We will ensure the confidentiality of data provided to EFMD Global and processed in the framework of the EDAF system. In comparative benchmarking tools, the School’s data is only reported in aggregate, such that no individual school’s data is identifiable.

Learn more about our privacy policy at https://efmdglobal.org/privacy-policy/.
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A – EFMD Global Deans Across Frontiers

1. Introduction to EDAF

1. EDAF – EFMD Global Deans Across Frontiers

EFMD’s mission is to promote excellence in business and management education worldwide. This is partly fulfilled by its existing accreditation systems, EQUIS and EFMD Programme Accreditation (formerly known as EPAS). However, EFMD also has a responsibility to support all schools, whether they are members of EFMD or not.

The mentoring system, EFMD Global Deans Across Frontiers (EDAF), is designed to assist business schools in their development. EDAF supports schools through a mentoring system for senior management based on a prior assessment of each school. The term “business school” or “school” here can be interpreted as any organisational unit, either free-standing or part of a larger institution, that is primarily concerned with business and management education and development.

EDAF is an additional endeavour of EFMD to raise the standard of management education worldwide. It complements the other EFMD accreditation systems (EQUIS and EFMD Programme Accreditation – formerly known as EPAS) and is targeted at business schools that are not yet able to benefit from the accreditation systems. These can be business schools at different stages of quality development. Participating schools that cannot afford to fund the EDAF process may apply for partial funding to cover some of the costs.

The process involves an in-depth assessment of each participating business school through international comparison and benchmarking using established criteria. Prior to or following this assessment and if the school requests it, a mentor will be appointed. This will be someone who will or has been a member of the Peer Advisory Team (PAT) and will or has already advised the school as it prepared the Self-Assessment Report (SAR) and Peer Advisory Visit (PAV), and they will be available to work closely with the school as an advisor for an initial period of 2-3 years. Together with the school, the mentor will work towards agreed development objectives to improve various aspects of the business school following one of two paths:

- **Path A: Institutional Development**
- **Path B: Bridging the Gap towards Accreditation**

Upon completing the EDAF process, the school will receive the EDAF Certificate recognising its commitment to quality improvement.

The EDAF process looks into a wide range of quality dimensions as shown in the EDAF Business School wheel on the next page.
The EDAF framework views the school as a wheel; the hub contains the Senior Management Team (SMT) who develop and implement strategy and they coordinate a number of interlinked activity spokes. The hub and spokes are located within a rim which is the school’s environmental context. The context is taken as a given but the activities or operations of the school itself are under the control or influence of the senior management team. These activities can be assessed for quality while the senior management team can be assessed for its effectiveness in leading and managing the school. The assessment of the school’s activities includes consideration of:

- management and resources (including strategic positioning, management structures and processes, people, infrastructure and facilities, financial management systems, etc.)
- external connections (corporate, international, public agencies, executive education, community, marketing, etc.)
- programmes (portfolio, curricula, assessment methods, quality of teaching)
- students and graduates (entry requirements, intake quality, graduate quality, jobs)
• faculty (qualifications, faculty management issues, recruitment, development, corporate links, etc.)

• intellectual activity (research, pedagogy, consultancy, output quality, etc.)

In addition, senior management is assessed for aspects such as leadership, management style, management systems and appointment processes. The strategic planning process is also reviewed along with the SMT’s ability to implement the strategic plans and to manage operations effectively.

While taking into account the environmental context, the assessment identifies strengths and weaknesses along these quality dimensions. The role of the mentor is to give advice on how the school can develop within its own individual context.

2. EDAF – One facet of EFMD’s social impact

Economic development depends on the presence of an educated and trained workforce, including the management cadre, to give leadership and direction. The management cadre must possess sufficient knowledge and skills in business and management. Business schools are essential in ensuring that different organisations in a country (private, public, NGO) are able to acquire and utilise resources efficiently so as to achieve national and institutional goals. The quality of business schools therefore has a direct impact on the quality of management in any economic region.

EDAF draws some inspiration from the two EFMD accreditation systems, EQUIS and EFMD Programme Accreditation (formerly known as EPAS), and it shares some of their core elements. Both EQUIS and EFMD Programme Accreditation are truly international in their design, and EDAF approaches diversity in a similar way. A business school assessment has to consider the educational, cultural and political environment in which the school operates and relate this to a wider international context. This approach rules out more traditional, single context advisory schemes and instead necessitates a flexible and customised approach. Hence, EDAF does not place an emphasis on any particular model of a business school. Business schools in the EDAF process may range from private schools focusing on postgraduate and executive education to public universities with a broad portfolio of undergraduate and postgraduate programmes.

3. EDAF – Addressing business schools’ diverse needs

EDAF acknowledges that business schools have different capacities and diverse interests. In order to get the most out of EDAF, a two-path approach was introduced in 2019. The objectives of the two EDAF paths are listed in the graphic below.

<table>
<thead>
<tr>
<th>Path A: INSTITUTIONAL DEVELOPMENT</th>
<th>Path B: BRIDGING THE GAP TOWARDS ACCREDITATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Objective</strong></td>
<td><strong>Objective</strong></td>
</tr>
<tr>
<td>Achieve specific institutional goals &amp; instil continuous improvement.</td>
<td>Assess state of affairs regarding international accreditation &amp; work on bridging the gap towards accreditation.</td>
</tr>
</tbody>
</table>
4. Benefits of the EDAF process

The EDAF process offers numerous benefits for business schools and wider community including:

- a structured process of reflection by each school’s Senior Management Team on the key attributes of the school according to a defined framework;

- thorough assessment and context-based analysis by a high-level Peer Advisory Team as a starting point for the mentoring process;

- a systemised approach to mentoring with quality assurance, progress tracking and defined assessment criteria given by highly experienced advisors/mentors thus offering international benchmarking and comparison;

- access to the expertise of the EFMD Global network through its events – waived registration fees for 1 person for both the EFMD Annual Conference and Conference for Deans and Directors General (in year 1 after the eligibility decision) and a 30-minute meeting with an EFMD/Quality Services Director during either of the two conferences;

- facilitated access to the EFMD Global network for schools that are not yet members of EFMD (free EFMD-affiliated membership for 1 year);

- direct link to international accreditation processes including EFMD’s own programmes (EQUIS and EFMD Programme Accreditation – formerly known as EPAS) and one seat at an appropriate EFMD accreditation seminar (online/f2f) for schools successfully completing the path Bridging the Gap towards Accreditation (Path B of the EDAF process1);

- obtaining the EDAF Certificate which is an internationally recognised label that confirms a commitment to quality improvement (the EDAF Label).

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1The full EDAF process is described in more detail in chapter C of this manual.
2. Management of EDAF

EDAF is the mentoring system of EFMD Global. EDAF is operated by the Quality Services Department of EFMD with the strategic support of the EDAF Committee. The EFMD Global Board appoints the members of the EDAF Committee. EDAF Committee members, peer advisors and mentors are required to sign a confidentiality agreement.

1. The EFMD Global Board
The EFMD Global Board approves EDAF policy, criteria and procedures based on the proposals submitted by the Quality Services Department after consultation with the EDAF Committee. It also appoints the members of the Committee (see the EFMD Global website for current members).

2. EFMD Quality Services
The Quality Services Department manages the EDAF process and provides administrative support for the system.

3. The EDAF Committee
The EDAF Committee, composed of international academic representatives, advises the EDAF Director on the strategic development of EDAF. All major decisions concerning policy, criteria and procedures are submitted to the EDAF Committee for consultation. The EDAF Committee vets applications and approves the eligibility of schools wishing to enter the EDAF process. It is also responsible for allocating EDAF funding.

The EDAF Committee meets three times a year (in January, May and September) at the request of the EDAF Director, who chairs the meetings. A detailed description of the role and functioning of the EDAF Committee and a list of current members can be consulted on the EFMD Global website.

The EDAF Committee can form several subcommittees according to its needs, for example fundraising, quality monitoring or fund allocation subcommittees.

4. Peer Advisory Teams and Mentors
Each Peer Advisory Team (PAT) is composed of three or four members with experience in the organisation and delivery of business and management education programmes. The composition of the PAT will depend on the size and type of applicant school. The members of the PAT will normally come from different countries. Each team includes:

- the chair of the Peer Advisory Team: an academic (dean or former dean) normally from a different country from that of the business school being assessed;

- The designated mentor (previously approved by the school): an academic (often a dean or former dean) also normally from a different country from that of the school being assessed;

- 1-2 academic representatives (deans, associate deans or former deans) of whom one will come from the same country or region where the school is located – this person should be familiar with the local educational environment and thus be able to advise the external team members on national issues.

2https://efmdglobal.org/assessments/business-schools/edaf/edaf-governance/
Should it be impossible to find a suitable local academic, he/she will be replaced by an international team member.

The Peer Advisory Team is responsible for carrying out a comprehensive assessment of the business school according to the EDAF criteria – during the Peer Advisory Visit – and consequently for delivering its assessment via the Peer Advisory Report.

One member of the Peer Advisory Team will serve as the mentor for a two to three-year mentoring period after the visit. The mentor will be appointed after the eligibility decision and will engage with the school before the Peer Advisory Visit to support the institution in its preparation. After the visit, the mentor will advise the business school on how to progress in the different EDAF assessment areas throughout the mentoring period taking into account the path chosen by the school (Path A: *Institutional Development* or Path B: *Bridging the Gap towards Accreditation*).
The following diagram illustrates the EDAF stakeholders:

- appointed by the EDAF office
- quality control by EDAF Committee
- policy decisions
- funding allocation
- quality monitoring
- runs operations
- management of budget
- fundraising
- composed of EFMD members and non-members
B – EFMD Membership, EDAF Eligibility and EDAF Funding

1. EFMD Membership and the EDAF Community

The EFMD aims to assist a wide range of business schools, even though EFMD usually only provides services to its members. However, the EDAF system is also open to non-EFMD members. The only additional requirement for non-members wishing to enter the EDAF process is to submit two Referee Forms (see Annex 3, EDAF Process Manual Annexes).

2. EDAF Eligibility

A business school wishing to take part in the EDAF process must meet the following criteria as a minimum:

1. It must be a higher education institution (or part of one) that delivers degrees that are recognised nationally, which:
   - has a mission appropriate for a higher education institution;
   - has a primary focus on education in general management or business administration;
   - can demonstrate sufficient institutional stability and resources.

2. The senior management of the school should have some autonomy in managing its staff and budget as well as in the design and running of its programmes.

3. The school should offer at least one degree programme from the following segments: Bachelors (first degree), Masters (second degree), MBA, Doctoral programmes.

4. There should be sufficient number of students in the school to make it a viable business school.

5. The school should have a reasonable number of core faculty so as to fulfil its mission. Faculty should cover the main fields of management and are expected to undertake some form of intellectual activity, e.g. research, case study development, authoring textbooks, etc.

6. The school should have adequate support services.
3. EDAF Funding: Financial Support for Business Schools

EFMD understands that some business schools may not be able to afford to pay all the EDAF administrative fees in full. Therefore, schools have the opportunity to apply for some EDAF funding that will grant a fee reduction for part of the process fees. However, schools will still have to pay the direct expenses, including the accommodation and travel expenses of the advisors and the mentor.

To apply for a fee reduction financed by the EDAF Community, schools should complete an EDAF funding application (see Annex 2, EDAF Process Manual Annexes) and submit it together with the EDAF Application Datasheet (see Annex 1, EDAF Process Manual Annexes). This form allows the EDAF Committee to assess to what extent a business school is eligible for funding. The EDAF Committee will take various criteria into account including:

➢ the availability of funds that EFMD can distribute;

➢ the financial situation of the applicant business school;

➢ the local context.
C – The Process

1. The EDAF Assessment and Mentoring Process

The EDAF process is designed to improve the quality of business schools through assessment and mentoring. A school must first demonstrate that it meets the Eligibility Criteria (see section B2) and be accepted by the EDAF Committee into the process. Thereafter a mentor is appointed to support the school in the preparation of the Self-Assessment Report and the Peer Advisory Visit. Following an assessment by an international Peer Advisory Team, the school and the mentor will engage in a mentoring relationship for a period of two to three years. The length of the mentoring period will depend on the path chosen by the school after the visit, and also on the specific needs of the school; the path can be adjusted according to the school’s needs. Indeed, after the visit, and depending on the recommendation of the PAT, the school will decide whether to pursue the Institutional Development path (Path A) or the Bridging the Gap towards Accreditation path (Path B). The two paths have different features, as explained below. From the time of application until the end of the mentoring relationship the entire process is expected to last four to five years.

The different stages of the EDAF process are summarised in the table below:

| Stage 0: Enquiry                  | - Documentation provided                    |
|                                  | - Questions answered                        |
| Stage 1: Draft application        | - Submission of draft Application Datasheet |
|                                  | - Feedback from EDAF office                 |
| Stage 2: Formal application       | - Submission of final Application Datasheet  |
|                                  | (and other documents, if applicable – e.g., Funding Application Form) |
| Stage 3: Eligibility              | - Consideration of application by EDAF Committee and eligibility decision |
|                                  | - Assessment of Funding Needs and Decision on EDAF funding |
| Stage 4: Self-Assessment with mentoring support | - Appointment of EDAF mentor |
|                                  | - Drafting of Self-Assessment Report |
|                                  | - Advisory assistance by EDAF office and mentor |
| Stage 5: Peer Advisory Visit and Peer Advisory Report | - 4-day Peer Advisory Visit of a 3 or 4-person team including mentor  
- Peer Advisory Report by team based on EDAF criteria |
|-----------------------------------------------------|---------------------------------------------------------------------|
| Stage 6: Mentoring and Progress Tracking            | - Confirmation of mentoring path:  
Path A: *Institutional Development* or  
Path B: *Bridging the Gap towards Accreditation*  
- Mentoring (2-3 years)  
- Regular visits and contact with mentor  
- Annual Progress Reports with mentor’s feedback |
| Stage 7: Conclusion: EDAF Certificate               | - Award of EDAF Certificate  
- Schools that follow Path A have the possibility to extend the mentoring for 1 more year, if they wish  
- Schools that follow Path B have the possibility to pursue EQUIS accreditation or EFMD Programme Accreditation (formerly known as EPAS) |

**Stage 0: Enquiry**

This is the first contact between the business school and the EDAF office and precedes the formal application process. It is an informal stage in the process and typically takes the form of email or telephone contact, or in person during meetings at EFMD events and other conferences where EDAF representatives are present.

The EDAF representative informs the school about the EDAF process and answers any questions that it may have in this respect. The school will provide basic information to the EDAF representative so that non-binding preliminary advice can be offered to the management of the school.

If EDAF is believed to be an appropriate step for the business school, the EDAF representative will encourage them. The EDAF representative will also give advice on whether it is appropriate to apply for EDAF funding and on potential paths for the school to EFMD membership if required.

**Stage 1: Draft Application**

A draft EDAF Application Datasheet contains basic factual information about the business school that is applying, its programme portfolio, activities and organisation. This allows a preliminary assessment of the school's profile against the EDAF criteria.
A copy of the Datasheet should be provided to the EDAF office in Word format to allow for directly annotated feedback.

The EDAF Application Datasheet should be completed in a clear and concise manner, with 8 pages maximum, including any annexes. The EDAF office can provide advice as required on completing the document. The EDAF office will also point out any unclear points or omissions in the form. Feedback from the EDAF office will normally be given within 3 weeks of receipt of the application. The business school should then revise its Application Datasheet appropriately.

Any views or feedback offered by the EDAF representative are provided simply as advice. The business school can subsequently apply for eligibility and the advice offered to the School at this stage will not be part of the information on which eligibility will be based.

**Stage 2: Formal Application**

Any business school that wishes to embark on the EDAF process should send a revised EDAF Application Datasheet to the EDAF office. If the school wishes to apply for EDAF funding it should send also a Funding Application (Annex 2, EDAF Process Manual Annexes). In addition, if the School is not yet a member of EFMD, it should include two EDAF Referee Forms (Annex 3, EDAF Process Manual Annexes).

Upon receipt, the revised EDAF Application Datasheet will be checked again and once it can be considered final, it will be presented to the EDAF Committee for the eligibility decision.

This formal application must be received at least 4 weeks prior to the target EDAF Committee meeting. Missing this date will delay submission of the application to the Committee until the following meeting.

*Upon receipt of the formal application, the applicant Business School will be invoiced for the application fee for stages 1-3 of the EDAF process. The EDAF Committee will only consider the application once this invoice has been paid.*

*The EDAF Committee’s decision on eligibility (and funding, if applicable) will be based entirely on the data provided in the Application Datasheet, Funding Application (if applicable) and Referee Forms; no other material will be submitted to the Committee.*

**Stage 3: Eligibility**

*The Eligibility and Funding Decision*

The EDAF Committee meets three times a year, approximately every four months, to make eligibility decisions. A business school can usually expect to be presented to this Committee at the next available date if its Application Datasheet is received no less than four weeks in advance of this date.

The EDAF Committee will base its decision on eligibility (and funding, if applicable) on its understanding of the information supplied in the Application Datasheet (and Funding Application Form, if applicable). There are three possible outcomes for the EDAF eligibility decision:

a) Eligible without EDAF funding;

b) Eligible with EDAF funding (with specifications about level and conditions for the financial support);

c) Not eligible for reasons to be given.
For more detailed information on eligibility and guidelines for EDAF funding, please refer to chapter B3 of this manual.

The EDAF Director will report the outcome of the Committee’s decision to the business school in writing within one week of the Committee meeting.

After the Eligibility Decision
Being declared eligible signifies that a business school’s application to enter the EDAF process has been formally accepted and that the EDAF office will work with the school towards its objectives of quality improvement. The school may therefore advance to Stage 4 of the EDAF process: Self-Assessment.

After a positive eligibility decision, the EDAF office will appoint a mentor to support the school in the next stages of the process. The EDAF office will propose a potential mentor to the school for their approval. At the start of this relationship the mentor and the school are required to complete the EDAF Mentoring Contract (see Annex 16, EDAF Process Manual Annexes).

A business school that receives a positive eligibility decision is expected to communicate its plans for the Self-Assessment and Peer Advice stages, ideally after consulting the designated mentor. The Peer Advisory Visit (PAV) should take place within two years of the eligibility decision.

Business schools that are declared ‘Not Eligible’ cannot be reconsidered for eligibility by the EDAF Committee within two years of the initial decision. This is considered to be the minimum time a school will need to make the necessary improvements to achieve eligibility.

Stage 4: Self-Assessment with Mentoring Support
After the business school is declared eligible, it should carry out an extensive self-assessment and write a Self-Assessment Report (SAR) covering the EDAF criteria as described in the EDAF Assessment Criteria document and in accordance with the Guidance for Self-Assessment in chapter C2.

The process of self-assessment is expected to take between six to nine months. During this period, the school may request advice and assistance from the EDAF office in preparing its Self-Assessment Report. The assigned mentor will also advise and support the school as it finalises the Self-Assessment Report and prepares the Peer Advisory Visit.

The SAR forms the basis for the school’s discussion with the Peer Advisory Team. The length of the Self-Assessment Report should be 80 pages maximum, including annexes.

The school should first send the report to the EDAF office (in digital copy), together with an updated Application Datasheet (see Annex 1, EDAF Process Manual Annexes) at least eight weeks before the date set for the Peer Advisory Visit. The EDAF office will check the documents for completeness. Upon confirmation by the EDAF office, the school should send the final documents to each member of the Peer Advisory Team in digital copy (PDF format) and once again also to the EDAF office. The paper copies of the documents are being sent only if the situation allows and requires so (A4 size and may be bound – different bindings are acceptable, including wire-, spiral- or comb-bound, but ring binders should be avoided). The EDAF office will provide the postal addresses of the peer advisors.
EFMD recommends that the school should appoint a project leader as soon as possible to manage the self-assessment process and organise the drafting of the report.

It is important to note that, should a Self-Assessment Report be considered inadequate preparation for the Peer Advisory Visit, the visit may be postponed. In this case, any additional costs incurred due to the postponement (e.g. rescheduling of Peer Advisors' flights) will be at the expense of the School.

The school authorises EFMD to use the Self-Assessment Report for research purposes and aggregate reporting. Anonymity and confidentiality are assured in such cases.

**Stage 5: Peer Advisory Visit and Peer Advisory Report**
A team of 3-4 peer advisors will visit the business school to assess the school's standing against the broad criteria areas of the EDAF Business School Wheel model and to draw up recommendations for future development.

As soon as the school has a clear timeline for how long it will require to produce the Self-Assessment Report, it should ask the EDAF office to schedule the Peer Advisory Visit. The date of the visit should be determined at least eight months in advance and should take place within two years of the eligibility decision. When scheduling the visit, the school must take into account the fact that the Self-Assessment Report should reach the EDAF office at least eight weeks before the date on which the Peer Advisory Visit will start. The school must also make sure that all its internal approval procedures and requirements are met before proposing a date. The visit should take place at a time when courses at the school are in session so that the Peer Advisory Team can meet students.

The date of the Peer Advisory Visit will be agreed between the business school and the EDAF office, since it will usually depend on the availability of the potential members of the Peer Advisory Team. Rescheduling is only permitted for unforeseeable and major reasons, and will most likely lead to a considerable delay in the mentoring process. In cases of postponement, the school is responsible for all expenses incurred by the advisors (e.g. flight tickets) up to the time of cancellation or postponement of the visit. In addition, the school will be charged an EFMD administration fee (see Annex 4, EDAF Process Manual Annexes).

When suggesting a date for the visit, the school is also required to specify one selected programme. This selected academic degree programme will receive a more detailed and rigorous assessment by the Peer Advisory Team during their visit. For more details, see chapter 4 of the EDAF Assessment Criteria.

Eight weeks before the Peer Advisory Visit, the business school should also send to the EDAF office a proposal for the schedule of the visit (as a Word document) prepared in accordance with both the guidance for the Peer Advisory Visit as provided in chapter C3 of this Process Manual and also following the template which will be sent in advance by the EDAF office (see Annex 8/Annex 9, EDAF Process Manual Annexes). The EDAF office will review this schedule and propose changes if necessary.

The composition of the Peer Advisory Team (which will include the designated mentor previously agreed by the school) is proposed by the EDAF office and is to be agreed by the applicant school.
The Peer Advisory Visit lasts normally not more than three days. During the visit, the peer advisors will meet a wide variety of people representing the different activities and interests of the school.

At the end of the visit, the chair will hold an oral feedback session with the management of the school and present the Peer Advisory Team’s preliminary conclusions and recommendations for quality improvement.

The chair will then draft the Peer Advisory Report (PAR) and send it to the other advisors for suggestions and amendments. This normally takes about six weeks. The Peer Advisory Report sets out the Peer Advisory Team’s final assessment of the school against the EDAF quality criteria, and gives the school advice for potential improvement. This report functions as the baseline for the mentoring process and will also help set development objectives for the school. If the school has indicated its intention to follow Path B: Bridging the Gap towards Accreditation, the report will also outline specific recommendations for the most important areas that the mentor and the school should work on. A template for this report can be found in chapter C3.

The draft report will be sent to the School within 6-8 weeks after the Peer Advisory Visit for comments and confirmation of factual accuracy. Factual errors will then be corrected by the chair of the Peer Advisory Team in liaison with the EDAF office. The final version of the report will then be returned to the school.

The Peer Advisory process is described in detail in chapter C3 of this manual, entitled Guidance for the Peer Advisory Visit.

Stage 6: Mentoring and Progress Tracking
Once the Peer Advisory Report has been finalised, the core mentoring process can begin. The process is carefully designed to build on what was learnt during the Peer Advisory Visit and to help the school develop along the lines recommended during the visit. During the Peer Advisory Visit, the school will have been able to get to know the designated mentor (if this has not happened before). After the visit, the mentor and the school will usually agree to formally initiate the core mentoring process. The core mentoring period will be envisaged initially for a duration of 2-3 years, depending on the path chosen by the school and its specific needs.

Using the Peer Advisory Report as guidance and the previously chosen/defined EDAF Path, the school and the mentor together will define consistent EDAF Development Objectives. These objectives must be submitted to the EDAF office for approval within three months at the latest after the Peer Advisory Visit.

The school will be expected to write a short Annual Progress Report, and the mentor will provide written feedback on this. This formal process is designed to maintain momentum and it may be a condition for any future funding. The school must submit a report to the mentor annually (using the template in Annex 13, EDAF Process Manual Annexes) one year, two years and three years after the submission and approval of the Development Objectives.

The Annual Progress Reports should summarise the progress made towards achieving the defined EDAF Development Objectives, together with any general improvements relevant to the school. The mentor should provide their feedback on the report within one month, by email to the School and the EDAF office. The reports will also be submitted to the EDAF Committee for reference, as the committee monitors the quality of the progress reports. If a school fails to provide the progress report on
time, or if the EDAF Committee considers that insufficient improvement has been demonstrated, the Committee has the option of ending the mentoring process.

The third progress report will summarise the overall improvement that the school achieved throughout the whole period of the EDAF process. In their feedback, the mentor can assess to what extent progress has been achieved. For schools which have chosen the *Institutional Development* path, the mentor will report on the progress made vis-à-vis the set development goals. In the case of schools which have taken the *Bridging the Gap towards Accreditation* path, the mentor will report on the progress on the areas determined by the PAR.

The mentoring process is described in more detail in chapter C4 of this manual.

**Stage 7: Conclusion: EDAF Certificate**

At the end of the mentoring process, the school will receive an EDAF Certificate recognising its participation in the EDAF process and its commitment to quality improvement. The Certificate will normally be awarded at a ceremony during the EFMD Annual Conference.
2. Guidance for Self-Assessment

1. Purpose of the Self-Assessment

The EDAF Business School Wheel model and supporting documentation provide an external yardstick against which business schools can measure their performance and the effectiveness of their processes and structures. Schools can maximise the added value of this quality improvement tool by completing the self-assessment as thoroughly as possible and involving a wide range of stakeholders.

The main aims of the EDAF self-assessment process are to:

a. provide an opportunity for the school to take stock of its situation;
b. carry out a comprehensive strategic assessment for the school;
c. provide a critical self-assessment;
d. provide a basis for the Peer Advisory Visit;
e. point out areas in the mentor’s and assessment team’s advice that the school views as particularly helpful.

2. The Self-Assessment Process

The mentor is appointed by the EDAF office and agreed by the school after the eligibility decision, and they will then support the school in preparing the Self-Assessment Report and the Peer Advisory Visit.

The overall self-assessment process will probably take between six and nine months. The members of the Peer Advisory Team must receive the Self-Assessment Report at least six weeks before the date of the Peer Advisory Visit (after approval from the EDAF office). The report must therefore be sent to the EDAF office eight weeks before the start of the visit at the latest for an initial check. Following approval from the EDAF office, the school should send the report to the Peer Advisory Team.

The following actions are recommended when designing and implementing the self-assessment process:

2.1. Responsibilities

EFMD recommends that the school should appoint a project leader as soon as possible to manage the process and organise the drafting of the report. The EDAF project leader should be suitably qualified and resourced to carry out the work.

2.2. Communication

At an early stage, the management team within the business school will need to provide a full explanation of the aims of the self-assessment exercise, of its role in the wider quality improvement process, and of the criteria against which the school is being measured. The assessment process should involve all key stakeholders who will need to understand the process if they are to contribute fully to the implementation of a rigorous self-assessment. Effective communication with these parties should be maintained throughout the process.

The self-assessment stage offers an ideal opportunity for the school to confirm the commitment of key stakeholders to secure resources and improve quality. Considerable care must therefore be taken to present the results of the self-assessment in a balanced,
realistic and honest way. The conclusions should clearly state what needs to be done to continue progress towards the achievement of the school’s strategic goals. The text must also provide the basis for an assessment by the Peer Advisory Team.

2.3. Methodology & Planning
In order to complete the self-assessment process within the required time frame, schools will need to develop a detailed plan at the beginning of the EDAF process.

The detailed project plan should contain details of the main stages of the assessment, methods to be employed, key issues to be addressed, responsibilities and participants, as well as time frames. The key stages of the assessment process will need to be accompanied by the systematic collection of data to support the process.

There is no pre-established format for the approach that should be adopted when conducting the self-assessment. With their mentor’s help, the school should develop a plan that meets its own specific needs.

However, the following criteria should also be considered when approaching the self-assessment process:

- **Systematic process**: the self-assessment should be well planned, thorough and comprehensive. The assessment should be driven by a methodology seeking to answer key questions, rather than simple application of a tick-box approach.

- **Objectivity and balance**: the self-assessment exercise should result in a balanced statement of current strengths and weaknesses, opportunities and threats and a determination of the action needed to address these issues. The school should not in any way restrict itself to the EDAF criteria or guidance and it should draw on as many sources of information as possible.

- **Participation**: in collecting data and evaluating the results of the self-assessment, the school should involve a variety of stakeholders to agree key conclusions and recommendations. This is not just in order to improve objectivity, but is also a way of improving communication and commitment to the findings.

2.4. Structuring the Report
Alongside formulating the detailed project plan, the business school should also determine the eventual format of the Self-Assessment Report, taking into account the requirements of EDAF in terms of the content to be covered (as shown in paragraph 3 below).

3. The Self-Assessment Report
The Self-Assessment Report should be based on the EDAF Assessment Criteria document (and the related supplement in Annex 5 of the EDAF Process Manual Annexes, which amplifies and clarifies the criteria). The overall report should be a unified piece of work with a clear narrative, rather than a collection of separate individual reports and should not exceed 80 pages including the essential annexes. The report should contain the following elements:

a. **Cover Page**
The cover of the Self-Assessment Report should clearly state the full name of the business school and the date of submission to the EDAF office.

b. **Statement of Accuracy**
The first page of the Self-Assessment Report should contain a statement confirming the accuracy of the report signed by the head of the business school. His or her title must be stated explicitly.

c. Executive Summary
An Executive Summary should be included at the beginning of the report.

d. Main Content
The format of the Self-Assessment Report should follow the ten chapters of the EDAF Assessment Criteria document. It is not necessarily expected that the school should answer every question. The school is expected to provide their own conclusions from the self-assessment process about the dimensions that are considered in each section, in the way they feel is most appropriate. However, it is expected that any key issues that are relevant for a comprehensive assessment of the school will be carefully addressed. The mentor can provide important advice during the process of producing the SAR in order to make the subsequent visit as productive as possible.

The EDAF Assessment Criteria are formulated in qualitative terms. However, the information provided by the school should, where appropriate, allow an assessment of the quantitative positioning of the school in relation to each criterion.

The report should be written in English.

Annexes and Supporting Documents
Annexes to the Self-Assessment Report should be limited to materials strictly necessary for a proper understanding of the report and should not lengthen the Self-Assessment Report. Bulky and less essential material should be placed in the (digital or physical) Base Room for consultation during the visit, either as paper or digital copy.

Distribution of the Self-Assessment Report
The School should first send the Self-Assessment Report and accompanying documents (an updated Datasheet) to the EDAF office in digital copy for initial approval.
Upon confirmation from the office, the school should send the documents to each of the peer advisors in digital copy (PDF format), paper copies are being distributed only upon request and if required.
3. Guidance for the Peer Advisory Visit

1. Introduction
This section explains the overall process of peer assessment and is intended to be a guide for all the parties involved including the business school, the Peer Advisory Team and the mentor.
If applicable, amendments to facilitate an online Peer Advisory Visit will be communicated with the school and the Peer Advisory Team well in advance of the scheduled dates of the visit.
Templates for the schedule of both the onsite and online visit can be found as a separate annex to this manual (see Annex 8 and Annex 9, EDAF Process Manual Annexes).

1.1 Composition of the Peer Advisory Team
Each Peer Advisory Team is composed of three or four members with experience of organising and delivering business education. The EDAF office will decide on the size of the Peer Advisory Team after the eligibility decision. The members of the PAT will normally come from different countries. Each team includes:

- the chair of the Peer Advisory Team;
- the designated mentor: an academic (often a dean or former dean), normally from a different country other than that of the school that is being assessed;
- 1-2 academic representatives (deans, associate deans or former deans), including at least one from the same country or region where the school is located who will act as the ‘local’ academic member.

In each team, there should be one academic who is familiar with the local educational environment and can explain the contextual background of the school for the benefit of the Peer Advisory Team.

Particular care should be taken when selecting the mentor, and the school will be consulted on the choice before the role is designated. Ideally the mentor should speak the working language of the school and both parties should feel comfortable with the final choice of mentor, as the mentoring relationship represents a strong commitment for both parties in terms of time and financial resources.

Prior to participating in a Peer Advisory Visit, advisors sign a general confidentiality agreement with respect to the information they will receive in the context of the assessment. It should be noted that the peer advisors volunteer their time but will claim reimbursement from the school for travel and accommodation costs as well as other expenses related to the visit.

1.2 Objectives of the Peer Advisory Visit within the EDAF process
The objectives of the Peer Advisory Visit are as follows:

- to engage in a constructive dialogue with the school
- to seek additional information as necessary in order to establish a comprehensive understanding of the school
- to confirm and/or challenge the main issues raised in the school’s Self-Assessment Report
- to make an overall assessment of the school based on the EDAF criteria
- to provide recommendations and confirm objectives that are consistent with the path the school has chosen for future development and quality improvement which will form the basis and starting points for the mentor-school relationship
In carrying out an EDAF Peer Advisory Visit, it is important that all parties begin the process with a clear idea of what the Peer Advisory process is designed to achieve. The success of the visit relies on a number of conditions being met by all those involved in the process, including:

- the allocation of a trustworthy and credible Peer Advisory Team to the school;
- thorough preparation by the school including production of a Self-Assessment Report;
- careful reading of the Self-Assessment Report by the Peer Advisory Team;
- clear relationships and expectations of all parties involved;
- open discussions free of excessive formality between the Peer Advisory Team and the key stakeholders of the school;
- the presentation of confidential feedback from the mentor and the Peer Advisory Team in a professional manner.

2. Preparation for the Visit
   2.1 Reading Materials for the Peer Advisors

The following documents are sent to each member of the Peer Advisory Team:

1. Names and addresses of the members of the Peer Advisory Team
3. Self-Assessment Report and an updated Datasheet (sent by the school directly to the peer advisors once the documents have been approved by the EDAF office)

2.2 Study of the Self-Assessment Report by the Peer Advisors

The school should send copies of the completed Self-Assessment Report and updated Datasheet to the members of the Peer Advisory Team at least six weeks before the start of the Peer Advisory Visit, once the Datasheet has been approved by the EDAF office.

It is very important that each member of the Peer Advisory Team studies this report carefully before the team comes together for the briefing meeting on the evening before the Peer Advisory Visit. In preparation for this preliminary meeting, each member of the team should attempt to answer the questions listed below:

- Are all the areas covered by the EDAF Business School Wheel adequately addressed in the report?
- What further information is required?
- Is the report sufficiently self-critical and analytical?
- Is the school’s local context clearly explained?
- Does the report clearly formulate the problems the school is facing?
- Does the school clearly sketch out how it plans to deal with these problems?
- What preliminary assessment can be formulated against the main EDAF criteria?
- What are the main issues that will require careful analysis during the visit?
- Has the school indicated preliminary interest in pursuing a specific path from the two-path framework?

When answering these questions, the team members are not tied to any final judgement but are simply forming a first impression based on the written information supplied.

The programme of the Peer Advisory Visit is put together in such a way that there will
be ample opportunity to further investigate these initial findings and consequently to confirm or revise them.

The chair should seek to collect the impressions of the other team members prior to the visit start in order to identify any further information that should be supplied by the school and to prepare the main focus of the interviews.

2.3 Logistics of the Onsite Visit

The school is expected to make all necessary arrangements for accommodation and local transportation for the peer advisors.

The members of the Peer Advisory Team arrange their own international travel according to the general guideline that flights should be booked in economy class, although business class tickets are allowed in the following circumstances:

a) for a trip involving at least one flight that lasts more than five hours, business class can be chosen for this flight and all its connecting flights;

or

b) for a trip involving several flights, all of them lasting less than five hours, as long as the time between the scheduled departure of the first flight and the scheduled arrival of the last flight to the final destination lasts more than eight consecutive hours, including any time spent in connecting airports.

Peer advisors are advised to book their flights at the earliest opportunity to minimise the cost to the school. If the price of travel is higher than 3,500 euros, advisors should ask for approval from the school before purchasing tickets. **In addition, please note that if the school is a recipient of EDAF funding, advisors are asked to book economy class tickets even if circumstance a) or b) above applies.**

The above travel guidelines also apply to the mentor’s annual visits to the school.

Accommodation for the visitors should be provided by the school, be of reasonable standard and be close to the school. Unless there are exceptional circumstances (for example infrequent flights), schools should expect to cover the costs for four-five nights’ stay, plus other expenses. For peer advisors whose journeys last longer than five hours, schools are expected to cover the cost of one or two additional nights. The school may also have to cover costs such as visas, travel insurance and vaccinations.

Lunches should be rapid, involving minimum disruption to the programme. There is a definite preference for on-site buffet lunches.

The schedule for the visit, which normally lasts not more than three days, will be very tight, so it is essential that this time is used efficiently. Name labels for all interviewees should be prepared and placed on the table for each meeting.

It is acceptable for some parts of the discussions to use electronic resources such as videos or PowerPoint, as long as the overall quality of the process is not diminished. The schedule of the visit can be modified if both the chair and the school agree to this. The EDAF office should be notified in advance of the proposed changes which should typically involve the PAT spending a reduced amount of time physically present.

2.4 The Base Room
The school should make a **physical or digital Base Room** available for the duration of the visit, and this should normally serve as the main committee room for meetings. If it is a physical room, the area provided for the team should:

- be spacious
- include a table for meetings
- possess a large table for laying out documents
- provide a telephone connection and computers with internet access
- be free from disturbance

All documents for the visit should be made available in this Base Room in hard or soft copy. Guidance on which documents to place in the Base Room can be found at the end of each chapter of the EDAF Assessment Criteria document (see also Annex 7, EDAF Process Manual Annexes).

### 3. Planning the Schedule

#### 3.1 General Structure of the Onsite Visit

The visit will normally begin with the Peer Advisory Team meeting on the night before the first full day, with the meeting proper then beginning at 9:00 on the following day. Overall visits normally last not more than three days (usually starting on the Monday afternoon) and should not extend beyond 14:30 (or later in the afternoon, if needed) on the last day (usually Thursday).

Guidance on the detailed schedule for the visit is given in the following section of this document. However, the following aspects deserve special mention:

**a. The initial briefing meeting with the team**

The Peer Advisory Team’s work will normally begin with a briefing meeting held in the late afternoon before the first day of the visit. It is essential for the team to be alone for this meeting.

The purpose of this meeting, which normally begins at 17:00, is to allow:

- briefing of the Peer Advisory Team by the chair (this can be followed by a short briefing on the process and cooperation to date from the mentor)
- agreement on the working methods and allocation of responsibilities within the Peer Advisory Team. For example, the chair will normally ask their fellow team members to take on the role of chair for some meetings
- review of the Self-Assessment Report and identification of the key issues
- review of the visit schedule and preparation for the next day’s meetings
- identification of any supplementary information to be requested from the school

The school is responsible for booking a suitable venue for this meeting, preferably a separate meeting room in the hotel.

This meeting will be followed by an informal dinner of the PAT with the dean for initial introductions.

**b. Informal dinner with the dean**
This is an opportunity for the PAT to get acquainted with the dean of the school in an informal way before the visit officially starts the following morning. This is also an opportunity to confirm the schedule and any other arrangements for the visit.

c. **Introductory session open to all members of the school**

The visit should start with an introductory session open to all members of the school to explain the purpose of the EDAF process.

d. **Initial meeting with the school's senior management team**

A meeting with the senior management team of the school will follow. The Peer Advisory Team can share with the key representatives of the School their initial impressions after reading the Self-Assessment Report and any requirements for additional information. It is important to allow sufficient time for this session in order to maximise the effectiveness of subsequent meetings.

This initial session is also an opportunity for the school to present its current situation and challenges. For example, this is an appropriate occasion to list the key difficulties that the school is facing in order to guide the Peer Advisory Team. However, it is important to stress that it is not helpful to use this time for any form of marketing presentation. This is the only meeting in which a short presentation by the dean is allowed (maximum 20 minutes).

e. **Final team meeting**

The team will be allocated a couple of hours alone towards the end of the visit (final day) to formulate its assessment.

f. **Final debriefing meeting with the business school**

The visit finishes with a second meeting with the senior management team. This session closes the Peer Advisory Visit and enables the chair to make a provisional summary of the team’s conclusions. It is followed by a discussion with the SMT of the findings of the Peer Advisory Team and a preliminary definition of development objectives aligned with the chosen path.

g. **Entertaining the Peer Advisory Team**

There is no time for the school to entertain the Peer Advisory Team during their visit.

### 3.2 Detailed Visit Schedule

The Peer Advisory Team should be allowed sufficient time alone throughout the days of the visit to debrief after each series of meetings and to prepare for the next round. It must be remembered that the team also needs time to read the materials made available in the digital or physical Base Room.

In all cases, the final schedule for the visit will be agreed between the school and the EDAF office. The visit schedule should clearly indicate the names and titles of all the participants. The school must send the first version of the draft schedule to the EDAF office eight weeks before the date of the Peer Advisory Visit, together with the SAR and updated Datasheet.

As a general principle, the Peer Advisory Team expects to see individuals only once unless they have more than one functional role. The sessions should not include too
many participants (normally a maximum of eight) so as to allow for meaningful discussions.

Templates for the schedule of both the onsite and online visit can be found as a separate annex to this manual (see Annex 8 and Annex 9, EDAF Process Manual Annexes).

4. The Peer Advisory Visit

The schedule of the visit should be structured such that the Peer Advisory Team has the opportunity to question people involved in the school which is being assessed. Although the meeting contents may apparently overlap or duplicate in some cases, this is to allow for different responses from different sets of interviewees. At the beginning of the visit, a short presentation (20 minutes maximum) may be made by the dean, but no other presentations are expected since the Self-Assessment Report should be self-explanatory and is the basis for the Peer Advisory Team’s questions.

Normally, all meetings and discussions will be conducted in English. However, in exceptional cases and depending on whether enough advisors are available who speak the local language, another language may be used during the visit. The school will have to indicate at the beginning of the EDAF process if they wish the process to be held in a language other than English and prior approval must be sought from the EDAF office.

All meetings and discussions should be conducted without any use of simultaneous translation. In case of the onsite visit, face-to-face meetings are more productive in all regards. At the same time, video-conferences are acceptable as long as the school can provide reliable technology. In exceptional circumstances, simultaneous translation may also be allowed but only with the prior approval of the EDAF office.

4.1 Preparation for interviews

The total time available for the visit is extremely limited and the team should make good use of its time. Team members need to be conscious about the purpose of each particular session and how it relates to the overall assessment process, i.e.

- Team members need to prepare for interviews and therefore must be allowed adequate preparation time.
- The team should consider requesting additional information from the school to facilitate their assessment.
- Throughout the interviews, individual team members should be working towards the overall assessment, to crosscheck facts and complete adequate documentation. This will make their work much easier when summarising their findings and writing the final report.

4.2 Periodic Debriefing

At the end of each major session, it is essential that the members of the Peer Advisory Team allow themselves enough time to consolidate their findings and to complete all relevant paperwork. Regular debriefing sessions are allocated throughout the onsite visit schedule for this purpose (in case of an online visit, the debriefing sessions can be scheduled after each day online). These meetings are also necessary to check that the Peer Advisory Team is on track to cover all the EDAF Criteria properly, and that it is working steadily towards the final assessment.

5. Assessment and Feedback during the Visit

5.1 Individual Assessment and Consolidation of Findings
Completion of the assessment forms (Institutional Development Profile and Criteria Assessment Form, respectively Annexes 11 and 12, EDAF Process Manual Annexes) will be an ongoing process for each advisor throughout the visit. The Peer Advisory Team has allocated time towards the end of the visit schedule to complete the documentation and to formulate their assessment and accompanying recommendations. The chair will normally set aside time at the beginning of this period for individual team members to complete the Institutional Development Profile, since this will be an essential tool for consolidating their findings during the final assessment meeting.

There are many different approaches which can be adopted by different quality organisations and individual chairs, but experience shows that it is generally a good idea to have a rigorous procedure for collecting and collating information and assessors’ perceptions in order to arrive at a consensus opinion while identifying discrepancies between the perceptions of different team members.

The EDAF Institutional Development Profile helps the team to arrive at an objective assessment, and also fulfils the school’s need for feedback on its development needs relative to its positioning in the international marketplace.

5.1.1 The EDAF Criteria Assessment Form

The EDAF Criteria Assessment Form (CAF) is a working document that will help peer advisors to build up their own personal assessment of the school. It will serve as a basis for the drafting of the Peer Advisory Report. The items listed follow the order in which they appear in the corresponding chapter of the EDAF Assessment Criteria document where a fuller explanation of the criteria can be found. In case of doubt about the content or meaning of the criteria, peer advisors should refer to the Supplement to the EDAF Assessment Criteria document (Annex 5, EDAF Process Manual Annexes).

Peer advisors will normally complete their comments on the Criteria Assessment Form as the visit progresses. It is very important that this process is carried out rigorously, since the final report will be in large part a synthesis of the documents completed by the different members of the Peer Advisory Team. Advisors are asked to write a full commentary as a minimum in all boxes relating to items with exceeding or below expectations, describing what they have observed. Responding with single adjectives or yes/no does not provide sufficient information to build up a profile of the School.

5.1.2 The EDAF Institutional Development Profile

The EDAF Institutional Development Profile (IDP) is used to summarise the team’s overall conclusions on the list of key areas in each chapter of the EDAF Assessment Criteria document. The items listed correspond exactly to those listed in the Criteria Assessment Form. The IDP form requires the team to agree on one of four possible assessments for each criterion, the choices being “above expectations”, “meet expectations”, “below expectations” or “N/A” (not applicable). Guidance on these assessments is given in the IDP itself.

The Institutional Development Profile is used to help structure the Peer Advisory Team’s discussion when it meets at the end of the visit to reach agreement on its assessment. At the beginning of this preliminary assessment, the chair will invite each member of the team to make a personal assessment against each assessment criterion. The normal procedure is for each member of the Peer Advisory Team to complete the document alone before any discussion takes place on the assessment of the different items. Only after each member has committed him/herself to an initial
judgement will the chair open the debate in order to work towards a common position that can then be entered onto a consolidated version of the Institutional Development Profile. This procedure will rapidly indicate areas where the team members are in complete agreement, and will also clearly reveal any areas that require careful discussion.

Once the final consolidated version of the Institutional Development Profile has been agreed, it will no longer be modified unless there are exceptional reasons for doing so. Any change will then require the explicit agreement of all members of the team. The document will be attached to the Peer Advisory Report as an appendix.

Based on the analysis of the Criteria Assessment Form and the Institutional Development Profile, the Peer Advisory Team will come up with a suggestion regarding the path to be followed and a list of recommendations and areas for improvement, which will form the baseline for the mentoring process.

5.2 The Feedback to the Business School

A formal session to give oral feedback to the business school at the end of the Peer Advisory Visit is scheduled in the programme. The chair of the Peer Advisory Team should give this feedback to the senior management team. The whole Peer Advisory Team is expected to be present during the feedback so as to support the chair and present a united front.

The debriefing

The oral presentation plays a special role in the assessment process. Given that the staff of the school will have invested a great deal of time and energy over a period of months, it is important that the feedback provides real value and ‘gives closure’ to the visit in the right way. Giving feedback is a skilled task, both for individuals and schools. The rules for good practice that apply to feedback given to individuals are just as valid when applied to institutional feedback. The person giving feedback should:

- adopt a positive, supportive and constructive approach
- concentrate on the key messages that need to be delivered
- enumerate the strengths as well as the weaknesses
- start by stressing positive feedback to create the right climate
- deliver key points in a clear and concise manner
- present more negative feedback in a constructive form that can be accepted
- confirm understanding and acceptance of key development needs
- suggest alternative ways to approach specific problems
- allow the recipients to identify the solutions
- provide clear guidance on the necessary action for quality improvement where appropriate

The debriefing also allows teams to distinguish between feedback provided informally and the feedback contained in a more formal report. Some findings and conclusions may not really be suitable for a more public report. The chair should take the opportunity during the oral feedback session to indicate the recommendation of the PAT regarding the path (Path A or Path B) that the School would like to follow during the subsequent mentoring stage.

The 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 possible referral of some points to the school’s dean/director. The subsequent discussion is an opportunity to begin to formulate the future development
objectives for the school with the involvement of the designated mentor. The choice of path for the mentoring stage should also be indicated and explained.

6. Peer Advisory Report
The Peer Advisory Report is the culmination of the assessment process and is the major reference document for the following mentoring process. The report will have considerable impact on activities concerning the business school and great care should therefore be taken with the wording of key sections, especially where the comments are critical of the school or its programmes.

6.1 Formulating the Report
The chair of the Peer Advisory Team is responsible for writing the Peer Advisory Report using the inputs from the EDAF Institutional Development Profile (obligatory) and the Criteria Assessment Form (optional) as a basis. The report should follow the Self-Assessment Report structure.

The chair could prepare a summary of the Criteria Assessment Form (based on the individual Peer Advisory Team members’ forms), which in particular should amplify any items that are “below expectations” on the Institutional Development Profile. The written report should include a general assessment, strengths and weaknesses, and a list of suggestions for improvement. It should also include the Institutional Development Profile as appendix. In addition, the report should clearly identify areas of development which will be the subject of the mentoring process. Strengths and weaknesses as well as suggestions for improvement are critical pieces of information for schools planning to embark on Path B (Bridging the Gap towards Accreditation).

6.2 Procedure for the Advisory Report
1. The chair consolidates comments from the team, using the written summaries in the EDAF Criteria Assessment Form and the minutes of the oral presentation.
2. The chair writes a draft of the report and circulates it to the team for comment.
3. The chair amends the report, taking into account the comments received from the other members of the Peer Advisory Team, and sends the revised draft, including the Institutional Development Profile and the recommended areas of development, to the EDAF office. The report will be edited by the EDAF office.
4. The revised version is submitted to the school for comments.
5. The school responds to any factual inconsistencies or misunderstandings and returns it to the EDAF office.
6. Following receipt of comments from the school, changes may be made and the final report will be completed by the chair in collaboration with the EDAF office.
7. This final version is sent to the school and the Peer Advisory Team members and the EDAF Committee.
8. While the school clearly has the right to decide on who should be given access to the report internally, it is desirable that the report be circulated as widely as possible, both to close the feedback loop and to encourage future participation in the EDAF process. The report and its recommended areas of development will provide the starting baseline for the mentoring process.
Peer Advisory Report Template

1. Introduction
   o Composition of the Peer Advisory Team
     - name, position and country of each advisor
     - any additional comments on the Peer Advisory Team
   o EDAF History
     - date of application
   o Institutional Background
     - in particular, scope of the assessment
   o Acknowledgement and Organisation
     - comments on the Self-Assessment Report
     - organisation of the visit and flexibility of the school
     - acknowledgements

2. General Assessment (Analysis following the EDAF Framework\(^3\))
   o Feedback on chapters 1-7 of the EDAF model including recommendations based on the oral feedback of the peer advisors and summarised in the consolidated EDAF Criteria Assessment Form
   o Succinct factual information to support the judgement of the Peer Advisory Team, particularly for areas identified as “below expectations” in the EDAF Institutional Development Profile

3. Strategy and Senior Management
   o Feedback on the assessment of strategy development and recommendations about the Senior Management Team (chapters 8-10 of the EDAF model)

4. Path Choice
   o This section includes a recommendation of the proposed path that the school could follow in the mentoring stage
     - Path A: Institutional Development
     - Path B: Bridging the Gap towards Accreditation

5. Conclusion

Appendix 1: EDAF Institutional Development Profile

7. Roles and Responsibilities
7.1 Responsibilities of the EDAF Office at EFMD Global
   - to liaise with the school throughout the process
   - to appoint a mentor after a positive eligibility decision
   - to set the date of the Peer Advisory Visit in agreement with the school
   - to advise and assist in the self-assessment process
   - to ensure there is adequate time between the receipt of the Self-Assessment Report and the date of the Peer Advisory Visit (usually at least eight weeks)
   - to establish the schedule for the Peer Advisory Visit in liaison with the school

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\(^3\)The EDAF Framework refers to the EDAF Business School Wheel on page 4.
to designate the members of the Peer Advisory Team and to secure the necessary agreement from the school
- to brief the Peer Advisory Team on the requirements of the EDAF assessment and to confirm receipt of all necessary supporting materials
- to ensure the school has made the necessary logistical arrangements for travel, accommodation and special requests
- to check the SAR for completeness before the school sends it to the members of the Peer Advisory Team
- to facilitate and finalise the Peer Advisory Report in liaison with the chair of the Peer Advisory Team and the dean of the school
- to ensure that the EDAF process assessment forms are completed by the school and the peer advisors

7.2 Responsibilities of the EDAF Project Leader within the School
- to liaise with the EDAF office throughout the process
- to consult regularly the mentor during the process of producing the Self-Assessment Report
- to coordinate the self-assessment process and the preparation of the Self-Assessment Report
- to ensure the timely production of the materials for the Self-Assessment Report, including supporting documentation and annexes to the main report
- to send to the EDAF office the SAR and an updated Datasheet at least eight weeks before the date of the visit
- upon confirmation from the EDAF office, to distribute the final Self-Assessment Report to the members of the Peer Advisory Team at least six weeks before the date of the visit
- to establish the schedule for the Peer Advisory Visit in collaboration with the EDAF office
- to make the necessary practical logistical arrangements for the visit, including local travel and accommodation
- to reimburse all travel and accommodation costs for the Peer Advisory Team in a timely fashion
- to ensure adequate access to key stakeholders during the visit of the Peer Advisory Team
- to check the final Peer Advisory Report for factual inconsistencies
- to complete the EDAF Process Assessment Form for Schools and return it to the EDAF office
- to actively participate in planning the schedule of the mentor’s visits

7.3 General responsibilities of the individual Peer Advisory Team members

The specific responsibilities of the mentor are listed in Section 4 (Guidance for the Mentoring Process).

Before the visit

- to liaise with the EDAF office and the chair of the Peer Advisory Team on the requirements of the EDAF Peer Advisory Visit
- to familiarise themselves adequately with the objectives of the assessment and the criteria by a thorough reading of the EDAF documents (especially Annex 5, EDAF Process Manual Annexes)
- to read the Self-Assessment Report carefully and carry out a preliminary SWOT analysis against the EDAF criteria
• to make appropriate and timely travel arrangements in accordance with the
guidelines given by the EDAF office
• to convey to the school and the EDAF office details of their travel arrangements
and any special requirements they may have regarding travel and accommodation
• to arrive on time to participate in the team initial briefing meeting

During the visit

• to ensure they are adequately prepared for all meetings
• to be present throughout the entire Peer Advisory Visit
• to fulfil specified and agreed responsibilities within the team, such as the provision
of specialist expertise
• to act as the main spokesperson for some sessions, as agreed with the chair
• to document their own findings clearly enough to support the work of the chair
• to operate in the spirit of consensus – if they disagree with the decisions arrived at
by the team, they must nonetheless abide by that consensus

Following the visit

• to hand in to the chair all relevant documentation relating to their personal
assessment (notably the EDAF Criteria Assessment Form) within one week after
the visit
• to contribute to the drafting of the final report
• to provide the school with all requested documentation required for reimbursement
of travel and accommodation
• to complete the EDAF Process Assessment Form for peer advisors and return it
electronically to the EDAF office
• to make arrangements for the destruction of all sensitive materials relating to the
visit following acceptance of the final report
• to avoid expressing any opinion or communicating the results of the assessment
to any person outside the Peer Advisory Team and the EDAF office

7.4 Additional responsibilities of the Chair of the Peer Advisory Team

Before the visit

• to check in advance of the Peer Advisory Visit whether the Self-Assessment
Report is adequate, and, if necessary, to request additional information from
the school

During the visit

• to brief the members of the team on the Peer Advisory process at the initial
briefing meeting
• to act as the main spokesperson for the Peer Advisory Team
• to ensure they are adequately prepared for the meetings
• to determine the delegation of lead responsibilities within the team
• to divide up some sessions and responsibilities among team members
• to lead the Peer Advisory Team towards a set of conclusions during the visit
• to ensure that the members of the team complete the assessment documents
before the end of the visit or, at the latest, one week after the visit
• to hold a meeting of the Peer Advisory Team, usually on the evening of the last full day, during which the team agrees on its conclusions and recommendations
• to run the debriefing for the school during the final meeting

Following the visit

• to collect documentation made by the Peer Advisory Team relating to the satisfaction of the core criteria, in particular the EDAF Institutional Development Profile and the EDAF Criteria Assessment Form
• to draft a first version of the report and circulate it to the other members of the team for comments
• to send the revised report to the EDAF office within six weeks of the visit; the office will edit the report and then forward it to the school and invite comment on the accuracy of the text
• to accommodate changes to the report where necessary in consultation, if appropriate, with the other members of the Peer Advisory Team
• to send the final report to the EDAF office for submission to the school

7.5 Role of Local Advisors
The local advisor is familiar with the local educational environment and can explain the contextual background of the school and programme for the benefit of the Peer Advisory Team. Normally he or she should speak the language of the country and is selected in agreement with the school that is being assessed.
4. Guidance for the Mentoring Process

The mentoring process is the core of the EDAF process. It is essential that mentor and school find a common basis to work on as this increases the effectiveness of the process for both parties. As this mentoring relationship requires a strong commitment for both sides in terms of time and resources, the right fit between school and mentor is essential.

1. The Selection of the Mentor

After the school has been declared eligible, the EDAF office will suggest a potential mentor to the school. The mentor will have significant experience in the field of management education. Usually he or she will be a dean or former dean who may also have experience with development work. It is important that the mentor has a particular interest in the country and region where the school is located, as this increases the motivation that is necessary to commit to a long-term working relationship. Ideally the mentor should speak the working language of the business school they are mentoring.

Once the school has agreed on the designated mentor, both parties will be asked to sign an EDAF Mentoring Contract (see Annex 16, EDAF Process Manual Annexes) to formalise their commitment. The Mentoring Contract will cover the period of time between EDAF eligibility and certification. If needed, both parties can later agree to extend the mentoring period.

The school and the mentor will then have the chance to get to know each other via phone, video-conference or email to get an idea of each other’s expectations. The school may also wish to invite the mentor to visit them. This helps to spot any strong disagreements between both sides at an early stage.

The mentor will provide advice and support to the school in the preparation of the SAR and the visit.

The designated mentor will also be part of the Peer Advisory Team. During the Peer Advisory Visit, the mentor and the school will have the chance to get to know each other even further. If the mentoring relationship is working to the satisfaction of both parties, the mentoring stage can start immediately afterwards. If not, the EDAF office will work with the school to identify an alternative mentor.

2. The Role of the Mentor

The role of the mentor is purely advisory and not executive. The school can rely on the mentor’s advice but remains the decision-maker. As such, the extent of advisory activity is a matter for mutual agreement between the dean of the school and the mentor. It is likely that the mentor will be able to advise on:

- the development of various activity areas within the school (within and outside the EDAF Business School wheel)
- the senior management structure
- the SMT’s management style and culture
- the personal development of the SMT members

The role should also have an eye to networking ideas, to make available contacts in other business schools, perhaps using the EFMD network.

Every mentor-school relationship will be different and it is the responsibility of both parties to find a working pattern that both consider effective.
3. The Mentoring Process
Taking into account the assessment of the Peer Advisory Team, the mentor and the school will define development objectives that the school wishes to achieve in the next 2-3 years according to which path is chosen by the school (path A: *Institutional Development* or path B: *Bridging the Gap towards Accreditation*). The agreed objectives should be submitted to the EDAF office within three months at the latest after the Peer Advisory Report is finalised.

The mentor should visit the school at least annually for 3-4 days of discussions with the dean and other relevant people. The in-person visit may be shorter provided there are alternative and reliable means of facilitating the discussion between the mentor and their school, e.g. video-conferencing tools. The mentor’s first visit (in case there has not been a visit already during the self-assessment phase) should take place within three months of the approval of the final EDAF Peer Advisory Report. Between visits there will be periodic contact with the dean and the EDAF project leader by email, telephone, video-conferencing, etc. to discuss progress and issues that may arise. Throughout the whole mentoring period, the mentor can expect to be involved with the institution for up to twelve working days in total (spread over the time span as needed).

The school will be expected to write a short Annual Progress Report on which the mentor will provide written feedback. This formal process is designed to maintain momentum and it may be a condition for any future funding.

4. Responsibilities of the Mentor
While fulfilling their role, the mentor should keep in mind that their role is purely advisory and that they should always behave diplomatically respecting the culture of the School. This includes formulating criticism in a constructive and encouraging way. The mentor’s responsibilities include:

- to liaise with the school throughout the process
- to agree with the school on the extent of the advising activity
- to support the school in the preparation of the Self-Assessment Report and the organisation of the Peer Advisory Visit
- to give advice on how to develop the school further (specifically taking into account the path chosen) and on the Senior Management Team’s management style
- to visit the school for 3-4 days each year, while making appropriate and timely travel arrangements in accordance with the guidelines sent by the EDAF office
- to provide feedback on the school’s progress reports
- to use their network and contacts for the benefit of the school
- to treat all the information received from the school in a confidential and trustworthy manner

5. Responsibilities of the Business School
- to accommodate and welcome the mentor in an appropriate manner
- to engage into a constructive dialogue with the mentor
- to deliver the progress reports in full, and on time
- to pay the process fees as applicable
Further Information and Contacts

If you have any questions concerning the EDAF system or would like to receive more information, please consult the EFMD Global website where all relevant documentation is available for download:

https://efmdglobal.org/assessments/business-scho.png/s/edaf/

Alternatively, you can contact the EDAF office: edaf@efmdglobal.org.