**LIST OF ACRONYMS**

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1 The EOCCS documents are revised periodically and it is the responsibility of the Institution to always use the latest version of the document. Older versions of the EOCCS document set are only acceptable by prior approval from the EOCCS Office. The periodical changes to the documents are always published on the EFMD Global website in the beginning of each year.
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Section 1: Introduction to EOCCS

1.1 EOCCS – EFMD Global Online Course Certification System

EOCCS is an international course certification system operated by EFMD Global. It aims to evaluate the quality of any online business and/or management course that has a contemporary perspective and, where of an appropriately high quality, to certify it.

The process involves an in-depth review of individual courses through exemplary and contemporary comparison and benchmarking. The process considers a wide range of aspects as shown in the EOCCS Course Certification Framework:

Figure 1.1: EOCCS Course Certification Framework

These aspects include:

- The market positioning of the course
- The Institution’s resources allocated to support the course
- The appropriateness of the course team members that design, develop, and deliver the course

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2 Please note that the term course in the following also covers the plural form and courses in a suite together with any learning opportunity that may not be embedded in a module or course (such as a simulation).
• The design process including assessment of stakeholder requirements
• The course objectives and intended learning outcomes
• The curriculum content
• The balance between academic rigour and managerial dimensions
• The delivery system including the quality of teaching
• The depth and rigour of the assessment processes (relative to the course level)

1.2 Benefits of the EOCCS Certification Process

International Quality Benchmark
➢ EOCCS is a demonstration of quality online learning which is determined by rigorous standards and Peer Review for Higher Education, Corporate Institutions, and Public Agencies.
➢ EOCCS is an indication of quality and can be used as part of marketing specific courses to potential learners.

Continuous Improvement
➢ The EOCCS application is an opportunity for an institution to reflect on best practice and innovative solutions in online learning for their own development.
➢ The Peer Review process, with active experts in the field, gives institutions constructive feedback, suggestions for improvement and future growth. EOCCS also explores the sustainability of an institution’s online learning offering.

Community and Peer-to-Peer Learning
➢ You can become part of an Annual Symposium and Community of Practice reporting on new practices, sharing experiences and exploring collective capabilities and future direction as a community.
➢ EOCCS enhances potential for international online collaborations and partnerships.
➢ Through EOCCS institutions can profit from mutual learning opportunities and gain insights into the “best practices” of EFMD members and other online learning practitioners and specialists in the field.

1.3 Scope of EOCCS Certification

1.3.1 Course Scope and Eligibility
EOCCS may be applied to any online course or suite of up to five (5) courses at any course level (e.g., Bachelors, Masters, MBA, PhD, or Executive Education) in the field of business and/or management provided it is at least equivalent to normally 20 hours of study.

Please see Glossary in the EOCCS Standards & Criteria for definition of online course and a suite of courses. Full Eligibility criteria are listed at Section 3.
Courses run by a consortium of 2 or more institutions, or run in partnership with an organisation, may also be offered up for assessment. In these cases, the EOCCS assessment process and fees are tailored to the course under review.

1.3.2 Differentiation from Other Accreditation Systems

EOCCS is the only course certification system able to assess individual courses in the full range from Bachelors to Doctoral degrees, including Executive Education in the business and management education field. EOCCS is available to HE Institutions, Government agencies, private companies, Corporate Learning providers and others.

1.4 EFMD Transversal Issues

Please note that whilst EOCCS aligns with EDAF, EQUIS and EFMDa it acknowledges that individual courses may not display the central EFMD Transversal standard themes of Internationalisation, Sustainability and Corporate links. However, institutions are encouraged to select courses that do align, or to explain how they align to these areas in other aspects of the institution.

The expectation of course development is not optional. The EOCCS Standards contain expectations about QA and re-certification focuses on developments since initial certification.
Section 2: Management of EOCCS

EOCCS is operated by the Quality Services Department of EFMD with the strategic support of the **EOCCS Certification Board (CB)**. Based on the recommendations of the Peer Review Panel (PRP), the CB grants certification. The Board of EFMD appoints members of the CB.

**Figure 2.1: EOCCS Management Framework**

![EOCCS Management Framework Diagram]

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2.1 The EFMD Board

The EFMD Board approves EOCCS policy, standards and procedures based on the proposals submitted by the Quality Services Department following consultation with the CB. It appoints the members of the CB (see the EFMD website for current membership). Any appeals made against certification decisions are also handled by the EFMD Board through an established Appeals Procedure (see Annex 12).

2.2 The Quality Services Department at EFMD

The Quality Services Department manages the EOCCS process and provides the administrative services for the system.
2.3 The EOCCS Certification Board (CB)

The CB is composed of academic and corporate representatives of high-profile organisations that are stakeholders in the quality improvement of management education. The CB advises the EOCCS Director on the strategic development of EOCCS. All major decisions concerning policy, standards and procedures are submitted to the CB for consultation.

The CB normally meets four (4) times a year at the request of the EOCCS Director, one CB member chairs the meetings. A detailed description of the Role and Functioning of the CB and a current members’ list are available on the EFMD Global website.

The CB evaluates Review Panel Reports (RPR) on courses that are being presented for certification, and based on recommendations in the reports, makes the final decision to confer EOCCS certification upon those business and management courses that have demonstrated excellence at an international level. The CB sets the recommendations for further development on which the Institution will need to work on until re-certification. In the case of more pressing areas for improvement, the CB will set required improvements. In this case, the Institution will be asked to work on the areas for improvement to resolve them (see Stage 4: Certification).

2.4 The EOCCS Committee (EC)

The EOCCS Committee (EC) comprises five (5) members: The EOCCS Director, one (1) EOCCS team member and two (2) representatives of the CB, serving a 12-month term during their CB membership. The Chair of the CB is an ex-officio member of the EC.

The EC approves the eligibility of courses at the initial application stage. It reviews Progress Reports on Required Improvements in the case of 1 year certification (see Section 3). It also advises the EOCCS Director on the strategic development of EOCCS. Any questions concerning continuing eligibility for EOCCS are to be resolved by the EC.

The EC normally meets at least four (4) times a year, in advance of the CB at the request of the EOCCS Director, who chairs the meetings. The EC can also be convened with one week’s notice for cases requiring urgent attention or in order not to significantly delay the Application stage of the EOCCS process. A detailed description of the role and functioning of the EC can be consulted on the EFMD Global website.

2.5 The Peer Review Panel (PRP)

The PRP will assess the course on the basis of information provided by the Institution in the EOCCS Application Form. The composition of the PRP is covered in more detail in Section 6. The PRP will have a dialogue with the Institution and will require access to the online learning platform, materials, and other learning resources as appropriate. The PRP will provide their assessment in a report including a recommendation for certification/non-certification to the CB.

2.6 Confidentiality and Conflict of Interest

All members of EOCCS decision-making bodies and the PRP are required to sign the EFMD Global Confidentiality Agreement (see Annex 9) and must abide by the EFMD Global Conflict of Interest Policy (see Annex 10).
**Section 3: The EOCCS Certification Process**

The main stages of the EOCCS certification process are as follows:

**Figure 3.1  EOCCS Process Schedule**

EOCCS is a process combining strategic development, on-going quality improvement and certification. Certification, in the most favourable circumstances, may be achieved within approximately ten (10) to twelve (12) weeks of application if the PRP indicates that the course satisfies the criteria. The precise timings will be discussed and set between EOCCS and the Institution.

Key timings for the EOCCS process are explained below:

**Stage 0:  EOCCS Enquiry**

This is the first direct contact between the Institution and EOCCS. It is an informal stage in the process and typically takes place online or at EFMD events and other conferences. Information on the EOCCS process may be downloaded from the EFMD Global website ([https://www.efmdglobal.org/assessments/online-courses/eoccs/](https://www.efmdglobal.org/assessments/online-courses/eoccs/)) and consists of the **EOCCS Standards & Criteria, EOCCS Process Manual and Annexes**. The EOCCS representative can clarify with the Institution any issues or questions about the EOCCS process and guide them through the EOCCS process.

**Stage 1:  EOCCS Eligibility**

The applicant institution must provide a datasheet confirming the eligibility criteria, together with (guest) access to the course(s) in question at the eligibility stage.
The full eligibility criteria for the EOCCS process are:

- The institution proposing the course has been in existence for at least one year
- The course represents at least 20 hours of study for learners (roughly equivalent to 1 ECTS credit)
- The cohort size for completions is at least 20 learners
- The course has run at least once within the year prior to the application

The datasheet will be submitted to the next available EOCCS Committee meeting. The EC’s decision on Eligibility will be based on the datasheet and interrogation of the online materials made available. The Eligibility decision will be communicated (normally by telephone or e-mail) to the Dean or CEO of the Institution within 48 hours of the meeting of the EC.

Once an institution has achieved Eligibility a full application may be submitted within the 6 months subsequent to the Eligibility decision.

**Stage 2: EOCCS Application Form**

An institution that wishes to enter the EOCCS certification process sends an EOCCS Application Form, in English, to the [EOCCS Office at EFMD Global](https://www.efmdglobal.org) in both Word and PDF formats. One Application Form needs to be filled in for each applicant course or a suite of courses (refer to Glossary in the [EOCCS Standards & Criteria](https://www.efmdglobal.org)). The total length of the EOCCS Application Form should not exceed 15 pages excluding the annexes with a font size not smaller than 11. Upon receipt and acceptance, the EOCCS Application Form will be sent to the EOCCS PRP for the assessment.

The Institution will be invoiced for the application process.

**Stage 3: Review**

By entering the process, the Institution authorises EFMD to use the EOCCS Application Form including Datasheet for EFMD research purposes and aggregate reporting. Anonymity and confidentiality are assured in such cases. Following the receipt of the EOCCS Application Form, the schedule of the Online Review is planned. The Review itself will take place by video conferencing and takes place at a time that suits both parties. Details on the Online Review is provided in Annex 4.

It is absolutely necessary that the applicant Institution provides (guest) access to the online course for the PRP and the EOCCS Consultant. Where courses are in languages other than English, applicant institutions will be asked to provide English interpreters and the Zoom interpreting function will be used during the Online Review.

After the Online Review, the EOCCS Consultant drafts the Review Panel Report (RPR) and sends it to the other Reviewers for agreement. This normally takes about three (3) weeks. The RPR sets out the team’s final assessment of the course against the EOCCS quality criteria together with its recommendation regarding certification. This recommendation can be for 3-year certification with development objectives (CDO), 1-year certification with required improvements (CRI) or denial of certification. The report will also give advice for potential improvements to the course. This report is for the use of the CB in making its final decision on certification and for the use of the Institution in planning its future development.
The final draft report will be sent to the Institution for comment and confirmation of factual accuracy. All factual errors will then be corrected by the EOCCS Consultant in liaison with the PRP. The PRP may, at their discretion, take into account some of the Institution's comments concerning the judgements expressed in the report. The final version of the report will be returned to the Institution, which will be asked to give formal authorisation to the EOCCS Office for the report to be submitted to the CB.

The final RPR is presented at the next CB meeting. The Institution will be invoiced for the Review.

**Stage 4: Certification**

With the formal agreement of the Institution, the RPR containing the recommendation of the PRP is submitted to the CB for the final decision on certification. The Board will only consider the report once all outstanding payments of the Institution towards the Quality Services Department have been made. The CB’s decision will be based on the findings and recommendation presented within the RPR and will be communicated (normally by telephone or e-mail) to the Dean or CEO of the Institution within 48 hours of the meeting of the CB.

The Institution will also receive a letter from the Chair of the CB formally communicating the decision.

**Figure 4.1 Certification Board Outcomes**

- **Certification**
  - 3 yrs. Certification
  - Recommendations

- **Certification with Required Improvements**
  - 1 yr. Certification
  - Recommendations

- **Non-Certification**
  - Eligible for re-application after 12 months.
  - Recommendations

EOCCS Process Manual
The decision will be one of:

- **3-year Certification with development objectives (CDO)**
  Courses that, in the CB’s judgement, meet the EOCCS quality standards will be awarded EOCCS certification for a period of three (3) years. A certified course is likely to have most entries on the Quality Profile (QP) that “meet standard” and only a few below and some above. However, there is always room for development and evidence of continuing progress will be expected at the re-certification review. The CB may specify areas for the development expected.

- **1-year Certification with required improvements (CRI)**
  Courses that, in the CB’s judgement, are evaluated below the EOCCS criteria in particular areas of the four EOCCS standards but otherwise meet the overall standards will be awarded EOCCS certification for a period of one (1) year with “required improvements”. These areas for development can be identified by the PRP. The final decision is in the discretion of the CB which may also decide to set required improvements if the PRP has not done so in the RPR.

  The number of required improvements that can be set is limited to a maximum of three (3). If required improvements are set, the Institution will be advised to work on them. This approach is very well aligned with the spirit of EOCCS where continuous improvement is one of its core values. It is the responsibility of the Institution to improve the identified weaknesses. A 1-year Certification Fee of 1/3 of the full (3 year) Certification Fee is payable at this time.

  Submission, to the EOCCS Office, of a Progress Report on Required Improvements is required 12 months following the date of the CB meeting (see Annex 7). The progress report will be reviewed at the next available EC meeting, where a recommendation will be made and presented at the next available CB meeting. Once the CB decides that the required improvements have been fulfilled, the course(s) will be certified for a further two (2) years. A 2-year Certification Fee of 2/3 of the full (3 year) Certification Fee is payable at this time. In case the CB feels that the required improvements have not been addressed sufficiently, a decision of non-certification will be made.

  In all cases, feedback will be agreed by the CB and offered to the Institution as soon as practicable after the CB meeting.

- **Non-Certification**
  Courses that, in the CB’s judgement, are below the EOCCS standards of quality in a given set of EOCCS criteria will be denied certification. In this situation, the CB will specify a number of improvements required before re-submission for certification.

  The CB may not follow the recommendation of the PRP if it perceives inconsistencies either between the RPR and its annexes or inconsistency across the portfolio of RPRs of other courses.

  A course that has been denied certification (or was withdrawn before the CB meeting) cannot be reconsidered for at least one (1) year after the CB’s decision or date of withdrawal. Institutions re-applying to EOCCS after failing to achieve certification should provide a Progress Report, in addition to the EOCCS Application Form. This should show how the Institution has overcome the weaknesses outlined in the CB’s letter or RPR and indicate the progress it has made in implementing the recommendations in the RPR.
The Institution can appeal against the decision on non-certification (see Annex 12).

**Specific policies applying after certification**

An institution that is awarded EOCCS certification for one or more of its courses must abide by the EOCCS Publicity Policy (see Annex 11).

It is important to note that institutions must inform the EOCCS Office of any major changes that take place within the institution which impact directly the certified course, for example major restructuring of the course or ownership change of the institution (see Annex 8).

Note that the names of all courses and their institutions certified by EOCCS will be published on the [EFMD Global website](https://www.efmdglobal.org) and in other documentation in accordance with the EU Directive on Freedom of Information. EFMD Global will not be held liable for any damage caused by such publication.

**Stage 5: Re-certification**

EOCCS certification is granted for a period of three (3) years, from the date of certification. Therefore, an institution that wishes to maintain its course certification must enter a process of Re-certification before the expiry of the 3-year period. Since the preparation for Re-certification may take several months, an institution should apply approximately six (6) months before the expiry. A period of grace of up to 6 months at the discretion of the CB is assured in such cases.

At the beginning of the 3rd year, the EOCCS Office will prompt the Institution about the expiry of its certification and the procedures described in this document for the renewal of certification. The Institution must then send the EOCCS Application Form for Re-certification (see Annex 2) to the EOCCS Office.

A prerequisite for Re-certification is that the course must have run at least once since initial certification and it must meet the eligibility criteria as determined by the EC at the time of re-certification.

Institutions applying for Re-certification are subject to lower fees than institutions undergoing their first certification (see Annex 3).

**The Course Self-Assessment Report (CSAR)**

The Application Form for Re-certification consists of the Datasheet (DS), which must be updated by the Institution, and the Course Self-Assessment Report (CSAR), which should be typically limited by the Institution to a maximum of 15 (fifteen) pages excluding the annexes with a font size not smaller than 11. The CSAR template contains questions in a survey format. The answers of the Institution should focus on any major changes that have occurred in the areas of the four chapters of the **EOCCS Standards & Criteria** since the previous certification. This likely includes:

- An update on the institutional strategy, commitment, and future plans
- An update on the institutional facilities and resources
- Any new roles that were added to the course team
- An update on how the Institution trains its faculty
- Any changes as regards the target group of the course
• Any changes to the learning design, course layout, content and/or delivery
• An update on the applied technology
• An update on the corporate input to the course
• Any changes to the review of the course
• Any changes to the assessment of participants
• Any changes to the monitoring of teaching and learning

The CSAR should explain the reasons for the implemented changes and analyse and evaluate the principal challenges that the Institution is now facing in relation to the certified course.

EOCCS recognises that in the case of a certified suite of courses, institutions may wish to add further courses to their certification as part of the re-certification process. In this case, the Institution should explain the reasons for adding the course to the suite and define the characteristics of it (i.e., learning outcomes etc.). The maximum number of courses per Application and Review is five. Should the Institution seek to apply with a second stand-alone course for EOCCS certification, the Institution is asked to submit the regular EOCCS Application Form (see Annex 1). The decision of the EC on eligibility for initial or re-certification is final.

The Application Form is tailored for each applicant to embed the recommendations from the previous certification. The CSAR should also be written with careful reference to the observations and recommendations contained in the previous RPR, describing the progress towards the specified areas for improvement.

When compiling the CSAR, it is important to understand that the members of the PRP will normally be different from those participating in the initial review. Whilst Reviewers will have access, on request, to all previous documentation for the Institution held by EOCCS it is proposed that a summary at the start of the CSAR on Re-certification outlines the history and context of the course(s) and the Institution; the new PRP will have access to the previous CSAR.

**Re-certification review process**

Upon receipt and acceptance, the Application Form for Re-certification will be sent to a PRP for the assessment. The Institution will be invoiced for the Re-certification process. The Online Review itself will take place by video conferencing and takes normally place within 5 weeks of the application (see Figure 3.1).

The review process will differ from the initial review process described above (Stage 2) in that it will focus on the major changes explained in the CSAR.

The PRP will normally comprise three (3) members (one Chair and two Reviewers). The review will normally constitute a 90/120-minute dialogue between representatives of the Institution and the PRP (for an indicative agenda see Annex 4 Review Schedule for Re-certification). Individual cases may require flexibility as regards the schedule. As the student perspective is a crucial part of all EOCCS certifications, at least two students will be interviewed in a separate session following the preceding discussion.

After the Online Review, the EOCCS Consultant drafts the RPR and sends it to the other Reviewers for suggestions and amendments. This normally takes about three (3) weeks.
The RPR sets out the team’s final assessment of the course against the EOCCS quality criteria together with its recommendation regarding Re-certification. This recommendation can be for 3-year certification with development objectives (CDO), 1-year certification with required improvements (CRI) or denial of certification. The RPR will also give advice for potential improvements to the course. This report is for the use of the CB in making its final decision on Re-certification and for the use of the Institution in planning its future development.

The final draft RPR will be sent to the Institution for comment and confirmation of factual accuracy. All factual errors will then be corrected by the EOCCS Consultant in liaison with the PRP. The PRP may, at their discretion, consider some of the Institution’s comments concerning the judgements expressed in the report. The final version of the RPR will be returned to the Institution, which will be asked to give formal authorisation to the EOCCS Office for the report to be submitted to the CB. The final RPR is presented at the next CB meeting.

The following stage will be the same as in initial certification processes explained above (Stage 3: Certification). The roles and responsibilities of the PRP and the Institution are outlined in Section 6 below.

**Policy on non-renewal of certification**

EFMD Accreditations and Certifications are designed to be demanding. They provide valuable incentives to even the highest quality institutions to achieve, maintain and develop. Since some Institutions may not achieve the required standard and will be given a negative outcome from a re-certification; EFMD recognises that withdrawal of certification may be harmful to the Institution. Non-certification and non-re-certification are, therefore, mitigated by:

a) The possibility of giving more time for the Institution to manage the situation rather than be instantly removed from the list of certified courses.

b) Granting Institutions an opportunity to state their case again, if they believe this will be to their benefit.

**Deferral Policy**

The following process will apply to the Re-certification of courses previously certified:

1. When the institution learns through the RPR of a recommendation by the PRP for non-certification and the institution then decides to withdraw from the certification process, its name will be removed from the list of certified courses six (6) months after the date of the CB meeting to which the Report would have otherwise been submitted.

2. If the CB makes a negative decision (either based on a negative recommendation or by not supporting a positive recommendation in the RPR), the course will be automatically placed on Deferral and it will not be removed immediately from the list of certified courses.

3. The institution will then be given the option to decide (within a maximum of three (3) months of the Board’s decision date) whether it will accept the non-certification or aim for another full Review to take place within one (1) year of the Board’s decision date. This review will require the preparation of a new CSAR by the institution and will involve a new PRP.

4. The offer of a new PRP should not be interpreted as recognition that the previous PRP, the Board or anyone other involved parties from EFMD did not perform as required. Should the institution disagree with this, it should appeal the decision rather than opting for a new
PRP. The new PRP is an additional opportunity granted to the institution that could potentially lose EOCCS certification. The Institution should then make sure that the new Application Form for Re-certification and the information provided to the new PRP persuasively convey the quality of the course according to the established quality framework. The institution should therefore pay particular attention to the recommendations made in the latest RPR and in the Board’s letter of non-certification. Both of these will be part of the documentation provided to the new PRP.

5. No application fee (see Annex 2) will be charged for the new review but the review fee applicable in the year of the Board’s decision will be charged. The certification fee for the deferral year (i.e., for extension of certification) will also be charged. If the institution then cancels the review during the Deferral period, a cancellation fee will be charged and the course will be removed from the list of certified courses (allowing the six (6) months grace period from the date of the Board’s decision as indicated below).

6. If the institution opts for the new review, it will remain on the list of certified courses until the Board takes a decision on the second RPR. A negative decision at that time will be final, i.e., it will not be allowed a further deferral period or appeal and the course will be removed immediately from the list of certified courses.

7. If the institution rejects the option of a new review and accepts the non-certification decision, it will remain on the list of certified courses for a total of six (6) months after the Board’s decision date.
Section 4: Certification Guidelines

4.1 EOCCS Certification Criteria

EOCCS is designed to certify high quality courses aimed at supporting the development of participants for careers in international business and management. Institutions offering such courses are likely to have a national or international reputation and to have a clear international perspective. The Certification criteria for EOCCS therefore consider both institutional and course dimensions.

4.1.1 Institutional status and reputation

The Institution must demonstrate that its activities fall within the scope of institutions covered by the scheme. It must produce evidence that:

a) The Institution has a record at course creation as well as delivery. It must have been in existence for at least one (1) year.

b) It should have a strong reputation. Evidence for such a reputation should be factual and objective. Indicators may include accreditation or certification by other bodies, positive national audit reports, strong media rankings, list of high-quality international partners or other equivalent measures of recognition.

4.1.2 Course Team(s)

The course team (assistants, authors, discussion leaders, e-tutors, facilitators, instructors, quality managers, retention specialists, content specialists, teachers, teaching assistants, community managers, etc.) must be of a size and be qualified appropriately for the level of course offered. The mix should have international expertise and experience. There should be evidence of high-quality intellectual activity or scholarship (e.g., case development, consulting projects, applied research, academic research) by team members so as to underpin the academic depth of the courses under review. The team should contain sufficient subject, didactic and technical expertise.

4.1.3 Nature of the Course

The course must aim to develop individuals within the broad field of business and management. It must have a sound academic standing but also an appropriate practical approach and include an international perspective. The course should enjoy a good national reputation and may be certified at the national level (where available and appropriate).

4.1.4 Course level

The EOCCS process is designed for management courses, although there is no requirement for these to be at any particular Higher Education level, they will typically be equivalent to Certificate, Diploma, Bachelors, or Masters level. The nature of any award or micro-credential should be stated in the application.
4.1.5 Course quality
The length of the course must be appropriate to the level of study. The content must have appropriate academic depth and rigour and be designed to develop the relevant intellectual skills and managerial competences of participants.

4.1.6 Credibility and sustainability
In order to have an established reputation and credibility and to ensure its long-term viability, the course must have been developing participants for at least one (1) course run.

4.1.7 Minimum size of each intake for mutual learning
To ensure interaction between participants for mutual learning, courses should have a minimum cohort size, or annual group intake conforming to the eligibility criteria. This minimum must be maintained throughout the certification process and certification period.

4.1.8 Contemporary perspective
In order to develop participants for a career in management, the course should develop a contemporary perspective. This is likely to require a diverse mix of participants, up-to-date academic content, the opportunity for interaction with international colleagues and the delivery of some course elements in English or another major foreign language.

4.1.9 Organisational perspective
The course should develop an understanding of the organisational world, which is likely to require corporate input to the course and the opportunity for work-based learning. Participants should be able to develop practical transferable skills.
Section 5: Guidance for Course Self-Assessment

5.1 The Purpose of Course Self-Assessment

The EOCCS Course Certification Framework and supporting documentation provide an external benchmark against which the Institution can measure its performance. The thoroughness with which the self-assessment is carried out and the breadth of involvement with the process will determine a large part of the added value of the quality improvement tool.

The main aims of the EOCCS Course Self-Assessment process are to:

a) provide an opportunity for the institution to take stock of its situation with respect to the course,
b) carry out a comprehensive review of the course,
c) result in an unbiased and critical self-evaluation
d) provide basis and context for the Peer Review Panel (PRP) to begin assessment.

5.2 The Course Self-Assessment Process

EFMD recommends that as soon as possible the Institution should appoint a Project Leader to manage the process and write the Course Self-Assessment Report.

The Course Self-Assessment is an ideal opportunity for the Institution to obtain commitment from key stakeholders to secure resources and improve quality. Considerable care should therefore be taken to present the results of the Course Self-Assessment in a balanced, realistic, and honest way. The conclusions should state clearly what needs to be done to continue progress towards the achievement of the Institution’s goals for the course. It must also provide the basis for an evaluation by the PRP.

The following criteria may be helpful in establishing the Course Self-Assessment process:

- **Systematic process**: the Course Self-Assessment should be well-planned, thorough, and comprehensive. The assessment should be driven by a methodology seeking to answer key questions.

- **Objectivity and balance**: the Course Self-Assessment exercise should result in a balanced statement of current strengths and weaknesses, opportunities and threats and a determination of the action needed to address these issues. The institution should use as many sources of information as possible.

- **Participation**: in collecting data and evaluating the results of the Self-Assessment, the Institution should involve a variety of groups to agree key conclusions and recommendations. This is not just a way of improving objectivity, but also a way of incorporating different perspectives, of improving communication and commitment to the findings.
5.3 The Course Self-Assessment Report

The Course Self-Assessment Report (CSAR) should be based on the EOCQS Standards & Criteria document, which sets out the full range of the EOCQS quality standards and the criteria against which the quality of the course will be measured. The document also lists the supporting information and materials that should be included in the CSAR.

The standards and associated criteria are grouped into four chapters in accordance with the EOCQS Certification Framework (see Section 1):

1. The Institutional Context
2. Course Composition
3. Course Delivery & Operations
4. Quality Assurance Processes

A copy of the EOCQS Standards & Criteria document can be obtained from the EFMD Global website or from the EOCQS Office.

The CSAR should lead to a conclusion in which the Institution makes a case for EOCQS certification for the applicant course. The report should be self-evaluative and self-critical and should demonstrate how the Institution has addressed existing weaknesses and how it will do so in the future. The overall report should be a unified piece of work, rather than a collection of separate individual reports.

The format of the CSAR should follow the four chapters of the EOCQS Standards & Criteria document. It should be noted that the EOCQS criteria are generally phrased in the form of questions, which should be interpreted against the level of course that is to be reviewed.

Institutions should normally follow the order of the sections of the EOCQS Standards & Criteria. It is not necessarily expected that the Institution should address each point in detail. The Institution is expected to provide their own conclusions from the Course Self-Assessment process about the considered dimensions in each section. It is expected that the key issues that are relevant for a comprehensive assessment of the course be carefully addressed.

The items in the EOCQS Standards & Criteria document are formulated in qualitative terms. However, the information provided by the institution should, where appropriate, allow an assessment of the quantitative positioning of the course in relation to each criterion.
Section 6: Guidance for Review Panel

6.1 Introduction

The CB has agreed that the **course standards should be of demonstrably high quality** and worthy of international recognition. It is therefore important for the PRP to establish rigorous evaluations noting that EOCCS is likely to be more difficult to achieve than a standard national certification, not least because of the expectation that courses will have international and corporate perspectives in line with EFMD’s mission.

This section explains the overall process of evaluation and is intended to be a guide for all the parties involved: the Institution and its course team(s), the PRP, and the CB.

6.1.1 Composition of the Peer Review Panel

Each PRP is composed of four (4) members with experience in the organisation and delivery of business and management courses. They normally have different nationalities and/or work in different countries. Each team includes:

- The Chair of the PRP: Dean, Associate Dean, Head of Online Learning, Director of Learning and Teaching or equivalent normally from a different country from the Institution being assessed.
- Two (2) academic representatives (Associate Dean or Course Director) or representatives that are experts in online learning and technologies (e.g., gaming, corporate learning).
- A Corporate representative or senior manager of a professional association.

While the working language of EOCCS is English, every attempt will be made to include a local language speaker within the PRP. In each PRP, there should be one member who is familiar with the local educational environment and can explain the contextual background of the Institution and course for the benefit of the PRP.

In addition, at least one member of the PRP should have specialist knowledge of the specific subject matter of the course being assessed and another member should be well-versed in online learning technologies.

Each member of the Panel will have to sign the EFMD Global Confidentiality Agreement with respect to the information provided to them in the context of the reviews, stating also their agreement to conform to the EFMD Global Conflicts of Interest Policy (see Annex 10). In accepting an invitation to participate in a PRP, each member commits to being present throughout the entire meeting.

Normally, an onsite visit is not required; however, the EOCCS Office or PRP may require an onsite visit as deemed appropriate with a minimum of two (2) reviewers (see Annex 3). It should be noted that the PRP members volunteer their time and are unpaid for their role in the process but will claim reimbursement from the Institution for travel and accommodation costs related to the review should an onsite visit be required.
6.1.2 Objectives of the Review Panel within the EOCCS process

The objectives of the Review Panel are as follows:

- To engage in a constructive dialogue with the Institution.
- To seek additional information as necessary in order to establish a comprehensive understanding of the course offering.
- To confirm and/or challenge the main issues raised in the institution’s Application.
- To make an overall assessment of the course against the EOCCS Standards & Criteria.
- To provide recommendations for future development and quality improvement.

There should be a careful balance between the role of the PRP in providing sufficient information to the CB to arrive at a decision on certification and the wider, strategic, and quality improvement role of the PRP. In carrying out an EOCCS Review Panel, it is important that all parties begin the process with a clear idea of what the Review is designed to achieve. The success of the process rests on a number of conditions being met by all those involved, e.g.:

- The assignment of a trustworthy and credible PRP to the Institution.
- Thorough preparation by the Institution through the production of the CSAR.
- Careful reading of the EOCCS Application Form by the PRP.
- Clear relationships and expectations on the part of all involved.
- The online assessment of the course, platform, learning environment, etc.
- Open discussions free of excessive formality between the PRP and the key stakeholders of the course.
- The presentation of confidential feedback and recommendations for certification in a professional manner, combining the requirements of the CB with an approach that respects the needs of the Institution as a client.

6.2 Preparation for the Review Panel

6.2.1 Study of the CSAR by the PRP

It is very important that each member studies the CSAR carefully before the PRP comes together for the online briefing meeting. As an important starting point for discussion during this meeting, each member should attempt to answer the questions listed below:

- Are all the areas covered by the EOCCS Certification Framework adequately addressed in the report?
- What further information is required?
- Is the report sufficiently self-critical and analytical? Is the Institution’s local context clearly explained?
- Does the course fit the Institution’s overall strategy and programme/course portfolio?
• Are the mechanisms for the strategic management of the course clearly visible from the report?

• Are the problems facing the course clearly formulated?

• Does the Institution clearly sketch out how it plans to deal with these problems? What assessment can be formulated against the EOCCS criteria?

• What are the main issues that will require careful analysis during the subsequent discussions?

By answering these questions, each PRP member is not tied to a final judgement but is simply forming a first impression based on the written information supplied. The schedule of the Online Review is put together in such a way that there will be ample opportunity to further investigate these initial findings and consequently to confirm or refute them.

The Chair should seek to establish the impressions of the other PRP members during the briefing meeting in order to identify further information that should be supplied by the Institution and to prepare the focus of the interviews.

6.3 Review Panel Meeting

6.3.1 Briefing meeting of the Peer Review Panel

The work of the PRP will normally begin with a briefing meeting the purpose of which is to:

• brief the PRP by the Chair,

• review the Institution’s Application and identify the key issues,

• identify any supplementary information to be requested,

• agree on the working methods and allocation of responsibilities within the PRP to match interest and expertise,

• review the schedule for the virtual meetings.

The PRP should also use the meeting to assure themselves that the certification criteria are still being met, e.g., the student intake numbers meet the minimum required.

6.3.2 The EOCCS Quality Profile and Criteria Evaluation Guide

The EOCCS Quality Profile (QP, see Annex 5) is used to summarise the PRP’s overall conclusions after initial reviews or reviews for Re-certification. It lists the key criteria for each chapter of the EOCCS Standards & Criteria. The form requires the PRP to agree on one of the four possible evaluations for each criterion, the choices being “Meets Standard”, “Above Standard”, “Below Standard” or “N/A”. Guidance on these evaluations is given in the QP itself.

The QP is used to structure the work of the PRP when it meets to reach agreement on its assessment.

At the beginning of this preliminary evaluation, the Chair will invite the members of the PRP to make a personal evaluation against each assessment criterion. The normal procedure is for each member to complete the document alone before any discussion has taken place on the assessment of the different items. It is only when each member has committed themselves to an initial judgement that the Chair opens the debate to work towards a common position
that will be entered onto a consolidated version of the QP. This procedure will rapidly indicate where complete agreement exists among the team members and will also clearly reveal the areas that require careful discussion.

Once the final consolidated version of the QP has been agreed, it will no longer be modified unless there are exceptional reasons for doing so. Any change will then require the explicit agreement of all members of the PRP. The document will be attached to the RPR and will be submitted to the CB.

The EOCCS Criteria Evaluation Guide (CEG, see Annex 6) is a tool to assist the PRP members in preparing the Review and filling out the QP.

6.4 Responsibilities and Powers of the PRP Chair

The PRP Chair has a primary responsibility to deliver a clear recommendation from the PRP to the CB. In order to achieve this the Chair is empowered to:

- Defer or postpone the Review where notice is given that PRP members or key Institutional participants are not available on the day of the Review. An example of this is where representative students are not available. The PRP can re-convene to interview them at a separate time. Deferrals should not extend beyond 10 working days of the Review date.

- Cause timings within the Review timetable to be shortened or extended to ensure that the PRPs questions are answered fully. Typically, extensions are necessary where language or technical issues delay proceedings.

- Cause the Review to be halted and reconvened where non-co-operation is encountered. Deferrals should not extend beyond 10 working days of the Review date.

At all times the PRP Chair will set deferrals and extensions to Reviews that do not unduly prevent the final report of the PRP being delivered to the next available CB. Additional responsibilities of the Chair are noted at Section 6.7.4

6.5 Review Panel Decision Making Process and Feedback

The decision-making process should be based on a consensus evaluation of the QP. Similarly, the PRP conclusions and certification recommendations should be agreed by consensus. A certified course is likely to have most entries on the QP that “Meet Standard” and only a few below and some above. The choices are 3-year certification with development objectives (CDO), 1-year certification with areas of required improvements (CRI) or non-certification. These recommendations must be clearly substantiated with reference to observations set out in the consolidated QP.

The PRP is not in a position to directly base its judgement upon comparison with courses run by other institutions, nor is it expected to do so. On the other hand, its judgement must be based firmly on the definition of EOCCS standards as set out in the document entitled EOCCS Standards & Criteria.

A formal oral or written feedback session to the Institution at the end of the PRP Process is a scheduled part of the process. The Chair of the PRP will give the feedback to the Institution and course management, and an outline of the feedback should be “rehearsed” with the PRP.
beforehand. The whole PRP is expected to be present during the feedback so as to support the Chair by presenting a united team.

6.6 Review Panel Report

The Review Panel Report (RPR) is the culmination of the assessment process and is an extremely important document not only for the CB but also for the Institution’s management team. The report will have considerable impact on activities concerning the course and so great care should be taken with the wording of key sections, especially where the comments are critical.

6.6.1 Formulating the Review Panel Report

The EOCCS Consultant is responsible for drafting the RPR using the QP as a basis. The CB has agreed on a preferred structure for this written report (see template later in this Section). In particular, the report should give a brief summary for each major sub-section of the QP.

The EOCCS Consultant, in liaison with the Chair and PRP should prepare a summary of the written report, which includes a General Assessment, Strengths & Weaknesses, Recommendations on Certification plus the QP. The report should make a recommendation to the CB with one of the following types (see Section 3 for details):

- 3-year certification with development objectives (CDO),
- 1-year certification with areas of required improvement (CRI) or
- non-certification.

The documents should be sufficiently extensive to provide enough evaluation of the course for the CB to be able to make a well-informed and rational decision and for the Institution to receive useful guidance on potential improvements to the course. It is expected that there will be 5-6 pages per course plus a further 3-4 pages to cover the institutional and QA aspects (i.e., around 9 pages for one course and 8-10/12 for two courses – this excludes annexes).

6.6.2 Procedure for the Review Panel Report

1. The Chair consolidates comments from the PRP, using the QP and the minutes of the oral presentation.
2. The EOCCS Consultant writes up the first draft of the RPR.
3. The EOCCS Consultant circulates it to the PRP where each member is expected to provide input and comment on the draft.
4. The EOCCS Consultant amends the RPR, considering the comments received from the other members of the PRP, and sends the revised draft, including the summary assessment forms (in separate files), to the EOCCS Office.
5. The revised version, which includes the PRP’s recommendation on certification, is edited, formatted and proofread by the EOCCS Office and submitted to the Institution. The editing process is mainly to ensure that the RPR’s documents are complete and coherent and that arguments are well made so as to lead to the recommendations on certification and the areas for improvement.
6. The Institution responds to any factual inconsistencies or misunderstandings and returns it to the EOCCS Office.

7. Following receipt of comments from the Institution, changes may be made and the EOCCS Consultant, in collaboration with the EOCCS Office will complete the final RPR.

8. The final RPR is sent to the Institution (normally within five (5) weeks from the PRP Meeting), which is asked to give its authorisation for the RPR to be submitted to the CB.

9. Once this authorisation has been obtained, the final RPR is submitted to the CB together with the QP, and the most recent EOCCS Application Form.

10. The PRP members receive the final version of the RPR after the Certification decision.

**Figure 6.1  Review Panel Report template**

| Length: 8-15 pages in total, excluding annexes |
| Title Page |
| Table of Contents |

1. **Introduction**  
   - Composition of the PRP  
   - name, position and country of each reviewer  
   - any additional comments on PRP  

2. **Scope of the assessment**  
   - definition of course under assessment  

3. **Background**  
   - background on the Review: initial or Re-certification, etc.  
   - recommendations and suggestions in previous RPR  

4. **Acknowledgements**  
   - comment on the EOCCS Application Form  

5. **General Assessment**  
   - the findings of the PRP covering the main points or sub-headings of the QP  

6. **Overall Strengths and Weaknesses**  
   - based on the feedback of the PRP following the meeting  
   - succinct factual information to support the judgement of the PRP  
   - particularly for issues rated “above” or “below” standard in the QP  

7. **Recommendations**  
   - certification for a period of three (3) years with development objectives (CDO)  
   - certification for a period of one (1) year with areas of required improvements (ARI)  
   - or non-certification, giving a detailed justification for this recommendation  

8. **Suggestions for Further Improvement**  
   - further advice that the Institution may wish to consider for the course  

9. **Appendix 1: EOCCS Quality Profile**  
   - consensus version  

10. **Appendix 2: EOCCS Application Form**  

11. **Appendix 3: EOCCS Certification Board’s letter (if Re-certification)**
6.7 Roles and Responsibilities

6.7.1 Responsibilities of the EOCCS Office at EFMD Global

➢ Liaise with the Institution throughout the process. Advise and assist in the application process.
➢ Review the eligibility criteria and the initial datasheet prior to submission to the EC.
➢ Fix the timetable for the EOCCS assessment and set the date of the PRP Meeting.
➢ Establish the schedule for the PRP in liaison with the Institution.
➢ Review the EOCCS Application Form (including annexes) prior to sharing with the PRP.
➢ Ensure there is adequate time between receipt of the EOCCS Application Form and the date of the PRP Meeting (4-6 weeks).
➢ Designate the PRP and secure the necessary agreement from the Institution.
➢ Brief the PRP on the requirements of the EOCCS assessment and to confirm receipt of all necessary supporting materials.
➢ Make the necessary logistical arrangements with the Institution and the PRP.
➢ Arrange for the dispatch of materials produced by the Institution to the members of the PRP, co-ordinate the compilation and finalisation of the RPR, in liaison with the Chair of the PRP and the representative of the Institution, and its presentation to the CB.
➢ Ensure that an EOCCS Process Evaluation Forms from the Institution and the PRP are completed.
➢ Arrange for the safe disposal of all sensitive materials following acceptance of the RPR by the Institution.
➢ Communicate the outcome of the CB to the Institution (typically to the Dean or CEO).
➢ Issue the appropriate invoice for certification.

6.7.2 Responsibilities of the EOCCS Project Leader within the Institution

➢ Coordinate the Self-Assessment process and the preparation of the EOCCS Application Form.
➢ Ensure the timely production of the materials for the Application, including annexes, and supporting documentation to the main report.
➢ Ensure that all members of the PRP have access to the virtual learning environment of the course at least one (1) week before the date of the Review.
➢ Liaise with the EOCCS Office. All communication should be addressed, in the first instance, to the EOCCS Office.
➢ Establish a programme for the PRP meeting in collaboration with the EOCCS Office.
➢ In the event of an onsite visit, make the necessary practical logistic arrangements for the visit, including local travel and accommodation.
➢ In the event of an onsite visit, reimburse all travel and accommodation fees for the RP within six (6) weeks from the date of the visit.
➢ Ensure adequate access to key stakeholders during the PRP Meeting. Check the final
RPR for factual inconsistencies.

➢ Complete the EOCCS Process Evaluation Form for Institutions and return it online to the EFMD Global.

6.7.3 Responsibilities of the individual PRP members

Before the Review

➢ Liaise with the EOCCS Office and Chair of the PRP on the requirements of the EOCCS Review.
➢ Attend a briefing meeting with the rest of the PRP up to a week before the date of the PRP.
➢ Prepare themselves adequately about the objectives of the assessment and the criteria used by a careful reading of the EOCCS documents.
➢ Read the EOCCS Application Form carefully and carry out a preliminary SWOT analysis against the EOCCS criteria.
➢ Make appropriate and timely meeting arrangements in accordance with the guidelines given by the EOCCS Office.
➢ Convey to the Institution and the EOCCS Office details of their communication arrangements and any special requirements they may have.

During the dialogue with the Institution

➢ Ensure adequate preparation for all meetings. Be present throughout the entire Review.
➢ Fulfil specified and agreed responsibilities within the PRP team, such as the provision of specialist expertise.
➢ Act as the main spokesperson for some sessions, as agreed with the Chair. Document their own findings clearly enough to support the work of the Chair. Operate in the spirit of consensus. If a member disagrees with the decisions arrived at by the PRP, they must nonetheless abide by the majority opinion, while being free to express a minority view in the RPR.
➢ Hand in to the Chair all relevant documentation relating to their personal assessment (notably the CEG – see Annex 6 and QP – see Annex 5).
➢ Attend a round-up meeting as directed by the Chair within 24 hours of the PRP meeting.

Following the dialogue with the Institution

➢ Liaise, as necessary, with the Chair and other PRP members to confirm the final decision on certification.
➢ Contribute to the drafting of the final RPR.
➢ Provide all requested documentation required for reimbursement of out-of-pocket expenses.
➢ Complete the EOCCS Process Evaluation Form for PRP and return it online to the EOCCS Office.
➢ Make arrangements for the destruction of all sensitive materials relating to the meeting following acceptance of the final RPR.
Avoid expressing any opinion or communicating the results of the assessment to any person outside the PRP and the EOCCS Office.

6.7.4 Additional responsibilities of the Chair of the PRP

Before the Review
➢ Upon receipt of the EOCCS Application Form (including annexes), check if both documents are adequate and inform immediately the EOCCS Office of any inconsistencies or problem areas in the reports.

During the dialogue with the Institution
➢ Brief the PRP members on the review process at the initial briefing meeting.
➢ Act as the main spokesperson for the PRP. Ensure adequate preparation for meetings.
➢ Determine the delegation of lead responsibilities within the team. Divide up some sessions and responsibilities to individuals.
➢ Lead the PRP towards a set of conclusions during the dialogue.
➢ Ensure that the members of the team complete the assessment documents. Hold a meeting of the PRP normally after the conclusion of the dialogue with the Institution during which the team agrees on its conclusions and recommendation.
➢ Run the debriefing for the Institution during the final meeting.
➢ During the EOCCS Review, a Chair may halt / defer / extend the Review in any of the following circumstances:
   • technical problems (e.g., unstable Zoom/Internet connection) which may prevent a smooth procedure
   • non-attendance of representatives that were scheduled to participate in one or more interview rounds
   • hostile and/or non-cooperative behaviour/remarks that prevent a constructive and respectful dialogue of the parties involved
   • language difficulties that extend the scheduled Review time
➢ A quorum of three (3) Reviewers is needed so that the Review can take place. If only two (2) Reviewers are present at any point in time of the Review, e.g., due to sickness or connectivity problems, the Chair will ask the applicant institution if the Review should take place as planned or if the institution wishes that the Review is scheduled for a new day.
➢ Inform the EOCCS Office urgently of any unusual incident that may disrupt the meeting.

Following the dialogue with the Institution
➢ Lead a conversation, either via a subsequent meeting (within 24 hours if possible) to agree or debate the overall views of the PRP members in relation to the satisfaction of the core criteria, in particular reference to the QP and CEG.
➢ Provide amendments to the draft RPR where necessary, in consultation with the EOCCS Consultant and the other members of the PRP, if appropriate.
➢ In exceptional circumstances, only:
• The Chair may decide to postpone the evaluation of the EOCCS QP to a different day in cases where the Review takes significantly longer than planned.

• The Chair may schedule an additional Review session, e.g., an additional 60-minute interview round, in case further questions need to be resolved. This case may arise particularly in cases where the PRP members feel that they cannot yet make an informed evaluation of the course(s) on the basis of what has been presented in the EOCCS Application and Review.

• The Chair may ask for additional information or documents which may be provided by the Institution via e-mail (e.g., evaluation forms) shortly after the Review.

6.7.5 Role of Corporate Reviewers (where applicable)

The corporate Panel member plays an important role in the PRP and provides a corporate perspective within the Review Process by paying special attention to the value of all processes and outcomes to the international business community.

6.7.6 Role of Local Reviewers

The local Reviewer is familiar with the local educational environment and can explain the contextual background of the Institution and course for the benefit of the PRP. Normally this reviewer should speak the language of the country and is selected in agreement with the Institution under review.
Further Information and Contacts

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

https://www.efmdglobal.org/assessments/online-courses/eoccs/

To visit our website, scan this QR Code with your mobile device:

Alternatively, you can contact the EOCCS Office: eoccs@efmdglobal.org