



PROCESS MANUAL ANNEXES

**EFMD Deans
Across Frontiers**



Adding Value through Partnership

We will ensure the confidentiality of data provided to EFMD 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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Annex 1

| EDAF
| Application Datasheet

EDAF Application Datasheet

Dated:

Where the applicant Institution is part of a larger organisation, this application should be supported and signed by the head of the parent organisation.

We, the undersigned _____ (name)

_____ (position)

representative of _____ (name of applicant Institution)

and the undersigned _____ (name)

_____ (position)

representative of _____ (name of parent Institution)

confirm the application of our organisation to go through the **EFMD Global Deans Across Frontiers (EDAF) process.**

I/we confirm the accuracy of the information supplied in the EDAF Application Datasheet (dated _____ and any subsequent revisions) and agree that my Institution will pay the relevant EDAF fees, as they fall due through the process. I/we also confirm that we will accept the mentoring process, the results of this process and the decisions of EFMD Global in respect of the mentoring process. EFMD Global, its directors, employees and consultants, dependent or independent, voluntary or not, shall not be liable on a tortious or contractual basis for any direct or indirect, foreseeable or unforeseeable damages resulting from the mentoring process, the conception and implementation of the standards, systems or procedures.

I/we fully understand and agree with EFMD Global's general terms and conditions on the next page.

General Terms and Conditions

1. The signatory of this Application Datasheet certifies she/he is a representative who is authorised to commit her/his organisation to go through the EDAF process.
2. The fees payable for the EDAF process are defined in the EDAF Fee Schedule effective at the date of the final submission of the Application Datasheet. These fees may be reduced if the Institution is granted a scholarship.
3. The reviewed Institution will be charged directly by the visiting experts for their travel, accommodation and other direct expenses for the Peer Advisory Visit.
4. Invoices and expenses claims shall be paid preferably by bank transfer, free of any bank charges, within 30 days from the end of the month in which the invoice was issued.
5. The fees are exempted from VAT (Swiss VAT 0% - Export).
6. In case the Institution decides unilaterally to stop the process, cancellation must be confirmed in writing.
7. The Swiss law shall apply to any and all disputes arising out of the process. In case of dispute, only the courts of Geneva are deemed competent.

Signature: _____

Date: _____

_____/_____/_____
Head of parent Institution

Signature: _____

Date: _____

_____/_____/_____
Head of applicant Institution

Stamp of the Institution:

Institution:.....

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 above)

EDAF Application Datasheet

The language of EFMD Global and EDAF is English and this form must be completed in English and should not exceed 8 pages. Please note that some parts of the EDAF process (Peer Advisory Visit, Self-Assessment Report, face-to-face mentoring) may take place in a different language, if resources allow. If wished, the Institution should state its preferred language and the parts of the process in which the language should not be English.

This application datasheet is intended to provide succinct factual information about the Institution that allows an assessment against the EDAF Eligibility criteria. No additional information provided by the Institution besides that contained in the application datasheet will be conveyed to the EDAF Committee.

All the sections, descriptions and instructions of this document should not be deleted when filled in.

1. Head of Institution

Please also provide address if different from above.

Name:
Job title:
Tel:
Email:

2. EDAF Project Leader at the Institution

This person should act as the central point of contact for EFMD Global for all issues concerning the EDAF process.

Name:
Job title:
Tel:
Email:

3. Members of the Institution's Senior Management Team (names and job titles)

4. Institutional Aspects

- EFMD Global membership status of the Institution (if any):

▪

- **Year of founding and key subsequent developments of the Institution (no more than 10 lines):**

- **Description of the Institution:**

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.

- **Governance:**

Please describe the governance structure of the Senior Management Team. The use of a diagram may be helpful. Include the relationship with the parent institution if applicable.

State who grants the Institution authority to award qualifications.

Comment on the degree of autonomy¹ of the internal Senior Management Team.

- **Positioning:**

Please describe the Institution's position in the national (international) environment (accreditation, recognition, competition).

5. Academic Programme Portfolio and Student Enrolment

Provide a list of the academic programmes currently offered by the Institution with the duration, number of students (full-time (FT) and part-time (PT)) enrolled in the last full academic year.

Examples:

Bachelor of Management (3 years, 120 FT and 60 PT)

MBA (2 years, 20 FT and 68 PT)

If the Institution offers Executive Education, list three of the most significant programmes, their duration, frequency and number of participants for the most recent offerings.

Example:

Change management (4 days; 3 times per annum, 22 participants)

Total Executive Education Revenue (EUR) for the last year:

¹This may include questions such as: Is the Institution allowed to retain financial resources obtained from corporations? Does it have authority to recruit new core faculty itself? Can it initiate programme modifications as well as new programmes?

6. Faculty

- **Number of core faculty in different academic ranks:**

Qualified academic staff employed on a permanent basis and for whom the Institution is the sole or principal employer.

Professor:

Associate Professor:

Senior Lecturer:

Lecturer:

Other (specify):

- **Number of adjunct faculty:**

Teaching staff for whom the Institution is not the primary employer, or who work for the Institution on a part-time basis under a permanent or an occasional contract.

- **Percentage of core and adjunct faculty holding a doctoral degree:**

- **Percentage of non-national/foreign core and adjunct faculty:**

- **Percentage of female core and adjunct faculty:**

7. Administrative and Technical Staff

List the different sections of the administration and support services (marketing, student administration, information technology, etc.) hosted by the Institution with applicable full-time (FT)/part-time (PT) staff in each section. State if services are provided internally or centrally.

Examples:

Student administration (internal, 4 FT and 2 PT)

Alumni relations (centrally, 5 FT)

8. Intellectual Activity (Research)

Give a short description of research expectations from academic staff and provide the total number of outputs for the Institution for the last full reporting year for each of the following:

- **Articles in academic/professional journals:**

- **Books and book chapters:**

- **Conference proceedings:**

- **Case studies:**

- **Other (specify):**

9. Financial Position

Please report all data in EUR.

In a case where no application for EDAF funding is made, simply provide the revenue, expenditure and surplus/deficit for the past financial year.

In a case where an application for EDAF funding is made, please complete the tables below with institutional financial data for the past 3 years (Current Year -2, Current Year -1 and Current Year) and a projection for the next 2 years (Current Year +1, Current Year +2) showing total revenue, expenditure and the surplus/deficit (add an explanation if surpluses have been falling significantly in recent years or annual surpluses are negative). Please provide any additional information that might contribute to the EDAF Committee's better understanding of the Institution's financial situation.

ALL FIGURES IN € 1000	Current Year -2	Current Year -1	Current Year
Revenue	€	€	€
Expenditure	€	€	€
Surplus	€	€	€

FORECAST FIGURES	Current Year +1	Current Year +2
Revenue	€	€
Expenditure	€	€
Surplus	€	€

10. Strategy

- Describe in 100 words what makes your Institution distinctive
- List 3 strategic objectives key to the Institution's future development
- Are there any areas of improvement on which you would like EDAF to focus?

11. Expectations

- How would you describe the ideal expected outcome of your EDAF development process?
- Do you have a preliminary understanding about which of the two EDAF Paths you would like to pursue?
 - a) General institutional development
 - b) Bridging the gap towards accreditation

12. Please add any further comments to motivate your Institution's EDAF eligibility

13. Referees

If your Institution is not an EFMD Global member, please provide contact details of two independent referees who may be consulted on the standing of the Institution.

If you wish to apply for an EDAF scholarship for partial funding of the process fees, please complete an EDAF Funding Application Form.

Thank you for returning by e-mail the EDAF Application Datasheet (together with the Funding Application Form, if applicable) to the EDAF Office at edaf@efmdglobal.org.

Annex 2

| EDAF
| Funding Application
| Form

EDAF Funding Application Form

IMPORTANT NOTE: Please return this form together with the EDAF Application Datasheet by e-mail to the EDAF Office at EFMD (edaf@efmdglobal.org).

I, the undersigned, _____ (name and position)

representative of _____ (name of Institution)

confirm the application of my Institution for EDAF funding assistance.

The EDAF Committee decides on the award of EDAF funding. The amount of funding, if any, is decided on a case-by-case basis by the Committee. EDAF funding can, in exceptional cases, cover up to 80% of the review and mentoring fees. It is however also possible that no funding will be granted.

Please explain why your Institution should receive EDAF funding. Please explain the financial situation of the Institution, its motivation for entering the EDAF process and the expected impact that the EDAF process may have on the Institution and the community. Please limit your response to a maximum of 1000 words.

Signature: _____

Date: _____

Annex 3

EDAF
Referee Form

EDAF Referee Form

IMPORTANT NOTE: Where a business school is acting as the referee, it is the person with chief executive (top management) responsibility and authority for the whole school who should sign this form, i.e. the Dean, the Director General, the Managing Director, the Rector or the President. An applicant Institution needs to submit two referee forms. At least one referee should be an EFMD Global Network member Institution.

I, the undersigned, representative of the following organisation:

.....

have been approached by (name of applicant Institution):

.....

to be one of its referees for its

EDAF APPLICATION

in accordance with the statutes of EDAF (<http://www.efmdglobal.org/index.php/edaf>).

I am pleased to recommend this application for the following reasons (please list three or four reasons for your support and an indication of your relationship with the applicant Institution):

.....

.....

.....

.....

.....

.....

.....

.....

I also commit herewith to support the application of this Institution by (please tick one or more if appropriate):

- ☐ Covering the travel and accommodation expenses of the Peer Advisory Team

- Covering the travel and accommodation expenses of the Mentor for the Peer Advisory Visit
- Covering the travel and accommodation expenses of the Mentor during the mentoring period (usually 2-3 years, with one visit to the School per year)
- Paying the EDAF Review Fee
- Paying the EDAF Mentoring Fee
- Providing someone who can act as the Mentor throughout the EDAF process (the Mentor should preferably have experience as a Dean)

Full Name: Signature:

Date:

Please return this form by e-mail to the EDAF Office at EFMD: edaf@efmdglobal.org.

Annex 4

EDAF
Free Schedule

EDAF Fee Schedule

2026

This fee schedule covers new applications submitted between **1st January 2026 and 31st December 2026**. The fee schedule at the time of the application remains valid throughout the entire cycle of the Institution's mentoring process.

In case of application for EDAF funding by the Institution, the EDAF Committee may decide to reduce or waive the peer advisory visit fee and possibly the mentoring fees.

EDAF Application Fee € 775

Invoiced on receipt of application and must be paid by the date of the EDAF Committee in order to be presented for eligibility.

EDAF Peer Advisory Visit Fee € 12,420

Invoiced after the final submission of the Self-Assessment Report.

EDAF Mentoring Fee € 4,658 per year

Due at the start date of each year of mentoring.

The EDAF process with one year pre-Peer Advisory Visit mentoring and three years of post-Peer Advisory Visit mentoring would cost € 31,827 over a period of 4-5 years. This amount does not include the expenses related to travel and accommodation of the members of the Peer Advisory Team nor expenses related to the annual visits by the Mentor.

Travel and other direct expenses of the Advisors/Mentor are to be paid by the Institution, which must also provide reasonable accommodation. Expenses may include items such as visa, travel insurance and vaccinations.

Peer Advisors and Mentors will be asked to keep intercontinental travel below €3,500. If the costs will exceed this amount, prior approval must be sought from the School, copying the EDAF Office.

Should the Institution decide to cancel or postpone the Peer Advisory Visit, the Institution will be liable for any non-refundable costs incurred by the Peer Advisors at that time. The Institution will be charged a fee of € 1,500 to cover the administrative expenses for cancelling or rescheduling the visit.

Annex 5

Supplement to the
EDAF
Assessment Criteria

14. ANNEX 5

15. Supplement to the EDAF Assessment Criteria

This Supplement provides (in the shaded boxes) a set of definitions, possible questions and comments on the basic criteria. It is intended to amplify or supplement the definitions in the main text to give a guide as to what to describe, explain, summarise, analyse, assess and so on but they should not be interpreted as necessarily all requiring a response. Using these additional points will enable Schools to provide a fuller description of themselves and especially if they would like to take Path B (Bridging the Gap), aiming for accreditation in the relatively near future. It is also **essential reading for the Peer Advisors** in order for them to understand the many aspects that should be reviewed during the visit.

16. Supplement to the EDAF Assessment Criteria

17.

Chapter 1: Environmental Context

The key areas are:

- a) The Environment
- b) Institutional status
- c) External governance

a) The Environment

- Provide general information on the political, economic and social environment which is pertinent to the School's operations, e.g.
 - *National political system (e.g. parliamentary democracy, executive presidential system, etc.)*
 - *Nature of current national government*
 - *National economic situation (e.g. total GDP, GDP per capita, national debt as % of GDP, growth rate, unemployment rate, welfare benefits, etc.)*
 - *Main trading partners*
 - *Religious and social cultures*
 - *National levels of education (e.g. participation rates at different levels)*
- Provide general information on the higher educational environment in which the School operates, e.g.
 - *The national educational system(s) within which it operates and grants degrees*
 - *Programme features pre-determined by the national system and environment*
 - *Student selection criteria required by the national system*
 - *Regulatory frameworks*

- *Degree certification procedures and the status of the degrees granted by the School within the hierarchy of existing national degrees*
- *What are the constraints which the national environment imposes on the School's activities, particularly in terms of:*
 - *the degree of freedom to innovate*
 - *access to resources and support (funding, faculty)*
 - *access to students*
 - *pricing of programmes*
 - *internationalisation*

■ Describe briefly the history of the School since its creation.

■ Provide a description of the School's markets and competition:

- ❖ The national market for higher education in business and management and the nature of the competition within the national system.
- ❖ The regional and international markets and competition.
 - *The interface of the School with the job market for which it trains graduates*
 - *The School's main competitors locally and at national and international level*

b) Institutional status

■ Provide a clear explanation of the School's legal status and affiliation within its national system. Hence identify the key factors which underpin the School's recognition and legitimacy within its own national context.

- *Type of institution (public, private, regulated/non-regulated, profit/not-for-profit, business school within a wider university framework)*
- *Parent organisation (e.g. University, Association, Chamber of Commerce in the case of French Grandes Ecoles)*
- *Legal status and by-laws*
- *Relation to the national or regional educational and accreditation bodies*
- *Sources of funding which derive from the above*
- *To what extent do the legal status and by-laws for the School allow its freedom to pursue its mission without undue interference?*
- *What constraints do the legal status and by-laws place on the activities of the School?*

c) External governance

■ Describe the formal mechanisms through which the School is externally governed, either by the governance system of the parent university, by a governing body in the case of a free-standing business school with no university affiliation, or by the Government.

- *To whom is the Dean or Director of the School accountable?*
- *How is the governance function exercised in terms of financial and strategic surveillance?*
- *How is external academic surveillance or oversight exercised?*

■ Identify the School's principal stakeholders and assess their impact on major issues such as strategic planning, autonomy and funding.

- *To what extent are external stakeholders such as companies, national education authorities and government agencies involved in the governance of the School?*
- *Does the School have an Advisory Body providing input that is external both to the School and the University and, if so, what is its membership and remit?*
- *How are faculty and students involved in the School's governance?*

■ Describe the interface between the external governance system and the School's internal management system.

- *How are decisions that require negotiation between the two levels taken?*
- *Explain the extent of the School's operational autonomy within this context.*

Chapter 2: Management and Resources

The key areas are:

- School's positioning and plans
- Internal management structure and systems
- Institutional performance management and quality assurance
- Administrative services and staff
- Human resource management
- Facilities and the learning environment
- Financial management systems

a) School's positioning and plans

This section is designed to establish in broad terms the stakeholders' understanding of the current strategic context of School.

Briefly describe or explain:

- The School's mission, vision and values. To what extent do the School's stakeholders have a clear understanding of them?
 - The School's current competitive position in its various markets and its current ability to satisfy the expectations of its various stakeholders.
 - The School's current strategic directions in terms of its stated medium term goals and the extent to which these are instrumental in achieving the vision.
 - The strategic plans for the coming years and how are these related to the School goals. The extent to which these are shared and understood by the School's stakeholders.
 - How shorter-term operational plans link to the strategy and how progress towards the achievement of the stated objectives is measured.
 - The extent to which the School values, incorporates and promotes a positive approach towards Ethics, social Responsibility and Sustainability (ERS).
- *Describe how management ensures that ERS is embedded in the culture of the School.*

- *How are issues relating to ethical behaviour and corporate responsibility integrated into the School's degree programmes, executive education activities and research?*
- *Describe actions taken within the School's operations that operationalise the ERS culture, e.g. gender and racial equality, financial probity, waste management, etc.*
- *Describe the School's policy and actions in favour of disadvantaged communities*

b) Internal management structure and systems

- Describe how the School is internally managed. Illustrate this with diagrams showing the organisation and management structures and decision-making processes including the structure
- of boards and committees. Assess these in terms of their effectiveness in contributing to the overall strategy and their efficiency in operational activities.
 - *How do the current organisational structure and job responsibilities for individuals support the achievement of the School's strategic objectives?*
 - *To what extent are individual management responsibilities understood across the School and are the reporting lines always adhered to?*
 - *How are faculty and students represented in the School's principal decision-making committees, either as voting or as non-voting members?*

c) Institutional performance management and quality assurance

Briefly describe or explain:

- The processes and indicators used to monitor overall performance.
 - *What methods does the School use for tracking progress and completion of individual objectives?*
 - *Are there any key performance indicators in use?*
- Any existing formal mechanisms for internal quality assurance at institutional (not programme) level.
 - *In case of quality revisions at the institutional level, How do the formal quality systems fit the context in which the School operates?*
 - *What policies are there for periodic reviews of academic departments, subject areas, research centres, programmes, etc.?*
- The ways in which stakeholders are involved in quality assurance.
 - *In case of an external accreditation, how do faculty and students participate in internal reviews or in the preparation of material for?*
 - *Describe the ways in which other key external and internal stakeholders are involved in quality assurance processes*

d) Administrative services and staff

- Describe the organisation and management of the support services (e.g. programme support, marketing, finance and accounting, buildings and grounds, documentation centre, computer service, etc.).
 - *Does the School have sufficient administrative staff to provide adequate service to participants and customers. In particular, show that programme support is sufficient especially for high-end programmes, e.g. MBA, EMBA, executive education.*
 - *How is the effectiveness of general support and administration facilities currently evaluated? What improvements to the quality of support have been achieved or you would like to set up in the near future?*

e) Human resource management

Describe or explain:

- How the HRM function is structured and operates within the School.
 - *Is HRM primarily the responsibility of the School or of the parent organisation? If the latter, explain how the relationship operates, i.e. who is responsible for what?*
 - *If HRM is located within the School, describe its organisational structure, remit and the reporting line.*
- The School's HRM strategy and its policies for the management of both academic faculty members and other staff.
 - *To what extent is the HRM strategy an integral part of the overall strategic planning process within the School?*
 - *Describe any formal processes for the recruitment, personal development, performance appraisal and dismissal of all staff categories.*
- How relevant routine personnel operations are organised and evaluate their effectiveness.
 - *Are staff records maintained and analysed to provide information useful for staff recruitment and development.*
 - *Describe, if it exists, the process for regular staff appraisal, and whether its outcomes have implications regarding development needs.*
 - *To what extent does the reputation of the School influence the recruitment and retention of staff? What are the perceived unique selling points (USP) for recruiting staff (particularly faculty) and what are the perceived problem areas?*

f) Facilities and the learning environment

Describe or explain:

- The educational facilities: auditoriums, classrooms, breakout rooms, individual workstations, and social areas for students. Identify any premises shared with other parts of the host Institution (if appropriate) and explain the allocation system.

- *Explain whether these are appropriately equipped with educational support facilities. computer access, projectors, microphone systems, etc.*
 - *Explain how these facilities are shared between the different programmes and/or other departments.*
 - *To what extent does this range of facilities contribute to the personal experience and development of students evaluated?*
- The office and other facilities available to faculty, administrative and other staff.
 - The processes for the management of physical resources within the School.
 - The library and documentation services provided on- and off-site (documentation centre, library, databases, research facilities, etc.). Describe any special relationships with external libraries (including that of the parent institution/ university) and research institutions.
 - *Demonstrate that the library and research facilities are adequate and that faculty and participants are provided with adequate access outside normal working hours.*
 - *Describe the off-site access to these facilities, e.g. home access by faculty and students.*
 - *Explain how the School evaluates the support provided to individuals by these facilities, e.g. faculty and student feedback. What evidence is there that feedback has been used to develop facilities for the benefit of individuals?*
 - The facilities available: hardware, software, intranet, e-learning platforms, open-access computer rooms, help services, Internet access, etc.
 - *Show that the IT facilities are sufficient and that participants are provided with appropriate access outside normal working hours.*
 - *What e-learning platforms are available and how are they used by faculty members in programme delivery?*
 - *What, if any, specialist software is provided and how is it utilised?*
 - *What support services are provided to students and staff?*
 - *What processes are in place to identify and fulfil development needs for new or updated IT facilities and systems?*

g) Financial management systems

- Describe the School's internal financial control and budgetary systems.
 - *What information is the system designed to provide to the School's managers?*
 - *How much budgetary autonomy is devolved to programme directors or department heads?*
 - *How does the School use the data collected to monitor key performance indicators?*
 - *To what extent is financial information reported to the School's stakeholders?*

Chapter 3: External Linkages

The key areas are:

- a) Strategies and policies for developing external links

- b) Connections with practice
- c) Executive Education (if applicable)
- d) International links
- e) Community links
- f) Marketing
- g) Organisation structures and operations

a) Strategies and policies for developing external links

- Describe in general the School's overall approach to making connections to its external community.
 - *Explain whether and how the School develops external links and whether they are a part of the overall strategy of the School.*
 - *Who or what functional areas within the School are responsible for these activities and to whom do they report?*

b) Connections with practice

Describe:

- The School's strategy and policies for including a managerial dimension into its activities and the key processes used to manage the School's relationships with the world of practice.
 - *To what extent do business leaders participate in the School's governance structures, e.g. as members of the Governing Board and/or Advisory Boards?*
 - *What are the School's main linkages with world of practice?*
 - *To what extent does the School enter into partnership with targeted companies and organisations, e.g. for graduate recruitment, research or consultancy contracts, executive education, etc.?*
 - *To what extent does the School perceive it has a customer orientation?*
 - *Explain how the School manages its relationships with the world of practice, e.g. through a 'corporate relations' office or department?*
- The involvement of the world of practice in the School's teaching activities.
 - *How does the School obtain advice from business people on curriculum design and review, e.g. through membership of programme advisory committees?*
 - *To what extent do practitioners give (part of) courses in some programmes?*
 - *Describe the forms of any internships and/or projects provided by partners from the world of practice.*
- Any flows of funding from business sources in the investment and operational budgets.
- Any international features of the School's relations with the world of practice.
- Any partnership with a hiring platform to facilitate the success of graduates in the labour market.

c) Executive Education (if applicable)

Describe or explain:

- How executive education fits into the School's overall strategy.
 - *Show how its executive education operation contributes to its strategic objectives beyond mere income generation?*
 - *How is executive education integrated into the mainstream of the School's activities and management systems?*
- The School's key areas of expertise in the area of executive education.
- The portfolio of programmes and services offered in the area of executive education and their rationale, e.g.
 - *Type of programmes - open/customised,*
 - *Residential/non-residential/distance learning*
 - *Duration: short/long/modular*
 - *Content (functional, general management, issue-based, skills workshops, action oriented, etc.)*
- The School's positioning in the national and international market for executive education.
 - *Who are its main clients?*
 - *Who are its main competitors?*
 - *Evaluate the strength of its brand image in the area of executive education?*
- The School's marketing and sales approach for its executive education activities.
 - *To what extent are faculty members involved in the sales of the School's programmes?*
 - *How rapidly can the School respond to a request for a customised programme?*
- The School's processes for selecting, managing and supporting the participants before, during and after training.
- The design process for executive education programmes.
 - *How does the School ensure that it has faculty and staff skilled in the task of negotiating customised programmes?*
 - *How are customer requirements diagnosed prior to designing customised programmes (needs analysis)? Is the faculty involved in this process?*
- The faculty resources available for deployment in executive education programmes (core faculty – FT or PT, adjunct faculty, visiting faculty, etc.).
 - *What proportion of the core faculty is involved in executive education and to what extent (e.g. % of workload)?*
 - *How is executive education integrated into core faculty workloads? Is this activity considered on-load or off-load? Is extra remuneration offered as an incentive to engage in executive education?*
- The delivery methods used in the School's executive education programmes.

- The School's approach to the management of quality in its executive education activities and the associated processes for monitoring, evaluating and reviewing programmes.
 - *What processes are in place for the regular evaluation of programmes and for the longer-term review of programmes?*
 - *Explain how the School measures the impact of its programmes on:*
 - *Individual participants*
 - *The participants' companies*
- The School's international executive education activities.
 - *To what extent, if any, does the School engage in executive education with clients outside its home country and how is this managed?*

d) International links

Describe or explain:

- The School's strategy and policies for incorporating an international perspective into its activities.
 - *How does the School integrate the international dimension within the normal structures and processes governing the activities of the School? To what extent do the Governing and Advisory Boards have international representation?*
 - *What are the key processes used to manage the School's international policy and relationships?*
 - *What are the resources specifically allocated to the management of the School's international activities? Does the School have an international office?*
- The current level of internationalisation as reflected in the profile of the faculty and of the student body, and in its programmes.
 - *To what extent has the School internationalised the classroom as measured by the intercultural mix of students and the international perspective in its programmes?*
- The School's international activities outside its home country (exchange students abroad, faculty mobility, joint programmes, offshore operations, etc.), including its network of international academic partners.

e) Community links

Briefly describe or explain:

- The role of the School in the local, national and international community.
- The School's overall contribution to the local and national environment, its role in developing the community and in acting as a catalyst for social initiatives.
 - *What does the School contribute to the business community, e.g. the development of small enterprises?*
 - *What is the School's role in providing an active forum for debate and the dissemination of knowledge, e.g. breakfast seminars, public conferences?*

- *What is the School's policy towards faculty involvement in service to the community?*
- The engagement of students in non-profit and/or humanitarian activities.
 - *How does the School support these activities?*
 - *How do these activities contribute to the personal development of the students?*
 - *What role do the faculty have in supporting extra-curricular activities?*
- The School's policy towards faculty participation in academic and professional organisations.
 - *What is the contribution of the faculty to the profession? Do they sit on key boards or committees for management education?*

f) Marketing

Describe or explain:

- The Marketing/Communication strategy and hence the mix of marketing and communication channels most commonly used by the School.
 - *How and with whom is the marketing strategy developed? How does it relate to the School's overall strategy?*
 - *Does the strategic marketing planning process involve the major internal stakeholders of the School (e.g. programme directors)?*
 - *What are the strategic marketing objectives?*
 - *How are these objectives to be achieved and what resources are available for implementing the plan?*
 - *What are the components of the marketing mix used by the School?*
 - *How is the budget allocated across the mix?*
 - *To what extent are outside agencies used and how are these managed?*
- How the effectiveness of the Marketing/Communication activities overall is evaluated.
 - *What performance measures are utilised to assess marketing effectiveness?*
 - *How do these measures influence management control of the Marketing / Communication function?*

g) Organisation structures and operations

- Describe how the external links (community affairs, corporate relations, executive education, international activities and marketing operations) are organised and managed.
 - *Are these functions carried out at a higher organisational level (e.g. University central function), in which case, how does the School ensure that it receives an effective service?*
 - *Alternatively, are these separate offices/managers for each of these functions within the School?*
 - *How are these functions staffed and financed? To whom do the functions report (e.g. Dean, Chief Admin Officer)?*

- *Within these areas, how are the resources allocated to different aspects of the School's activities?*

Chapter 4: Programmes

The key areas are:

- The Programme portfolio
- Programme design processes
- Programme content
- Intellectual and managerial skills acquisition
- Programme delivery
- Student assessment
- International, corporate and societal relevance
- Programme quality assurance
- Sample or selected Programme

a) The Programme portfolio

Describe or explain:

- The overall portfolio of programmes that the School currently offers (consistent with the latest Datasheet).
 - *What constituencies and markets is the School serving?*
 - *What are the strengths and weaknesses of the present portfolio and how are these assessed?*
 - *What are the criteria for assessing the overall coherence of the portfolio?*
 - *How are decisions regarding the positioning of programmes made?*
- The School's teaching and learning strategy for the development of its programme portfolio. Explain the School's policy as regards the balance between programme offerings at different levels (undergraduate, Masters, MBA, doctoral, executive education).
 - *Describe the policies and processes used to develop the portfolio in line with the School's strategic objectives.*
- How the programme portfolio has changed over the past 5 years and summarise plans for future programme creation or deletion, repositioning or development.
- The School's systems for managing its programmes.

b) Programme design processes

Describe or explain:

- The process for designing programmes. Explain how the School ensures that programmes meet the needs of the market and of participants.
 - *How does the development and review cycle ensure that the design, content, delivery methods and materials for programmes are relevant, up-to-date and of high quality?*
 - *How does the programme design process ensure that the School's values are embedded within the programmes?*
 - *How does the School ensure that the needs of external stakeholders (e.g. employers, regulatory bodies, students and their parents) are met within the programme design?*
 - *How does the School decide on and what are the values, attitudes, knowledge, skills and behaviours that it is seeking to instil in its students for all programmes?*
 - *In what ways are programmes and student profiles differentiated with respect to similar programmes at other schools?*
 - *How does the School encourage innovation and creativity in programme design?*
 - *Where the design of programmes is strongly modular, are participants provided clear guidance as to the means by which the integration of individual subjects is achieved?*
 - *How do programmes provide for interdisciplinary integration?*
- The key changes in programme design that have occurred in the last 5 years, together with an identification of key problems in the resourcing or design of current programmes.
 - *What steps does the School take to keep up to date with best practice, major trends and significant innovation in similar programmes around the world?*

c) Programme content

- For each broad programme (or programme set)², briefly describe:
 - ❖ The nature of the degree or qualification, its level of recognition in the national and international context, together with details of equivalencies to other qualifications (where appropriate).
 - ❖ The programme philosophy and rationale, key programme objectives and intended learning outcomes (ILOs).
 - ❖ The core content, options offered and the pedagogy adopted.
- In general:
 - *Do the programmes have clearly stated objectives and learning outcomes? How does the School ensure that staff and participants are fully aware of these?*
 - *Show that the ILOs are explicit in explaining to participants what they are expected to know and be able to do at the end of the programme.*
 - *How are the programme objectives and intended learning outcomes translated into the practical aspects of programme content?*
 - *Are any programme requirements set by the nature of the employment market? How are these taken into account?*

² For a definition of Programme Set, Programme Objectives and Intended Learning Outcomes: see Notes at the end of Chapter 4 in the EDAF Assessment Criteria document.

- Show that the design and content of the programmes embrace a comprehensive range of relevant business and management theory, which is firmly linked to the practical world of management.
- Explain how the School makes clear the way in which it recognises and assesses personal skills and qualities as well as the subject-specific knowledge and skills being developed by each course.³
- Provide evidence that the Schools make available to its students full information about the programmes, both in document form and on-line.

d) Intellectual and managerial skills acquisition

■ Describe the means by which **transferable intellectual skills** (conceptualisation, analysis, critical thinking, communication, etc.) appropriate to higher education are integrated into the

curricula. Schools should explain how the various learning and development outcomes for students are defined in their different programmes.

- Show that the programmes have general education aims to develop intellectual skills such as the ability to:
 - analyse, synthesize and critically assess complex material
 - formulate and defend independent judgments
 - conceptualise
 - communicate effectively in writing and orally
 - demonstrate an awareness of the wider context of the programme of study
 - apply general concepts to practical situations
- How are these skills assessed?

■ Summarise the **key managerial skills** (team work, interpersonal skills, presentation skills, project management, leadership skills, etc.) which the School promotes in students and the methods it uses to achieve them. Discuss the role of practical work, internships and projects in developing these skills.

- What opportunities are provided in the curriculum for students to apply the targeted managerial skills?
- Demonstrate that there is an appropriate balance between intellectual development and the development of managerial skills in the delivery and assessment of coursework. How are these skills assessed?
- Describe any training in research and consultancy skills received by students.
- Demonstrate that the programmes include sufficient individual practical project work for the development and assessment of an individual's ability to integrate core subjects with the application of managerial skills.
- What opportunities are provided to allow students to benefit from group work and practical experience?
- Describe any extracurricular or special activities involved in the programme

e) Programme delivery

Describe or explain:

³ For a definition on the difference between Programme and Course and/or Module: see Notes at the end of Chapter 4 in the EDAF Assessment Criteria document.

- The teaching methods currently used in programme delivery (lectures, case studies, business games, group work, project-based learning, tutorials, etc.) and the School's policy as regards teaching innovation and the use of new technologies in the educational process.
 - *Demonstrate that there is a sufficiently diverse range of teaching and learning methods to maximise learning and the practical application of learning outcomes. What is the balance between different methods and how does this support programme's aims?*
 - *How aware is the School of programme delivery practices in other institutions/countries?*
 - *To what extent is there an emphasis on learning as well as teaching?*
 - *How does the School promote innovation in teaching methods and in the learning process?*
 - *To what extent have information and communication technologies been integrated into the programme delivery systems? What is the contribution of these technologies to individual programme objectives? What specific knowledge, skills and qualities are developed through the use of information technology and how do these match programme objectives?*
- The main constraints which limit the range or scope of teaching methods and materials employed in the School's programmes.
- Processes for the allocation of faculty to programmes.
- The mechanisms for maintaining quality control of teaching and learning on a continuous basis. Explain how the criteria and processes used to monitor programme quality relate to the programme objectives.

f) Student assessment

- Describe the assessment systems for monitoring and grading students' work and progression through the programme.
 - *How does the School ensure that participants meet the agreed objectives and learning outcomes for individual degree awards?*
 - *How does the assessment regime support the programme design in terms of its ILOs, objectives and general philosophy?*
 - *Explain how the assessment regime explicitly identifies the criteria for assessment and the range and relative weighting of the various assessment methods employed.*
 - *To what extent does the assessment system distinguish between a normative approach (attribution of a grade) and a formative approach (marking designed to help students to understand their shortcomings and to improve)?*
 - *What provision is made for re-sitting assessments or examinations? Is this appropriate and does it support the programme's aims and objectives?*
 - *How does the School ensure that the assessment regime is applied with sufficient rigour and consistency?*
 - *Describe the mechanisms used to protect the integrity and validity of the degree awarding process from abuse by individuals (students or faculty)? What steps are taken to ensure objectivity in terms of the standards being applied, e.g. does a system of double sample marking and/or examination boards exist?*
 - *How does the School deal with cases of cheating and plagiarism?*

- Demonstrate that the quality of the students' work is appropriate to the level of the programmes and meets international degree standards.
 - *How does the School ensure that the depth of knowledge taught and assessed in the programmes and that the intellectual demands made on students become greater the higher the level of programme (e.g. Bachelor, Master, Doctorate)?*
 - *How does the School calibrate its degree standards against those in other countries? For example, would the School's Bachelor programmes automatically meet the entry requirements for a Master's programme in a reputable international school?*

g) International, corporate and societal relevance

Describe or explain:

- How the School's programmes include an intercultural perspective.
 - *Which programmes are targeted at international students and how attractive are these programmes to that market?*
 - *How many courses are delivered in a foreign language?*
 - *How international is the content of the School's programmes?*
 - *How is the intercultural perspective delivered?*
- The opportunities for international cross-cultural learning between students on the programmes, e.g. international student enrolment and opportunities for student exchange.
- How the School's programmes include a corporate perspective.
 - *How is this perspective built into the definition of learning objectives and into the design and delivery of the programme?*
 - *Describe the School's formal processes for involving corporate stakeholders in programme design and monitoring.*
 - *What is the extent of corporate practitioner input into the delivery of the School's programmes?*
 - *In what ways does the corporate community provide opportunities for live project work, internships and placements?*
- The extent to which programmes integrate the current challenges in business and society such as Global Responsibility and Sustainable Development and the necessity to develop socially responsible managers.

h) Programme quality assurance

Describe or explain:

- The institutional systems designed to ensure the delivery of high quality programmes that meet international standards.
 - *What formal institutional quality systems are applied to programmes and how do they contribute to the achievement of the School's strategy?*
 - *What organisational structure supports these systems?*

- The processes for the periodic review of programmes.
 - *How does the School ensure that programmes continue to meet the needs of the market and of participants and how does it include key stakeholder groups (e.g. alumni and corporates) in the process?*
 - *What generic adjustments to the programme design process have been made over the last 5 years in the light of feedback from programme teams and key stakeholders?*
 - *What mechanisms exist for the assessment of consistency with the standards required by external bodies, where appropriate, for the programme content?*
 - *Is there a process for periodic fundamental review? Does this involve external input, e.g. external academics?*
- The processes for the evaluation of standards of teaching and assessment.
 - *How does the School evaluate the quality of the teaching input, in addition to evaluation by students?*
 - *How is the assessment regime rigorously evaluated by management, particularly when new or innovative approaches are being applied?*
 - *How is the consistency of standards across courses assured, e.g. is there a system of sample double marking?*
- The evidence for satisfaction on the part of key stakeholder groups with regard to programme design, content and delivery, and standards.

i) Sample or selected programme

- The selected programme will be reviewed in depth as an indicator of how well the systems work across all programmes. More detail is therefore required for this programme in the Self-Assessment Report and in the Base Room. For the Schools pursuing the Pathway B: Bridging the Gap, in particularly towards EFMD Programme Accreditation (formerly known as EPAS), the selected programme should be the one aiming for EFMD Programme Accreditation. The review will cover components b) to h) above, namely:
 - ❖ Programme design processes
 - ❖ Programme content
 - ❖ Intellectual and managerial skills acquisition
 - ❖ Programme delivery
 - ❖ Student assessment
 - ❖ International, corporate and societal relevance
 - ❖ Programme quality assurance

Chapter 5: Students and Graduates

The key areas are:

- a) Target profiles and criteria for selection
- b) Preparation for study and progression
- c) Support and counselling services

- d) Personal and professional development
- e) Graduate quality and career placement/support
- f) Alumni relations
- g) Students on the Selected Programme

a) Target profiles and criteria for selection

Describe or explain:

- The target markets and profiles (e.g. age, entry qualifications, work experience) for incoming students in the School's various programmes (sets).
- The target profile for graduating students in terms of knowledge, values, managerial skills, professional competences, and entry level into corporate employment.
- The selection processes. Show how these relate to the objectives set for the School's different programmes. Describe the results of the selection for the different programmes, including the number of applications, the number of students to whom a place was offered, and the number of students effectively enrolled for each of the past 3 years.
 - *Show that the entry criteria are set at the appropriate levels and that they are used rigorously in the selection process.*
 - *Demonstrate that the procedures and standards applied for admission for each programme are rigorous, fair and appropriate.*
 - *Describe any standardised tools that are used in evaluating the readiness of candidates to successfully complete the programme of study for which they are applying (e.g. aptitude tests, language tests, etc.). How do these contribute to the quality of the student selection process?*
 - *In what way do language skills and international experience figure among the admissions criteria?*
 - *Show how the actual intake profiles match the pre-defined target profiles in the School's different programmes.*
 - *Show that there is an adequate pool of candidates to ensure sufficient numbers of students of the right quality and that the selection and enrolment ratios support this conclusion.*
 - *Provide data on the international mix and the gender mix in the programmes.*
 - *Evaluate the effectiveness of the School's selection criteria and processes. In what ways is admissions information for all programmes analysed so as to improve the targeting and the effectiveness of marketing the programmes?*
- How the School ensures the quality of its graduating students in cases where selection upon entry is not possible.
- The current student population in terms of origin, previous study, age and gender. For post-experience programmes such as the MBA, indicate the number of years of professional experience before admission. This information should be presented in a table with statistics for the past 3 years. Assess whether this student mix is in line with the School's strategic objectives.
 - *What trends emerge from the above statistics?*
 - *What future changes would the School like to see in the student mix?*
 - *What actions are planned to address issues in recruitment?*

- The mechanisms in place to ensure that socially disadvantaged students have access to the School's programmes.

- *Describe any scholarships or other initiatives available to help needy students.*

b) Preparation for study and progression

- Describe the processes used to prepare students in advance of their entry into their course of study.

- *How does the School ensure that all students are adequately prepared and informed about course requirements before enrolment?*
- *What steps are taken to identify barriers to learning or progression as early as possible?*
- *To what extent is assistance provided to students who experience difficulties or problems? How is the effectiveness of this support evaluated?*

- Provide a summary, for each of the main programmes, of progression, completion, failure and drop-out rates. This should be accompanied by an explanation of these trends and the actions taken to respond to them.

- *How is student progression through their course of study monitored?*
- *Evaluate whether drop-out and success rates are at acceptable levels relative to the School's reputation for quality. Are there any fluctuations or trends in time and across programmes?*
- *How does the School evaluate the match between its selection processes and the subsequent progression/performance of individuals? To what extent is information for all programmes analysed in sufficient detail to improve the targeting and effectiveness of programmes?*

c) Support and counselling services

- Describe the processes used to provide learning support for students throughout their courses.

- *How does the School provide adequate support to develop learning skills in participants who have been absent from formal education for an extended period of time?*
- *How is student counselling organised? What evidence is there that problems are diagnosed at an early stage and remedied where possible?*
- *Explain any special tutoring that may be available to support disadvantaged students.*
- *How does the School help its students to acquire intercultural skills?*
- *Describe the services provided to outgoing local and incoming international students.*

d) Personal and professional development

- Identify the processes by which the School helps students to develop both personally and professionally.

- *What are the key personal skills that the School aims to develop in individuals?*
- *How does the School encourage students to define their own personal and professional plans as they proceed through their course of study?*

- Explain the role of any special techniques and tools in diagnosing the personal qualities of individual students.
 - *To what extent does the School have faculty and/or staff members who are specialised in personal development?*

e) Graduate quality and career placement/support

- Provide clear statistics on the employment of graduates, such as
 - *distribution of employment by market sector and function*
 - *distribution of salaries offered to graduates*
 - *geographical distribution*
 - *percentage of employment on graduation and 6 months after graduation*
 - *list of major employers over the past 5 years*
 - *How do these employment trends meet the stated programme objectives?*
- Describe the arrangements for career development support on campus and for the alumni.
 - *What services are provided to help students identify job opportunities and prepare themselves for interviews?*
 - *How do students obtain counselling in defining their career objectives?*
 - *Describe the interface between the School and corporate world for employment and career support, e.g. corporate representation and support on campus, career days, forums, and links to international companies.*

f) Alumni relations

- Describe the way in which the School maintains and utilises contacts with its former students.
 - *Is there an alumni association and how is it used to support the School's strategy and programmes?*
 - *How does the School support the alumni?*
 - *To what extent do the alumni contribute to the support of the School (e.g. by supporting students in their career development, helping in the development of programmes, funding)?*

g) Students on the selected programme

- Show how all the above issues are applied to the Selected Programme described in the previous chapter on Programmes.

Chapter 6: Faculty

The key areas are:

- a) Faculty size, qualifications and composition
- b) Faculty management
- c) External links

a) Faculty size, qualification and composition

Describe or explain:

- The current core faculty as defined above and evaluate the sufficiency of the size and mix of the faculty to fulfil the School's strategic objectives. Include the following information:
 - ❖ The number of faculty members holding degrees, e.g. first degree (Bachelors), Masters, Doctorates (PhD or DBA)
 - ❖ The number of faculty members currently working towards a doctoral degree
 - ❖ The organisation of the faculty (departments, chairs, professorial ranks)
 - ❖ The distribution of the faculty by subject speciality or departments
 - ❖ The age distribution of the faculty
 - ❖ The gender mix of the faculty
 - ❖ The distribution of the faculty by nationality
 - ❖ The flows of new appointments and departures over the past five years
- *What is the size and profile of the core faculty in terms of subject expertise, academic qualifications, business experience, etc.?*
- *Show how the size and the composition of the faculty is in accordance with the strategic objectives of the School and that it is sufficient to deliver the School's programme portfolio.*
- *Demonstrate how this profile ensures adequate coverage of the principal management disciplines.*
- *To what extent does the core faculty have an inter-disciplinary approach and how do they integrate programme content across disciplinary boundaries?*
- *What are the principal strengths and weaknesses of the current faculty?*
- *What are the key areas of shortfall in faculty expertise and what actions are being taken to address these problems?*
- *How has the faculty evolved over the past five years, e.g. numbers, subject expertise, intellectual output, etc.?*

Much of this information can be presented in the supporting documents in the SAR or the Base Room as listed.

- The impact of the national environment, if relevant, on the organisation of the faculty (civil servant status, promotion procedures, tenure, career tracks, remuneration, work permits for foreigners, etc.).
- The non-core, adjunct or part-time teaching resources available. Use a similar breakdown to that provided for core faculty.
 - *How are these additional resources recruited and integrated into the School?*
 - *How does the School coordinate the contributions of non-core faculty within programmes?*
 - *How does the School evaluate the relative effectiveness of non-core faculty contributions? How does it manage performance issues?*

- The School's current deployment of teaching resources, including both core faculty and non-core faculty, within its different programmes.

- *What proportion of the total teaching provision is entrusted to non-core teaching staff? Is this balance considered to be optimal and why?*
- *What is the ratio of core faculty to the number of students enrolled, i.e. student/staff ratio (SSR)?⁴ How has this evolved over the last five years? What is the overall SSR, i.e. including the use of adjunct faculty?*
- *Does the workload for the faculty as a whole allow students sufficient access to staff for tutoring and counselling?*

b) Faculty management

Describe or explain:

- The management processes governing the operation of the faculty and assess their effectiveness. Particularly address the issues of academic workload management.

- *How is responsibility for the management of the faculty allocated within the School? For example, is there a Dean of the Faculty with overall responsibility?*
- *Show how the teaching planning process integrates all the requirements needed to meet the strategic objectives of the School and maintains a balance across the core activities. How are conflicts between demands resolved? Give evidence of a faculty resourcing plan which addresses all these issues.*
- *Describe the School's framework of policy and practice for all staff (full-time, part-time, service staff) which addresses the issues of School culture, workloads and the integration of staff into the total teaching and learning environment. How does this consistently reflect the strategic plan?*
- *Demonstrate that there is an adequate balance within core faculty members' workload between:*
 - *direct teaching and tutoring*
 - *programme administration*
 - *innovation, course development and the production of teaching materials*
 - *intellectual activity such as research and publications*
 - *service to the profession and the wider community*
 - *consulting*
- *How are workloads managed?*

- The current policy and practice regarding the recruitment, induction, review and promotion of faculty members.

- *Explain the process for the recruitment and selection of faculty. What are the key factors that attract high quality staff to the School? To what extent can the School recruit faculty of a quality which is consistent with the strategy and programme requirements?*
- *Describe the processes, if any, in place for periodic evaluation of individual faculty members.*
- *What are the processes for retention and promotion of faculty members?*
- *What are the formal processes for obtaining feedback from faculty members on critical issues?*

⁴ For an explanation on student/staff ratio: see Notes at the end of Chapter 6 in the EDAF Assessment Criteria document.

- The current policy for the development of faculty and explain how this supports the strategic plan for the School.
 - *How are priorities for faculty development decided? What formal processes for faculty development exist? How is their effectiveness reviewed?*
 - *What have been the major components of faculty development plans in recent years? What faculty time has been laid aside specifically for the purposes of individual development and general support of the faculty? What impact has the development plan had on programme quality and general innovation?*
 - *What opportunities exist for sabbatical periods and for periods as a visiting professor in other countries?*
 - *What opportunities are available to academic staff to interact with the management community? How do these benefit individuals and programmes?*
 - *To what extent do faculty members participate in academic and professional organisations?*
 - *How does the School ensure that faculty are aware of the latest developments in their field and are fully aware of modern business practice?*

- The strategic plan (in brief) for the future development of the faculty. Identify the key priorities for the future and the budgets involved.

c) External links

Describe or explain:

- The international dimension of the faculty.
 - *What is the nationality mix of the faculty, as a % by major geographic region?*
 - *How many international visiting professors are involved in the School's activities?*
 - *What percentage of the home country faculty has had significant international exposure, e.g. more than one year?*
 - *What are the foreign language skills of the home country faculty?*
 - *To what extent is the current level of internationalisation of the faculty in line with the School's aspirations in terms of strategic positioning?*
 - *Describe the range of international links made by individual faculty.*

- The nature of the links between the faculty and the corporate world (through consulting, executive education, Board membership, etc.).
 - *Show that the exposure of the faculty to the world of management is sufficient to ensure the professional relevance of the School's programmes.*
 - *To what extent are practising managers part of the teaching staff or involved in programme delivery?*
 - *What percentage of the core faculty participates actively in executive education programmes?*
 - *Explain the School's policy with respect to consulting by individual faculty. To what extent do faculty members engage in consulting activities?*

Chapter 7: Intellectual Activity

The key areas are:

- a) Expectations on intellectual activity
- b) Academic and applied research activities
- c) Pedagogical development and innovation
- d) Consultancy activities and links with the world of practice
- e) Management of intellectual activity
- f) Quantity and quality of intellectual output

a) Expectations on intellectual activity

■ Given the School's current positioning, mission and target audiences, describe in general the objectives for intellectual activity and the types and extent of this activity expected from faculty members.

- *What are the key forms of intellectual activity that best fit the School's mission and strategic objectives? For example, does the School aim to be an internationally renowned school in which case academic research publication may have the highest priority, or does the School primarily aim to be a teaching oriented institution where the production of case studies and textbooks may be more important, or does it primarily aim to raise the performance levels of management in local and national organisations in which case articles in newspapers and professional journals may be key?*
- *What processes and/or incentives are in place to encourage faculty to undertake the School's primary focus on intellectual activity?*
- *To what extent are all core faculty expected to undertake intellectual activity as defined above? Are faculty free to choose where they operate on the intellectual activity spectrum, including the possibility of being teaching-only faculty?*

b) Academic and applied research activities

Describe or explain:

■ The School's overall research strategy and policy. Explain how the research agenda contributes to the strategic objectives of the School.

- *What are the principal types of research carried out by the School?*
- *How are priorities established within the strategy?*
- *What is the current research potential of the core faculty?*
- *How has this potential evolved over the last five years?*
- *What methods have been used to attract key research staff to the School in recent years?*
- *What are the plans for future development of the research capacity?*

■ How research is organised within the School.

- *Is there a Dean or Director of Research?*

- *Is there a Research or Scientific Committee and, if so, who sits on it?*
- *Describe any self-standing Research Centres or Institutes within the School.*
- *To what extent is the research agenda managed?*

■ How the School attracts applied research and consultancy contracts.

- *What types of applied research and consultancy is generally undertaken?*
- *How successful has the School been in winning contracts in the last 3 years?*
- *What have been the unique selling points for success and what have been the perceived barriers to success?*
- *Describe any support structures, e.g. research office, that exist to help faculty to win such contracts.*

■ How research is funded (internal budgetary allocations, government funding, research grants, company sponsorship).

■ The research activities of the non-core faculty to the extent that they contribute to the quality of the School's programmes and to its ability to serve its chosen markets. Clearly specify which of this output is produced by academics that work primarily for other academic institutions.

■ The impact and influence of research on the School's activities.

- *How has research contributed to the accumulation of distinctive expertise within the School?*
- *How have the outcomes of research contributed to the quality of learning and programme innovation?*
- *If applicable, how has the doctoral programme contributed to the School's research profile?*
- *What has been the contribution of the research agenda to the international dimension of the School?*
 - *Give details of faculty involvement in joint research with schools or colleagues in other countries.*
 - *Describe the contribution of international academic visitors to enhance R&D in the School.*

c) Pedagogical development and innovation

■ Describe the School's overall policy for promoting pedagogical innovation and the mechanisms for determining priorities in this area.

- *Summarise the key achievements in pedagogical innovation, including the development of new courses, educational materials, and new learning and delivery methods that may or may not be based upon state-of-the-art information and communication technologies.*
- *Describe any current and proposed activities designed to develop new tools for management or to increase the impact of the School in its corporate market.*

d) Consultancy and links with the world of practice

■ Describe how the School's overall intellectual production can be considered relevant to its corporate markets.

- *Describe how the School engages in knowledge development with business and other stakeholders through collaborative enquiry and other methods. What types of output does this generate?*
- *Describe intellectual activities that are sponsored by or run in collaboration with companies.*
- *Describe the type and extent of consultancy activities undertaken by faculty. Is this type of activity encouraged and how is it rewarded?*
- *Describe any projects relating to the area of socially responsible management.*

e) Management of intellectual activity

Describe or explain:

■ How intellectual activity is integrated into the workload of individual faculty members.

- *What priority level is accorded to this activity?*
- *To what extent is intellectual activity a value within the culture of the School?*
- *How much time is allowed for this activity within faculty members' workload?*
- *What is the link between the faculty developmental budget and the policy on intellectual activity?*

■ The processes for monitoring and evaluating intellectual activity.

- *To what extent is intellectual activity a requirement for promotion and retention?*
- *What is the reward system for excellence in research?*

f) Quantity and quality of intellectual output

■ Summarise the intellectual activity carried out by the core faculty over the past 5 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 and/or quality declined?*
- *What proportion of the faculty can be considered intellectually active within the definitions of this chapter?*

Chapter 8: Strategy Development

The key areas are:

- a) Strategic planning process
- b) Current strategic positioning
- c) Strategic objectives and plans
- d) Financial resources
- e) Sufficiency of resources to meet current and future needs

a) Strategic planning process

Describe or explain:

- The internal process by which its mission, vision, values and strategic objectives were developed and then converted into strategic and operational plans.
 - *Who are the main stakeholders that the School serves? What is their relative importance and how is this reflected in the development of strategy and the allocation of resources?*
 - *How are the plans reviewed and updated by whom and how often?*
- The extent to which the School's stakeholders were involved in the planning process and thus the extent to which it may be expected that they have understood and accepted the current plans.
 - *How are the mission, vision and values publicised among the School's stakeholders?*
 - *To what extent do the stakeholders agree that the vision is clearly stated and that it is widely recognised as both challenging and realistic?*
 - *Evaluate the progress so far towards meeting this vision.*
 - *Show whether the School's core values include an explicit commitment to ethically and socially responsible behaviour in the management profession?*
 - *Show whether the values embrace the idea that management should be for the good of society as a whole and not just for the benefit of the employing organisation?*
 - *How does management ensure that these values are broadly accepted and adhered to across the School?*

b) Current strategic positioning

- The School's current market position and its current resourcing position in terms of how this influenced the development of strategy. Provide a brief analysis of the School's strengths and weaknesses in maintaining this strategic positioning and its perceived opportunities and threats for the future (SWOT analysis – see Notes at the end of the Chapter).
 - *Identify the School's key competitors nationally and internationally. How does it differentiate itself from the other institutions in this group? In what way has the School identified an appropriate set of measures to accurately pinpoint its competitive position in the market and its success in achieving its mission?*
 - *To what extent does the School have a well-known brand image? Explain what that is.*
 - *What is the School's current reputation among its stakeholders and in its markets? Indicators of public reputation or esteem might include:*
 - *National and international accreditations*
 - *Results of external audit reports*
 - *Position in national and international media rankings*
 - *Significant links with academic partners and client organisations*
 - *How well is the School situated in each of its programme markets (with quantitative analysis over the last 3 years, where possible)?*
 - *What impact does the School's reputation have on other activities such as:*
 - *Bidding for applied research and consultancy contracts*
 - *Recruitment of faculty and administrative staff*
 - *Seeking donations and sponsorship*

- *What are the perceived unique selling points (USP) of the School and where, if any, are the perceived problem areas in marketing and selling the School's portfolio of activities?*
- *Discuss the adequacy of its faculty mix relative to the range of programmes offered and to the ability to generate intellectual output.*
- *Review the quality of its facilities and other resources compared with competitors of similar standing.*
- *Identify the particularly key aspects of the SWOT analysis.*
- *Explain its main strategic actions over the past five years and describe how its strategic position has changed in terms of recognition and operational effectiveness.*

c) Strategic objectives and plans

Describe or explain:

- The rationale or logic for translating the vision into strategic direction as expressed in the School's long term goals.
- How the medium term strategic objectives were developed from the broad long term strategic direction and how their achievement is to be assessed.
- How the School's strategic objectives were matched to the availability of resources. Identify the key constraints which limit future performance and the actions planned to eliminate them, decrease their impact or otherwise deal with them.
- A broad outline of the strategic plans (including business/resourcing plans) for the coming years.
 - *Show how the overall strategic plan for the School reflects its context.*
 - *List the areas in which sub strategies have been developed (these should be explained in other chapters) such as:*
 - *Finance and resources*
 - *Teaching & Learning*
 - *Research & Development*
 - *Human resources*
 - *Marketing and communication*
 - *External links, e.g. corporate, international, societal, etc.*
 - *How will these plans for future development change the School's current strategic positioning? Are these plans realistic?*
 - *What changes will have to occur within the School and within its portfolio of programmes and activities for the strategic objectives to be achieved?*
 - *Demonstrate that the School has the financial and teaching resources that will be necessary to achieve the objectives.*
 - *Show how shorter-term operational plans link to the strategy and indicate how progress towards the achievement of the stated objectives is measured.*
 - *Explain how the strategic plan is communicated effectively to all concerned.*
 - *Show how the School integrates its strategic planning processes into other improvement activities.*
- How the School takes advantage of opportunities as they arise and how or whether the activities that are then developed are eventually incorporated into the strategy.

- How the strategy is used to inform the annual operational and budgeting process.
- The principal strategic risks that the School faces or may face in the future and how these risks will be managed.
 - *Explain these risks and demonstrate that they are clearly defined.*
 - *What plans and actions have been taken to reduce or mitigate these risks?*

e) Financial resources

Describe or explain:

- The current financial resources of the School with a breakdown by source of funding. Indicate the degree of stability or vulnerability of these funding sources. Public university Faculties/Schools should explain fully the budgetary allocation system by which the national educational authority funding is channelled through the central University to finance the School's activities (notably programme costs and the salaries of teaching staff).
 - *What degree of financial autonomy does the School enjoy?*
 - *What are the regulations and constraints that limit the School's financial autonomy?*
 - *How much freedom does the School have to generate and retain additional sources of funding?*
 - *What evidence is there that the financial provision made for the support and development of programmes is adequate? How does this compare with the provision made in the last five years?*
- The budget for the current year with an analysis of the major headings.
 - *How is the School's budget integrated into the budgeting system of the wider university or parent institution?*
- The financial performance of the School over the past 5 years.
- The projected financial needs of the School and the plans to meet these targets.
 - *Give evidence, if available, of a medium term business plan showing the acquisition and use of financial and other resources necessary to achieve the strategic objectives.*
 - *How realistic is the plan to generate larger financial resources in the future?*
 - *What are the main areas of financial risk for the School? Is the level of risk acceptable?*

f) Sufficiency of resources to meet current and future needs

- Assess the overall adequacy of all the resources to meet the demands of the School's portfolio of activities.
 - *To what extent is the overall level of resources sufficient to fully support the current activities of the School in terms of its mission and core processes?*
 - *What shortfalls in resources are expected relative to the School's future strategy? What steps are being taken to address these?*

Chapter 9: Senior Management Team

The key areas are:

- a) Senior Management Team structure and operation
- b) Appointment processes
- c) Quality of senior management
- d) Management style and culture
- e) Leadership abilities
- f) Strategic management
- g) Operational management
- h) Performance appraisal and development

a) Senior Management Team structure and operation

Describe or explain:

- The Senior Management Team structure showing the areas of responsibility for each member of the Team and relate the reporting lines back to the organisation chart given in Chapter 1.
 - ❖ Provide a brief job description for each member of the Team in terms of their management role (i.e. excluding any faculty role as a teacher/researcher).
- How the SMT operates in terms of meeting schedules (frequency), agenda setting, decision-making, communication of outcomes to the School, follow up actions, etc.
- The working relationship with the governing body or person.
- Any steps that have been taken to review internal decision-making structures and processes and improve their effectiveness over the past 3 years.

b) Appointment processes

Describe or explain:

- The appointment process for the Dean or Director of the School.
 - *Once vacant, how is the post of Dean filled, e.g. by election within the School, appointment by the governing body, by open competition, or by some other method?*
 - *If by internal election, what is the process? What safeguards are in place to ensure appropriate candidates?*
 - *If by open competition, is a search committee established; is the post advertised within the School, nationally or internationally; what is the selection process?*
 - *If by closed appointment, who are the decision makers?*
 - *What are the key criteria for appointment?*
 - *Is this post usually held for fixed but renewable terms or is it permanent?*
 - *By what method was the current Dean appointed?*

- The appointment processes for the other members of the SMT. These may be different for different roles.
 - *Is the appointment usually made by the Dean? Are others involved in the selection/appointment process? What are the selection criteria?*
 - *Are these posts usually held for fixed but renewable terms or are they permanent?*
 - *Are they full-time or part-time appointments? If part-time, what proportion of a normal workload do these roles entail?*
- Any incentives, rewards or compensations made for taking on these roles and their general nature. Confidential personal information is not expected.
 - *To what extent are responsibility payments sometimes or always made for some or all of these roles?*
 - *To what extent are these usually promoted (career advancement) posts?*

c) Quality of senior management

- Provide information on the qualifications and management experience of the SMT members.
 - *What experience do the team members have of managing academic operations / institutions and the staff within them?*
 - *For those relatively new to the roles, what development support was provided by the institution?*
 - *What are generally seen as the strengths and weaknesses of SMT?*

d) Management style and culture

- Describe the management style and culture within the School.
 - *To what extent would others say that the culture or management style of the Dean and SMT was open and consensual, top down or autocratic, or somewhere in-between? Where does SMT generally lie on this spectrum?*
 - *In a consensual culture, is SMT seen as ultimately decisive after consultation or do decisions drift?*
 - *In a top down culture, to what extent does consultation occur prior to decision making?*
 - *What are perceived as the relative advantages and disadvantages of these approaches?*
 - *To what extent is open debate on major issues within the School fostered, listened to and acted upon if appropriate?*
 - *Are there effective information flows up and down the School? Do people know what is going on and why?*
 - *What is the primary focus of the Dean and SMT members, e.g. on internal operations, external affairs, a carefully defined mix depending on roles? Please specify.*

e) Leadership abilities

- Describe the approach of the Dean and SMT members to providing leadership to the School.

- *To what extent would others say that SMT provides visionary leadership?*
- *How do SMT members motivate the School's staff to fulfil their functions effectively and to help develop the School?*
- *What factors make this a good leadership team, or not?*

f) Strategic management

- Describe the approach of the Dean and SMT to the development of the School's strategy.
 - *To what extent has SMT been pro-active in developing a vision for the future of the School and promoting it among the School's stakeholders?*
 - *How has SMT gone about leading the strategic planning process?*
 - *How has it ensured that the planned portfolio of the School's range of activities is coherent, feasible and sustainable?*
 - *To what extent does SMT believe in and own the strategic plan?*
 - *What people and management issues have arisen during the planning process?*
 - *How is implementation of the strategic plan managed by SMT?*

g) Operational management

- Describe the major issues that arise in running the School's various operations, e.g. do the issues tend to focus on customers or students, academic programmes, resources or finance, people or staff, etc.
 - *What are the key management issues (including people management) that arise frequently?*
 - *What are the major problem areas on which the School would like to receive advice?*

h) Performance appraisal and development

- Describe the performance review process for the SMT.
 - *Who appraises the performance of the Dean?*
 - *Who appraises the other members of SMT?*
 - *What is the appraisal process and what are the criteria? Does it include a 360° appraisal, i.e. relationships upwards, downwards and sideways?*
 - *What are the potential generic outcomes, e.g. written report, possible promotion or pay rise, identified development needs?*
 - *What steps are then taken to improve performance through personal development measures? What might these be?*

Chapter 10: Concluding Overview

a) Summary of current position

- Describe very briefly the key aspects of the School's current position.

- *Constraints and difficulties in current operations*

b) Key issues for future development

List briefly:

- The key features of the strategic plan, i.e. not just the strategic objectives but also the planned actions to achieve them.
- The areas and issues perceived as key to the successful achievement of the School's strategic objectives.
 - *What are the constraints on the School which may inhibit achievement of its objectives (e.g. government/university restrictions, limited resources)?*
 - *What actions should the School be taking to reduce or eliminate the effects of the constraints?*
 - *What other actions should the School take to facilitate the implementation of its strategic plan?*

c) Areas for EDAF advice and assistance

- List areas in which the School and its SMT are particularly seeking advice and assistance through the EDAF process.

Annex 6

| Supporting Information
and Documents to be
provided in the SAR

Supporting Information and Documents to be provided in the Self-Assessment Report

*The following information and documents should be provided either in the main text of the Self-Assessment Report (SAR) or as annexes to the report. The structure of the SAR should follow the sequence of chapters of the **EDAF Assessment Criteria** document.*

Chapter 1: Environmental Context

- History of the School: a one-page summary table illustrating the evolution and key events in the development of the School, e.g. main events, creation of programmes, creation of research centres, establishment of major partnerships, opening new facilities and premises, etc.
- Organisation Chart showing reporting lines for external governance
- List of members in the School's Governing Body and/or Advisory Board (indicating name, position, organisation, nationality, year of appointment)

Chapter 2: Management and Resources

- Internal Organisation Chart showing reporting lines
- Internal Management Structure diagram, if different from the organisation structure
- Chart showing the internal Committee structure

Chapter 3: External Linkages

- List of the School's principal connections with practice indicating the nature of their relationships
- Statistical data on the executive education programmes offered over the past 3 years
- A list of the School's key clients in the field of executive education in the past 3 years
- List of international academic partners showing the nature of relationship (e.g. student exchanges, faculty exchanges, research collaboration, joint programmes)
- Examples of community outreach activities
- Table showing the marketing budget for the current year and for the past 3 years
- Organisation structure diagram (if available) for all these functions.

Chapter 4: Programmes

- A table indicating international student enrolment, if relevant, in the School's various programmes over the past three years
- A table indicating student exchange flows in the School's various programmes over the past three years
- A table showing the take up by students of the opportunities for live project work, internships and placements with corporate partners over the past three years.

Chapter 5: Students and Graduates

- A table providing for each programme the statistical information over the past 3 years about the selection and admissions process (applications, offers, acceptances, enrolment, full-time equivalent in the case of part-time students).
- A table for each programme showing annual progression rates, drop-out rates and graduation rates (as % of initial entry).
- A table showing graduate employment statistics for past 5 years including a list of major employers.

Chapter 6: Faculty

- A summary list of the core faculty indicating: name, 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
- A table setting out the key statistics for the faculty for the current year (gender distribution, age distribution, nationality mix, degree profile, etc.)

Chapter 7: Intellectual Activity

Data on research and publication should only be reported for the core faculty, defined as those members of the teaching staff for whom the School is the principal employer. The publications of part-time staff from other schools, adjunct teaching staff, visiting professors, or business practitioners should not be included. It must be underlined, however, that non-core teaching resources can contribute substantially to innovation and development. Their contributions should be described separately.

- Provide pertinent numeric data on output, e.g. numbers of publications in different categories of journals.
- A table listing the School's choice of the best 10 articles published over the past 5 years.

- A table listing funds received from research grants, commissioned research or development, and company sponsorship over the past 5 years
- A table of applied research and consultancy contracts won over the past 3 years showing client name, nature of work, revenue
- Membership of the Research Committee

Chapter 8: Strategy Development

- The budget for the current year and forecast budgets for coming years where available
- A summary of the School's financial accounts for the last 5 years broken down by main activity area (income statements and balance sheets)

Chapter 9: Senior Management Team (SMT)

- Senior management structure chart
- An annex table of SMT job descriptions
- Summary table of qualifications and experience of SMT members, giving name, role, age, gender, academic qualifications and experience in the past 10 years.

Chapter 10: Concluding Overview

- Conclusion

Annex 7

Information and
Documents to be
provided in the Base
Room

Information and Documents to be provided in the Base Room during the Peer Advisory Visit

All supporting information and documents for the EDAF Peer Advisory Visit should be laid out in the digital or physical Base Room (see EDAF Process Manual, section C3). When possible, Base Room exhibits should preferably be made available in English. Schools are advised to provide a list of the documents available in the Base Room and to use clearly earmarked folders.

*The list below follows the sequence of chapters of the **EDAF Assessment Criteria** document.*

Chapter 1: Environmental Context

No supporting documents related to this chapter need to be displayed in the Base Room.

Chapter 2: Management and Resources

- Documents describing the School's strategic plans and related policies (if possible in English).
- Any relevant policy and procedure documents that have been developed to support the implementation of the strategic plans.
- Any current operational plans with associated timelines.
- HR strategy and policies (e.g. Staff Handbook, New Employees' Induction Pack)
- Information distributed to students explaining the documentation facilities and services available (e.g. texts and articles in the national language and in English).

Chapter 3: External Linkages

- Strategy and policy documents on external links
- Documents describing special projects related to the community.
- Marketing strategy/plan

Chapter 4: Programmes

General Programme Portfolio

- Teaching and Learning strategy (provide any formal documents that may exist)
- Brochures and other general descriptions for each degree programme
- Course catalogue or list of courses in each programme, including brief descriptions of the aims and objectives
- Documents describing the overall assessment regime and grading system
- Evaluation questionnaires
- Code of Ethical Conduct or similar document

Selected Programme

The term 'Selected Programme' refers to the programme chosen for more intensive assessment during the Advisory Visit.

For this programme, the documents listed below should be made available in the Base Room, either in hard copy or electronically.

- ❖ Documents setting out the rationale and structure of the programme including overall objectives and Intended Learning Outcomes (preferably in English)
- ❖ Details of each course in the programme including Intended Learning Outcomes and syllabi
- ❖ Descriptions of the assessment regime and grading system (preferably in English)
- ❖ Access to online material regarding course organization and delivery.
- ❖ Teaching evaluations (summary) by students for each core course and elective courses.
- ❖ Teaching materials and student work: there should be one course for each faculty member selected for interview by the Peer Advisory Team (see Faculty Interviews below).

Teaching materials should be provided for each of the selected courses to include the course notes, slides or hand-outs, case studies, textbooks, journal readings.

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

- ❖ the assignments/exams set
- ❖ a sample of 6 graded/marked student scripts matching those assignments / exams. 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 6 graded final dissertations or internship reports (as appropriate, e.g. Masters theses or first degree "stage" reports) should also be provided, with the 2 highest marks and the 2 lowest marks and 2 with mid-level marks.

Faculty Interviews

In order to better understand the teaching ethos and processes for the selected programme, the EDAF process aims to **link the Base Room teaching materials and samples of student work directly to the faculty selected for interview by the Peer Advisory Team**. The Institution should select a maximum of 8 faculty for interview on the basis of:

- providing broad subject coverage within the programme
- faculty with major teaching contributions to the programme
- a mix of senior and junior faculty
- a gender and age balance and
- faculty with good English language skills (as far as possible)

Summary teaching evaluations must be provided for all faculty teaching on the programme, highlighting those for the faculty selected for interview. Faculty teaching on the selected Programme should be available for interview.

Prior to the meeting with the selected faculty, the PAT will have reviewed in the Base Room the teaching materials and course work of the selected faculty sample in order to provide an informed basis for discussion of teaching and assessment methods.

In turn this will assist the PAT to evaluate the programme and course structures, academic depth of the programme, the teaching methods used and the appropriateness of the assessment regime.

Chapter 5: Students and Graduates

- Documents relating to the selection process: information packs, application forms, interview reports, test material, process documents, etc.
- Guidance documents for incoming international students, where applicable
- A table showing the profile of each student cohort within the School's degree programmes (previous study, age, gender, percentage of international students, etc.). Indicate also the average number of years of professional experience for MBA's.

Chapter 6: Faculty

- HR strategy document for faculty (if it exists)
- Copies of the Faculty Handbook or other documents setting out the missions, rights and responsibilities of the teaching staff (if available)
- CVs in English for all the core faculty members including publications over the past five years (recommended format: 2 pages of CV + key publications list)

Chapter 7: Intellectual Activity

- A sample of materials published during the past year (Articles, Books, Theses, Reports, Case Studies, Educational materials, etc.). These can be made available in hard copy or electronically.
- Any written statements regarding strategy, policy and processes on intellectual activity.

Chapter 8: Strategy Development

- SWOT analysis (if available)
- Documents describing the School's strategic plans and related policies (if possible in English).
- A financial business plan.
- Any relevant policy and procedure documents that have been developed to support the implementation of the strategic plans.
- Any current operational plans with associated timelines.

Chapter 9: Senior Management Team (SMT)

- Review reports on management structures, if any
- CV's for each member of the SMT
- Performance management documentation
- Minutes of SMT meetings for the past 3 years

Chapter 10: Concluding Overview

No supporting documents related to this chapter need to be displayed in the Base Room.

Annex 8

| EDAF Onsite Peer
| Advisory Visit Template
| Room

Guidelines for Drafting the EDAF Visit Schedule

1. Applicant Institutions will be contacted well in advance of the Peer Advisory Visit with the request to submit a draft visit schedule. Draft schedules need to be received by the EDAF office no later than **four (4) weeks** prior to the Peer Advisory Visit. The EDAF office will send the final schedule to the Peer Advisory Team no later than two (2) weeks prior to the visit.
2. The draft schedule must be based on the relevant template provided in the following pages. **The visit will normally start in the afternoon on day 0 with a briefing meeting of the Peer Advisory Team alone and it is expected to end in the afternoon on day 2.** The schedule will be adapted to the particular situation of the Institution under review. Deviations should be explicitly justified when submitting the draft schedule. The Institution should therefore only amend the document in the appropriate places.
3. The Institution shall not contact the Peer Advisory Team or its Chair in advance of the visit to change the schedule. Any proposed changes to the visit schedule must be agreed with the EDAF office first.
4. The draft schedule must contain the names of all session participants as well as their titles/roles, so that the EDAF office can evaluate the appropriateness of their inclusion. All the session participants must be physically present during the Peer Advisory Visit.
5. Visit schedules shall be designed so that Peer Advisory Teams can interact with as many individuals as possible. Multiple appearances in several sessions should therefore be avoided, unless these individuals have multiple functional roles.

EDAF Onsite Peer Advisory Visit Template

This schedule functions as a rough template for the EDAF Onsite Peer Advisory Visit. The schedule will be adapted to the particular situation of the institution under review.

Day 0

- 17:00-19:00** Initial briefing meeting at the place of accommodation for the Peer Advisory Team (PAT) alone to prepare for the visit
- 19:30** **Informal dinner of the PAT with the Dean**

Day 1

- 09:00-10:00** **Introductory session open to all members of the School: What is EDAF and what benefits does it bring?**
- 10:00-10:30** **Initial meeting with the Dean**
- 10:30-11:30** **Initial meeting with the School's Senior Management Team**
- 11:30-11:45** **Coffee Break**
- 11:45-12:30** **Governance** – Representatives of the School's Governing Body, including for example members of the University leadership or Board of Trustees
These should not be the same people as for the initial meeting.
- 12:30-13:30** **Light Lunch** – Peer Advisory Team alone for discussion
- 13:30-14:30** **Faculty Management** – Dean of the Faculty or those responsible for faculty management
- 14:30-15:30** **The Overall Programme Portfolio**
Associate Dean(s) responsible for overall portfolio and Programme Directors
- 15:30-15:45** **Coffee Break**
- 15:45-16:45** **Teaching Faculty including adjuncts: 2 groups in parallel (4-5 faculty members per group)**
These should be different from the senior staff already met and should mostly be those teaching on the Selected Programme (see Annex 7, Chapter 4, Faculty Interviews).
- 16:45-17:15** **Site visit**
- 19:00** **Dinner and debriefing for Peer Advisory Team alone**

Day 2

9:00-9:45	Session with individual member of Senior Management Team: 2 members and 2 PRT members in parallel
9:45-10:45	Faculty (Intellectual Activity) – Associate Dean / Director for Research, members of the Research Committee and faculty members that conduct research
10:45-11:00	Coffee Break and Debriefing session
11:00-12:00	Students: 2 groups in parallel (<i>not more than 8 students per group</i>) Group 1: exclusively with students from the Selected programme Group 2: with students from other programmes reflecting the programme portfolio
12:00-13:00	Connections with practice and Alumni: 2 groups in parallel (<i>not more than 6 persons per group</i>) Group 1: Connections with practice – Representatives of key external partners and clients, advisory boards, etc. Group 2: Alumni – Representatives of the Alumni network
13:00-13:45	Light lunch – Peer Advisory Team alone for debriefing and discussions
13:45-14:30	Financial Resources – Managers responsible for budgeting, investments, funding, risk management
14:30-15:15	Staff responsible across all programmes for Quality Assurance
15:15-16:30	Peer Advisory Team alone to discuss and prepare their feedback
16:30-17:15	- Debriefing and feedback to the School by the Peer Advisory Team - Informal discussion of the preliminary findings of the Peer Advisory Team
18:30-18:45	End of the visit
19:00	Optional dinner for Peer Advisory Team alone

Annex 9

| EDAF Online Peer
| Advisory Visit Template

Guidelines for Drafting the EDAF Online Peer Advisory Visit Schedule

1. Applicant Institutions will be contacted in advance of the Online Peer Advisory Visit (oPAV) with the request to submit a draft online visit schedule. Draft schedules need to be received by the EDAF office no later than **four (4)** weeks prior to the Peer Advisory Visit. The EDAF office will send the final schedule to the Online Peer Advisory Team (oPAT) no later than two (2) weeks prior to the visit.
2. The draft schedule must be based on the relevant template provided in the following pages. **The exact timing of the visit will be agreed between the School and the EDAF office.** The schedule will be adapted to the particular situation of the Institution under review. Deviations should be explicitly justified when submitting the draft schedule. The Institution should therefore only amend the document in the appropriate places.
3. The Institution shall not contact the Peer Advisory Team or its Chair in advance of the visit to change the schedule. Any proposed changes to the visit schedule must be agreed with the EDAF office first.
4. The draft schedule must contain the names of all session participants as well as their titles/roles, so that the EDAF office can evaluate the appropriateness of their inclusion. All the session participants must be present during the Peer Advisory Visit. Linked to that is also the request to prepare the 'participant directory' prior to the visit to save time during the online interactions.
5. Visit schedules should be designed so that Online Peer Advisory Teams can interact with as many individuals as possible. Multiple appearances in several sessions should therefore be avoided, unless these individuals have multiple functional roles.

EDAF Online Peer Advisory Visit Template

This schedule functions as an outline template for the EDAF Online Peer Advisory Visit and will be adapted to the particular situation of the institution under review.

Preparation required before the oPAV

- **EDAF office:** oversees the preparations and the timeline, fulfils a function of a go-to-person for both the school and the PAT members.
- **School:** prepares a virtual campus tour but, if not possible due to technology limitations, at least create an album with pictures of the premises; furthermore, virtual base room should be set up and participant directory compiled prior to the visit (*replacing Site visit*)
- **oPAT:** read the school's Datasheet and Self-Assessment Report and prepare preliminary questions
- **Chair of oPAT:** prepares a preliminary script to introduce the first session with the Dean and Senior Management Team

Asynchronous: Pre-Session approx. 1-2 weeks prior to the oPAV

1.5 hour	Review of Virtual Base Room materials → School to create a shared folder with documents on the preferred (and easy to access) platform providing access to the PAT approx. 2 weeks prior to the oPAV
1 hour (or as required)	Internal briefing of oPAT on their preliminary findings and to prepare questions <i>*(EDAF office hosting this session)</i>

Synchronous: Day 1 (online time 4 hours; including breaks approx. 5 hours)

45 mins	Initial meeting with the Dean
1 hour	Meeting with School's Senior Management Team
15 mins	Programme break
45 mins	Governance – Representatives of the School's Governing Body, including for example members of the University leadership or Board of Trustees <i>These should not be the same people as for the initial meeting.</i>
30 mins	Programme break
45 mins	The Overall Programme Portfolio & Faculty Management: 2 groups in parallel
2 groups in parallel:	Associate Dean(s) responsible for overall portfolio and Programme Directors & Dean of the Faculty or those responsible for faculty management

15 mins

Programme break

45 mins

Teaching Faculty including adjuncts & Research Faculty (Intellectual Activity)

(4-5 faculty members in one group & Associate Dean / Director for Research, members of the Research Committee and faculty members that conduct research in the second group)

2 groups

in parallel:

These participants should be different from the senior staff already met and should mostly be those teaching on the Selected Programme (see Annex 7, Chapter 4, Faculty Interviews).

Synchronous: Day 2

(online time 3,25 hours; including breaks approx. 4 hours)

30 mins

Staff responsible across all programmes for Quality Assurance

45 mins

Sessions with individual members of Senior Management

2 groups:

Team: 2 members in 2 parallel groups (decision based on size of the School)

15 mins

Programme break

30 mins

Selected Programme – Programme Director(s) and Administrators responsible for this programme

45 mins

Students, Connections with practice, and Alumni: 2 groups in parallel *(not more than 6 persons per group)*

2 groups

in parallel:

Group 1: students from the Selected programme and from other programmes reflecting the programme portfolio

Group 2: Connections with practice – representatives of key external partners, clients, and representatives of Alumni network *(from past experience, corporate representatives and alumni can be the same people)*

30 mins

Programme break

45 mins

Financial Resources & Support Services: 2 groups in parallel

2 groups

in parallel:

Group 1: Managers responsible for financial and risk management

Group 2: Representatives of support services – admissions, marketing, internships, international office, careers, ICT etc.

Synchronous: Day 3

(online time approx. 1,5 hours; 3 hours including the prep of the oPAT)

90 mins

Online Peer Advisory Team only to discuss and prepare their feedback **(EDAF office hosting this session)*

90 mins

Debriefing and feedback to the School by the Online Peer Advisory Team

END OF THE VISIT

Time required in online connection: 3 Days

- **1st day:** approx. 4 hours (5 hours including breaks)
- **2nd day:** approx. 3,25 hours (4 hours including breaks)
- **3rd day:** approx. 3 hours

Annex 10

| Senior Management
| Team Interview
| Template

EDAF

Senior Management Team Interview Template

Institution:

1. Interviewee name:
2. Job title/function:
3. Date & length of appointment:
4. Academic qualification (highest):
5. Prior academic experience (length & nature):
6. Prior academic management experience:
7. Other experience, e.g. business or government:
8. How appointed, e.g. open advert or offered appointment?
9. Reason for applying/accepting post:
10. Job responsibilities, especially direct reports:
11. Institution's objectives/expectations for the post (including awareness of School's vision, mission and strategic objectives):
12. Personal objectives/expectations (including your vision & objectives for the post):
13. Perceived achievements so far:

14. Perceived difficulties/obstacles/frustrations, including availability of resources necessary for achieving the objectives (if any):
15. What do you like/dislike about the job?
16. Relationships with SMT colleagues (e.g. friendly, competitive, collegial):
17. Management & leadership style of SMT:
18. Personal management & leadership style:
19. Personal development needs, if any:
20. What next in career terms:
21. Anything else:

Interviewers:

Annex 11

| EDAF Institutional
| Development
| Profile (IDP)

EDAF Institutional Development Profile (IDP)

The EDAF Institutional Development Profile summarises the expectations in relation to the different criteria as found by the Peer Advisory Team during the visit.

One of four possible assessments for each criterion should be ticked:

- “Above expectations” (i.e., the School has a relative strength);
- “Meets expectations” (i.e., the School exhibits a satisfactory level of development);
- “Below expectations” (i.e., the School has a relative weakness);
- “N/A” (not applicable).

NB: The items deemed “below expectations” form the basis for selecting development objectives for the ensuing mentorship period.

Name of the Institution:

Date of the evaluation:

Chap.	Criterion	Expectations			
		Above	Meets	Below	N/A
2.0	Management and Resources				
2.1	Appropriate mission, vision & values				
2.2	Positive and active approach to ERS				
2.3	Perception of current competitive positioning				
2.4	Relevant strategic direction & objectives				
2.5	Clear links between operational plans & strategy				
2.6	Internal management structure & systems				
2.7	Systems for monitoring institutional performance				
2.8	Institutional quality assurance processes				
2.9	Effectiveness of administrative support				
2.10	Effectiveness of HRM or personnel operations				
2.11	Appropriate facilities & learning environment				
2.12	Effective financial control systems				
3.0	External Linkages				
3.1	Clear strategies for developing external links				
3.2	Corporate involvement in strategy development				
3.3	Corporate involvement in teaching & learning				
3.4	Extent & nature of executive education (if any)				
3.5	Internationalisation strategy				
3.6	Extent of internationalisation within the School				
3.7	Community links & activities				
3.8	Marketing / Communication strategy				
3.9	Use of marketing / communication channels				
3.10	Effectiveness of marketing operations				
3.11	Management organisation for external links				
4.0	Programmes				
4.1	Nature of the programme portfolio				
4.2	Teaching & learning strategy				
4.3	Effectiveness of programme design processes				

Chap.	Criterion	Expectations			
		Above	Meets	Below	N/A
4.4	Appropriateness of programme content				
4.5	Intellectual & managerial skills acquisition				
4.6	Effectiveness of teaching/learning methods				
4.7	Rigour & effectiveness of assessment methods				
4.8	International, corporate & societal relevance				
4.9	Quality of student work at different degree levels				
4.10	Comparability to international degree standards				
4.11	Effectiveness of quality assurance systems				
5.0	Students and Graduates				
5.1	Target profiles and criteria for selection				
5.2	Actual intake quality				
5.3	Preparation for study and progression				
5.4	Support and counselling services				
5.5	Personal and professional development				
5.6	Graduate quality				
5.7	Career placement & support				
5.8	Alumni relations				
6.0	Faculty				
6.1	Mix of faculty & subject areas appropriate to mission and programme portfolio				
6.2	Qualifications & experience				
6.3	Use of adjunct or PT faculty				
6.4	Faculty management processes, e.g. recruitment & retention, performance management				
6.5	Faculty workloads				
6.6	Faculty development				
6.7	International mix and links of faculty				
6.8	Faculty links to the corporate world				
7.0	Intellectual Activity				
7.1	Expectations on intellectual activity				
7.2	Academic & applied research organisation				
7.3	Pedagogical development & innovation				
7.4	Consultancy & other research links to corporate world				
7.5	Management of intellectual activity				
7.6	Quantity & quality of intellectual output				
8.0	Strategy Development				
8.1	Inclusive & credible strategic planning process				
8.2	Realistic assessment of current strategic position				
8.3	Effective SWOT analysis				
8.4	Clear & credible strategic direction & objectives				
8.5	Evidence of comprehensive strategic plans				
8.6	Explicit risk assessment & management				
8.7	Adequacy of financial resources to fulfil strategic plan				
8.8	Clear & credible business plan				

Chap.	Criterion	Expectations			
		Above	Meets	Below	N/A
8.9	Sufficiency of resources to meet current and future needs				
9.0	Senior Management Team				
9.1	Senior Management Team structure				
9.2	Appointment processes for Dean & SMT				
9.3	Qualifications & experience of SMT				
9.4	Management style and culture				
9.5	Leadership abilities				
9.6	Development of the strategy				
9.7	Operational management abilities				
9.8	Performance appraisal & development				
10.0	Concluding Overview				
10.1	SMT understanding of current position				
10.2	SMT perception of key future issues				

Annex 12

EDAF Criteria
Assessment
Form (CAF)

EDAF Criteria Assessment Form (CAF)

This Criteria Assessment Form (CAF) is intended to be a working document for Peer Advisors to help them build up their assessment of the Institution during the on-site visit. It will also serve as a basis for the drafting of the Peer Advisory Report following the visit.
*A fuller description of each criterion listed below can be found in the document entitled **EDAF Assessment Criteria**, which should be read in conjunction with this form.*
The rows can be extended as needed.

Name of the Institution:

Date of the evaluation:

Chap.	Criterion
2.0	Management and Resources
2.1	Appropriate mission, vision & values
2.2	Positive and active approach to ERS
2.3	Perception of current competitive positioning
2.4	Relevant strategic direction & objectives
2.5	Clear links between operational plans & strategy
2.6	Internal management structure & systems
2.7	Systems for monitoring institutional performance
2.8	Institutional quality assurance processes
2.9	Effectiveness of administrative support
2.10	Effectiveness of HRM or personnel operations
2.11	Appropriate facilities & learning environment

2.12	Effective financial control systems
3.0	External Linkages
3.1	Clear strategies for developing external links
3.2	Corporate involvement in strategy development
3.3	Corporate involvement in teaching & learning
3.4	Extent & nature of executive education (if any)
3.5	Internationalisation strategy
3.6	Extent of internationalisation within the School
3.7	Community links & activities
3.8	Marketing / Communication strategy
3.9	Use of marketing / communication channels
3.10	Effectiveness of marketing operations
3.11	Management organisation for external links
4.0	Programmes
4.1	Nature of the programme portfolio
4.2	Teaching & learning strategy
4.3	Effectiveness of programme design processes
4.4	Appropriateness of programme content

4.5	Intellectual & managerial skills acquisition
4.6	Effectiveness of teaching/learning methods
4.7	Rigour & effectiveness of assessment methods
4.8	International, corporate & societal relevance
4.9	Quality of student work at different degree levels
4.10	Comparability to international degree standards
4.11	Effectiveness of quality assurance systems
5.0	Students and Graduates
5.1	Target profiles and criteria for selection
5.2	Actual intake quality
5.3	Preparation for study and progression
5.4	Support and counselling services
5.5	Personal and professional development
5.6	Graduate quality
5.7	Career placement & support
5.8	Alumni relations
6.0	Faculty
6.1	Mix of faculty & subject areas appropriate to mission and programme portfolio

6.2	Qualifications & experience
6.3	Use of adjunct or PT faculty
6.4	Faculty management processes, e.g. recruitment & retention, performance management
6.5	Faculty workloads
6.6	Faculty development
6.7	International mix and links of faculty
6.8	Faculty links to the corporate world
7.0	Intellectual Activity
7.1	Expectations on intellectual activity
7.2	Academic & applied research organisation
7.3	Pedagogical development & innovation
7.4	Consultancy & other research links to corporate world
7.5	Management of intellectual activity
7.6	Quantity & quality of intellectual output
8.0	Strategy Development
8.1	Inclusive & credible strategic planning process
8.2	Realistic assessment of current strategic position
8.3	Effective SWOT analysis
8.4	Clear & credible strategic direction & objectives

8.5	Evidence of comprehensive strategic plans
8.6	Explicit risk assessment & management
8.7	Adequacy of financial resources to fulfil strategic plan
8.8	Clear & credible business plan
8.9	Sufficiency of resources to meet current and future needs
9.0	Senior Management Team
9.1	Senior Management Team structure
9.2	Appointment processes for Dean & SMT
9.3	Qualifications & experience of SMT
9.4	Management style and culture
9.5	Leadership abilities
9.6	Development of the strategy
9.7	Operational management abilities
9.8	Performance appraisal & development
10.0	Concluding Overview
10.1	SMT understanding of current position
10.2	SMT perception of key future issues

Annex 13

| EDAF Progress
| Report Template

EDAF Annual Progress Report Form

Name of Institution:	
Name of Mentor:	
Starting Date of Mentoring:	
Selected Path:	
Progress Report n. ____:	
Due Date:	Day/Month/Year
Submitted:	Day/Month/Year
Date of Mentor's Feedback:	Day/Month/Year
Feedback on Overall Progress:	

Guidelines:

- The *EDAF Annual Progress Report Form* represents a living document enabling Institutions to record relevant changes and initiatives within the framework of the EDAF mentoring and development process.
- The School and the appointed Mentor will receive the relevant form for the progress reports within 2 months following the submission and approval of the Development Objectives and at the beginning of every year of core mentoring. All relevant information will be added by the EDAF Office as well as any adjustments to the form to reflect the specific case.
- When providing feedback on the progress report to the Institution, the Mentor should copy also the EDAF Office.
- When completing the form, **please do not delete any sections and do not change the formatting of this template.**

PROGRESS REPORT Year XXXX-XXXX

Development Objectives agreed between the Institution and the Mentor:	Planned by Date ⁵	In progress	Finished
1. Environmental Context			
• • •			
Comments			
<i>Mentor's Feedback:</i>			
2. Management and Resources			
• • •			
Comments			
<i>Mentor's Feedback:</i>			
3. External Linkages			
• • •			
Comments			
<i>Mentor's Feedback:</i>			
4. Programmes			
• • •			
Comments			
<i>Mentor's Feedback:</i>			
5. Students and Graduates			
• • •			
Comments			
<i>Mentor's Feedback:</i>			

⁵ Indicate the date at which the School plans to start working on this development objective.

Development Objectives agreed between the Institution and the Mentor:	Planned by Date ⁵	In progress	Finished
6. Faculty			
• • •			
Comments			
Mentor's Feedback:			
7. Intellectual Activity			
• • •			
Comments			
Mentor's Feedback:			
8. Strategy Development			
• • •			
Comments			
Mentor's Feedback:			
9. Senior Management Team			
• • •			
Comments			
Mentor's Feedback:			
10. Concluding Overview			
• • •			
Comments			
Mentor's Feedback:			

Annex 14

EFMD Confidentiality
Agreement Form

EFMD

CONFIDENTIALITY AGREEMENT

IN RELATION TO:

EDAF – EFMD GN DEANS ACROSS FRONTIERS

Name of the School:
(delete if not relevant)

Date of the Peer Advisory 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 Peer Advisor / Mentor and/or as a member of the EDAF 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*.

Signature:

Date:

NAME
TITLE
ORGANISATION
ADDRESS

Annex 15

| Policy on Potential
| Conflicts of Interest for
| EFMD Peer Advisors

Policy on Potential Conflicts of Interest for EFMD Peer 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 the Institution or Programme being assessed. It is therefore necessary to ensure that there is no conflict of interest in the appointment of Peer Advisors. 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 Advisory Team for a given Institution to declare any actual or potential conflict of interest as soon as possible to the EFMD Quality Services Department.

Some **sources of potential conflicts of interest** may include:

1. The following types of relationships, current or past, with the Institution 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
2. A current or past personal conflict with the Institution or any of its current or recent leaders.
3. Reciprocity: one of the members of the Institution to be reviewed has in the recent past assessed the advisor's own home institution either in an EFMD review or in some other capacity.
4. Hidden agendas: having been approached by the Institution to encourage him or her to volunteer to be a peer advisor of the Institution.
5. Any other reason that could be perceived by others to bias the judgement of the advisor, even if the advisor is 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 Institution assessed and the advisor's own Institution, etc.) surrounding the situations described above. For example, working for one of the several partners of the Institution to be assessed will not be usually considered as a source of conflict of interest.

Once the conflict of interest is declared, the **EFMD Quality Services Department will act as follows**:

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

Judgement is necessary to find the balance between declaring negligible conflicts of interest and ensuring that true potential conflicts of interests are actually declared. Conflicts of interest should be declared as soon as possible to the member of EFMD making the invitation to participate in the Peer Advisory Team for a given Institution. When the source of the conflict of interest needs to be kept confidential, this should also be made explicit.

The EFMD Quality Services (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 any part in any stage of the accreditation process of the Institution concerned.

Annex 16

| EDAF Mentoring
| Contract

EDAF

Mentoring Contract

This mentoring contract establishes the EDAF mentoring relationship between

_____ (*name of Mentor*)

and

_____ (*name of Mentee Institution*)

represented by _____ (*name of Dean*).

1. Both parties confirm that they will follow the rules and guidelines described in the EDAF Process Manual (in particular Section 4: Guidance for the Mentoring Process).
2. Both parties confirm the confidentiality of the discussions between them and of information supplied in either direction, with the exception of progress reports submitted to the EDAF Office and EDAF Committee.

This contract lasts for the period comprised between the Institution receiving EDAF Eligibility and obtaining an EDAF Certificate.

(*Date and signature of Mentor*)

(*Date and signature of Dean*)

(*Date and signature of Head of Parent Institution*)

Annex 17

Policy on Public Use
of the EDAF Logos

Policy on Public Use of the EDAF Logos

Purpose of the Policy

To ensure that

- The EDAF logos are applied in an appropriate manner
- The logos are not applied to partner institutions
- All Schools apply the EDAF brand in a consistent way
- Publicity of EDAF is informative

Use of the EDAF Logos

Reference to EDAF may be made and the EDAF logo may be used on any publicity material, which is produced in the name of the School alone.

The School may only use the EDAF logo once it has been declared eligible and for as long as it remains in the EDAF process. The School may use the EDAF logo until the end of the mentoring period.

The logo may not be used on co-branded materials (e.g. programme brochures) with partner institutions such as for off-shore or off-campus provision. However, such materials may mention EDAF mentoring of the Parent Institution in the text inside the brochure.

The use of the EDAF logo must always conform to the EFMD guidelines.

Public Reference to EDAF

When public reference is made to EDAF, Schools should (where possible) either provide a brief overview of the EDAF development process or provide a reference or link to the EDAF section on the EFMD GN website. EFMD will mention all Schools on its website that have been declared eligible.

Schools that have acted as a Sponsor Institution will be asked for agreement before their Sponsor role will be published on the EDAF GN website.

Promotion of EDAF

Effective promotion of EDAF by the School will help to reinforce the reputation of EDAF in the marketplace. It is the collective effort of all EDAF Schools that will produce a longer lasting and effective impact. The following are examples of how a School might promote EDAF to its constituencies:

- Include the EDAF logo on the homepage of the School's website with a direct link back to the EDAF section of the EFMD GN website.
- Include the EDAF logo on all printed material, brochures and stationary where the School is mentioned, following the above regulations.
- Within the school or parent institution, spread the news in the internal mail service with a message addressed to all staff and directors; send a message to all professors, students, alumni, recruiters, and business contacts, telling them about EDAF and what it means for the School; include it in internal communication, student and alumni magazines, distributed in printed or in electronic form. If the School has an active social media platform it may post announcements on Twitter, Facebook, LinkedIn, etc. It could also interview the Dean and post this as a podcast/video message.
- Promote externally, as appropriate, the value of EDAF to the development of your School. For example:
 1. Arrange interviews for the Dean to explain to journalists what EDAF is, what the key criteria are and how this process will bring lasting benefits to the School.
 2. Give presentations to colleagues from other business schools.



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