice that are based outside the primary geographic location of the school

- Extent and nature of international connections with practice
- Contribution of digitalisation to connections with practice outside the home country

### 9. ETHICS, RESPONSIBILITY AND SUSTAINABILITY

#### 9.1 Strategy re. ethics, responsibility and sustainability

- Strategy for development of ERS
  - Incorporation of ERS into the overall strategy of the school
  - Integration of ERS into core activities

#### 9.2 Internal management systems

- Management policies to support the implementation of sustainability practices
- Evidence of progress in sustainable operations via metrics and appropriate control systems

#### 9.3 Contributions to the wider community

- Integration of ERS into contributions to academic community, business community and wider society
- Services related to ERS for the management profession

#### 9.4 Community outreach activities (local and global)

- Adequacy of school’s community outreach and public engagement activities
- Level of engagement of the school’s faculty, staff, students and alumni in outreach activities
- Coverage in School communications
- The school’s commitment to the global environmental protection agenda
### 9.5 Contribution to and from the world of practice

- The role that connections with the world of practice play in the ERS agenda of the school
- The extent to which the school engages with ERS-related policy and practitioner bodies to support and progress its ERS agenda
- The extent to which the school embraces and open eco-system and participates in co-creation of knowledge taking advantages of possibilities offered by digitalised work environments in academia and business

### 10. CONNECTIONS WITH PRACTICE

#### 10.1 Strategy relating to connections with practice

- Existence of strategies, policies and processes for the effective management of the school’s connections to the world of practice
- Strategic developments in the work and activities of the school that deliver increased connections to the world of practice

#### 10.2 Customer orientation

- Systematic management of connections to the world of practice (systems, processes, people)
- The extent to which the school’s work and activities develop student understanding of the practice and impact of business and management through interaction with a range of organisational and societal stakeholders

#### 10.3 National links to the world of practice
### Annex 17: EQUIS Criteria Evaluation Form

| Nature and quality of the connections at local and national level |
| Extent to which national connections influence the work of the school (Faculty, students) |
| Extent to which national connections are influenced by the work of the school |

#### 10.4 Ethics, responsibility and sustainability

- The role of connections to the world of practice in enhancing the schools' efforts to internationalise and take forward its ERS agenda
- Application of ERS based standards in the assessment of the practice-related activities and relationships

#### 10.5 International links to the world of practice

- Nature and quality of the connections at local and international level
- Extent to which international connections influence the work of the school (faculty, students, programme content and delivery)
- Extent to which international connections are influenced by the work of the school

#### 10.6 Impact of connections with world of practice (to and from the school)

- The level of impact of the school’s work and activities on organisational and societal stakeholders
- Extent to which the world of practice impacts on the school’s academic activities, in both education and research

### 11. OVERALL ASSESSMENT

| Recommendation for EQUIS accreditation: |
| **Please mark the recommendation with an X** |
| 5-year accreditation: |
| 3-year accreditation: |
| non-accreditation: |

<p>| Areas of Required Improvement in case of 3-year accreditation |</p>
<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>
ANNEX 18

EQUIS Mid-Term Progress Report Form
Name of the school:

Date of accreditation decision:

Areas of Development:

1
2
3

Mid-Term Progress Report:

Due Date: Day/Month/Year
Submitted: Day/Month/Year
Feedback Provided: Day/Month/Year

Overall Assessment of Progress:

Above Expectations
Meets Expectations
Below Expectations
Not Acceptable

(Information above added by EQUIS Office)

Guidelines:

- The school should be aware that the achievement of progress is a particularly important dimension in reaccreditation decisions of the EQUIS Accreditation Board (AB). The AB may deny reaccreditation if the school has shown insufficient effort in addressing the Areas of Development (AoDs) and no tangible progress has been achieved.

- The EQUIS Mid-Term Progress Report Form represents a living document enabling schools to record any relevant changes and initiatives relating to the AoDs within the EQUIS system. This report, including the feedback, is an important part of the documentation received by the Peer Review Team for reaccreditation.

- The school will receive a customised Mid-Term Progress Report Form as soon as the AoDs have been agreed with the EQUIS Office following the AB decision. Only this customised form may be used for progress reporting by adding text in the appropriate boxes. When completing the form, please do not delete any sections and do not change the formatting of this template.

- The school is expected to address the headings of each text box with a succinct but informative summary of developments. It is essential that all arguments are supported by factual evidence and that the effectiveness of developmental initiatives is described based on their tangible impact. The length of the report should not exceed 15 pages.

- The school may support its arguments with internal documents, which can be added as appendices. This option should however be used very selectively. The school should be aware that the next Peer Review Team will receive past Mid-Term Progress Report without any appendices.

- A formal overall rating for each AoDs of the Mid-Term Progress Report will be given. The rating categories are:
  - Above Expectations: The school is making significant progress. At the present state and given the evidence presented, the school is expected to meet the AoD to the full satisfaction of the AB.
- **Meets Expectations:** The report is sufficiently detailed and demonstrates that the school is making sufficient progress. At the present state and given the evidence presented, there is a reasonable chance that the school will be able to meet the AoD to the full satisfaction of the AB.

- **Below Expectations:** The report shows that the school is making insufficient progress in addressing the AoD. At the present state and given the evidence presented, the school is unlikely to satisfy the expectations of the AB.

- In addition, a formal overall rating of the whole report is provided.
  - **Above Expectations:** Overall progress exceeds the expectations of the EQUIS Office.
  - **Meets Expectations:** Overall progress meets the expectations of the EQUIS Office.
  - **Below Expectations:** Overall progress fails to meet the expectations of the EQUIS Office.

- The report may be deemed **Not Acceptable** if it is excessively vague and lacks factual support in key areas. In this case, the school is asked to revise and resubmit the Mid-Term Progress Report within 4 weeks after receiving the initial feedback.
## MID-TERM PROGRESS REPORT Year XXXX

### Strategic Developments within the school

**Description of strategic developments within the school**

Add text here…

Feedback from the EQUIS Office:

### Area of Development 1 <Description added by EQUIS Office>

**Description of progress in the AoD**

*Please mention general developments relevant for the AoD as well as specific initiatives and developments (milestones and achievements)*

Add text here…

Feedback from the EQUIS Office:

<table>
<thead>
<tr>
<th>Above expectations</th>
<th>Meets expectations</th>
<th>Below expectations</th>
</tr>
</thead>
</table>

### Area of Development 2 <Description added by EQUIS Office>

**Description of progress in the AoD**

*Please mention general developments relevant for the AoD as well as specific initiatives and developments (milestones and achievements)*

Add text here…

Feedback from the EQUIS Office:

<table>
<thead>
<tr>
<th>Above expectations</th>
<th>Meets expectations</th>
<th>Below expectations</th>
</tr>
</thead>
</table>

### Area of Development 3 <Description added by EQUIS Office>

**Description of progress in the AoD**

*Please mention general developments relevant for the AoD as well as specific initiatives and developments (milestones and achievements)*

Add text here…

Feedback from the EQUIS Office:

<table>
<thead>
<tr>
<th>Above expectations</th>
<th>Meets expectations</th>
<th>Below expectations</th>
</tr>
</thead>
</table>
Other Developments

<table>
<thead>
<tr>
<th>Description of Other (Relevant) Developments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add text here…</td>
</tr>
</tbody>
</table>

| Feedback from the EQUIS Office:            |

Overall Feedback: Conclusions and Recommendations year XXXX

| EQUIS Office Feedback:                    |


ANNEX 19

EQUIS Annual Progress Report Form
**EQUIS ANNUAL PROGRESS REPORT**

**Name of the school:**

**Date of accreditation decision:**

**Areas of Required Improvement:**

1

2

3

**Progress Report 1:**

<table>
<thead>
<tr>
<th>Due Date:</th>
<th>Day/Month/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted:</td>
<td>Day/Month/Year</td>
</tr>
<tr>
<td>Feedback Provided:</td>
<td>Day/Month/Year</td>
</tr>
</tbody>
</table>

**Overall Assessment of Progress:**

| Above Expectations | Meets Expectations | Below Expectations | Not Acceptable |

**Progress Report 2:**

<table>
<thead>
<tr>
<th>Due Date:</th>
<th>Day/Month/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted:</td>
<td>Day/Month/Year</td>
</tr>
<tr>
<td>Feedback Provided:</td>
<td>Day/Month/Year</td>
</tr>
</tbody>
</table>

**Overall Assessment of Progress:**

| Above Expectations | Meets Expectations | Below Expectations | Not Acceptable |

*(Information above added by EQUIS Office)*

**Guidelines:**

- The school should be aware that the achievement of progress is a particularly important dimension in reaccreditation decisions of the EQUIS Accreditation Board (AB). The AB may deny reaccreditation if the school has shown insufficient effort in addressing the Areas of Required Improvement (AoRIs) and no tangible progress has been achieved.

- The EQUIS Annual Progress Report Form represents a living document enabling schools to record any relevant changes and initiatives relating to the AoRIs within the EQUIS system. These reports, including the feedback, are an important part of the documentation received by the Peer Review Team for reaccreditation. In the first year, plans for action should be stated at minimum and, in the second year, tangible progress must be reported and backed by factual evidence.

- The school will receive a customised Annual Progress Report Form at least 9 months prior to the submission deadline. Only this customised form may be used for progress reporting by adding text in the
Appropriate boxes. When completing the form, please do not delete any sections and do not change the formatting of this template.

- The school is expected to address the headings of each text box with a succinct but informative summary of developments. It is essential that all arguments are supported by factual evidence and that the effectiveness of developmental initiatives is evaluated based on their tangible impact. **The length of each report should not exceed 10 pages.**

- The school may support its arguments with internal documents, which can be added as appendices. This option should however be used very selectively. The school should be aware that the next Peer Review Team will receive past Annual Progress Reports without any appendices.

- A formal overall rating for each AoRI of the Annual Progress Report will be given. The rating categories are:
  - **Above Expectations:** The school is making significant progress. At the present state and given the evidence presented, the school is expected to meet the AoRI to the full satisfaction of the AB,
  - **Meets Expectations:** The report is sufficiently detailed and demonstrates that the school is making sufficient progress. At the present state and given the evidence presented, there is a reasonable chance that the school will be able to meet the AoRI to the full satisfaction of the AB.
  - **Below Expectations:** The report shows that the school is making insufficient progress in addressing the AoRI. At the present state and given the evidence presented, the school is unlikely to satisfy the expectations of the AB.

- In addition, a formal overall rating of the whole report is provided.
  - **Above Expectations:** Overall progress exceeds the expectations of the EQUIS Office.
  - **Meets Expectations:** Overall progress meets the expectations of the EQUIS Office.
  - **Below Expectations:** Overall progress fails to meet the expectations of the EQUIS Office.
  - The report may be deemed Not Acceptable if it is excessively vague and lacks factual support in key areas. In this case, the school is asked to revise and resubmit the Annual Progress Report within 4 weeks after receiving the initial feedback.
## FIRST PROGRESS REPORT Year XXXX

### Strategic Developments within the school

**Description of strategic developments within the school**

Add text here…

**Feedback from the EQUIS Office:**

### Area of Required Improvement 1

**Description of progress in the Area of Required Improvement**

*Please mention general developments relevant for the area of required improvement as well as specific initiatives and developments (milestones and achievements)*

Add text here…

**Feedback from the EQUIS Office:**

- Above expectations
- Meets expectations
- Below expectations

### Area of Required Improvement 2

**Description of progress in the Area of Required Improvement**

*Please mention general developments relevant for the area of required improvement as well as specific initiatives and developments (milestones and achievements)*

Add text here…

**Feedback from the EQUIS Office:**

- Above expectations
- Meets expectations
- Below expectations

### Area of Required Improvement 3

**Description of progress in the Area of Required Improvement**

*Please mention general developments relevant for the area of required improvement as well as specific initiatives and developments (milestones and achievements)*

Add text here…

**Feedback from the EQUIS Office:**

- Above expectations
- Meets expectations
- Below expectations
### Other Developments

**Description of Other (Relevant) Developments**
Add text here…

Feedback from the EQUIS Office:

---

### Overall Feedback, Conclusions and Recommendations year XXXX

**EQUIS Office Feedback:**

---
## Strategic Developments within the school

**Description of strategic developments within the school**

Add text here…

Feedback from the EQUIS Office

## Area of Required Improvement 1

**<Description added by EQUIS Office>**

**Description of progress in the Area of Required Improvement**

*Please mention general developments relevant for the area of required improvement as well as specific initiatives and developments (milestones and achievements)*

Add text here…

Feedback from the EQUIS Office

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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

## Area of Required Improvement 2

**<Description added by EQUIS Office>**

**Description of progress in the Area of Required Improvement**

*Please mention general developments relevant for the area of required improvement as well as specific initiatives and developments (milestones and achievements)*

Add text here…

Feedback from the EQUIS Office

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<td></td>
<td></td>
</tr>
</tbody>
</table>
### Other Developments

**Description of Other (Relevant) Developments**

Add text here…

Feedback from the EQUIS Office:

### Overall Feedback, Conclusions and REcommendations year XXXX

**EQUIS Office Feedback:**
ANNEX 20

Policy on Accreditation of Multi-Campus Operations
Policy on Accreditation of Multi-Campus Operations

An increasing number of schools maintain more than one physical campus location. It is also foreseeable that situations may be encountered where it becomes increasingly difficult to assess what the “main campus” is or whether there actually is one. Multi-campus operations imply that school resources and activities are spread across a network of different campus locations, thereby adding an additional layer of complexity to the provision of management education.

Schools apply different management approaches to the oversight of satellite campuses ranging from tight control exercised by headquarters to some form of arm’s length relationship. The operations found at a satellite campus may therefore closely mirror the situation found on the main campus or, at the other extreme, may resemble a parent-controlled but distinct school.

Given that quality may differ within a school's campus network, the EQUIS process must include a review of the school's activities at different campus locations, the linkages between them, the degree of managerial and operational independence granted to them, and the form of control exercised by headquarters.

Policy for the EQUIS process

The EQUIS process evaluates the whole school and its overall provision and not particular campus locations or activities. Wholly or majority-owned satellite campuses will be included in the accreditation process and therefore cannot be excluded by the school. Campuses embedded in joint ventures based on an equal partnership with another institution can be considered majority-owned for the purpose of this policy, if the school can document that it effectively controls the campus operation.

Conversely, campuses for which the school is not the majority owner cannot be included in the accreditation and are not covered by this policy. The school nevertheless needs to supply sufficiently detailed information on minority-owned campuses so that the Peer Review Team (PRT) can understand and evaluate the potential quality implications of these activities for the part of the school covered by the accreditation.

For the purposes of this policy, a campus is defined as a physical location used for the regular and on-going production of academic output. This will for instance exclude administrative offices in foreign countries staffed by administrative personnel, which are used for liaison with local stakeholders or recruitment of students. It will however include any permanent operation used for the delivery of degree and non-degree education even if the delivery itself takes place in temporary premises such as hotel conference facilities.

The EQUIS Accreditation Board (AB) may, in exceptional circumstances, limit accreditation to specified campuses. This is only feasible if the brand of these campuses can be
completely differentiated from the accredited part of the school. It must be noted that the inclusion of a satellite campus will increase the risk of non-accreditation if the quality of its resources and activities do not meet EQUIS Standards.

Accredited schools should note that the addition of a new campus may represent a major institutional change (see Annex 26: EQUIS Policy on Institutional Change and Restructuring).

**Policy on multi-campus operations**

1. A school that is requesting accreditation must include all its campuses as defined by this policy.

2. The school must describe all campus operations (including minority partners) in full as an annex to the Self-Assessment Report (SAR). An informative summary must also be provided in addition to the SAR Datasheet. The description must include:

   a. Description of activities conducted at each campus location (e.g., degree programmes and non-degree education delivered at each location). This includes a description of how the satellite campus contributes to the strategic objectives of the school.

   b. Local resource support (e.g., faculty, academic/non-academic support personnel) for each campus location as well as resource sharing policies and practices within the school’s campus network.

   c. Policies, management processes and governance mechanisms in place to control campus activities and to ensure formal coordination of activities within the campus network, evidence of their effectiveness.

   d. Policies, management processes and governance mechanisms in place to ensure the provision of proper academic quality and to encourage a commonality of academic culture within the school’s campus network, evidence of their effectiveness.

   e. Financial performance of campus satellites and potential risks emanating from different campus locations.

   f. Development objectives, strategies and milestones for the school’s campus network (e.g., plans of opening new campus locations, plans of expanding educational offerings at different campuses, local faculty development plans).

   The Online Document Repository (ODR) must include policy documents, minutes, data and further evidence to substantiate the coverage of points a. – f. in the SAR.

3. All data regularly requested for the SAR Datasheet, SAR and ODR must be presented in aggregated form as well as for each campus location separately.

4. If the school operates several campuses with major activity (in terms of faculty and staff assigned to the campus, student/participant numbers in degree and non-degree provision, or income generated), then the main location of the Peer Review Visit (PRV) can vary across accreditation cycles. The decision about where the PRV will take place will be taken by the EQUIS Office after consultation with the school. A visit to another school campus may be added upon the request of the EC. In the case of reaccreditation, it is at the discretion of the EQUIS Office, and this is decided in the feedback to the Reaccreditation Datasheet.
5. The PRV may involve additional campuses at the discretion of the EQUIS Office, which may request further information.

   a. Additional campus visits may for example be required if:
      i. a school going through initial accreditation operates several campuses;
      ii. a school going through reaccreditation has added a campus since the last PRV;
      iii. on-site resourcing (e.g., faculty, academic and non-academic staff, physical infrastructure) varies within the school’s campus network.

   b. PRVs will normally be limited to a maximum of three locations with e.g., the full PRT conducting the major part of the review at the main campus and sub-teams of two reviewers visiting the other campuses.

   c. Separate schedules for the additional visits need to be agreed in advance.

   d. Visits to any additional campuses must take place prior to the visit to the main campus.

6. When deemed appropriate, a PRV may include online sessions with participants located at other campuses, to enhance the PRT’s understanding whether EQUIS Standards & Criteria are met.

7. Once the AB has confirmed accreditation, the use of the EQUIS label and logo will only be permitted for activities conducted out on campuses included in the accreditation. Non-compliance may lead to the loss of accreditation. The EQUIS Office may conduct periodic checks, which may potentially involve campus visits someone from EQUIS leadership. The school will be informed of such visits in advance and will not bear any of the costs.
ANNEX 21

Policy on Accreditation of Collaborative Provision
Policy on Accreditation of Collaborative Provision

One feature of the increasing excellence in business and management education worldwide is the delivery of degree programmes in collaboration with partner institutions. The partners may be in the same country or abroad; they may be academic or non-academic institutions; they may collaborate in terms of face-to-face, online or blended learning. Research and programmes of knowledge exchange are also increasingly collaborative. EQUIS accreditation, as a system that promotes management across borders, welcomes such developments, which should be embedded and resourced to achieve the delivery of the school’s strategy in pedagogy and student experience.

In the case of educational programmes, degrees may be awarded solely by one of the partners, jointly by several partners (joint degrees) or individually by several (typically not more than two) partners (dual degrees). Collaborative provision is normally regulated by bilateral agreements. Consortium structures can be set up with a portfolio of bilateral contracts or may be formally operated as a joint venture.

The form of collaboration can vary ranging from traditional face-to-face learning and teaching at home or at the partner institution to pure distance delivery. Collaborative provision may assign the teaching role solely to one of the partners.

Collaborative provision implies that the school requesting EQUIS accreditation is likely not to fully control the design, delivery and management of the respective degree programmes. It is therefore necessary to assess during an EQUIS review how collaboration is impacting quality and therefore indirectly the EQUIS brand.

Policy for the EQUIS process

The EQUIS process evaluates the whole school and not the provision of degree programmes. The review will include an evaluation of outside contributions to a school’s programmes, but EQUIS accreditation will not extend to any of the partner institutions making such a contribution.

Where a school is engaged in collaborative provision, i.e., in programmes where it does not have complete control over design, content, delivery or assessment, it must nonetheless demonstrate that there are no detrimental effects on quality compared to fully owned and controlled activities, e.g., in terms of resourcing, expertise, delivery, student intake quality and managerial oversight. It is further expected that the school applies the same quality assurance principles and processes as it does for fully owned and controlled provision.

This policy is particularly concerned with collaborative activities leading to a degree award by the school requesting EQUIS accreditation or its parent institution. In other words, if a programme delivered through collaboration is to be awarded accredited status, as part of the portfolio of an EQUIS school, it cannot be significantly different from the programmes delivered by the EQUIS accredited school solely. Such differences will affect the accreditation status of the applicant school. Some forms of collaborative provision (e.g., dual
degree offerings in support of student outward mobility for the school’s main degree programmes) have become a mainstay in management education and are therefore unlikely to warrant special attention under this policy. In contrast, off-campus delivery in cooperation with a lesser reputed or non-academic partner institution will. It is important, therefore, that schools seeking to maintain or gain EQUIS accreditation provide evidence of equivalence of resource and students’ experience.

The EQUIS Accreditation Board (AB) may, in exceptional circumstances, exclude certain parts or all the school’s collaborative provision if these activities can be completely differentiated from the accredited part in terms of branding and market reputation. It should be noted that collaborative provision involving partner institutions of lesser market standing will increase the risk of non-accreditation. The same applies to arrangements that assign most or all the academic production to the partner institution, while still leading to a degree award by the school requesting EQUIS accreditation or its parent.

Policy for accreditation processes which include collaborative provision

1. A school requesting EQUIS accreditation must include all its collaborative activities as defined by this policy.

2. The school must describe all collaborative activities (including partner institutions) in full as an annex to the Self-Assessment Report (SAR). It is important to specify the nature of the activity and any award resulting from collaborative provision, including whether the award is from either institution or both, or several. Equally important is the specification of how the collaboration delivers the overall school strategy. An informative summary of the programmes, their target markets and pedagogic methods must also be provided in addition to the SAR Datasheet. The Online Document Repository (ODR) must include partnership agreements, policy documents, minutes, (financial) data and any further evidence needed to understand the school’s collaborative activities.

3. Where collaborative activity is extensive, it may be necessary to extend the period of the Peer Review to visit a partner institution, interview those responsible for collaborative activities or interview representatives of partner institutions. The focus of such reviews will mirror those undertaken at the ‘main’ campus or institution. The EQUIS Office may request additional information when the Peer Review Visit (PRV) is planned. Any extension of the PRV schedule needs to be agreed in advance of the visit to reflect the specific situation of the applicant school.

4. Where the collaborative arrangements for a programme contain a large online component, a full description of how this reflects the applicant school’s policies and procedures, learning objectives and learning outcomes, and the monitoring of these is essential.

5. Once the AB has confirmed accreditation, the use of the EQUIS label and logo will only be permitted on the accredited school’s publicity materials. It will not be permitted on the partner’s materials or on joint brochures and advertisements, except where the partner is also EQUIS accredited.

6. Periodically the EQUIS leadership may conduct checks on partner institutions for collaborative provision. The school will be informed of such visits in advance and will not bear any of the costs.
ANNEX 22

EFMD Confidentiality Agreement Form
EFMD - CONFIDENTIALITY AGREEMENT

IN RELATION TO:

EQUIS – EFMD QUALITY IMPROVEMENT SYSTEM

Name of the school under review:

Date of the Peer Review Visit:
(delete if not relevant)

I hereby agree to respect the confidentiality of all information provided to me in the context of my role as a EQUIS peer reviewer / advisor / expert (delete as appropriate) or as a member of the EQUIS Accreditation Board / EQUIS Committee (delete as appropriate).

I also agree to declare any potential conflicts of interest in accordance with the Policy on Potential Conflicts of Interest for EFMD Peer Reviewers or the applicable Statutes of EQUIS (delete as appropriate).

Signature: Date:

NAME
TITLE
ORGANISATION
ADDRESS
ANNEX 23

Conflict of Interest Policy
Policy on Potential Conflicts of Interest for EFMD Peer Reviewers and Advisors

The credibility and value of EFMD’s quality improvement and accreditation systems depend, inter alia, on ensuring that there is no bias (real or perceived) in favour of or against a school or Programme being assessed. It is therefore necessary to ensure that there is no conflict of interest in the appointment of peer reviewers, advisors, experts or the work of the Accreditation Board or Committee members. Since EFMD cannot be aware of all possible causes of potential conflicts of interest, it must be the responsibility of those volunteering or being invited to be part of the Peer Review Team for a given school, that work with the school as Experts or Advisors, or that participate in meetings of the Accreditation Board or Committee to declare any actual or potential conflict of interest as soon as possible to the EFMD Quality Services (QS) Department or the chair of the Accreditation Board or Committee, respectively.

Some sources of potential conflicts of interest may include:

1. The following types of relationships, current or past, with the school or with one of its closest competitors or collaborators:
   - Graduate
   - Employee
   - Member of the part-time or visiting faculty
   - Consultant, advisor or member of an Advisory Board
   - Peer reviewer (in case of an Accreditation Board or Committee member)

2. A current or past personal conflict with the school or any of its current or recent leaders.

3. Reciprocity: one of the members of the school to be reviewed has in the recent past assessed the Reviewer’s own home institution either in an EFMD review or in some other capacity (in case of a peer reviewer).

4. Hidden agendas: having been approached by the school to encourage them to volunteer to be a peer reviewer of the school.

5. Any other reason that could be perceived by others to bias the judgement of the reviewer, briefing expert, advisor, Accreditation Board or Committee member, even if they are confident that this will not be the case.

The extent of the potential conflict of interest depends on the specific circumstances (duration and intensity of the relationship, time since occurrence, degree of competition or collaboration between school assessed and the reviewer’s own school, etc.) surrounding the situations described above. For example, working for one of the several partners of the school to be assessed will not be usually considered as a source of conflict of interest.

Once the conflict of interest is declared, in case of a peer reviewer, the EFMD QS Department will proceed as follows:

a) When the peer reviewer declares a conflict of interest that may be perceived as a potential source of bias against the school, the QS Department will ask the school to be assessed for approval, as is done for the local peer reviewer.
b) When the peer reviewer declares a conflict of interest that may be perceived as a potential source of bias in favour of the school, the Quality Services Department will determine whether the peer reviewer should be excluded from the specific team.

In case of an Accreditation Board or Committee member, the respective chair may ask the member not to contribute to the discussion of the school or programme.

Judgement is necessary to find the balance between declaring negligible conflicts of interest and ensuring that true potential conflicts of interests are declared. Conflicts of interest should be declared as soon as possible to the member of EFMD making the invitation to participate in the Peer Review Team for a given school or at the beginning of the meeting of the Accreditation Board or Committee, respectively. When the source of the conflict of interest needs to be kept confidential, this should also be made explicit.

The QS Department will also maintain and regularly update an open register of the additional external interests of all QS directors. As these individuals work with EFMD as part-time consultants, they are likely to be involved in other business school activities. When these conflict with their QS responsibilities, they will declare the conflict of interest and not take part in any stage of the accreditation process of the school concerned.
ANNEX 24

Policy and Publicity Guidelines for the Use of the “EQUIS” Brand
POLICY AND PUBLICITY GUIDELINES
FOR THE USE OF THE “EQUIS” BRAND

The EQUIS label is the leading mark of international quality recognition for business schools, and it allows you to differentiate your school in an increasingly competitive management education market. It also signifies that your school is part of a global community of peers who continue to grow and strive towards excellence.

Your achievement deserves acknowledgement across the management development network worldwide.

In this document, you will learn how best to promote your accomplishment among your stakeholders and communicate your status in line with the EFMD Global policy.

PURPOSE OF THE GUIDELINES

The guidelines help ensure that

- publicity about EQUIS is as broad and informative as possible, benefiting your school as well as the rest of the community of EQUIS accredited schools;
- you can leverage the value and the recognition of the EQUIS label among your stakeholders;
- the EQUIS label and logo are applied only to schools that are accredited;
- the logo is not applied to partner institutions, except where the partner is also EQUIS accredited;
- all accredited schools apply the EQUIS brand in a consistent way.

PROMOTION OF EQUIS ACCREDITATION

Active promotion of EQUIS accreditation by the member school will help reinforce the positive reputation of EQUIS.

Schools may start publicising their EQUIS (re)accreditation as soon as they receive an official notice (orally or in writing) from the EQUIS Office and are contacted by the EFMD Marketing & Communications department with appropriate guidelines.

The active collaboration of members like yourself in promoting the EQUIS label helps all EQUIS accredited schools gain the recognition they deserve, enabling them to have a long-lasting and positive impact. The following are examples of how a school might promote EQUIS accreditation to its stakeholders:

- Include the “EQUIS Accredited” logo on the accredited school’s homepage with a description of what EQUIS stands for and a direct link to the EQUIS section of the EFMD website.
• Include the “EQUIS Accredited” logo on all printed and digital material where the accredited school is mentioned, including brochures, digital banners and stationery, following the below regulations. The EFMD Marketing & Communications department will provide your school with a custom-made digital banner that may be used for this purpose.

• Arrange interviews with journalists for the head of school to discuss the accreditation and explain the value it brings to your school. Highlight the unique added value offered by EQUIS and explain its key standards and criteria and how this process could bring lasting benefits to the School and your stakeholders.

• Announce the news to local, national and international media and internet news service providers.

• Place an advertisement in EFMD’s Global Focus magazine to announce the accreditation.

• Within the school, share the news in the internal mail service with a message addressed to academic and administrative staff. Moreover, send a message to your key stakeholders, including students, alumni, recruiters, and business contacts, informing them about the accreditation and its meaning for the school; include it in internal communication, student and alumni magazines, distributed in printed or in electronic form.

• Post announcements on the school’s active social media platforms. You may wish to include an interview with the Head of School or the accreditation manager.

• Arrange an announcement for distribution across the school’s network in the form of a special message from the Head of School to institutional partners, recruiters, executive programmes’ participants, and other key contacts. Due to the EU’s General Data Protection Regulation, EFMD is not able to provide you with personal contacts of the EFMD member schools’ representatives.

• Use EQUIS accreditation to generate maximum impact for students, ensuring international recognition of their study programme and qualifications. To this end, it is also important to develop collective pride, for example, by placing posters or banners around the school or by having the Head of School communicate the news to students verbally. The EQUIS community includes some of the best schools globally, and students need to understand that it is a significant achievement for their School to gain this accreditation.

• Mention the value of EQUIS accreditation as a key achievement of the school in external communications (addressed to applicants, recruiters, media, corporate contacts, etc.).
POLICY FOR PUBLICITY

Public reference to EQUIS accreditation

When making public reference to EQUIS, the school should, where possible, either provide a brief overview of EQUIS accreditation or provide a reference or link to the EQUIS section on the EFMD website. EFMD makes a distinction between 5-year and 3-year Accreditations. EFMD will provide this information on its website for all schools that have been accredited or reaccredited.

Use of comments from the EQUIS Accreditation Board (AB) letter

Use of comments from the AB letter is permitted in general terms when the school is communicating their (re-)accreditation in their internal and external publicity materials. However, the school may not use explicit extracts from the AB letter or attribute comments made to any individual.

Use of comments from the Peer Review Report (PRR)

The PRR may not be published, and no explicit extracts or other data from it may be quoted in the school’s publicity materials. If the school wishes to share excerpts of the report (e.g., for a national accreditation body), it must first receive an agreement from the EQUIS Office.

The PRR may be distributed internally. The head of school decides who should receive a copy of the report per the school’s approval procedures. This policy extends to parent institutions (if applicable) and members of any committees or advisory bodies established by or for the school.

Information contained in the report should never be taken out of context. EFMD requires that the report should always be distributed as a complete report rather than in summary or extract form.

All recipients should be informed that the report is confidential and that any further distribution of all or part of the report is not allowed.

USE OF THE EQUIS LOGO – GUIDELINES

Reference to EQUIS accreditation and the EQUIS Accredited logo may feature on any publicity produced in the name of the accredited school alone. The logo may not be used on co-branded materials (e.g., programme specification) produced in cooperation with partner institutions abroad or for off-campus provision. However, such materials may mention EQUIS accreditation within the body of the text, if it is clearly indicated that the accreditation applies only to one partner school.

Subject to certain restrictions as outlined below, the EQUIS Accredited logo can be used for various purposes, including marketing materials, presentations, promotional items, event materials, and to reinforce the school’s corporate identity. It is recommended that when using any of the logos on your website, a corresponding link should be made to the EFMD homepage (www.efmdglobal.org). EFMD strongly advises all its members to review the guidelines set out below regarding the terms and conditions for using the EQUIS Accredited logo.
EQUIS Accredited trademarks consist of the following:

- **EQUIS Accredited logo**

These trademarks hereinafter referred to as the "EQUIS Accredited logo" represent EFMD Global's corporate brand identity, and their usage must be strictly managed in a consistent manner to preserve the quality and integrity of the brand.

The following formats of EQUIS Accredited logo are available on the EFMD website:

- .jpg: High resolution (white background)
- .png: High resolution (transparent background)
- .eps: Please contact the EFMD Communication and Marketing department

### EQUIS Accredited logo colours

- The EQUIS Accredited logo can only be used in the original colours or in its off-white version as represented below. Any other variation of the EQUIS Accredited logo will be at the discretion of the EFMD Communications & Marketing department.

---

**Primary Colour**

- PANTONE 194 C
- R 155  G 39  B 67
- HTML 9B2743

**Secondary Colours**

- PANTONE Cool Gray 1
- R 217  G 217  B 214
- HTML D9D9D6

- PANTONE 425 C
- R 84  G 88  B 90
- HTML 54585A
- If the EQUIS Accredited logo is being used with other company logos or identities, it should be equal in size to the other logos and placed equally prominently.

- When using the EQUIS Accredited logo in communications, there should always be a clear space between the logo and other elements such as other logos, text or images. Please respect a 0.5 cm border all around the logo.

- To maintain legibility and consistency when printing, the minimum height of the EQUIS Accredited logo should be 18 mm.

- Do not place the EQUIS Accredited logo over any other graphics or distort the logo in any way.

- Do not use the EQUIS Accredited logo with or as part of another logo or symbol to create a unique symbol. The EQUIS Accredited logo is distinct and should always stand alone.

- Do not remove any part of the EQUIS Accredited logo.

- Do not add any words or graphics to the EQUIS Accredited logo.

- Do not add any effects or drop shadows to the EQUIS Accredited logo.

If you are not sure which logo to download, please contact the Marketing & Communications department at communications@efmdglobal.org
ANNEX 25

Appeals Procedure
APPEALS PROCEDURE
against decisions on eligibility, accreditation and certification

1. A school can present an appeal against decisions on eligibility, accreditation and certification. The school should notify its intention to appeal by means of a letter addressed to the president of EFMD not later than one month after the date of the meeting of the relevant body at which the decision being appealed was made. Otherwise, the school will be deemed to have accepted the decision, thereby giving up any possibility of appeal at a later stage.

2. As soon as the letter notifying the intention to appeal is received, the decision being appealed will be suspended and the school will return to the status it had before this decision was made until the appeals process ends.

3. The Institution making an appeal must substantiate its claim that there are grounds for review beyond a mere expression of disagreement with the decision. It should submit a detailed statement of its reasons for believing that the decision should be reversed. This full appeal should be submitted in writing to the president of EFMD not later than two months after the date of the meeting of the relevant body at which the decision being appealed was made. The president of EFMD will immediately forward the appeal to the chair of the Board of EFMD.

4. A school failing to proceed as indicated above will be considered to have definitively renounced its intention to appeal. The suspension of the decision will then be cancelled, and the decision will be enacted.

5. The chair of the Board of EFMD then appoints three members of the EFMD Board, one of whom will be the chair, to serve as a special Appeals Committee mandated to examine the appeal.

6. The Appeals Committee will study the arguments and the supporting material provided by the Institution and consult as appropriate orally or in writing.

7. The Appeals Committee will first seek to establish whether there are substantive grounds for reviewing the decision being appealed. Substantive grounds for review of a decision may be of two kinds:

   a) Matters of procedure where it can be demonstrated that the documented process may not have been respected.
   b) Substantiated evidence that the decision was unjustified in the light of the information made available at the time of the assessment.

\[1\] Decisions to remove the accreditation of a school or programme will not be reflected in the list of accredited schools or programmes until this one-month period ends.
8. The Appeals Committee does not take a position on the appropriateness of the decision. It may conclude that there are grounds for review, in which case it requests that the decision-making body re-examines the case during its next meeting, or that there were failures in the process and that the process should be repeated from the stage where the failure occurred. Otherwise, it may conclude that the appeal should be rejected.

9. The Appeals Committee will communicate its conclusions in writing to the EFMD chair of the Board and to the EFMD president who will inform the school and the EFMD Quality Services Department not later than 3 months after receipt of the full, substantiated appeal.

10. When the appeals process ends, the decision reached will become final.

11. If the outcome of the appeals process is that the school is invited to undergo another peer review, the review must take place within 12 months of the appeals decision and a review fee will be charged at the rate pertaining on the date of that appeals decision.

12. A deposit of 15,000 € is required when submitting the substantiated appeal. Once the substantiated appeal document is received, the invoice will be issued. The deposit will be refunded if the appeal is upheld. If the appeal is rejected, the deposit will be donated to a charity proposed by the school and agreed by EFMD Quality Services.
ANNEX 26

Policy on Institutional Change and Restructuring
POLICY ON INSTITUTIONAL CHANGE AND RESTRUCTURING

An EQUIS accredited school or a school declared Eligible for EQUIS accreditation may experience some form of major institutional change. This may be the result of internal/organic growth (e.g., opening a campus at a foreign location) or external growth (e.g., acquisition of another school). Institutional change may also be triggered by the school being absorbed by another organisation (e.g., loss of autonomy from the parent faculty within the same university) or by an institutional crisis (e.g., financial distress). While institutional change is in most cases a deliberate process, the latter example illustrates that it can also be brought upon a school by unforeseen developments.

Institutional change will normally be followed by some form of restructuring, i.e., the reorganisation of the school’s governance or activities to adjust to the new circumstances. Again, this may be a deliberate effort (e.g., post-merger integration of an acquired school) or not (e.g., faculty departing in a distress situation and the school lacking the financial means to refill these positions).

Institutional change may affect the quality or extent of the school’s activities. Consequently, the school is advised to inform the EQUIS Office without undue delay if any of the above instances apply. Notification should be submitted when it can be assumed that institutional change will occur (rather than when the consequences of institutional change begin to materialise). The purpose is to provide an opportunity for assessing how to act prudently with respect to the EQUIS accreditation or Eligibility of the school. Failure to submit notification in a timely manner may lead to the suspension of the school’s EQUIS accreditation or Eligibility at the discretion of the EQUIS Accreditation Board (AB) or EQUIS Committee (EC), respectively. The same applies to cases where the true situation of the school is misrepresented in the notification or in later communication. If the EQUIS Office receives information suggesting the presence of institutional change while no notification has been received from the school, then EQUIS has the responsibility to initiate the review processes specified in this annex.

This document establishes the policies and procedures related to an institutional change:

- As soon as institutional change can be assumed to lead to a tangible impact on the school, the head of school writes a letter to the EQUIS Office describing the school’s situation and future plans.

- An Ad-Hoc Committee involving the EQUIS director and two additional members of the EQUIS leadership will preliminarily determine whether the reported institutional change is major or minor. For this purpose, the reported development is minor if
  
  a) it is unlikely to affect the quality of the school to require changing its accreditation status (5-year or 3-year) or its Eligibility status, or
  
  b) it alters the institutional scope so moderately that a new accreditation or Eligibility process is clearly not required.
A virtual or a personal meeting with the head of school may be required to clarify or amplify the information provided.

- If a majority of the Ad-Hoc Committee members agree that the institutional change is major the school will be informed that the process described below will be applied.

- No later than three months after the date on which the major institutional change is formally implemented, the school must submit an updated Datasheet, via the online platform, OX, reflecting the new structure and send a brief report (20-25 pages maximum) to the EQUIS Office, describing the differences between the old and the new structure of the school as well as the resulting ability of the school to satisfy the EQUIS Standards & Criteria.

- Within three months of receiving this information, an EQUIS Expert will meet online with the school’s management team to assess the situation. This Expert will submit a report to the EQUIS Office. The report should include a recommendation as to whether the new school still satisfies the Eligibility Criteria.

- The Datasheet, the school’s report on major differences, and the Expert’s assessment report will then be submitted to the EQUIS Accreditation Board (AB) or EQUIS Committee (EC) respectively at its next meeting to decide on the accreditation or eligibility status of the changed school. The decision, made by a simple majority vote of the AB or EC attending, can be:

In case of an EQUIS accredited school:

a) Temporary suspension of the school’s EQUIS accreditation until it undergoes a new accreditation process.

This decision will be based on one or more of the following reasons:

- The new school is substantially different from the one originally accredited.
- The new school no longer satisfies the Eligibility Criteria.
- The quality of the new school is perceived to be affected in one or several of the 10 EQUIS quality dimensions.

The school will continue to appear in the list of EQUIS accredited schools with the label “Accreditation under review due to major institutional change”.

b) Maintenance of the school’s EQUIS accreditation until its original period of validity expires; i.e., the AB does not accept the Ad-Hoc Committee’s recommendation that this represents a major institutional change.

In case of an EQUIS Eligible school:

a) Loss of the school’s Eligibility.

This decision will be based on one or more of the following reasons:
- The new school is substantially different from the one originally declared Eligible.
- The new school no longer satisfies the Eligibility Criteria.
- The quality of the new School is perceived to be affected in one or more of the 10 EQUIS quality dimensions.

b) Maintenance of the school’s Eligibility until its original period of validity expires; i.e., the EC does not accept the Ad-Hoc Committee’s recommendation that this represents a major institutional change.

- When a school has had its EQUIS accreditation temporarily suspended by the AB, it must go through a new accreditation process as if it had just been declared eligible, i.e., it will need to go through the Self-Assessment and Peer Review stages within two years. The AB may limit this two-year period to a period not shorter than nine months, if it concludes that there is no reason to unnecessarily delay a reaccreditation that otherwise would have taken place earlier. Successful accreditation requires that the school fully satisfies all Eligibility Criteria at the time of the Peer Review Visit (PRV).

- The AB will, at the appropriate time, not only decide what duration of accreditation will be granted but also whether the EQUIS records should show it as an initial accreditation or as another reaccreditation.

- When a school has lost its Eligibility by decision of the EC, it can restart Stage 3 of the EQUIS process as detailed in the EQUIS Process Manual. However, it cannot reapply for Eligibility within two years after the EC decision.

- The procedure described above does not apply to a situation where an accredited school is forced to officially declare bankruptcy/insolvency or loses its official license for granting academic degrees. In this case, EQUIS accreditation or Eligibility is automatically and permanently suspended.

- If a school in the EQUIS accreditation process reports a major institutional change between the PRV and the corresponding meeting of the AB, the following procedure will be put into practice:
  1. The AB will deal with the case based on the existing Peer Review Report and the information supplied by the school on re-structuring.
  2. If the AB decision is Accreditation, an Ad-Hoc Committee will be formed, and the process detailed above will be carried through.

The process described above may accelerate or delay the planned reaccreditation of a school. For example, a school that was accredited one year ago for 5 years and that is experiencing a major institutional change in the next six months may have to go through a reaccreditation before the time its last accreditation expires. On the other hand, a school that was accredited two years ago for 3 years and that is experiencing a major institutional change in the next six months may be entitled to postpone its originally planned reaccreditation for up to one year. The justification for a delay in the latter case is that it may require some time for the school to appear as a consolidated unit.
Once the AB has made the decision to temporarily suspend a school’s EQUIS accreditation due to a major institutional change, the annual Accreditation Fee for any remaining period of the previous accreditation will no longer be due. Thus, if paid annually, no further payments will be due and, if paid in advance, monies paid for the remaining period will be credited towards any new fees due. Full fees will be charged for the new cycle, i.e., the Application Fees, the Review Fee and new annual Accreditation Fees as appropriate.
ANNEX 27

Special Reaccreditation
SPECIAL REACCREDITATION

1. Preamble

It is assumed that readers of this document are familiar with the EQUIS Process Manual for regular reaccreditations.

Special Reaccreditation (SR) is an alternative to regular reaccreditation which is available only to schools that have been EQUIS accredited for at least three consecutive periods of 5 years.

SR has been developed because of three circumstances:

1. EFMD’s desire to ensure that the value added by EQUIS to its members and the effort sustained by them is balanced, not only in the initial cycle but also in all subsequent reaccreditation cycles.
2. The view of a group of deans of leading schools in Europe, that schools that have proven three consecutive times to have the highest quality according to EQUIS, should be entitled to a less “exhaustive” and time-consuming process.
3. EFMD’s view that EQUIS should not be any less demanding on the quality of or grant unjustified privileges to any school, while remaining able to add value to schools in different circumstances.

However, it is recognised that, in five years, the quality of a very good school could deteriorate because, for example, key environmental features could change significantly, a new head of school could have been appointed, or the school could have suffered unforeseen internal problems. The role of EQUIS is to assess quality and therefore enhance reputation, rather than simply assuming that reputation is always based on high quality. Consequently, regular reaccreditation may be considered desirable under such circumstances and thus SR is presented as an option. Schools that, for example, have undergone a major restructuring or have recently appointed a new dean, may benefit more from the regular reaccreditation process. While SR incorporates differences in focus and process, it should be noted that it is not a new category or “rating.”

In summary, SR pursues the following objectives:

- Continue to evaluate the essential quality aspects.
- Analyse progress in development objectives and degree of improvement in quality.
- Continue to add value in a more focused way.
- Make the process more focused and less onerous.
- Continue to provide challenges for continued quality improvement.
- Contribute learning to the community by analysing good practices of those EQUIS accredited schools that show a longer record of satisfaction of standards.

This is achieved by means of:
• A process that is shorter and less demanding in terms of the quantity of information required and the length of the visit to the school.
• A process that requires more structured and concise information about the essential aspects of the school, its progress and its future development.
• A Peer Review Team (PRT) involving only two experienced peer reviewers.
• A process that is less costly for schools from many perspectives.

2. Beginning of the process

Any school that has obtained EQUIS accreditation for 5 years for at least three consecutive times will be entitled to opt for SR instead of regular reaccreditation, if its last reaccreditation was a regular one.

Therefore, any school that has gone through SR must necessarily go through a regular reaccreditation in the next reaccreditation cycle. This will make sure that every school goes through a regular reaccreditation at least once every ten years. After this regular reaccreditation, a school can, again, opt for SR when holding 5-year Accreditation.

Any school candidate for SR will be contacted by the EQUIS Office as soon as possible in the last year before its accreditation expires. This communication will:

• Formally remind the school that its accreditation expires in less than one year, providing the specific expiration date.
• Inform the school that it is entitled to go through SR, if it chooses to do so.
• Highlight that, if the school opts for SR this time, the next reaccreditation will necessarily be a regular reaccreditation.
• Inform the school, that if SR is chosen, it will be given the opportunity to suggest some areas of strategic development that it would like to be the focus of the assessment during the Peer Review Visit (PRV).
• Name, provide links to or enclose EQUIS documents and forms that are relevant to the school for the SR process in addition to those relevant for a regular reaccreditation.
• Suggest dates for the PRV (ideally 3-4 months – and minimum 10 weeks – before the applicable EQUIS Accreditation Board (AB) meeting date).
• Request a response from the school as indicated below, within the next two months.

The response of the school should include:

• Its preference for an SR (including topic(s) of assessment focus) or for a regular reaccreditation. In the latter case, the school should follow the guidance of the EQUIS Process Manual for regular reaccreditations and therefore the rest of this document is not applicable.
• Two dates for the PRV among those suggested, indicating the preferred option.
• A list of the names and positions of all members of the senior management or executive team of the school.

The EQUIS Office will inform the school of the selected date for the PRV after consultation with potential peer reviewers.

3. Self-Assessment Report (SAR)
As soon as the school has sent the response indicated above, it is ready to start its self-assessment process. The internal organisation of this stage of the process will benefit from the guidance offered in the EQUIS Process Manual for regular reaccreditations.

The SAR will include:

1. The submission of an updated SAR Datasheet via the online platform, OX and the production of the following two documents:

2. A Report on Major Developments, organised by EQUIS Chapters (10-20 pages). This will provide information about the major changes and developments in the school since the last EQUIS accreditation affecting each of the ten EQUIS Standards. In particular, progress on the specific Areas of Development (referred to by earlier EQUIS documentation as Development Objectives) chosen by the school following its previous reaccreditation should be reported in the corresponding Chapter(s).

3. A SWOT Analysis and Executive Summary of the school’s 3-5-year Strategic Plan (10-20 pages). This should convey a succinct strategic analysis of the school organised as Strengths, Weaknesses, Opportunities and Threats, followed by a summary of its strategy, objectives and time horizons.

SAR Datasheet, Report on Major Developments, and SWOT Analysis and Executive Summary will be considered the SAR in the case of SR. It is expected that the length of the SAR will not exceed fifty pages.

A Student Report and information on a Selected Programme are not required for SR. Annexes to the SAR should also be limited in line with its more focused and restricted content. Additional information may be requested by the PRT after their online preparatory meeting (see item 4 below).

The SAR should be delivered to the EQUIS Office (electronically) and to the members of the PRT (electronically, and in hard upon their request) eight weeks in advance of the PRV.

4. The PRT and the PRV

The PRT for an SR is composed of two experienced peer reviewers from different nationalities, avoiding those corresponding to the country where the main campus of the school is located. Consequently, the PRT will not include a local or a practitioner peer reviewer. The two members of the PRT will be appointed by EQUIS, one of them acting as PRT chair.

The PRT will work in two phases: the PRT online preparatory meeting and the PRV.

The PRT online preparatory meeting (for the members of the PRT only) will take place after the SR SAR has been received by the members of the PRT, as soon as the two peer reviewers have had sufficient time to read and analyse it, and not later than four weeks before the PRV begins. It will take place by videoconference, organised by and with the involvement of the EQUIS Office only.
The purpose of this dialogue will be to discuss the SR SAR provided by the school with the following specific objectives:

1. Identify any areas of concern detected in any section of the SAR.
2. Decide if more information on any of these areas is needed. This will only be done when strictly necessary for the PRT.
3. Decide whether such information should be provided in writing before the PRV or conveyed orally during the PRV.
4. Based on points 2 and 3, list any additional documents to be requested from the school and prepare the PRV Schedule, indicating the people to be interviewed, by name, position or area of responsibility.

If, in rare circumstances, the PRT believes there are indications that the school quality may have deteriorated to such an extent that it puts its accreditation at risk, the PRT will focus their visit and the additional documents requested on the areas where significant problems have been detected.

The PRT chair will then send a letter to the school, through the EQUIS Office, with a summary of the conclusions reached, as soon as possible and not later than three weeks before the PRV. This letter will specify:

1. The list of documents or sets of data, if any, to be available in the Online Document Repository (ODR) – the PRT will inform the school if the additional documents should be available two weeks in advance of the PRV or at the start of the PRV.
2. A PRV Schedule specifying the people to be interviewed during the third half day of the PRV.

The PRV itself will involve one and a half days at the school. The first half-day will be spent by the PRT alone while preparing the visit and examining the materials in the ODR. The second half-day will be spent interviewing the head of school and the executive team. The third and last half-day will be devoted to interviewing the people that the schedule of the PRV specifies, if any, who may include again specific members of the executive team. Otherwise, this time will be devoted to discussion between the peer reviewers to agree their conclusions. The PRT will meet the head of school again (or the full executive team at the Head’s discretion) at the end of the third half-day for a preliminary oral debriefing. Thereafter, the PRT leaves the school.

The head of school is encouraged, but not required, to join the two peer reviewers for lunch or dinner (depending on the timing of the proposed PRV schedule) as it provides an opportunity to discuss their issues of interest. Therefore, delegating attendance if the head of school is not available, is not expected.

5. Peer Review Report (PRR)

The PRR will contain:

- A summary general assessment of the school that considers each of the ten EQUIS Standards & Criteria.
- The recommendation to the AB about the reaccreditation of the school. This recommendation can only be:
  a. A justified proposal for reaccreditation for another 5 years, or
b. A justified request that the school’s current accreditation be extended temporarily for 1 year and that the school undergoes as soon as possible a full regular reaccreditation to be concluded within twelve months.

- An appendix with the SAR Datasheet provided in the SR SAR.

The EQUIS Quality Profile (Annex 16) may be used by the PRT as a working document to assist in the general assessment of the school but will not form part of the PRR.

The PRR will go through the same process of revision by the school and approval for presentation as in a regular reaccreditation before it is submitted to the AB.

6. Decision on Accreditation

The AB will decide on the EQUIS accreditation of the school following the normal process, requiring approval by a simple majority, and using the same criteria as in any regular reaccreditation. However, under either of the two possible recommendations by the PRT described above, the decision can only be:

- Reaccreditation for another 5 years, or
- Temporary extension of the current accreditation for 1 year, with the requirement that the school undergoes a full regular reaccreditation to be concluded within twelve months.

7. Fees

If a school opts for SR, it will pay the same Application and (final) Accreditation Fees as in a regular reaccreditation. However, the (main) Review Fee will be only 50% of that in a regular reaccreditation to consider the relative simplicity of the SR process. In those cases, where the school is not reaccredited for another 5 years, its (final) Accreditation Fee will be just 20%, thus covering the 1-year temporary extension of its accreditation.

If a school, by decision of the AB in a SR, is required to undergo regular reaccreditation in less than twelve months, then the Application Fee for this regular reaccreditation will be waived. However, the (main) Review Fee and the (final) Accreditation Fee will be payable in full.

For all parts of the process that are not described here in detail, the process and rules of a regular reaccreditation will apply.
ANNEX 28

EQUIS Policy on Reaccreditation of Schools with EFMD Programme Accreditation
EQUIS POLICY ON REACCREDITATION OF SCHOOLS WITH EFMD PROGRAMME ACCREDITATION

The following regulations only concern schools in the EQUIS reaccreditation process.

Where an EQUIS accredited school already has an EFMD accredited programme, there is no need for a Selected Programme during the EQUIS reaccreditation process to be determined or assessed. The requirement is that the EFMD accreditation for that specific programme is still valid within its stated duration at the time of the EQUIS review. Further process details are described below.

The EQUIS accredited school may, however, opt to have a Selected Programme assessed in the regular way. See process details in the relevant section of the EQUIS Datasheet (Annex 2).

The school should indicate its preference in the Reaccreditation Datasheet when starting its reaccreditation process.

If the school makes use of the option, this means in detail that:

- A Selected Programme will not be described in the Self-Assessment Report (SAR)
- The Peer Review Visit (PRV) Schedule will not contain a session on a Selected Programme (Day 2)
- The Peer Review Report (PRR) will not contain an assessment of a Selected Programme
- Items 2.13-2.20 of the EQUIS Quality Profile Sheet will not be evaluated (ditto in the repeats)
- Criteria 2.13-2.20 of the EQUIS Criteria Evaluation Form will not be commented on
- The Online Document Repository will not contain the documents requested for the assessment of a Selected Programme
- The school, however, will make available the report of the peer review of the programme currently holding EFMD programme accreditation. It is at the discretion of the EQUIS Peer Review Team to study this report. In case of several accredited programmes, the EQUIS Office will choose the report.

This process will be replaced in the following reaccreditation cycle by a regular reaccreditation process that includes a Selected Programme unless the cycle is a Special Reaccreditation (see Annex 27).
ANNEX 29

Policy on Non-Renewal of Accreditation of Schools
POLICY ON NON-RENEWAL OF ACCREDITATION OF SCHOOLS

The following process will apply to the reaccreditation of schools previously accredited:

1. When a School learns through the Peer Review Report (PRR) of a recommendation by the Peer Review Team (PRT) for non-accreditation and the school then decides to withdraw from the accreditation process, its name will be removed from the list of accredited schools only six months after the date of the EQUIS Accreditation Board (AB) meeting to which the report would have otherwise been submitted. The school can choose to restart Stage 2 immediately or Stage 3 later. However, it cannot reapply for Eligibility within two years after the date of withdrawal.

2. If the AB makes a negative decision, either based on a negative recommendation or by not supporting a positive recommendation in the PRR, the school will be automatically placed on Deferral, and it will not be removed immediately from the list of accredited schools.

3. The Deferral school will be given the option to decide within a maximum of two months of the AB decision date if it accepts the non-accreditation or if it will aim for another full Peer Review Visit (PRV) to take place within one year of the AB decision date. This PRV will require the preparation of a new Self-Assessment Report (SAR) by the school and will involve a new PRT. The date of the new PRV should be fixed as soon as the school decides in this respect.

4. The offer of a new PRV should not be interpreted as recognition that the previous PRT, the AB or anyone else involved from EFMD did not perform as required. Should the school think otherwise, it should appeal the decision rather than opting for the new PRV (see Annex 25). This new visit is just an additional opportunity granted to the school that faces losing its EQUIS accreditation. The school then must make sure that its new SAR and the information provided to the new PRT persuasively convey the quality of the school according to the established quality framework (the Selected Programme remains the same). The school should therefore pay particular attention to the recommendations made in the latest PRR and in the AB letter of non-accreditation. Both will be part of the documentation provided to the new PRT.

5. No Application Fee will be charged for the new review but the Review Fee applicable in the year of the new review will be charged; subsequent accreditation fees will follow that same Fee Schedule. The Accreditation Fee for the Deferral year (i.e. for extension of accreditation) will also be charged, where the Fee Schedule of the cycle when the negative AB decision was taken is applicable. If a school then cancels the PRV during the Deferral period, a Cancellation Fee will be charged, and the school will be removed from the accredited list, allowing the six-months grace from the date of the AB decision as indicated below.

6. If the school opts for a new review, it will remain on the list of accredited schools until the AB decides on the second PRR. A negative decision at that time will be final, i.e., it will
not be allowed a further deferral period or appeal, and the school will be removed from the list of accredited schools.

7. If the school rejects the option of a new review and accepts the non-accreditation decision, it will remain on the list of accredited schools for a total of 6 months after the AB decision date. The school can choose to restart Stage 2 immediately or Stage 3 later. However, it cannot reapply for Eligibility within two years after the AB decision.
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