



PROCESS MANUAL

EFMD accreditation for international business schools

LIST OF ACRONYMS

Document version 2025

AoCs		Areas of Concern
AoDs		Areas of Development
AoRIs		Areas of Required Improvement
AB		Accreditation Board
CEF		Criteria Evaluation Form
EC		EQUIS Committee
EE		Executive Education
EQUIS		EFMD Quality Improvement System
KAM		Key Account Manager
OB		Online Briefing
ODR		Online Document Repository
PRR		Peer Review Report
PRT		Peer Review Team
PRV		Peer Review Visit
QP		EQUIS Quality Profile Sheet
S&C		EQUIS Standards & Criteria
SAR		Self-Assessment Report

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IMPORTANT NOTES

1. Privacy

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

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

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

Learn more about EFMD privacy policy at <https://efmdglobal.org/privacy-policy/>.

2. The EQUIS Core Documents Package is available for download on the [EFMD website](#)

and consists of:

-  1. EQUIS Standards & Criteria
-  2. EQUIS Process Manual
-  3. EQUIS Process Manual Annexes

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

Introduction to EQUIS

| Section 1

Section 1 | Introduction to EQUIS

EQUIS – the EFMD Quality Improvement System

EQUIS is an international quality assessment framework embracing strategic review, quality improvement and accreditation for schools.¹ It applies to schools in any cultural environment in any region and is uniquely international, designed to offer a powerful tool for cross-border development of excellence.

Giving diversity a framework

True to its international mission, EQUIS balances the need for excellence standards which respect diverse cultural and educational contexts. EQUIS does not emphasise any particular model for business schools, with EQUIS accredited schools ranging from private business schools focusing on postgraduate and executive education to public university faculties of business and management with a broad portfolio of undergraduate and postgraduate programmes. No specific programme type is a pre-condition for entry into the scheme.

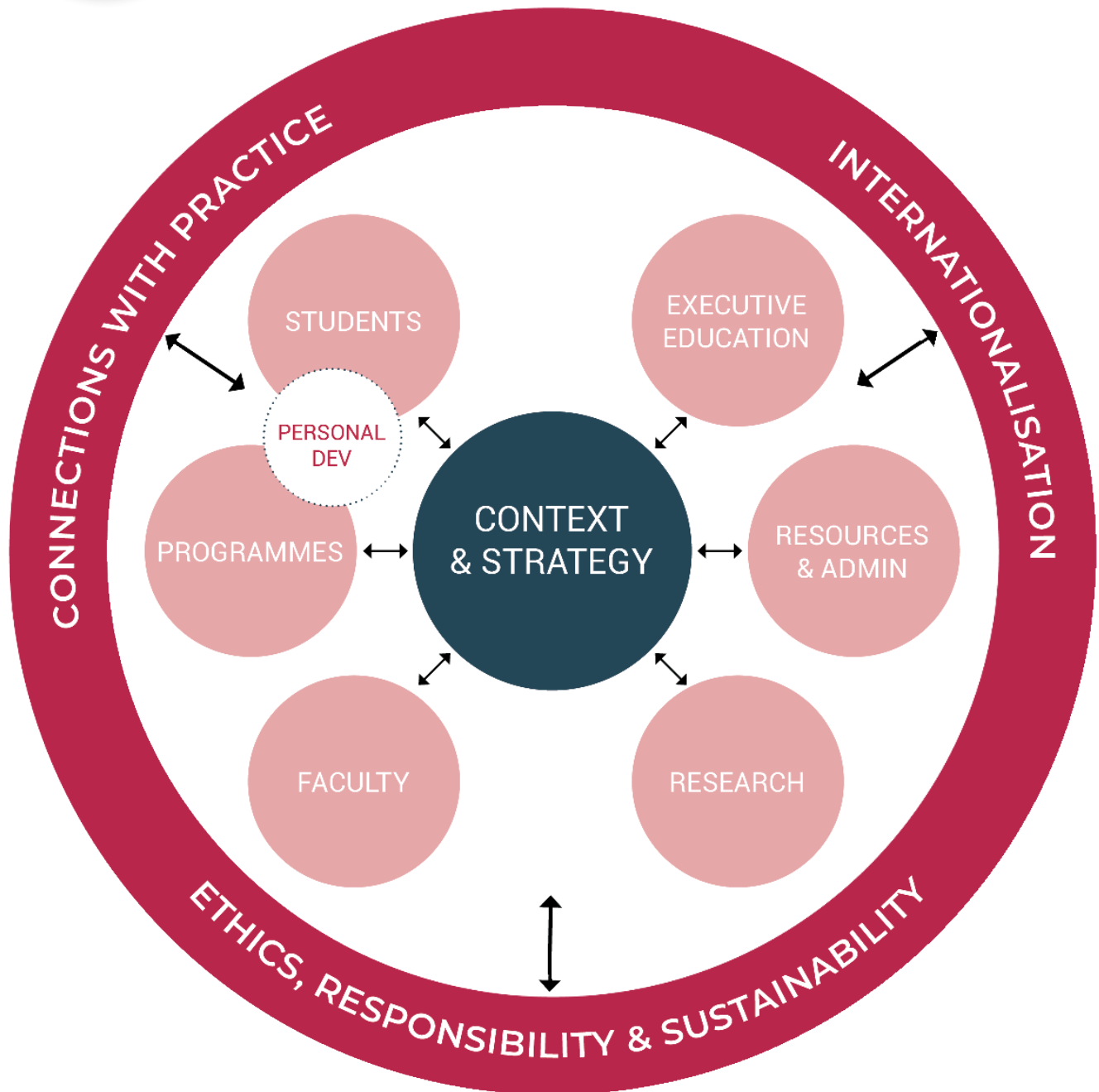
Providing a flexible development tool

The EQUIS system is a quality improvement framework that provides a full strategic evaluation of a school's current and future development by peers and professional stakeholders; EQUIS accreditation recognises a school's attainment of high international quality. The EQUIS framework consists of ten standards covering different inter-related areas, centred on the school's Context and Strategy, which forms Standard 1. The EQUIS framework is shown in Figure 1 below and each standard is fully described in the document entitled [EQUIS Standards & Criteria](#) (S&C).

¹ Defined as the organisational entity providing business and management education (a Faculty, School or Department within a university or a free-standing business school). See Introduction to the EQUIS Standards & Criteria document ([paragraph 3](#)) for a full definition.

Figure 1

EQUIS Standards & Criteria



Management of EQUIS

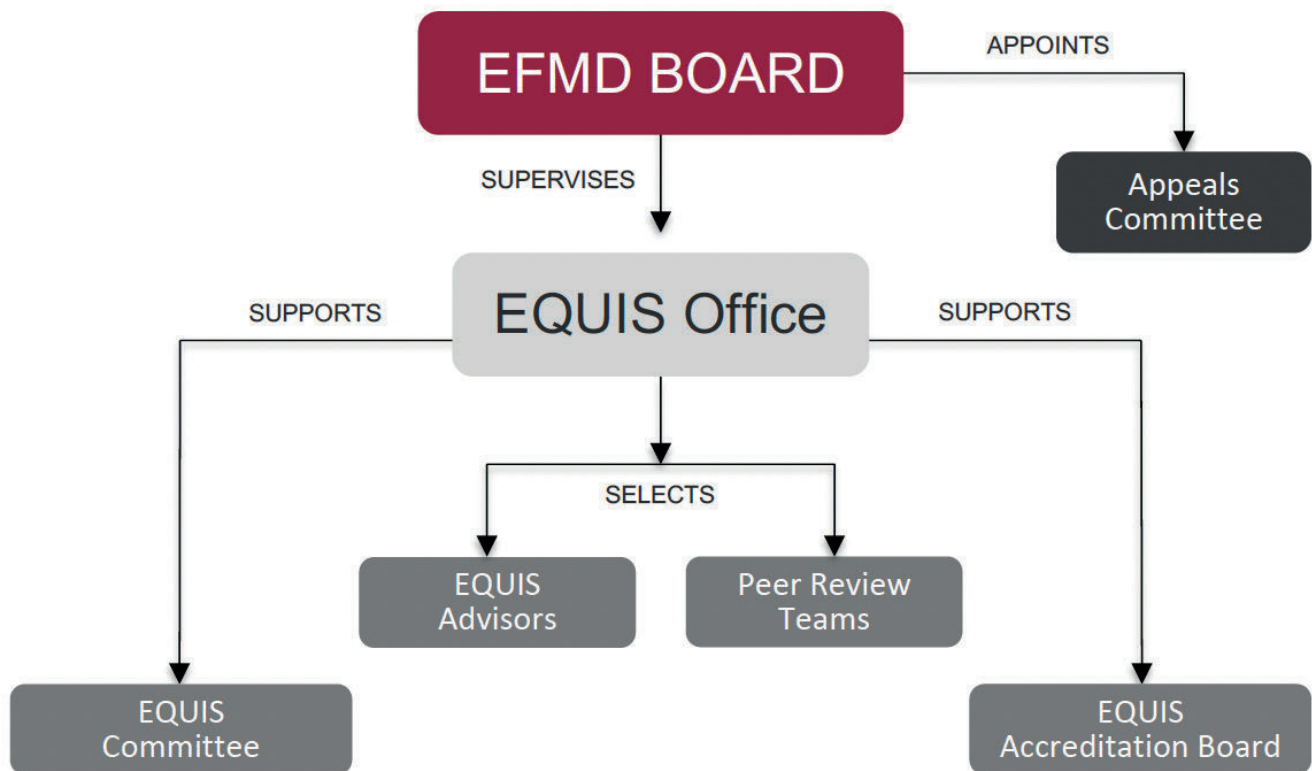
I Section 2

➤ Section 2 | Management of EQUIS

The management of EQUIS is co-ordinated by the EQUIS Office, with two key policy and decision-making committees: the EQUIS Committee and the EQUIS Accreditation Board, as shown in Figure 2 below.

Figure 2

The Management of EQUIS



1. The EFMD Board

The EFMD Board is comprised of senior international representatives from business schools and the world of practice. The EFMD Board approves EQUIS policies, standards and procedures based on the proposals submitted by the EQUIS Office after consultation with the EQUIS Committee.

The EFMD Board appoints the members of the EQUIS Accreditation Board and the EQUIS Committee, both supported by the EQUIS Office. The EFMD Board also appoints the Appeals Committee which handles appeals through an established Appeals Procedure (see [Annex 25](#)).

2. The EQUIS Office at EFMD

The EQUIS Office develops and implements appropriate quality assurance procedures and manages EQUIS processes, providing administrative services for the system.

The EQUIS Office is headed by the EQUIS director, supported by EQUIS associate directors and EQUIS senior advisors alongside EQUIS managers and coordinators, who also function as Key Account Managers (KAM) assigned to each school. The KAM is the main point of contact with a school throughout the entire EQUIS process.

3. The EQUIS Committee (EC)

The EQUIS Committee (EC), composed of academics and representatives from the world of practice, advises the EQUIS director on the strategic development of EQUIS. All major decisions concerning policies, standards and procedures are submitted to the EC for consultation.

The EC approves the eligibility of schools. Any questions concerning continuing eligibility are resolved by the EC.

The EC meets at least three times a year at the request of the EQUIS director, who chairs the meetings. A detailed description of the role and functioning of the EC and a current members' list can be consulted on the [EFMD website](#).

4. The EQUIS Accreditation Board (AB)

The EQUIS Accreditation Board (AB) is composed of academics and management education stakeholders from the world of practice. Meeting at least four times a year, it evaluates the Peer Review Reports on schools that are seeking EQUIS (re)accreditation and, based on their recommendations, makes the final decision to grant EQUIS accreditation. For more information on the role and functioning and a current members' list see [EFMD website](#).

5. EQUIS Advisors

EQUIS Advisory – an optional service – support the school during the Pre-Eligibility and/or Pre-Review processes and advise schools so that they can manage the accreditation process more effectively, produce accreditation documents with greater clarity, and address any development issues prior to proceeding with the accreditation process.

The Advisory Service is managed by the EQUIS Office. EQUIS advisors are drawn from a pool of experts comprised of chairs and experienced members of Peer Review Teams as well as former members of AB and EC. More information is given on the Advisory Service in [Section 3](#) of this document (Stages 3, 4 and 5) and [Annex 7](#).

6. Peer Review Teams (PRTs)

Each Peer Review Team (PRT) is composed of four members (including the PRT chair) holding senior positions in the world of management education or with substantial experience in this field.

The PRT assesses the school based on information provided by the school in a Self-Assessment Report and in meetings held during a Peer Review Visit (PRV) to the school. The PRT provides their assessment in a Peer Review Report (PRR) including a recommendation for accreditation to the AB.

[Section 5](#) of this document describes the PRT composition and process in greater detail.

7. Appeals Committee

Where schools have appealed a decision on eligibility or accreditation, in line with the Appeals Procedure (see [Annex 25](#) of Process Manual Annexes), an Appeals Committee can be set up by the chair of the EFMD Board, comprising three EFMD Board members.

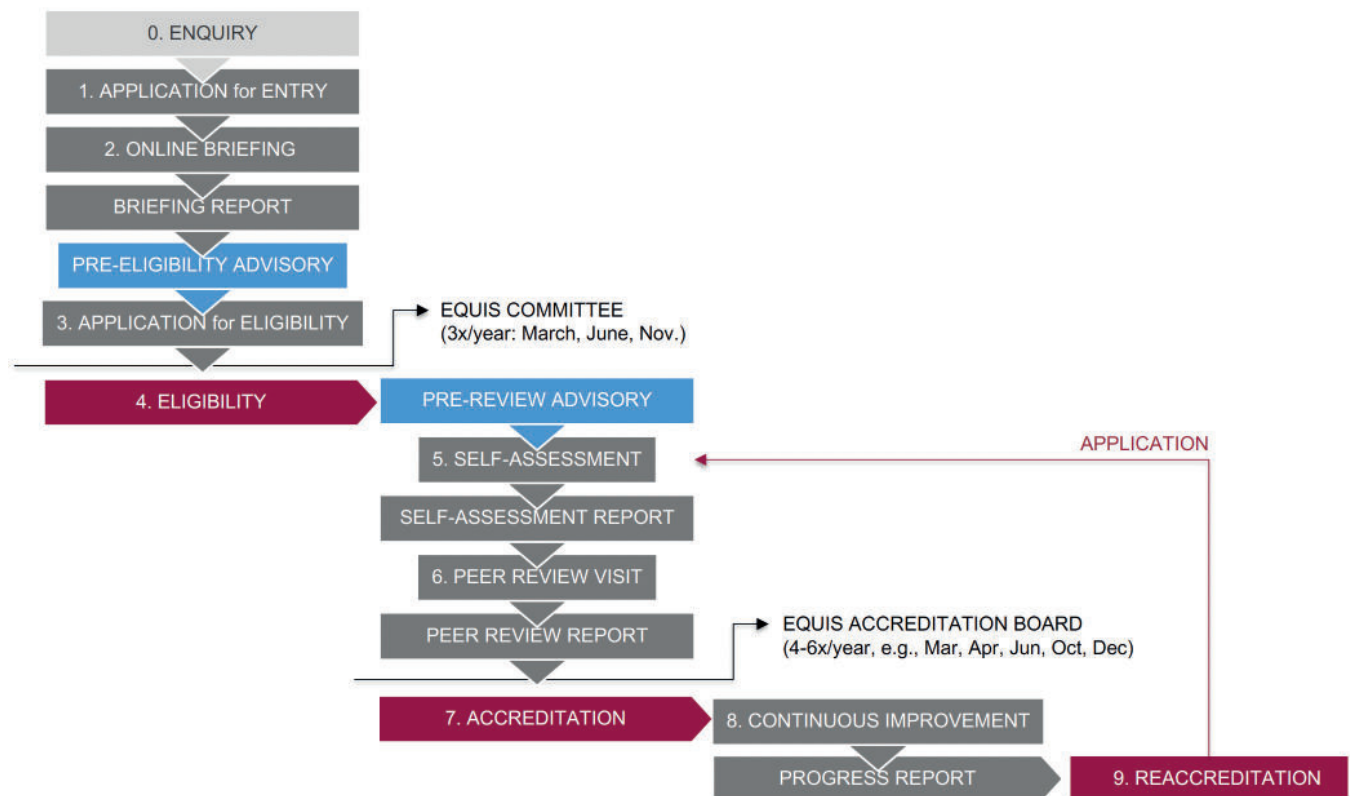
The EQUIS Accreditation Process

| Section 3

Section 3 | The EQUIS Accreditation Process

The stages of the EQUIS accreditation process are indicated in Figure 3 below.

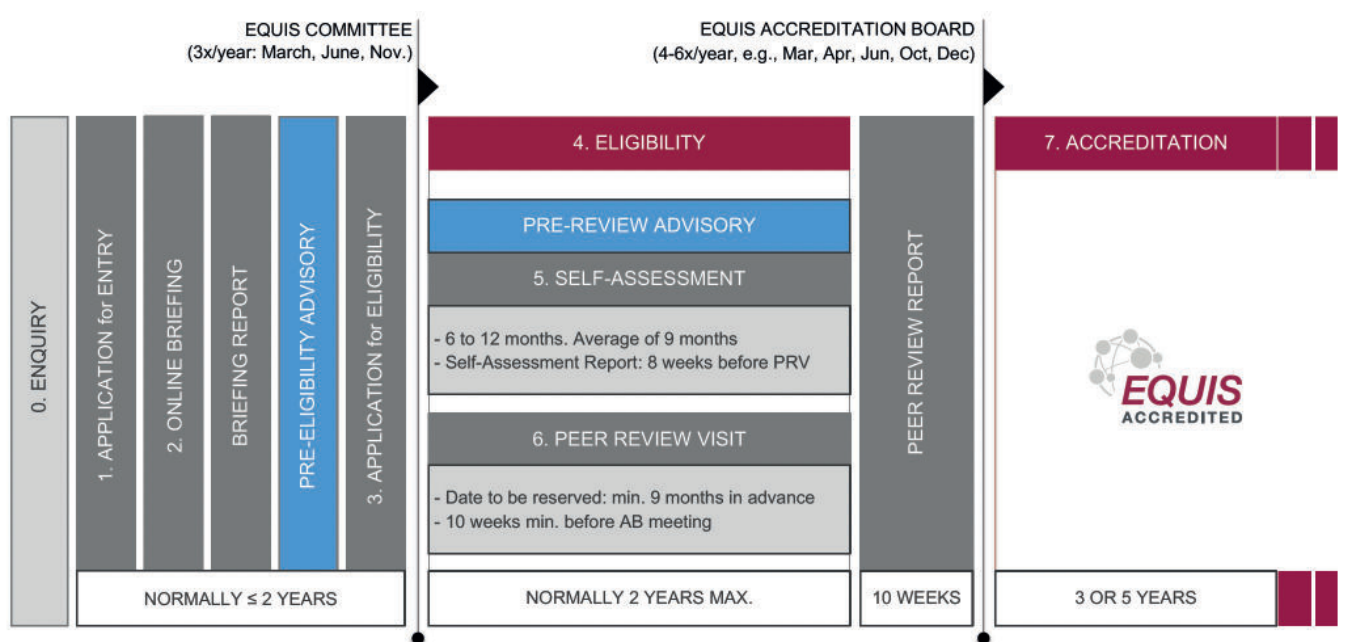
Figure 3 EQUIS Process Flowchart



EQUIS is a continuous improvement process combining strategic institutional development, ongoing quality improvement and accreditation. Initial accreditation will typically require 2-3 years and in the most favourable circumstances may be achieved within 15 months of application.

Key timings for the EQUIS process are summarised in Figure 4 and are explained in more detail in the following text.

Figure 4 EQUIS Key timings



0 Stage 0: Enquiry

This is the first direct contact between the school and the EQUIS Office and precedes the Formal Application. An informal stage in the process that begins with an initial call with the EQUIS Office or a meeting at [EFMD events](#) where EQUIS leadership² is present. Before making the enquiry, school representatives should have read the documents in the standard [EQUIS Core Documents Package](#)³. During this Enquiry stage, schools are advised to attend one of the EQUIS introductory webinars organised regularly by the EQUIS Office, published on the [EFMD website](#).

After an initial conversation with the EQUIS Office, to clarify any issues or questions concerning the EQUIS process, if appropriate, the school may complete a preliminary Draft Datasheet, via an online platform, OX (see [Annex 2](#) for the datasheet structure). Login data for OX is provided upon request by the assigned KAM. The EQUIS Office then reviews and comments on the preliminary Draft Datasheet for clarity, consistency and completeness.

² The EQUIS leadership team is comprised of the EQUIS director, associate directors and senior advisors.

³ The EQUIS Core Documents Package is available for download on the [EFMD website](#).

Once the Draft Datasheet is appropriately completed, the EQUIS Office will offer non-binding preliminary advice to the school's management regarding whether to proceed with a [Formal Application for Entry](#) or continue to attend to any issues that require development. In order to apply formally, the school **must apply for EFMD full membership, or already have applied or be a full member**. Schools which have EFMD full membership may receive several rounds of comments on their Draft Datasheet. Whatever views are offered by the EQUIS Office, it remains the prerogative of the school to proceed at any time, if it so chooses.

SCHOOL ACTIONS FOR STAGE 0: ENQUIRY

- › Contact the EQUIS Office noting interest.
- › Meet with a member of EQUIS leadership (within the initial call or at some of the EFMD events).
- › Attend EQUIS introductory webinar if possible.
- › Submit Draft Datasheet via OX if deemed appropriate.
- › If school wishes to pursue further rounds of feedback on the Draft Datasheet, apply for EFMD full membership (if not already applied or have full membership).
- › Revise Draft Datasheet as necessary – normally up to three drafts can be reviewed before formally entering the EQUIS process.
- › Decide whether to enter the EQUIS process formally (i.e. enter Stage 1).

1 Stage 1: Formal Application for Entry

As noted above, only schools that have already applied for full membership of EFMD or are already full members of EFMD may apply to enter the EQUIS process formally. The application entails sending an email to the EQUIS Office with an Application Form ([see Annex 1](#)) in attachment and submitting the Entry Application Datasheet via the online platform, OX ([see Annex 2](#) for the structure of the datasheet).

In applying for entry, it is critical that the school be familiar with the documents included in the standard [EQUIS Core Documents Package](#).

SCHOOL ACTIONS FOR STAGE 1: FORMAL APPLICATION FOR ENTRY

- › Send formal email to the EQUIS Office with Application Form.
- › Submit Entry Application Datasheet via the OX platform.

2 Stage 2: Pre-Eligibility: Online Briefing & Pre-Eligibility Advisory

An Online Briefing (OB) will be organised by the EQUIS Office as soon as possible and usually not later than three months after receipt of the Formal Application for Entry. Sometimes schools that have failed to achieve accreditation previously will be recommended to undertake an OB. The OB takes the form of a videoconference between a member of the EQUIS leadership (the briefing expert) and the school, lasting between 2.5 and 3 hours.

Following the OB, an OB Report is prepared by the briefing expert. Further details on the OB can be read in the Online Briefing Guide and Online Briefing Report Form ([Annexes 4](#) and [5](#)). After sharing the OB Report with the school, the EQUIS Office assigns a pre-eligibility advisor who will support the school during the stage leading up to the [Application for Eligibility](#) (Stage 3), if the school indicates that it wishes to have an EQUIS advisor.

Pre-Eligibility Advisory is a free, optional service of EQUIS with a minimum duration of nine months. It focuses on addressing the developmental needs identified in the OB Report to produce an updated Eligibility Datasheet that represents the school comprehensively and with sufficient clarity to enter formally the [Eligibility stage](#) of the process. The school's decision to proceed with Pre-Eligibility Advisory will be confirmed when the OB Report has been submitted to the EQUIS Office. A school that was previously denied eligibility or accreditation or withdrew from the process may also make use of Pre-Eligibility Advisory.

The Pre-Eligibility stage ends with the joint resolution of the school and EQUIS advisor (if engaged) that the school is ready to be considered by the EC for eligibility and that the remainder of the accreditation process is likely to be completed within two years of eligibility being granted. The school, however, may still proceed with the [Application for Eligibility](#) without the explicit support of the pre-eligibility advisor.

The [Application for Eligibility](#) should take place within two years of the OB. If not, an updated Eligibility Datasheet and Progress Report should be submitted, outlining the progress made with respect to the comments identified in the OB Report relating to the [Eligibility Criteria](#).

SCHOOL ACTIONS FOR STAGE 2: PRE-ELIGIBILITY: ONLINE BRIEFING AND PRE-ELIGIBILITY ADVISORY

- › Host an OB with a briefing expert (for details see [Annex 4](#): Online Briefing Guide).
- › Decide on whether to use the Pre-Eligibility Advisory.
- › Review the OB Report once received.
- › Work with the allocated EQUIS advisor for a minimum duration of nine months to revise the Eligibility Datasheet.
- › If the Pre-Eligibility Advisory is not used, indicate to the EQUIS Office which EC meeting the school will target for the presentation of its Application for Eligibility.

3 Stage 3: Application for Eligibility

The school applies for eligibility by submitting a formal email to the EQUIS Office (indicating which scheduled EC meeting it seeks to target), together with the Eligibility Datasheet, which must be updated via the online platform, OX, at least one month before the EC meeting.

If the school has opted for the [Pre-Eligibility Advisory](#), the EQUIS advisor will independently submit a Pre-Eligibility Advisory Evaluation of the school (see [Annexes 7](#) and [8](#)). This report follows the same structure as the OB Report and includes a discussion of the school's principal strengths and risks from an EQUIS perspective. The report is shared with the school.

SCHOOL ACTIONS FOR STAGE 3: APPLICATION FOR ELIGIBILITY

- › Email the EQUIS Office formally indicating which EC meeting it wishes to target.
- › Revise and submit the Eligibility Datasheet on OX at least one month before the targeted EC meeting.
- › Schools re-entering the process after non-eligibility or applying for eligibility more than two years after the OB must also submit a Progress Report and updated Eligibility Datasheet.

The EC is responsible for examining all applications and for taking decisions on eligibility. It will declare a school eligible if it is satisfied that the school meets the following **Eligibility Criteria:**

1. EFMD Full Membership in Good Standing

The school must maintain this status while going through the accreditation process as well as during the entire period of accreditation.

2. Institutional Scope

The school's activities must fall within the scope of institutions covered by the scheme and it must produce evidence that it:

- 2.1 is or is part of a degree awarding institution; institutions with the sole focus on non-degree education cannot be declared eligible, even if they are attached to a higher education institution.
- 2.2 has a mission that is appropriate for a higher education institution.
- 2.3 has a primary and main focus on management or business administration; all activities with this focus are considered core activities. To a limited extent, a school can engage in non-core activities, which need to complement and support its core activities; other non-core activities are not subject to EQUIS accreditation.
- 2.4 has reasonable autonomy in formulating and implementing its strategy, in the management of its academic staff and budget, and in the design and delivery of its programmes.
- 2.5 has clear boundaries which make it possible to distinguish it from other units within the wider institutional structure; boundaries refer to management and academic control as well as external recognition by stakeholders and the market at large.
- 2.6 has academic staff covering the principal management disciplines.
- 2.7 has been in operation for at least 10 years, which can include the transition from a previous structure to the current one.
- 2.8 can demonstrate sufficient institutional stability in cases where major structural changes have occurred.

3. Excellent National Standing

The school is recognised as an institution having excellent standing in its home market. The school should produce evidence that it enjoys significant recognition for excellence in at least two clearly defined areas of activity.

4. International Reputation

The school is recognised outside its own country.

5. Breadth of Activities

The school has reasonable breadth in its programme portfolio as demonstrated by presence in at least two of the principal segments (bachelor's, master's, MBA, PhD, executive education). The school must also demonstrate substantial engagement in knowledge generation and dissemination.

6. Core Faculty

The school must demonstrate that the size of its core faculty is sufficient to support its portfolio of activities and the number of students enrolled in its programmes and the faculty must constitute a viable academic community. This suggests that the school should have a core faculty of at least 25 FTE qualified academics.

7. EQUIS Standards & Criteria

The school has a reasonable prospect of meeting the S&C normally within two years of being declared eligible, which is the key factor for the EC in making the eligibility decision.

Throughout this process, the onus is upon the school to present a convincing case that it does demonstrably satisfy the above Eligibility Criteria.

The EC meets approximately every four months to make the eligibility decisions.

A school will be presented to the EC when the following documents have been submitted to the EQUIS Office at least one month before the targeted EC meeting date:

- ◆ The Eligibility Datasheet
- ◆ The Online Briefing Report or Progress Report (in cases of re-application for eligibility)
- ◆ The Pre-Eligibility Advisory Evaluation (if an EQUIS advisor has been engaged).

The EC will consider the conclusions of the EQUIS advisor or briefing expert made in the aforementioned documents but will not be bound by them in making its final decision.

Where a school is declared eligible, the EC will also select a specific programme (known as the Selected Programme) to be assessed in greater depth during the PRV. The EC will also determine whether executive education (EE) should be included or excluded from the accreditation, in the case of an initial accreditation. For reaccreditation, confirmation of whether to include any EE in the PRV is given by the PRT.

The decision to declare a school eligible will be accompanied by brief preliminary comments by the EC on the school with respect to the EQUIS Standards, reflecting any areas of concern or difficulties that may be envisioned along the road to the future accreditation (referred to as Reservations). A favourable eligibility decision is not to be interpreted as a formal prediction of future success at the end of the accreditation process.

The decision to declare a school not eligible will be founded on the EC's judgement that the school has not made a convincing case that it satisfies the Eligibility Criteria.

The formal decision will be communicated via phone or a brief e-mail to the head of school within 48 hours of the meeting of the EC. This communication will be followed up with a formal Eligibility Letter, normally within one week of the EC meeting.

A school can present an appeal against the decision on eligibility. For details, see [Annex 25](#).

Being declared eligible signifies that the school can advance to [Stage 5](#) of the EQUIS process: Self-Assessment. A school is expected to email its plans to the EQUIS Office indicating the period in which it aims to host the PRV, within two months of the notification of eligibility.

At this time, the school should also inform the EQUIS Office if it chooses to make use of [Pre-Review Advisory](#), a free, optional service of EQUIS, which can be a continuation of the Pre-Eligibility Advisory, or a new appointment (see [Annex 7](#)).

The status of eligibility is normally valid for a maximum period of two years, within which the PRV must take place. Under exceptional circumstances, the EC may extend this period to four years.

If a school is declared not eligible, it cannot re-apply within two years. Schools re-applying for eligibility between two and five years after failing to achieve eligibility or after eligibility has expired, should provide a Progress Report, in addition to the updated Eligibility Datasheet. This should show how the school has overcome the weaknesses outlined in the EC Eligibility Letter and indicate the progress made in those areas. If more than five years have elapsed, a re-application will be treated as an initial application.

The school re-applies for eligibility by submitting a formal email to the EQUIS Office indicating which scheduled EC it seeks to target and an Eligibility Datasheet, updated via the online platform, OX, at least one month before the EC meeting. The formal email should attach an Application Form ([Annex 1](#)) and the above-mentioned Progress Report. The school is subject to the Fee Schedule (see [Annex 3](#)) valid in the year of their re-application for eligibility.

IMPORTANT: EQUIS requires that the Eligibility Criteria be maintained throughout the accreditation process and thereafter during the period of accreditation awarded. If the criteria are no longer met, the school is obliged to inform the EQUIS Office without delay. The EQUIS Office will then review the case and, if necessary, consult the EC.

SCHOOL ACTIONS FOR STAGE 4: ELIGIBILITY EVALUATION AND DECISION

- » Email the EQUIS Office, indicating the period in which the school aims to host the PRV and whether it wishes to engage the Pre-Review Advisory, within two months of the notification of eligibility.

Where a school is declared eligible, it should initiate an extensive self-evaluation leading to a Self-Assessment Report (SAR). For detailed information on Self-Assessment stage see [Section 4](#).

This process will normally take a minimum of six to twelve months. If, in declaring the school eligible the EC has communicated Reservations, then the school should make tangible progress in the respective areas before receiving the PRT.

Within two months of the eligibility decision, the school should inform the EQUIS Office regarding the time it will need to prepare the SAR and PRV. The EQUIS Office schedules the [PRV](#) at least nine months in advance.

Factors to consider when estimating the date for the PRV include:

- ◆ The SAR should reach the EQUIS Office at least eight weeks before the date on which the PRV will start.
- ◆ All school internal approval procedures and requirements are met before proposing a date.
- ◆ The PRV should take place at a time when courses from the major programmes are taking place within the school.
- ◆ Advice from the pre-review advisor, where the school has requested this service.

Once dates are set, rescheduling is only permitted for unforeseeable and major causes, as it will produce a considerable delay in the accreditation process. The school will have to cover all expenses incurred by the PRT (e.g., flight tickets) up to the time of cancellation/postponement of the PRV. In addition, the school will be charged an EFMD Administration Fee, see [Annex 3](#) for the Fee Schedule.

For an initial accreditation, as noted above, the school may request to work with a pre-review advisor for a minimum period of nine months. The pre-review advisor helps the school to address Reservations or AoCs that may be indicated in the Eligibility Letter and provides more general developmental support. The pre-review advisor may comment on the draft SAR and provide counsel on the process of preparing the self-assessment and PRV, which helps the creation of a coherent, self-critical, and convincing SAR that sets out how the school meets the S&C. The pre-review advisor independently submits a Pre-Review Advisory Evaluation of the school (see [Annex 9](#)). This report is shared with the school and provided to the PRT prior to the PRV.

In the special cases where the EC had decided to extend the eligibility period to four years, an assessment is made by the end of year two, by the EQUIS Office, as to whether the school has made progress on the Areas of Concern (AoCs) expressed by the EC. To facilitate such an assessment both the EQUIS advisor (where one is appointed) and the school individually submit a report describing how the school has addressed the AoCs. This will be the Eligibility Progress Report ([Annex 6](#)). The school may continue the process with or without (the same or different) EQUIS advisor.

For schools seeking reaccreditation, the EQUIS Office will inform the school of the timelines in which

to re-apply and propose a date for the PRV.

The SAR, together with its Annexes and the Student Report (see [Annex 15](#) and [Section 4](#)) should be sent by email to the EQUIS Office (as separate PDF files) and an updated SAR Datasheet should be submitted via OX at least eight weeks before the date set for the PRV. Upon approval of completeness, and at least six weeks before the start of the PRV, the school must send all four aforementioned documents to each of the peer reviewers in electronic copy (PDF); and in hard copy upon request. The school should make its Online Document Repository (ODR), as detailed in [Annex 14](#), available to the PRT and the EQUIS Office at least two weeks before the PRV.

It is important to note that, should a SAR be considered inadequate as a preparation for the PRV or if it is delivered too late, the visit may be postponed. In this situation, any additional costs incurred, for example the rescheduling of peer reviewer flights, will be at the expense of the school.

Unless otherwise explicitly notified, by entering the process, the school authorises EFMD to use the submitted documents for research purposes and aggregate reporting. Anonymity and confidentiality are assured in all cases.

SCHOOL ACTIONS FOR STAGE 5: SELF-ASSESSMENT & PRE-REVIEW ADVISORY

- › Conduct an internal assessment of its strategy, operations, processes and outcomes against the 10 EQUIS Standards and write the SAR and its Annexes, and update the SAR Datasheet in OX.
- › Submit the Eligibility Progress Report by the end of year two to the EQUIS Office (in cases where the eligibility period is extended to four years).
- › Invite a selection of students to write the Student Report.
- › Send the SAR, Annexes and Student Report to the EQUIS Office, and submit the SAR Datasheet on OX no later than eight weeks before the scheduled PRV.
- › Send the SAR, Annexes, Student Report and updated SAR Datasheet to each of the PRT members no later than six weeks before the scheduled PRV.
- › Share the ODR details with the PRT and the EQUIS Office no later than two weeks before the scheduled PRV.

6

Stage 6: Peer Review Visit and Peer Review Report

The PRT visits the school to evaluate it against the EQUIS Standards and make recommendations for future progress.

Six weeks prior to the PRV, the school should send the EQUIS Office a proposal for the PRV Schedule prepared in accordance with the templates provided in [Annexes 11](#) and [12](#) and the Guidance for Peer Review in [Section 5](#) and [Annex 10](#). This schedule is reviewed by the EQUIS Office which, in collaboration with the PRT chair, may propose changes to the school. Schools should not send the draft PRV Schedule directly to the PRT chair or the members of the PRT at this stage. Once the EQUIS Office and PRT chair have confirmed the PRV Schedule, the school sends it to the PRT no later than two weeks before the PRV. Minor last-minute changes (names, times, locations) may be sent directly to the PRT. At the latest on the day before the start of the PRV, the school should send a Participant Directory with names, job titles, photos and a one-paragraph bio organised by session to the PRT (cc EQUIS Office).

The PRV lasts two and a half days during which the PRT meets a wide variety of representatives from different activities and interests of the school. In cases where a school has activities or grants degrees in different locations, either alone or in collaboration with partner institutions, see [Annexes 20](#) and [21](#) for further details. A visit to another school campus may be added upon the request of the EC. In the case of reaccreditation, it is at the discretion of the EQUIS Office, and this will be communicated to the school in the feedback to the Reaccreditation Datasheet.

At the end of the PRV, the PRT chair presents the PRT's preliminary conclusions and recommendations to the executive team of the school. At this point, the PRT will not divulge the accreditation recommendation it intends to make to the AB, nor is there any discussion of this initial feedback. The PRT chair then drafts the PRR and sends it to the other PRT members for any amendments.

The PRR sets out the PRT's final assessment of the school across the EQUIS Standards, together with its recommendation to the AB regarding accreditation. It should reflect the consensus opinion of the PRT. The recommendation will be for 5-year accreditation, 3-year accreditation, or non-accreditation. The draft PRR with the recommendation is normally sent by the PRT chair to the EQUIS Office within two weeks from the date of the PRV.

The EQUIS Office sends the draft PRR with the recommendation to the school for comment and confirmation of factual accuracy not later than five weeks after the PRV. All factual errors are corrected by the PRT chair in liaison with the EQUIS Office. The PRT chair may, at their discretion, consider any comments concerning the judgements expressed in the PRR. Issues that substantially change the assessment of the PRT should be agreed with the whole PRT. The final version of the PRR, together with the recommendation, is returned to the school. Before the PRR is submitted to the AB, the school must give its formal authorisation to the EQUIS Office.

The final PRR is sent to the school normally within eight weeks from the date of the PRV and is presented to the next appropriate AB meeting.

When the recommendation of the PRT is for non-accreditation, the school has the option to withdraw its application for accreditation, in which case no formal decision will be taken by the

AB. This option implies that the school discards an appeal against the AB decision, since no such decision will be made at the school's explicit request.

The peer review process is described in detail in [Section 5](#) of this manual and [Annex 10](#) (Peer Review Visit Guide).

SCHOOL ACTIONS FOR STAGE 6: PEER REVIEW VISIT & PEER REVIEW REPORT

- › Send draft PRV Schedule to the EQUIS Office at least six weeks and approved final PRV Schedule to the PRT no later than two weeks before planned PRV date.
- › Send Participant Directory to the PRT (cc EQUIS Office) at the latest on the day before the start of the PRV.
- › Review draft PRR for factual accuracy and send queries to the EQUIS Office.
- › Send formal agreement that PRR can be sent to the AB.

7 Stage 7: Accreditation Decision

The outcome of the AB decision is: 5-year accreditation, 3-year accreditation or non-accreditation. The formal decision will be communicated via phone or a brief e-mail to the head of school within 48 hours of the meeting of the AB. This communication will be followed up with a formal letter, normally within one week.

A school can present an appeal against the decision on accreditation. For details, see [Annex 25](#).

5-year accreditation

Schools that, in the AB's judgement, meet all the EQUIS Standards are awarded EQUIS accreditation for a period of 5 years. This means that these schools are good in all areas and probably excellent in several. As EQUIS is an improvement system, evidence of continuing progress will be expected at the next PRV.

3-year accreditation

Schools satisfying the EQUIS Standards with exceptions in one or two of the quality dimensions are awarded EQUIS accreditation for a period of 3 years. Both the degree to which quality is below a specific EQUIS Standard and the number of EQUIS Criteria affected determine whether the school will achieve 3-year accreditation.

The letter communicating the AB decision to the school will normally indicate three Areas of Required Improvement that must be satisfied during the 3-year period if EQUIS accreditation is to be maintained.

Non-accreditation

Schools that, in the AB's judgement, are below the EQUIS Standards of quality in a set of EQUIS Criteria will be denied accreditation. Both the degree to which quality is below the EQUIS Standard and the number of EQUIS Criteria affected are grounds for the AB to reject a school's accreditation.

Sometimes the AB may not follow the recommendation of the PRT. This can happen for several reasons including the following:

- ◆ There is inconsistency within the PRR between the conclusions set out in the main body of the text and the EQUIS Quality Profile Sheet (QP – see [Annex 15](#)) or the recommendation regarding accreditation.
- ◆ The interpretation of the EQUIS Standards by the PRT does not fully match that of the AB.

A school that has been denied accreditation (or has withdrawn before presentation to the AB) loses its eligibility status. The school can choose to restart the Pre-Eligibility stage ([Stage 2](#)) immediately; however, it cannot reapply for eligibility ([Stage 3](#)) within two years after the AB decision (or date of withdrawal). The school should inform the EQUIS Office by email within six months maximum of its choice to restart Pre-Eligibility stage ([Stage 2](#)).

Schools re-entering the EQUIS process at Stages 2 or 3 between two and five years after failing to achieve accreditation or after withdrawal following a negative PRT recommendation, are asked to provide a Progress Report which should convincingly demonstrate that the school has overcome the weaknesses outlined in the AB letter and should further explain the progress it has made in implementing the recommendations in the PRR. Schools having withdrawn from the process should indicate progress in those areas that led to a negative recommendation by the PRT.

Schools re-applying for eligibility after a negative accreditation decision or withdrawal should submit a formal email to the EQUIS Office indicating its plan for submission to the EC at the latest one month in advance of the targeted EC meeting. The formal email should include in attachment an Application Form ([Annex 1](#)) and the above-mentioned Progress Report. An updated Eligibility Datasheet should be submitted via the online platform, OX.

Specific policies applying after accreditation

A school that is awarded EQUIS accreditation must abide by the Policy and Publicity Guidelines for the Use of the "EQUIS" Brand (see [Annex 24](#)).

Accredited schools must inform the EQUIS Office of any major changes that take place within the school during the accreditation period, for example major restructuring or merger activities, see [Annex 26](#) for the detailed EQUIS Policy on Institutional Change and Restructuring.

The school must also report any changes that might lead to a loss of eligibility (e.g., the core faculty number is no longer sufficient to support the school's portfolio of activities). The EQUIS Office will consult the AB for advice on whether it would be appropriate to change the date of the school's reaccreditation.

Note that the names of all schools accredited by EQUIS will be published on the [EFMD website](#) and in other documentation along with the period of accreditation, due to the EU Directive on Freedom of Information. EFMD will not be held liable for any damage caused by such publication.

SCHOOL ACTIONS FOR STAGE 7: ACCREDITATION DECISION

- » Abide by the [Policy and Publicity Guidelines for the Use of the "EQUIS" Brand](#).
- » School may appeal decision ([Annex 25](#)).

8

Stage 8: Continuous Improvement & Progress Reports

All schools within the EQUIS system will be required to pursue actively a development plan, agreed with the EQUIS Office in the case of 5-year accreditation or determined by the AB in the case of 3-year accreditation. The resulting Progress Reports as well as the feedback provided by the EQUIS Office are considered important documents, are included in the reaccreditation process of the school and are reviewed by the subsequent PRT.

For schools accredited for a 5-year period

The school should select at least three Areas of Development (AoDs) to be pursued during the 5-year period. The purpose is to ensure that even schools granted 5-year accreditation continue to develop in the EQUIS spirit of institutional development and continuous improvement.

The selection of these areas should normally be based on the recommendations provided by the PRT in the PRR. AoDs are a natural continuation for a school which has achieved 5 years. These must be submitted to the EQUIS Office within two months of the 5-year accreditation decision, for a brief assessment of their appropriateness for the school.

Two and a half years after the AB decision, the school must submit a Mid-Term Progress Report ([Annex 18](#)) of approximately 10-15 pages on the progress towards achieving the AoDs, based on clear factual data. In this way the development angle is emphasised when the AoDs are proposed by the school and assessment of progress towards their achievement is emphasised at the time of reporting.

The EQUIS Office will evaluate the Mid-Term Progress Report and the feedback will be communicated to the school.

For schools accredited for a 3-year period

A school receiving 3-year accreditation will be notified of the Areas of Required Improvement (AoRIs), on which they must report annually for two years and again at the time of writing the subsequent SAR. The Annual Progress Report Form, which includes the AoRIs and the due date for completion is sent by the EQUIS Office. Using this form, the school should describe clearly and succinctly the progress made on the AoRIs (see [Annex 19](#)). The length of each year's report should not exceed 10 pages.

The EQUIS Office will evaluate both Annual Progress Reports and feedback will be communicated to the school. A follow-up visit after Year 1 and Year 2 may very exceptionally take place if deemed necessary after review of the Annual Progress Report.

When a school fails to provide the Annual Progress Report on time or when the EQUIS Office considers that insufficient achievement is shown, the EQUIS Office may make a case for the AB to withdraw the accreditation in the next scheduled AB meeting. It should be noted that feedback on Annual Progress Reports is only for guidance and a complete assessment will only occur at the next PRV.

IMPORTANT: Quality improvement is an essential element of the EQUIS process. The AB may deny reaccreditation if the school has provided insufficient evidence of addressing the AoRIs of Required Improvement and inadequately evidenced progress has been achieved.

SCHOOL ACTIONS FOR STAGE 8: CONTINUOUS IMPROVEMENT & PROGRESS REPORTS

- › Schools receiving notification of 5-year accreditation, submit AoDs to the EQUIS Office within two months of the AB decision.
- › Schools receiving notification of 3-year accreditation begin working on the AoRIs.
- › Submit Mid-Term or Annual Progress Reports by the due date (indicated on the forms) to the EQUIS Office.

9

Stage 9: Reaccreditation

EQUIS accreditation is awarded for a period of either 5 years or 3 years. Therefore, a school that wishes to maintain its accreditation must enter a process of reaccreditation before expiry of the accreditation period. The expiry date is 3 or 5 years after the date on which the EQUIS accreditation was granted by the AB.

The EQUIS Office will remind the school approximately fifteen months in advance of the expiry of its accreditation about the reaccreditation process. A school is expected to submit its application for reaccreditation twelve months before its accreditation expires.

Schools that have been EQUIS accredited for at least three consecutive periods of 5 years can opt for Special Reaccreditation ([Annex 27](#)). The procedures described below only apply to schools renewing their accreditation in the regular reaccreditation cycle.

The school sends an application email, which explicitly indicates any proposed changes in institutional scope, with the Application Form ([Annex 1](#)) attached, to the EQUIS Office. In addition, a Reaccreditation Datasheet is submitted via OX. The documents need to be submitted and received at the latest twelve months in advance of the expiry date of the accreditation.

In its Reaccreditation Datasheet, the school nominates three different programmes from its portfolio such that there is a variety of programme types. The previously Selected Programme should normally not be suggested. Schools that hold an [EFMD Programme Accreditation](#) do not need to suggest any Selected Programme where the programme accreditation is time-valid (see [Annex 28](#)). In all other cases, the EQUIS Office will select a specific programme to be assessed in greater depth during the PRV among the three programmes suggested by the school.

The reaccreditation process is substantially the same as that for initial accreditation following the eligibility decision, with some differences. These relate to the focus in the reaccreditation PRV, which emphasises changes that have occurred and progress achieved during the accreditation period. Key points for the Self-Assessment stage and PRV for schools undergoing reaccreditation are given in [Sections 4](#) and [5](#) of this manual respectively.

Policy on non-renewal of accreditation

This policy is specifically designed to mitigate the effects of negative reaccreditation decisions by:

- a) giving more time for the school to manage the situation rather than being instantly removed from the list of accredited schools.
- b) granting schools an opportunity to state their case again, if they believe this will be to their benefit.

More details on the policy are given in [Annex 29](#).

The SAR for reaccreditation

The SAR itself should be drafted in accordance with the guidelines established in [Section 4](#) of this manual. Additional key points for a reaccreditation SAR, include:

- ♦ a summary of each chapter on changes that have occurred since the previous accreditation and explaining the principal challenges that the school is now facing;

- ◇ reference to the observations and recommendations contained in the previous PRR;
- ◇ reference to progress on the AoDs or AoRIs
- ◇ reference to feedback from the Mid-Term Progress Report or the Annual Progress Reports.

It is important to note when compiling the SAR that the members of the PRT will be different from those participating in the initial or earlier PRV and they will not have access to the previous SAR.

The PRV for reaccreditation

The organisation of the PRV for reaccreditation is similar to that of an initial accreditation in terms of logistical and procedural aspects, including a PRT of three academics and one representative from the world of practice and a visit duration of two and a half working days.

The PRV Schedule will follow closely that of an initial accreditation, with minor differences to account for the focus on the school's overall development and continuous improvement, and achievement of AoDs or achievement of AoRIs. The schedule template for a reaccreditation PRV can be found in [Annex 12](#).

SCHOOL ACTIONS FOR STAGE 9: REACCREDITATION

- › Send an application email with the Application Form attached twelve months before accreditation expiry and submit Reaccreditation Datasheet on the OX platform.
- › Submit the reaccreditation SAR, Annexes, Student Report and SAR Datasheet not less than eight weeks before the scheduled PRV (see also [School Actions for Stage 5](#))
- › Proceed to organise the PRV in accordance with schedule shown in [Annex 12](#) (see also [School Actions for Stage 6](#))

Guidance for Self-Assessment

| Section 4

Section 4 | Guidance for Self-Assessment

1. The Purpose of Self-Assessment

Self-assessment – undertaken to form the eventual SAR – is a key part of the EQUIS process ([Stage 5](#)) but it has wider strategic significance for the school and its team responsible for EQUIS. It provides an opportunity for the whole school to gain greater ownership of the process and to improve general understanding of the issues surrounding the school's development as a high-quality provider of business and management education.

The self-assessment should form an integral part of the school's quality system to avoid duplication of effort and to ensure maximum contribution towards continuous improvement. It is intended to lead the school to judge its overall effectiveness in strategy, operations and processes in preparation for writing the SAR, thereby contributing to the development of the school and providing considerable added value. Effective self-assessment will link the school's existing processes in the areas of strategic management, quality management, and programme management with the framework for EQUIS accreditation.

The purpose of the SAR is to assist the EQUIS accreditation process and as such the self-assessment must be reflective, with critical analysis and balanced assessment of evidence.

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

1.1 Provide an opportunity for the entire school to take stock of its situation

The self-assessment is best approached as a strategic review, owned by the whole organisation, even if some aspects of the assessment are challenging and may provoke resistance.

1.2 Result in a critical self-examination

The key objective of the self-assessment is to evaluate the school's effectiveness in attaining its strategic objectives and delivering continuous improvement in programme, research, and process quality. The self-assessment process should identify its current position against the EQUIS Criteria and establish the basis for future action.

1.3 Provide a basis for the SAR and PRV

The SAR summarises the outcome of the self-assessment process and as such forms the basis for the PRV. The needs of the PRT must be considered carefully during the self-assessment process and particularly during the writing of the final report. The school has a responsibility to present information that will:

- ◆ establish a starting point and a balanced evaluation to be assessed by the peer reviewers
- ◆ provide key data and supporting documentation to aid understanding and to substantiate claims made in the SAR.

There must be a balance between facts and their interpretation. Therefore, all factual and descriptive information should be interpreted and evaluated. In parallel, judgements and statements should be backed up by the corroborative facts.

2. The Self-Assessment Process

As mentioned, the overall self-assessment process usually takes between six and twelve months, depending on the size and complexity of the school and its experience with accreditation.

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

2.1 Responsibilities

The EQUIS Office recommends the designation of an EQUIS project leader and an EQUIS Accreditation Committee to manage the process and draft the SAR.

In addition to the EQUIS Project Leader being suitably qualified and resourced to conduct the work, they should be a senior colleague with direct access to the head of school. Representation on the EQUIS Accreditation Committee is also a key issue and should include representatives from key stakeholder groups.

2.2 Communication

At an early stage, it is recommended that the school's senior management team provides a full explanation across the school of the aims of the self-assessment exercise, of its role in the wider accreditation process and of the standards against which the school is measuring itself in the first instance. The assessment process should involve all key stakeholders, who will need to understand the process if they are to contribute fully to the implementation of a rigorous self-assessment. Effective communication with these parties should be maintained throughout the process.

The self-assessment is an ideal opportunity for the school to obtain commitment from key stakeholders to secure resources and improve quality. Considerable care must therefore be taken to present the results of the self-assessment in a balanced, realistic, and honest way. The conclusions should state clearly what will be done to continue progress towards the achievement of the school's strategic goals.

2.3 Methodology and planning

While there is no pre-established format for the approach to be adopted when conducting the self assessment, a successful self-assessment process benefits from the early development of a detailed plan. This provides sufficient time to conduct a high-quality self-assessment and deliver a SAR by the required date. Each school should develop a plan that meets its own specific needs.

The following criteria are recommended for the design of the self-assessment process:

A systematic process – the self-assessment should be thorough, comprehensive and driven by seeking to answer key, searching questions for the school, rather than a ‘tick-box’ approach. It is recommended that the school:

- ◇ measures its activities against external norms within its operating environments and internationally
- ◇ identifies key strengths and weaknesses
- ◇ evaluates the adequacy of resources and identify key limitations
- ◇ arrives at a clear understanding of the efforts to be deployed to achieve its strategic objectives.

It is strongly recommended that the school:

- ◇ avoids reducing the process to the writing and production of a SAR by an isolated team.

Objectivity and balance – the self-assessment should produce an objective statement of current strengths and weaknesses, opportunities and threats and a determination of the actions needed to address these issues. It is recommended that the school:

- ◇ evaluates the overall appropriateness, consistency, and credibility of the strategic objectives
- ◇ reaches an enhanced understanding of its market(s) and environmental constraints
- ◇ achieves a balance between ambition and realism
- ◇ develops a strategic plan that will enable achievement of the strategic objectives within the envelope of currently available and of potential future resources.

Participation – in collecting data and evaluating the results of the review, it is good practice to 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, improving communication and commitment to the findings. It is recommended that the school:

- ◇ involves as many people as possible and certainly all the major actors
- ◇ provides added value to the school through the processes used
- ◇ presents a historical perspective, i.e., how the school has developed and how it sees its future
- ◇ conducts a learning process for the school which provides a chance for everyone to gain an overall view of its situation.

It is strongly recommended that the school:

- ◇ avoids a restricted exercise conducted by a few key staff in the school.

2.4 Data collection

Having decided the methodology for the self-assessment, the school will need to determine the information and documents to be collected.

The normal reporting time frame is three years unless specific tables ask for five years reports.

The collection and analysis of information for the self-assessment require considerable time and effort. It is useful to identify the key sources of information at an early stage and allocate clear responsibilities for the collection, organisation, dissemination, and analysis of information. The school should seek to use as wide a variety of sources as possible to include internal and external reports (e.g., assessment/accreditation/audit reports, programme reviews, assessment results, exit surveys), special surveys, meetings and focus groups.

3. The Self-Assessment Report (SAR)

The SAR should be based on the S&C which sets out the full range of the EQUIS quality standards and the criteria against which the quality of the school will be measured. The standards and the associated criteria are grouped into ten chapters covering the different areas that will be reviewed:

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

The purpose of the S&C document is twofold:

1. to provide a comprehensive description of the standards and criteria against which the school is to be reviewed
2. to give guidance to schools in preparing their SAR.

The school must ensure that the national context within which it operates is clearly explained in the SAR so that the assessment by the PRT can consider the constraints and specific quality expectations of the local environment.

The EQUIS Office is always available to provide advice, however, the following brief comments are provided to aid the preparation of the SAR:

3.1 Main report

The SAR should lead to conclusions whereby the school makes the case for EQUIS accreditation. It should be self-evaluative and self-critical and should demonstrate how the school is progressing strategically and describe how it has addressed existing challenges and 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.

Cover page

The cover of the SAR should clearly state the full name of the school, the date of submission to the EQUIS Office and the name of the individual to contact in case of questions related to the report.

Signed Statement of Accuracy

The first page of the SAR should contain a statement confirming the accuracy of the report signed by the head of school and by the most senior representative of the parent institution (where appropriate). Their titles must be made explicit.

The statement should also give brief details of the internal review team and process used to produce the report.

Executive Summary

An Executive Summary of 2 to 5 pages should be included at the beginning of the report.

Main content covering the EQUIS Standards

The SAR represents an evidence-based narrative covering the ten chapters described in detail in the S&C. The internal organisation of the ten chapters can be determined freely by each school. There is no requirement to follow the order of the different sections or the order of the items within the S&C sections. Nor is it expected that the school should answer every question. The school is expected to provide its own conclusions from the self-assessment process regarding the dimensions being considered in each chapter, in the way it feels most appropriate. It is expected, however, that the key issues that are relevant for a comprehensive assessment of the school's activities be carefully addressed.

The items in the S&C are formulated in qualitative terms. The information provided by the school should, where appropriate and possible, provide evidence – for example, quantitative positioning – of the school in relation to each criterion. Schools should carefully consider the indicators or evidence used for positioning in relation to the different EQUIS Criteria. Guidance for this is given in each of the chapters in the document.

The report must be between 100 and a maximum of 150 pages long, excluding annexes, supporting documents, Table of Contents and Statement of Accuracy (with a font size not smaller than Arial 10).

3.2 Annexes to the SAR and supporting documents

Annexes should be limited to materials strictly necessary for a proper understanding of the SAR and should not exceed the length of the SAR. Details concerning annexes and supporting materials are provided at the end of each chapter in the [S&C](#) and are summarised in [Annexes 13](#) and [14](#).

3.3 Online Document Repository

More comprehensive documents and less essential material are placed in the Online Document Repository (ODR). The ODR can include electronic versions of faculty management handbook, course documents, examples of students' work, case studies, research output, brochures etc. and should be accessible to the PRT at least 14 days before the start of the PRV and until the AB has taken its decision. Guidance on which documents to provide in the ODR can be found at the end of each section in the [S&C](#) (and also [Annex 14](#)).

Schools are advised to structure the documents organised according to the ten chapters of the S&C in alignment with the SAR.

3.4 Student Report

The SAR should be accompanied by a report compiled by a representative group of students. A template is provided (see [Annex 15](#)), based on selected chapters of the S&C, and will be the focus of the discussion with them during the PRV.

The students must compile the Student Report independently without involvement of the school's leadership or other external guidance. The school should not monitor discussions leading up to the writing of the report and should not be involved in the assembly of the report, other than initiating the process. If it is apparent that this independent process has not been strictly followed, the submitted Student Report may be returned to the school by the EQUIS Office for subsequent resubmission.

3.5 SAR Datasheet

The SAR submission should also include an updated version of the SAR Datasheet on the OX platform ensuring that the information is accurate at the time of the PRV.

Guidance for Peer Review

I Section 5

Section 5 | Guidance for Peer Review

1. Introduction

This section summarises the Peer Review Visit Guide ([Annex 10](#)), which contains detailed guidelines to help schools and the Peer Review Team (PRT) to prepare for and conduct a Peer Review Visit (PRV).

2. Objectives of the PRV

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

3. Composition of the PRT

The PRT is composed of four members holding senior positions in the world of management education or with substantial experience in this field. Further information on the PRT is in [Annex 10](#).

4. Preparation for the PRV

4.1 Reading materials for the peer reviewers

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

1. SAR and Annexes
2. Student Report
3. SAR Datasheet

In addition, the school will prepare the ODR which should be made accessible to the PRT and the EQUIS Office at least 14 days before the beginning of the PRV. For further information on the ODR, see [Annex 14](#).

The following documents will be emailed to each PRT member by the EQUIS Office:

In the case of initial accreditation PRVs:

1. The Eligibility Datasheet

2. The Eligibility Letter, highlighting any Reservations that the EC noted regarding the application
3. The Pre-Eligibility Advisory Evaluation, for schools opting for Pre-Eligibility Advisory
4. The Pre-Review Advisory Evaluation, for schools opting for Pre-Review Advisory

In the case of reaccreditation PRVs:

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

4.2 General logistics

The school is expected to make all necessary arrangements for accommodation and the local transport for the PRT members. Fuller details and guidance on logistics for the PRV are set out in [Annex 10](#).

The PRT members arrange their own travel according to the general guideline.

4.3 Setting up the PRV Schedule

As noted previously, six weeks prior to the PRV, the school sends the EQUIS Office a proposed PRV Schedule (see [Annexes 11](#) and [12](#) and the Peer Review Visit Guide, [Annex 10](#)).

4.4 PRT Base Room

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

5. PRV Schedule and Participant Directory

The school sends a draft PRV Schedule to the EQUIS Office where it will be checked and then passed to the PRT chair for any comments and approval. For detailed guidance, refer to [Annex 10](#) as well as the PRV Schedule Template (see [Annexes 11](#) and [12](#)).

A Participant Directory with names, job titles, photos and a one-paragraph bio organised by session should be sent to the PRT (cc EQUIS Office) at the latest on the day before the start of the PRV.

6. Conduct of the PRV

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

The total time available for the PRV is extremely limited and it is vital that the PRT makes effective use of its time, facilitated by the interactions with the school.

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

The focus of individual PRV meetings is given in [Annex 10](#).

7. Roles and Responsibilities

A number of roles, responsibilities and tasks are carried out in relation to the PRV by various parties, including the EQUIS Office, the PRT chair, PRT members and the EQUIS project leader within the school. Details of these are given in [Annex 10](#).

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

Further Information and Contacts

If you have any questions concerning the EQUIS accreditation system, or would like to receive more information, please consult the [EFMD website](#) where all documentation is available for download.

Alternatively, you can contact EQUIS Office:

 equis@efmdglobal.org

For questions regarding OX, contact:

 ox@efmdglobal.org





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