



PROCESS MANUAL ANNEXES

EFMD accreditation
for international
business schools

CONTENTS

Page

ANNEX 1	EQUIS APPLICATION FORM	4
ANNEX 2	EQUIS DATASHEET	7
ANNEX 3	EQUIS FEE SCHEDULE	20
ANNEX 4	ONLINE BRIEFING GUIDE	23
ANNEX 5	ONLINE BRIEFING REPORT FORM	27
ANNEX 6	EQUIS ELIGIBILITY PROGRESS REPORT FORM	30
ANNEX 7	EQUIS ADVISORY GUIDE	32
ANNEX 8	PRE-ELIGIBILITY ADVISORY EVALUATION FORM	38
ANNEX 9	PRE-REVIEW ADVISORY EVALUATION FORM	41
ANNEX 10	PEER REVIEW VISIT GUIDE	44
ANNEX 11	INITIAL PEER REVIEW VISIT SCHEDULE TEMPLATE	66
ANNEX 12	RE-ACCREDITATION PEER REVIEW VISIT SCHEDULE TEMPLATE	70
ANNEX 13	SUPPORTING INFORMATION & DOCUMENTS TO BE PROVIDED IN THE SELF-ASSESSMENT REPORT OR SAR ANNEXES	74
ANNEX 14	DOCUMENTS TO BE PROVIDED IN THE ONLINE DOCUMENT REPOSITORY	78
ANNEX 15	STUDENT REPORT TEMPLATE	84
ANNEX 16	EQUIS QUALITY PROFILE SHEET	90
ANNEX 17	EQUIS CRITERIA EVALUATION FORM	95
ANNEX 18	EQUIS MID-TERM PROGRESS REPORT FORM	126
ANNEX 19	EQUIS ANNUAL PROGRESS REPORT FORM	131
ANNEX 20	POLICY ON ACCREDITATION OF MULTI-CAMPUS OPERATIONS	138
ANNEX 21	POLICY ON ACCREDITATION OF COLLABORATIVE PROVISION	142
ANNEX 22	EFMD CONFIDENTIALITY AGREEMENT FORM	145
ANNEX 23	CONFLICT OF INTEREST POLICY	147
ANNEX 24	POLICY AND PUBLICITY GUIDELINES FOR THE USE OF THE “EQUIS” BRAND	150
ANNEX 25	APPEALS PROCEDURE	156
ANNEX 26	POLICY ON INSTITUTIONAL CHANGE AND RESTRUCTURING	159
ANNEX 27	SPECIAL RE-ACCREDITATION	164
ANNEX 28	EQUIS POLICY ON RE-ACCREDITATION OF SCHOOLS WITH EFMD PROGRAMME ACCREDITATION	171
ANNEX 29	POLICY ON NON- RENEWAL OF ACCREDITATION OF SCHOOLS	173

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 Document 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.

Annex

1

EQUIS
Application Form

Application Form for Entry into EQUIS

EFMD Quality Improvement System

I, the undersigned _____ (name)

_____ (position)

representative of _____ (name of organisation)

confirm the application of my organisation to go through the EFMD **EQUIS process – EFMD Quality Improvement System**.

I confirm the accuracy of the information supplied to EQUIS and agree that my school will pay the EQUIS fees as specified below. We also confirm that we will accept the accreditation process, the results of this process and the decisions of EFMD aisbl in respect of the accreditation. EFMD aisbl, its directors, employees and consultants, dependent or independent, voluntary or not, shall not be liable on a tortious or contractual basis for any direct or indirect, foreseeable or unforeseeable damages resulting from the accreditation process, the conception and implementation of the standards, systems or procedures, nor for the accreditation decision. The afore-mentioned shall also not be liable for the use by the school of the recommendations nor for any delay in the accreditation process.

I fully understand and agree with EFMD's general terms and conditions below.

General Terms and Conditions

1. The signatory of this Application Form certifies being a representative who is authorised to commit their organisation to go through the EQUIS Process.
2. The fees payable for the EQUIS process are defined in the EQUIS Fee Schedule effective at the date of the submission of this Application Form.
3. The reviewed school will be charged directly by the visiting experts for their travel, accommodation and other direct expenses for the advisor's visits, as well as the Peer Review Visit.
4. Invoices and expenses claims shall be paid preferably by bank transfer, free of any bank charges, within 30 days from the end of the month in which the invoice was issued.
5. The fees are exempted from Belgian VAT according to art. 196 Directive 2006/112/CE if the member is liable to VAT in another country of the European Union (reverse charge), or if the member is established in a country outside the European Union.
6. In case the school decides unilaterally to stop the process, cancellation must be confirmed in writing.
7. The Belgian law shall apply to any and all disputes arising out of the process. In case of dispute, only the French-speaking courts of Brussels are competent.

Signature: _____

Date: ____/____/____

Stamp of the organisation:

Organisation:

Department:

Address including Post/Zip Code:

.....

.....

City and Country:

Telephone:

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

Annex 2

|EQUIS
|Datasheet

During their accreditation and re-accreditation processes, schools submit a multitude of datasheets, e.g., Draft Datasheet, Entry Application Datasheet, Eligibility Datasheet, SAR Datasheet, etc. The following sample datasheet shows which information and data is to be provided. Datasheets are submitted via OX, EFMD's online platform for data entry. Login data can be obtained via the EQUIS Office or from the school's key account manager.

EQUIS Datasheet

The Datasheet is intended to provide succinct factual information about the school that allows it to be assessed against the Eligibility criteria. Data about the university, when applicable, should be limited to that strictly necessary to understand the school. Descriptions should be clear, concrete, concise and compelling. There should be many more facts and data than opinions. EQUIS will trust the data provided at this stage since it will be checked at a later stage, if applicable.

Unless otherwise stated, the data in the Datasheet should present a snapshot of the school's current situation at the time of submission of the document. The general rule is to provide the most recent data which is available. This may vary from table to table depending on the time of the semester or year when the data becomes available to the school.

The document will be limited to 16 pages. All information must be included in the 16 pages; links to additional documents are inadmissible. Appendices on multi-campus operations and collaborative provision should only be included if applicable. Tables 4b, 8, 9 and 10 as well as Appendices 1 to 3 do not count against the page limit.

For schools applying to EQUIS for the first time, it should be noted that no additional information provided by the school besides that contained in the Datasheet will be conveyed to the EQUIS Committee. Once eligible, the school should submit an updated Datasheet together with the Self-Assessment Report. For schools applying to EQUIS for re-accreditation, this Datasheet should be completed when starting the re-accreditation cycle; an updated Datasheet should be submitted together with the Self-Assessment Report

School and Contact Information

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

Name:

Address

Website:

EFMD membership status:

☐ Full

☐ Affiliate

☐ Date of EFMD membership application:

Name of parent Institution (if any):

Contact Information:

	Head of School	EQUIS Project Leader (if different)
Name:		
Job Title:		
Tel:		
Email:		

General Description of the School

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

1:

2:

3:

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

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

Campus Locations: Please list all campuses of the school (see Annex 20 of the Process Manual) and tick the box for the main campus (if any). Note that the Datasheet itself should provide summary information for the whole school, including all campuses. This applies in particular to the programme portfolio (Table 8) and the financial situation (Table 10). Additional information on individual campuses should be provided in Appendix 2 (Tables 13a, 13b, etc.).

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

Organisation and Internal Management System of the School

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

Institutional Autonomy and External Governance System

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

External Governance: Explain how external governance is organised and how external governance bodies (e.g. Governing Board, University-Level Executive Committee) are exercising authority over the school. Describe any external international advisory bodies engaged with the school. State the proportion of international representation in external governance and advisory bodies.

The Degree Programme Portfolio

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

Total number of full-time degree students in the school: 0

Total number of part-time degree students in the school: 0

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

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

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

Table 1: MBA Programmes' Participant Experience

Programme Name	Average years of experience	Number of participants with less than 2 years of experience

Name of the Selected Programme: (not applicable for schools going through Special Re-accreditation) The EQUIS process not only takes an overview of the programme portfolio and the management thereof but it also reviews one sample programme in depth as a check on the effectiveness of the overall programme portfolio management. The school should name three of its major programmes and check them in the Table of Degree Programmes (Table 8) (but no programmes abroad) such that there is a variety of programme types, e.g. an undergraduate (Bachelor), a pre-experience postgraduate (e.g. specialist Master), a post-experience postgraduate (e.g. MBA) programme and a doctoral (PhD) programme. The proposed programmes will be approved by the EQUIS Office. One of these programmes will be chosen as the selected programme by the EQUIS Committee. In case of re-accreditation, the previously selected programme should normally not be suggested. Schools entering a re-accreditation cycle and holding an EFMD Programme Accreditation have a choice regarding the assessment of the Selected Programme (see Annex 28 of the EQUIS Process Manual).

Faculty

The term «faculty» designates the academic staff. Provide a readily understandable picture of the quality and quantity of the academic human resources available to the school. If you believe that it is extremely difficult to fit your faculty into the typology below, use your own classification and typology preceded by a clear description of the qualifications, experience and dedication that apply to each type. Occasional speakers are not considered faculty, even if academically qualified. Definitions are given below.

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

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

Notes:

- 1. Core faculty:** Qualified academic staff employed on a permanent basis and for whom the institution is the sole or principal employer. Permanence is indicated by an open-ended contract or by a fixed-term contract of a minimum of 2 years.
- 2. Number of core faculty with international experience:** Number of core faculty (excluding foreign only passport holders) with significant professional/work experience or study abroad (e.g. a complete degree) which entailed living abroad for at least 1 full year (i.e. not made up of part years).
- 3. Adjunct faculty:** Teaching staff for whom the school is not the primary employer or who work for the school on a part-time basis under a permanent or an occasional contract.
- 4. Visiting professors in current year:** Academic staff that are core faculty at another academic institution and visit the school to teach for a consecutive period of not less than 2 weeks.
- In describing the size of the faculty, the **“full-time equivalent”** (FTE) is the total of faculty contract days divided by 5, assuming that 5 is 100% employment. For example, 5 faculty members with 3-day contracts would be the equivalent of 3 faculty members with 100% contracts. In this case, the headcount is 5 but the FTE is 3. The FTE is a useful indicator when a large percentage of the faculty have less than full-time contracts. The percentage of full-time employment refers to the number of contract days in the case of faculty members who are employed on a part-time basis. A four-day contract is thus the equivalent of 80%.
- The **ratio FTE students / FTE core faculty** is calculated by dividing the number of full-time equivalent students by the number of full-time equivalent core faculty. Calculating the full-time equivalent for students is obviously a question of reasonable estimation. For instance, the total number of part-time students on a two-year executive MBA programme can be divided by two in order to approximate the full-time equivalent. The resulting ratio has, of course, to be interpreted in the light of other variables such as the contribution of a well-structured non-core faculty. However, the ratio is useful as one indicator to measure faculty sufficiency.

Subject or Teaching Areas or Departments

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

Table 3: Departments/Areas and Faculty Allocation

Department/Area	Core Faculty		Adjunct Faculty	
	Headcount	FTE	Headcount	FTE
Total	0	0.00	0	0.00

Non-Academic Staff

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

Overview of the School's Research Activities

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

Table 4a: Research Output

Last year for which complete data is available ("Year t"):

If you want to provide data for academic years rather than calendar years, then t is the year the academic session starts.

Research Type	Year t-4	Year t-3	Year t-2	Year t-1	Year t	Total
Academic research articles (peer-reviewed)	0	0	0	0	0	0
Research books or monographs (with distinguished publishers)	0	0	0	0	0	0
Practice-oriented research articles	0	0	0	0	0	0
Papers in academic conferences (peer-reviewed)	0	0	0	0	0	0
Papers in professional conferences	0	0	0	0	0	0
Published case studies (peer-reviewed)	0	0	0	0	0	0
Other research publications (peer-reviewed)	0	0	0	0	0	0

Note: Only include the work of authors who **are core faculty members at the time of writing**.

Table 4b: Academic Research Projects, Partnerships and Collaborations

Provide factual data on funded academic research projects where core faculty have been leading or co-investigators over the past 2 years. Note this table is reserved for academic research projects only. Practice-oriented research projects are included in Table 12a. If a specific project focuses on theory and practice, include it here, not in Table 12a.

Project Name	Source of Funding	Collaborators/ Partners	Revenue (in 1000€)	Duration
Total			0	

Note: Only include the work from investigators who are **core faculty members at the time a project was undertaken**.

Table 5: Core Faculty Workload Distribution

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

Workload model	% allocated to research	% allocated to learning & teaching	% allocated to service	No. of core faculty
	0	0	100	

Executive Education

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

- ☐ ExecEd excluded by EQUIS Committee
- ☐ No ExecEd Activity

Table 6: ExecEd Activity

	Number of participant days	% delivered by core faculty
Open Programmes	0	0.00
Tailored Programmes	0	0.00

Notes:

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

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

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

Five principal national clients:

Five principal international clients:

Online Learning

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

Overview of the School's Financial Management and Performance

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

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

Describe the school's risk management processes and activities:

National Standing

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

Area of Recognition 1

Area of Recognition 2

Accreditation or Recognition by National and International Agencies

National

International

International Reputation

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

Internationalisation

Identify the purpose of the school's internationalisation. Provide factual evidence on the principal aspects of the school's international dimension (faculty, student body, programmes, strategic alliances, international partners, alumni networks, etc.) that has not already been given.

Ethics, Responsibility and Sustainability

Provide factual evidence on the school's activities in areas of ethics, responsibility and sustainability (strategy, faculty, programmes, research, infrastructure, operations & administration, community outreach, etc.) that has not already been given. Any further information on the school's ERS research activities can be included in Tables 12a-12d. below.

Overview of the Principal Links with the World of Practice

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

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

Table 7: Partner Organisations' Interactions

Partner	Type of Organisation	Interaction Group	Type of Interaction

Facilities

Describe the dimension and quality of your campus(es) including residential facilities, library, databases, computer facilities, etc

Table 8: Degree Programme Portfolio

	% of programme delivered by core faculty	Duration in months	Year in which programme was launched	Collaborative provision	Delivery of Online Learning	Does the programme require previous work experience? Yes/No	Primary language(s) of instruction	No. of currently enrolled students in the programme FT / PT	No. of applicants this year	No. offered a place this year	No. of students enrolled this year (new entrants)	No. of non-national students enrolled this year (new entrants) - not including exchange students	No. of incoming exchange students this year	No. of outgoing exchange students this year
Bachelor														
Total														
Pre-Experience Master														
Total														
Post-Experience Master														
Total														
MBA														
Total														
Doctoral Programmes														
Total														
Other														
Total														
GRAND TOTAL														

Table 9: Distribution of non-national students enrolled this year (new entrants) - not including exchange students

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

	No. of students	%
Bachelor		
1		
2		
3		
Other home countries		
Total	0	

	No. of students	%
Pre-Experience Master		
1		
2		
3		
Other home countries		
Total	0	

	No. of students	%
Post-Experience Master		
1		
2		
3		
Other home countries		
Total	0	

Table 10: Summary Information on the School's Financial Situation

Last year for which complete data is available ("Year t"):

If you want to provide data for academic years rather than calendar years, then t is the year the academic session starts.

Currency rate and date used for conversion:

Example: 1 South Korean Won = 0.00070 EURO, Date 15 February 2024

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

Appendix 1: Research Output (two last completed years)

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

Table 11: Academic Research Output Ranking

Rank	Journal Name	No. of Pubs.	Comment

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

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

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

Project Name	Source of Funding/Partner	Type of Project	Revenue (in 1000€) Total	Duration (from...to)

Table 12b: Actionable Insights

Category	Number	Target Audience or Clients	Comments
White papers			
Policy or legislation reviews			
Trade publications			
Patents/IP Licenses			
Handbooks or books produced for practice			
Artefacts (e.g., software, frameworks or tools...)			
Consultancy			
Start-ups			

Table 12c: Dissemination

Type	Target Audience, Customers or Clients	Evidence of Reach (audience numbers, downloads, views, impressions, engagements...)	Comments
Conferences, Colloquia or Congresses			
Keynote speeches			
Briefings (e.g., policy, legislation, industry, ...)			
Print media coverage			
Digital media coverage			
Other			

Table 12d: Recognition of Research from Practice

Category	Source of Funding/Award	Revenue (in 1000€)	Comments
Endowed chairs			
Joint research centres			
Prizes, awards and honours			
Other			
		Total	

Appendix 2: Multi-Campus Operations

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

☐ Not applicable

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

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

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

1. Programmes				
1.1. Degree Programmes				
Degree Designation	Student FTE (all years)	Student FTE (intake this year)	Non-Nationals FTE (intake this year)	Mobility Incoming/Outgoing (this year)
...	...	...	...	...
Total	0.00	0.00	0.00	0 / 0
1.2. Executive Education				
Programme Type	Number of Programmes	Participant Days		
Open Enrolment	0	0		
Tailored	0	0		
2. Personnel				
2.1. Faculty				
Core Faculty FTE	0.00	Non-nationals FTE	0.00	
		With international professional or study experience FTE	0.00	
Adjunct Faculty FTE	0.00			
Visiting Faculty FTE	0.00			
Teaching/Research Assistants FTE	0.00			
2.2. Staff Support				
Academic Areas FTE	0.00			
Non-Academic Areas FTE	0.00			
3. Host Organisation (if applicable) **				
Institution	Nature of Legal/Contractual Relationship			
4. Campus Development				
Briefly describe activities of further developing the campus location (if any):				

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

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

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

Appendix 3: Collaborative Provision

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

☐ Not applicable

Table 14a: Collaboration for <Name of Programme>

Name of Partner Organisation: <Name>

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

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

Annex

3

|EQUIS
|Fee Schedule

EQUIS FEE SCHEDULE

(2026)

The total fee for the EQUIS process is 69.600 € (5-year accreditation); 60.900 € (3-year accreditation) or 47.850 € (non-accreditation) for new applications submitted between 1 January 2026 and 31 December 2026. For accredited schools starting the re-accreditation process between 1 January 2026 and 31 December 2026, no Eligibility Fee will be due. The Fee Schedule at the time of the (re-)application remains valid throughout that cycle of the school's accreditation process.

ADMINISTRATIVE FEES

Application Fee: 13.050 €

Invoiced upon receipt of the Application Form for Entry into EQUIS. This fee is **also** payable by schools entering a re-accreditation cycle.

Eligibility Fee: 13.050 €

Invoiced only upon a **positive** eligibility decision by the EQUIS Committee.

This fee is charged **only** to schools in the initial accreditation cycle, not to those starting a re-accreditation cycle.

Review Fee: 21.750 €

Invoiced two weeks in advance of the Peer Review Visit.

Accreditation Fee

Invoiced only upon a **positive accreditation decision** by the EQUIS Accreditation Board.

- If (re-)accreditation for 5 years: 21.750 €
- If (re-)accreditation for 3 years: 13.050 €
- If non-accreditation: 0 €

The accredited schools have 2 options regarding the final payment:

Option 1: The above amount can be paid in annual instalments of 4.350 €.

Option 2: The above amount can be paid in a single payment.

EXPENSES

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

Peer reviewers are advised to book their flights at the earliest opportunity to minimise the costs to the school. Peer reviewers should ask approval from the school before ticket purchase, copying the EQUIS Office, and should endeavour to keep the costs as low as possible (a maximum of 7000 € is envisaged but cannot be considered as the norm).

CANCELLATION, POSTPONEMENTS, LATE PAYMENTS

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

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

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

Annex

4

Online
Briefing Guide

ONLINE BRIEFING GUIDE

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

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

1. Objectives of the OB

The goal of the OB is to:

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

2. Explanation of the EQUIS System during the OB

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

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

3. Specifying the School's Advisory Needs during the OB

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

4. Organisation of the OB

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

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

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

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

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

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

Break (10 minutes)

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

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

Break (10 minutes)

3. Process briefing and advice (30 minutes)

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

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

The school is asked to send the detailed schedule of the OB, including the names and positions of the participants for each meeting, no later than one week in advance of the briefing. The school also provides a video platform for the OB, using the solution of its choice, in agreement with the EQUIS Office. The virtual meeting link will be included in the OB schedule.

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

5. OB Report

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

Annex

5

Online Briefing
Report Form

ONLINE BRIEFING REPORT

Name of the school

A. General information

Date of the Online Briefing	DD.MM.YYYY
Name and Title of the Briefing Expert	NAME, TITLE
Date of Application for Entry	DD.MM.YYYY

B. Briefing expert's assessment of satisfaction of the Eligibility Criteria:

1. EFMD Full Membership in good standing

2. Institutional Scope

3. Excellent National Standing

4. International Reputation

5. Breadth of Activities

6. Core Faculty

7. EQUIS Standards & Criteria

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

D. Recommendations of the briefing expert:

1. Should eligibility be granted?

2. Which programme is recommended as the Selected Programme, based on the school's list of proposed programmes in the Entry Application Datasheet?

3. What are the principal Areas for Development, if any?

Annex: Online Briefing Schedule and Participants

Annex 6

| EQUIS Eligibility
| Progress Report Form

EQUIS ELIGIBILITY PROGRESS REPORT

Name of the school:

Date of eligibility decision:

Areas of Concern (AoCs):

1	
2	
3	

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

(Information above added by EQUIS Office)

Guidelines:

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

AoC 1 <Description added by EQUIS Office.>
Description of progress in the Area of Concern
Please mention general developments Add text here...
Feedback from the EQUIS Office:

AoC 2 <Description added by EQUIS Office.>
Description of progress in the Area of Concern
Please mention general developments Add text here...
Feedback from the EQUIS Office:

AoC 3 <Description added by EQUIS Office.>
Description of progress in the Area of Concern
Please mention general developments Add text here...
Feedback from the EQUIS Office:

Annex

7

EQUIS
Advisory Guide

EQUIS ADVISORY GUIDE

1. Introduction to the EQUIS Advisory

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

2. Objectives of the EQUIS Advisory

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

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

Examples of advice that can be provided are:

Pre-Eligibility Advisory: Addressing Areas for Development identified in the OB Report and required to satisfy the Eligibility Criteria.

Pre-Review Advisory: Addressing any Areas of Concern (AoCs) expressed by the EQUIS Committee in returning a positive eligibility decision and providing general developmental support.

3. Nature of the EQUIS Advisory

The EQUIS Advisory is an optional part of the accreditation process, provided upon request by the school, and is managed by the EQUIS Office. This includes matching advisory needs and the EQUIS advisor's experience, the interaction between the applicant school and EQUIS advisor, and final reporting. EQUIS advisors are drawn from a pool of experts comprised of chairs and experienced members of Peer Review Teams (PRT) as well as (former) members of the EQUIS Committee (EC) and Accreditation Board (AB). EQUIS advisors volunteer their time as a service to the EFMD community. A conflict-of-interest policy ([Annex 23](#)) ensures that EQUIS advisors distance themselves from the accreditation process beyond their assigned roles. For that purpose, EQUIS advisors are required to sign a Confidentiality Agreement (see [Annex 22](#)).

The EQUIS advisor's role consists of:

1. Scoping the advisory needs of the school in terms of understanding and meeting the Eligibility Criteria and the accreditation standards, and the developmental requirements to manage the process successfully.
2. Ensuring the school attends to the developmental requirements summarised either in the OB Report or the Eligibility Letter of the EC.
3. Providing input based on ongoing interaction with the school's executive and accreditation team as well as its wider community; this normally includes on-site visits.

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

4. The EQUIS Advisory Process

Pre-Eligibility Advisory

- a) The school submits its Formal Application for Entry into the EQUIS process (Application Form and Entry Application Datasheet).
- b) The EQUIS Office schedules an Online Briefing (OB), which serves the purpose of informing the school community about the challenges ahead. It also helps to scope the school's advisory needs. The outcome of the OB is summarised in the OB Report.
- c) The EQUIS Office, upon request by the school, assigns an EQUIS advisor, who supports the school in its developmental efforts, consistent with the Areas for Development identified in the OB Report, over a period of up to two years. The EQUIS advisor will write a Pre-Eligibility Advisory Evaluation. The document will be shared with the school and presented to the EC, together with the Eligibility Datasheet, for the decision on eligibility.
- d) The school submits the Application for Eligibility with the time of submission being ultimately determined by the school. It consists of the Application for Eligibility (i.e., a formal email indicating its plan for submission to the EC) and the Eligibility Datasheet.

Pre-Eligibility Advisory is concluded when the school submits the documents for the EC. If declared eligible, the school has the option to advance to Pre-Review Advisory. If denied eligibility, the school can choose to immediately restart Pre-Eligibility Advisory which then has a minimum duration of two years. In any case, it is possible that the school or the EQUIS advisor may wish to end the cooperation at this time. If requested, the EQUIS Office will assign a different EQUIS advisor.

Pre-Review Advisory

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

which PRV has to take place. Pre-Review Advisory normally runs over a period of maximum of two years.

- b) The EQUIS Office, upon request by the school, assigns an EQUIS advisor, who supports the school's self-assessment and preparation for the PRV with particular emphasis directed towards addressing any AoCs included in the Eligibility Letter (i.e., possible development shortfalls or difficulties identified by the EC). EQUIS Advisory may involve commenting on parts of the Self-assessment Report (SAR), as well as providing advice on the process of preparing the self-assessment and PRV.
- c) In the special cases where the EC had decided to extend the eligibility period to four years, an assessment will be made by the end of year two, by the EQUIS Office, as to whether the school has made progress on the AoCs expressed by the EC. To facilitate such an assessment the school submits an Eligibility Progress Report ([Annex 6](#)) describing how the school has addressed the AoCs. For the remainder of the eligibility period, the school may continue the process with or without (the same or different) EQUIS advisor.
- d) The school's submission of the SAR and accompanying materials concludes the EQUIS advisor's involvement with the school. The EQUIS advisor separately submits a Pre-Review Advisory Evaluation, which will be shared with the PRT and with the school. It evaluates the developmental progress during the Eligibility stage in the AoCs identified in the Eligibility Letter.

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

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

5. Stages of the EQUIS Advisory Process

A. Getting started

- ♦ The first step in the advisory process is for both sides to agree to work together. The EQUIS Office intends to create a match so that the EQUIS advisor's professional background and experience fit with the school's advisory needs.
- ♦ The EQUIS advisor assignment to an applicant school is always based on mutual consent. After the mutual consent, the EQUIS Office introduces the EQUIS advisor to the school.
- ♦ The EQUIS advisor receives all relevant background materials from the EQUIS Office to facilitate the advisory work. Specifically, these consist of
 - Pre-Eligibility: Entry Application Datasheet, OB Report
 - Pre-Review: Eligibility Datasheet, Eligibility Letter.

B. Interacting with the school

- ◆ In the first conversations it is important to agree on a general roadmap, on how the EQUIS advisor intends to interact with the school. This involves planning campus visit(s) as well as other forms of interaction.
- ◆ The advisory work will require 3-4 days in Pre-Eligibility and 4-6 days in Pre-Review. The total scope of the EQUIS advisor's time commitment will be determined by the developmental challenges facing the school.
- ◆ The EQUIS project leader at the school will be the person interacting with the EQUIS advisor most frequently. Given the EQUIS advisor's focus on institutional development, it is however equally important to have direct access to the head of school and the school's executive team.
- ◆ The EQUIS advisor's travel and out-of-pocket expenses will be covered by the school. The travel expense rules for peer reviewers apply here as well – see EQUIS Process Manual, Section 5 [Subsection 4.2.](#) and [Annex 10](#), item 4. 3.

C. Providing advice

- ◆ The role of the EQUIS advisor is to support the school's institutional development. The EQUIS advisor plays an instrumental role in helping the school to focus adequately on its development priorities to meet or exceed EQUIS Eligibility Criteria and EQUIS standards.
- ◆ The advisory activities will always begin with acknowledging the school's advisory needs. OB Report (Pre-Eligibility) and the AoCs mentioned in the Eligibility Letter (Pre-Review) should be used as initial guidance. The EQUIS advisor should however also engage in an open dialogue with the school and try to discover other issues that need to be addressed while going through the accreditation process.
- ◆ Quality improvement is not only about addressing institutional weaknesses; the EQUIS advisor should also provide adequate feedback on the school's strengths, ensuring they are fully recognised, and offer advice on how both strengths and weaknesses can be further developed to support continuous improvement.
- ◆ The advisory process ideally concludes with the school effectively using the feedback and advice received, with resulting improvements reflected in the datasheet and SAR.
- ◆ The EQUIS advisor provides feedback and advice throughout the process, and it is also part of the role to assess the development achieved by the school in the areas identified at the outset. The EQUIS advisor's assessment will be received either by the EC (Pre-Eligibility) or by the incoming PRT (Pre-Review).

D. Reporting

- ◆ The EQUIS advisor receives a reporting template from the EQUIS Office, which is kindly asked to fill out. The report should be brief (2-3 pages).

- ◆ The EQUIS advisor's report should be submitted before the deadline specified by the EQUIS Office. This is essential for the school to proceed in the accreditation process as planned.

E. Managing conflict of interest issues

- ◆ The Advisory Service is voluntary. It cannot be combined with any form of paid consultancy work, even if the school requests it.
- ◆ The Policy on Potential Conflicts of Interest for EFMD Peer Reviewers and Advisors, which can be found in [Annex 23](#) of the EQUIS Process Manual Annexes, applies.
- ◆ It is considered inappropriate for EQUIS advisors, once assigned to a school, or for the school itself, to propose or envisage mutual areas of collaboration or consultation before the end of the advisory assignment.

6. Fees

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

7. Further information

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

Annex

8

Pre-Eligibility Advisory
Evaluation Form

PRE-ELIGIBILITY ADVISORY EVALUATION

Name of the school

Name, title, school of the EQUIS advisor

Date: DD.MM.YYYY

Application for Entry	DD.MM.YYYY
Online Briefing	DD.MM.YYYY
Appointment of EQUIS advisor	DD.MM.YYYY

Areas for Development	
1	
2	
3	

Area for Development 1 <Description added by EQUIS Office.>
Description of progress in the Area for Development
<i>Please mention specific developments.</i>
Add text here...

Area for Development 2 <Description added by EQUIS Office.>
Description of progress in the Area for Development
<i>Please mention specific developments.</i>
Add text here...

Area for Development 3 <Description added by EQUIS Office.>

Description of progress in the Area for Development

Please mention specific developments.

Add text here...

Other Developments and Areas of Strength

Description of progress in other areas Areas of specific strength

Please mention other general developments and areas of strength.

Add text here...

Advisory Process

Identification of the key interactions with the school

Identify and describe (if needed) the key interactions with the school.

Add text here...

Annex

9

**Pre-Review Advisory
Evaluation Form**

PRE-REVIEW ADVISORY EVALUATION

Name of the school

Name, title, school of the EQUIS advisor

Date: DD.MM.YYYY

Eligibility decision	DD.MM.YYYY
EQUIS Committee recommendation on Peer Review Visit timing	
Appointment of EQUIS advisor	DD.MM.YYYY

Areas of Concern (AoCs):	
1	
2	
3	

AoC 1 <Description added by EQUIS Office.>	
Description of progress in the AoC1	
<i>Please mention specific developments.</i>	
Add text here...	

AoC 2 <Description added by EQUIS Office.>	
Description of progress in the AoC2	
<i>Please mention specific developments</i>	
Add text here...	

AoC 3 <Description added by EQUIS Office.>

Description of progress in the AoC3

Please mention specific developments

Add text here...

Other Developments and Areas of Strength

Description of progress in other areas

Areas of specific strength

Please mention other general developments and areas of strength.

Add text here...

Advisory Process

Identification of the key interactions with the school

Identify and describe (if needed) the key interactions with the school.

Add text here...

Annex 10

Peer Review
Visit Guide

PEER REVIEW VISIT GUIDE

1. Introduction

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

2. Objectives of the PRV

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

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

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

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

3. Composition of the PRT

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

Each PRT includes:

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

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

The roles and responsibilities of the various PRT members are set out in detail at the end of this guide. Each PRT member is required to sign a Confidentiality Agreement with respect to the information provided to them in the context of the PRV, also stating their agreement to conform to the Conflict of Interest Policy (see [Annex 22](#) and [23](#)). It is considered inappropriate for individual peer reviewers, once assigned to a school's PRV, or for the school itself, to suggest or imply mutual areas of collaboration before a final decision on accreditation or re-accreditation has been reached by the AB. Prudence suggests that any such collaborations should not take place until at least 1.5 years after the accreditation decision.

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

4. Preparation for the PRV

4.1 Reading materials for the peer reviewers

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

Documents specific to the school under peer review:

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

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

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

In the case of initial accreditation PRVs:

1. The Eligibility Datasheet
2. The Eligibility Letter, highlighting any Areas of Concern (AoCs) that the EC noted regarding the application
3. The Pre-Review Advisory Evaluation, for schools opting for Pre-Review Advisory

In the case of re-accreditation PRVs:

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

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

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

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

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

4.3 General logistics & travel policy

Following EQUIS procedures, the school should take charge of PRT members' travel expenses. PRT members may arrange their own travel, however many schools prefer to purchase tickets therefore PRT members and school should agree the process between them. The following guidelines must be followed when making travel arrangements:

1. School approval (copying the EQUIS Office) is required before purchasing a ticket.
2. In principle, flights should be booked in economy class, but business class tickets are allowed in the following circumstances:
 - a) in a trip involving at least one flight lasting more than 5 hours, business class can be chosen for this flight and all its connecting flights.
 - b) in a trip involving several flights, all of them lasting less than 5 hours, if the time between the scheduled departure of the first flight and the scheduled arrival of the last flight to the final destination takes more than 8 consecutive hours including time spent in connecting airports.

PRT members work on a voluntary basis and it is important to optimise their working conditions as much as possible so that they will be able to work immediately when they arrive.

3. Trains can be booked in first class.
4. Peer reviewers must book their flights at the earliest opportunity to minimise the costs to the school. Peer reviewers should endeavour to keep the costs as low as possible (a maximum of 7000€ is envisaged but cannot be considered as the norm). Should the price of the ticket exceed this amount, prior approval must be sought from the school, copying the EQUIS Office. Any further variations in ticket purchase must be agreed by the school in advance.

Schools under review are expected to cover the travel insurance of peer reviewers, where they are not covered by an insurance of their home institution. Flights, whether booked by the PRT members or by the school, are required to be refundable. The school should also advise peer reviewers should they require a visa to enter the country.

Travel expenses will be reimbursed by the school directly, copying additionally the EQUIS Office. It is, therefore, necessary to keep all invoices and ticket stubs and send them back after the PRV. If peer reviewers combine a PRV to the school with other professional activities, then it should be agreed on a fair cost splitting arrangement with the school.

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

Lunches should be rapid, involving a minimum of disturbance. There is a definite preference for on-site buffet lunches in the PRT Base Room (see below). The schedule will be very tight, so maximum use of the time is essential. Formal presentations and social events are to be avoided. Table nameplates and lists of names, roles, preferably with head shots should be prepared for every participant in each meeting and distributed to the PRT at least one day before the visit begins.

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

5. Setting up the PRV Schedule

The school will propose a PRV Schedule to the EQUIS Office, which then checks it and passes it to the PRT chair for any comments and approval.

The PRV Schedule should include sessions on the listed topics indicated in the PRV Schedule Template (see [Annexes 11](#) and [12](#)). Deviations from this template may be proposed by the school to consider its specific circumstances or in cases of unusual scheduling difficulties, should be explicitly justified when submitting the draft PRV Schedule and will only be accepted exceptionally.

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

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

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

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

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

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

6. The Peer Review Visit

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

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

6.1 Preparation for PRV meetings

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

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

6.2 PRT Base Room

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

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

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

6.3 Focus of individual PRV meetings

Evening before the PRV

Meeting 1: Briefing Meeting of the PRT

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

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

A suitable place for this meeting is booked by the school, preferably, a separate meeting room in the hotel, or a quiet and isolated table in the hotel restaurant where they can have dinner and work undisturbed. The PRT will have confidential discussions which the school may not wish being overheard by outsiders.

The PRT chair should seek to establish the impressions of the other team members to identify further information that should be supplied by the school and to prepare the focus of each meeting.

Day 1 of the PRV

Meeting 2: Initial meeting with the school's executive committee

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

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

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

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

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

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

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

Meeting 3: External Governance

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

Meeting 4: Overall Programme Portfolio

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

This will be followed on Day 2 by an in-depth session on the Selected Programme.

Meeting 5: Executive Education

If the school conducts executive education (EE) and it has been included in the assessment, a meeting should be scheduled with those responsible for the management of EE. Representatives of key partners and client organisations can be met during Meeting 12: Connections with Practice (see below). For re-accreditations, the PRT chair, together with the PRT decides on the inclusion of EE. For initial accreditations, this is specified by the EC.

Meeting 6: Faculty Management

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

Meeting 7: Research

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

End of Day 1

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

Day 2 of the PRV

Meeting 8: Selected Programme

The Selected Programme will be chosen by the EQUIS Office from a list of three programmes proposed by the school (typically major programmes) from the programme portfolio listed in the SAR Datasheet.

Schools that hold an [EFMD Programme Accreditation](#) have a choice regarding the assessment of the Selected Programme (see [Annex 28](#)).

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

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

Meeting 9: Students

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

Meeting 10: Faculty

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

Meeting 11: Finances, Resources and Control

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

For initial accreditation only – Meeting 11.2: Support Services

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

Meeting 12: Connections with Practice and Alumni

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

The purpose of the parallel session with representatives of the alumni network is to obtain evidence from these stakeholders that the school meets their needs, and that the school offers appropriate support to alumni activities for the benefit of both.

Some of the alumni participating in this session may have graduated recently but others should be alumni that are now employed and may be at various stages of their professional careers.

End of Day 2

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

Day 3 of the PRV

Site visit

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

Meeting 13: Final PRT Meeting

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

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

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

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

7. Interactions with the PRT

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

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

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

8. Assessment during the PRV

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

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

The stages involved in this process will be as follows:

1. Individual assessment and completion of documentation, using the CEF and QP described below and shown in full in [Annexes 16](#) and [17](#).
2. Consolidation of findings in the final team debriefing meeting(s), including:
 - ◆ Agreement on the QP scoring
 - ◆ Development of a consensus view on the school's performance with respect to the different criteria, as outlined in the CEF, particularly where performance is rated above or below standard or there is no obvious consensus
 - ◆ Agreement on the final recommendation on accreditation
 - ◆ Preparation for the debriefing of the school (oral report).
3. Debriefing of the school.
4. Preparation of the PRR.

Each of these stages is discussed in more detail below.

8.1 Individual assessment and completion of the CEF and QP

This will be an on-going process from the beginning of Day 1. PRT members should make use of the CEF ([Annex 17](#)) to help cover the issues in the EQUIS framework and evaluate the school in relation to them. The CEF is the working document that will help each PRT member build up their own personal assessment of the school.

The items listed follow the order in which they appear in the corresponding chapter of the [S&C](#), where a fuller explanation of the criterion will be found. Peer reviewers should refer to this document in case of doubt as to what is meant.

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

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

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

8.2 Consolidation of findings in the final team debriefing meeting

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

8.2.1 Agreement on the QP scoring

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

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

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

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

Meets standard

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

Above standard

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

Below standard

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

N/A

Not considered applicable or relevant to the school concerned.

8.2.2 Development of a consensus view

Although the PRT may naturally be reluctant to do something that looks like ‘ticking boxes’, the rationale for this approach is that it encourages the peer reviewers to implement a systematic process to arrive at a consensus view. Since PRT members are likely to have divergent views on any number of criteria assessments, discussion of the diverse opinions is the process that brings a detailed discussion of the school to evidenced conclusion. The process is described next.

At the beginning of the final PRT meeting on the evening of Day 2, or immediately before, the PRT chair will invite the members of the team to make a personal evaluation by checking above standard, meets standard, below standard or N/A for each assessment criterion. The preferred procedure is for each PRT member to complete the document alone before any discussion has taken place on the assessment of the different items. It is only when each member has committed themselves to an initial judgement that the PRT chair opens the debate to work towards a common position that will be entered onto a single, consolidated version of the QP. This procedure will rapidly indicate where complete agreement exists among the PRT members and will also clearly reveal the areas that require careful discussion.

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

8.2.3 Agreement on the final recommendation

Once the QP has been completed, the PRT should then be able to agree on the final recommendation as to whether the school has met the standards for EQUIS accreditation.

If they do not believe these have been met, then the shortfall must be fully defined, together with a clear statement as to the action necessary to meet the shortfall.

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

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

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

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

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

8.3 Debriefing

The oral presentation at the end of the PRV plays a special role in the assessment process. With a great deal of time and energy having been invested by the staff of the school over a period of months, it is important that the feedback provides real value and ‘closes out’ the PRV in an appropriate way. Giving feedback is a skilled task, both for individuals and institutions. The rules for good practice that apply to feedback given to individuals are just as valid when applied to institutional feedback:

- ◆ Adoption of a positive, supportive, and constructive approach
- ◆ Concentration on the key messages that need to be delivered, not on the fine detail
- ◆ Presentation of the strengths as well as the weaknesses
- ◆ Early stressing of positive feedback to create the right climate
- ◆ Delivery of key points in a clear and concise manner
- ◆ Presenting more negative feedback in a constructive form that can be accepted
- ◆ Confirming understanding and acceptance of key development needs
- ◆ Suggesting alternatives for the way to deal with specific problems
- ◆ Allowing the recipients to identify the solutions
- ◆ Providing clear guidance on the necessary action for quality improvement where appropriate.

The debriefing also allows PRTs to distinguish between feedback provided informally and that contained in a more formal PRR. There are sometimes findings and conclusions that

may not really be suitable for a more public PRR, yet the panel would like to make more critical (but constructive) statements about a particular aspect of institutional management. In these cases, the oral feedback can be used to formulate more strongly worded recommendations to the right audience and in the right place, e.g., the school's main management committee.

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

9. The Peer Review Report (PRR)

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

9.1 Producing the PRR

The PRR is created in the following steps:

1. Consolidating the comments from the PRT, and using the written summaries in the CEF and the minutes of the oral debriefing, the PRT chair writes up a first draft of the PRR and circulates it to the PRT for comment where each member is expected to provide input and comment on the draft.
2. The PRT chair amends the PRR, considering the comments received from the other PRT members, and sends the revised draft, including the consolidated QP (in a separate file), to the EQUIS Office.
3. The revised PRR draft is edited, formatted, and proofread by the EQUIS Office and submitted to the school. The editing process is to ensure that the PRR's documents are complete, coherent and that arguments are well made to support the assessment in the QP and lead to the recommendation on accreditation and the areas of improvement. Sometimes the editing process leads to the draft PRR being returned to the PRT chair for clarification or amendment before it is sent to the school for comment.
4. The school responds to any factual inconsistencies or misunderstandings and returns it to the EQUIS Office normally within 10 working days. Following receipt of comments from the school, changes may be made with the approval of the PRT chair.
5. The final PRR together with the QP, and the SAR Datasheet are sent to the school (normally within 8 weeks from the date of the PRV). The school is requested to give its written authorisation for the report to be submitted to the AB.
6. The final PRR is submitted to the AB.

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

9.2 Formulating the PRR

When setting out the PRT's assessment of the school against the EQUIS criteria and its recommendation regarding accreditation, great care should be taken to ensure consistency between the three parts of the PRR: the conclusions written in the main body of the PRR, the assessment set out in the QP, and the recommendation regarding accreditation.

The PRR should fully explain why a particular area has been rated above standard or below standard. The PRR must also fully explain the reasons that led the PRT to make its recommendation on accreditation.

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

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

9.3 Responsible and transparent use of artificial intelligence

Artificial intelligence (AI) tools may be used in the review process. However, independent analysis and professional judgement by peer reviewers must remain central at all stages of the Peer Review Visit, including document review, site visits, and team deliberations. The following principles apply to peer reviewers:

- ◆ Confidentiality must be preserved at all times. Confidential, proprietary, or non-public documents or information provided by the school under review or by EFMD in the context of the accreditation must not be uploaded or otherwise disclosed to any AI tool.
- ◆ Peer reviewers retain full responsibility for the methodology, analysis, content, and professional quality of all submitted work, regardless of the use of AI tools.
- ◆ The AI Transparency Statement must be completed at the end of the Peer Review Report (see point 9.4 below).

9.4 Recommended format

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

Length: minimum 15 pages and maximum 25 pages

Table of Contents

1. Introduction

1.1 Composition of the PRT

- name, position, and country of each reviewer
- any additional comments on the PRT

1.2 EQUIS-related background

- background on the visit: initial or re-accreditation, delay, AoCs, etc.

1.3 Institutional scope

- institutional focus of the accreditation: limitations and exclusions

1.4 Acknowledgements

- organisation of the visit and flexibility of the school
- acknowledgements
- any general comments on the visit

1.5 Comments on the SAR and ODR materials

1.6 Comments on the Student Report

2. **General Assessment**

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

2.2 Assessment of progress – in case of re-accreditations (1 page)

- AoDs (for schools with 5-year accreditation)
- AoRIs (for schools with 3-year accreditation)
- Other recommendations and suggestions in previous PRR or AB letter

2.3 Area(s) of excellence – optional (1/2 page)

- Description of any aspect of outstanding quality

3. **Recommendation to the AB**

- for a period of 5 years, indicating areas where the school excels;
- for a period of 3 years, describing the AoRIs where the school has not yet fully complied with the EQUIS standards of quality;
- for non-accreditation, giving a detailed justification for this recommendation.

4. **Detailed analysis following the S&C (10 pages)**

- based on the feedback of the peer reviewers following the visit and summarised in the consolidated CEF
- succinct information to support the judgement of the PRT, particularly for issues rated above or below standard in the QP

5. **AI Transparency Statement** (tick as appropriate)

- ☐ The content of the PRR was **not** prepared with the assistance of AI tools.
- ☐ The content of the PRR **was** prepared with the assistance of AI tools and has been carefully reviewed by all PRT members for accuracy, integrity, and appropriateness.
- ☐ All PRT members have reviewed and approved the content (signatures required).

Appendix 1: QP

Appendix 2: SAR Datasheet

Appendix 3: AB letter with the latest accreditation decision (in case of re-accreditation)

10. Roles and Responsibilities

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

1.1 Responsibilities of the EQUIS Office

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

1.2 Responsibilities of the EQUIS project leader within the school

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

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.

1.3 *Responsibilities of the individual PRT members*

Before the PRV

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

During the PRV

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

Following the PRV

- ◆ to liaise, if necessary, with the PRT chair and other peer reviewers to confirm the final decision on accreditation
- ◆ to contribute to the drafting of the final PRR
- ◆ to provide all requested documentation required for reimbursement of travel to the school
- ◆ to complete the online feedback survey

- ◆ to destruct all sensitive materials relating to the PRV following acceptance of the final PRR
- ◆ to avoid expressing any opinion or communicating the results of the assessment to any third parties.

10.3.1 Role of peer reviewers from the world of practice

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

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

10.3.2 Role of local peer reviewers

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

The local reviewer or another member of the team will normally speak the language of the country.

1.4 Responsibilities of the PRT chair

Before the PRV

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

During the PRV

- ◆ to brief the PRT members on the peer review process at the initial briefing meeting
- ◆ to be the main spokesperson for the PRT
- ◆ to ensure adequate preparation for PRV meetings
- ◆ to determine the delegation of lead responsibilities within the PRT

- ◆ to divide up sessions and responsibilities to individual peer reviewers
- ◆ to lead the PRT towards a set of conclusions during the PRV
- ◆ to ensure that the PRT members complete the assessment documents before the end of the PRV
- ◆ to hold a meeting of the PRT, usually on the evening of the second day, during which the team agrees on its conclusions and recommendation
- ◆ to run the debriefing for the school during the final meeting
- ◆ to inform urgently the EQUIS Office of any unusual incident that may disrupt the PRV.

Following the PRV

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

Annex 11

Initial Peer Review
Visit Schedule
Template

Peer Review Visit Schedule

Template for Initial Accreditation Visits

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

<u>Evening before the PRV:</u>		
19:30	Meeting 1: Briefing meeting of the PRT Dinner at hotel in private room for the PRT alone to set the visit agenda.	
<u>Day 1:</u>		
09:00-10:30	Meeting 2: Initial meeting with the school's executive committee	90 mins
10:30-10:45	Break	
10:45-11:45	Meeting 3: External Governance Representatives of the school's governing body, including for example members of the university leadership or board of trustees. N.B. These should not be the same people as for the initial meeting.	60 mins
11:45-13:00	Meeting 4: Overall Programme Portfolio Associate dean(s) responsible for overall portfolio and programme directors.	around 1 hour
13:00-14:00	Lunch PRT alone for discussions.	
14:00-15:00	Meeting 5: Executive Education Director of executive education programmes and support staff.	60 mins <i>If no EE, schedule can be shortened accordingly.</i>
15:00-16:00	Meeting 6: Faculty Management Dean, deputy dean or associate dean of faculty, department or subject area heads.	60 mins
16:00-16:15	Break	
16:15-17:15	Meeting 7: Research Associate dean / director for research, members of the research committee.	60 mins
17:30-18:30	Optional reception and buffet Wider selection of the school's stakeholders	max. 90 mins

Day 2:

09:00-10:30	Meeting 8: Selected Programme Programme director(s) and administrators responsible for the programme.	90 mins
10:30-10:45	Break	
10:45-12:15	Review of programme materials Reading time for the PRT.	
12:15-13:15	Meeting 9: Students* 2 groups in parallel from different programmes, to be scheduled in related programme groups, including students from the Selected Programme and students who contributed to the Student Report.	60 mins <i>2 groups of 10-15 students in parallel</i>
13:15-14:15	Lunch PRT alone for discussions.	
14:15-15:15	Meeting 10: Faculty* Randomly selected faculty members, different from the staff already met. Group 1: Senior faculty Group 2: Junior faculty	60 mins <i>2 groups of 8-10 faculty members in parallel</i>
15:15-16:00	Meeting 11.1: Financial Management, Resources and Control Managers responsible for budgeting, investments, funding, risk management and those responsible for other professional resources in the school (administration, marketing, facilities).	45 mins
16:00-16:15	Break	
16:15-17:15	Meeting 11.2: Support Services* Group 1: Representatives of student support services – admissions, marketing, internships, international office, careers etc. Group 2: Other support services – management of non-academic staff, ICT, facilities, etc.	60 mins <i>2 groups in parallel</i>
17:15-18:15	Meeting 12: Connections with Practice and Alumni* Group 1: Connections with practice – representatives of key partners and clients from the world of practice, advisory boards, etc. Group 2: Alumni – representatives of the alumni network In some cases, the school may also invite representatives from the world of practice and alumni to the optional reception at the end of Day 1	60 mins <i>2 groups in parallel</i>
19:30	Dinner at hotel in private room PRT meets separately to formulate its overall assessment.	

<u>Day 3:</u>		
09:00-09:45	Site visit Lecture halls, working group rooms, libraries, IT facilities etc.	45 mins
09:45-12:00	Meeting 13: Final PRT meeting PRT meets separately. May be used for additional meetings at the request of the PRT.	
12:00-12:30	Meeting 14: Debriefing and feedback to the school by the PRT	30 mins
12:30-13:30	Optional buffet lunch	

* PRT can be split into 2 sub-teams

Annex 12

Re-accreditation Peer
Review Visit Schedule
Template

Peer Review Visit Schedule

Template for Re-accreditation Visits

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

<u>Evening before the PRV:</u>		
19:30	Meeting 1: Briefing meeting of the PRT Dinner at hotel in private room for the PRT alone to set the visit agenda.	
<u>Day 1:</u>		
09:00-10:30	Meeting 2.1: Initial meeting with the school's executive committee	90 mins
10:30-10:45	Break	
10:45-11:45	Meeting 2.2: AoDs/AoRIs meeting with the school's executive committee For schools previously granted 5-year accreditation: Review of the AoDs. For schools previously granted 3-year accreditation: Review of progress made in relation to the AoRIs.	60 mins
11:45-12:30	Meeting 3: External Governance Representatives of the school's governing body, including for example members of the university leadership or board of trustees. N.B. These should not be the same people as for the initial meeting.	45 mins
12:30-13:30	Lunch PRT alone for discussions.	
13:30-14:45	Meeting 4: Overall Programme Portfolio Associate dean(s) responsible for overall portfolio and programme directors.	around 1 hour
14:45-15:45	Meeting 5: Executive Education Director of executive education programmes and support staff.	60 mins <i>If no EE, schedule can be shortened accordingly.</i>
15:45-16:00	Break	

16:00-17:00	Meeting 6: Faculty Management Dean, deputy dean or associate dean of faculty, department or subject area heads.	60 mins
17:00-18:00	Meeting 7: Research Associate dean / director for research, members of the research committee.	60 mins
18:30-19:30	Optional reception and buffet Wider selection of the school's stakeholders	max. 90 mins
Day 2:		
09:00-10:30	Meeting 8: Selected Programme Programme director(s) and administrators responsible for the programme. <i>This meeting is not required for schools that hold an EFMD Programme Accreditation, see Annex 24.</i>	90 mins
10:30-10:45	Break	
10:45-12:15	Review of programme materials Reading time for the PRT.	
12:15-13:15	Lunch PRT alone for discussions.	
13:15-14:15	Meeting 9: Students* 2 groups in parallel from different programmes, to be scheduled in related programme groups, including students from the Selected Programme and students who contributed to the Student Report.	60 mins <i>2 groups of 10-15 students in parallel</i>
14:15-15:15	Meeting 10: Faculty* Randomly selected faculty members, different from the staff already met. Group 1: Senior faculty Group 2: Junior faculty	60 mins <i>2 groups of 8-10 faculty members</i>
15:15-15:45	Break	
15:45-16:45	Meeting 11: Financial Management, Resources and Control Managers responsible for budgeting, investments, funding, risk management and those responsible for other professional resources in the school (administration, marketing, facilities).	60 mins
16:45-17:45	Meeting 12: Connections with Practice and Alumni* Group 1: Connections with practice – representatives of key partners and clients from the world of practice, advisory boards, etc. Group 2: Alumni – representatives of the alumni network	60 mins <i>2 groups in parallel</i>

	In some cases, the school may also invite representatives from the world of practice and alumni to the optional reception at the end of Day 1	
19:30	Dinner at hotel in private room PRT meets separately to formulate its overall assessment.	
<u>Day 3:</u>		
09:00-09:45	Site visit Lecture halls, working group rooms, libraries, IT facilities etc.	45 min
09:45-12:00	Meeting 13: Final PRT meeting PRT meets separately. May be used for additional meetings at the request of the PRT.	
12:00-12:30	Meeting 14: Debriefing and feedback to the school by the PRT	30 mins
12:30-13:30	Optional buffet lunch	

* PRT can be split into 2 sub-teams

Annex 13

Supporting Information &
Documents to be Provided in
the Self-Assessment Report
or SAR Annexes

SUPPORTING INFORMATION & DOCUMENTS TO BE PROVIDED IN THE SELF-ASSESSMENT REPORT OR SAR ANNEXES

(also refer to the [EQUIS Standards & Criteria](#))

Chapter 1: Context, Governance and Strategy

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

Chapter 2: Programmes

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

Chapter 3: Students

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

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

- ◆ A list of major employers over the past 5 years
- ◆ A table describing the outward and inward flows of international exchange students, with a breakdown by programme, by country of destination or by country of origin, by partner school, by length of stay for the latest, complete year
- ◆ A Student Report is required from students at the school on issues of key interest in the EQUIS accreditation process. For more information see [Annex 15](#) of the EQUIS Process Manual.

Chapter 4: Faculty

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

- ◆ A table showing faculty staffing levels over the past five years, including the number of new appointments and the number of departures for each year, with a breakdown by category or rank
 - ◆ Distribution of the core faculty by academic department when appropriate
- Note: If the school has filled out Table 3 in the accompanying SAR Datasheet completely, it is sufficient to insert a reference here: “Please, see Table 3 in the SAR Datasheet for this information”.
- ◆ A table setting out for the current year the key statistics for the faculty (gender distribution, age distribution, nationality mix, number of PhDs, etc.)

Chapter 5: Research

- ◆ Numerical data on research outputs.
- ◆ A table listing funds received from research grants, commissioned research or organisational research sponsorship over the past five years and financial support for endowed chairs, research centres and doctoral research
- ◆ If appropriate, details of any commercialisation projects resulting from the school's research (e.g., software, frameworks or tools...)

Chapter 6: Executive Education

- ◆ Budgetary information with the breakdown of revenues by open and customised programmes for the past three years
- ◆ Data concerning the number and type of programmes offered, the number of participants, the number of training days, etc. This information should be presented in the form of a table
- ◆ A list of the school's key clients in the field of executive education in the past three years
- ◆ A list of academic and non-academic partners with an indication of the type of cooperation (course or programme delivery, digital tool provision, skills development)

Chapter 7: Resources and Administration

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

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

Chapter 8: Internationalisation

- ◆ List of international academic or non-academic partners showing the nature of relationship such as student exchanges, research collaboration, joint programmes, course or programme deliver
- ◆ The Chapter on Internationalisation should include cross-references to tables included in other Chapters, notably as regards Students, Faculty and Research

Chapter 9: Ethics, Responsibility and Sustainability

- ◆ Brief description of policies and institutional projects in these areas
- ◆ Brief description of student-led projects in these areas
- ◆ Approaches to the assessment of ERS
- ◆ Examples of community outreach and public service activities

Chapter 10: Connections with Practice

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

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

- ◆ Details of funding when applicable

Annex 14

| Documents to be
| Provided in the Online
| Document Repository

DOCUMENTS TO BE PROVIDED IN THE ONLINE DOCUMENT REPOSITORY (ODR)

(also refer to the [EQUIS Standards & Criteria](#))

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

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

Chapter 1: Context, Governance and Strategy

- ◆ Documents describing the school's strategic plans and related policies
- ◆ List of members in the school's governing body or advisory board (indicating name, position, organisation, nationality, year of appointment)
Double passport holders should always be counted as nationals, if one of the passports is the domestic one.
- ◆ Cyber security policy
- ◆ Risk register

Chapter 2: Programmes

General Programme Portfolio

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

- ◆ **Learning and teaching strategy** (provide any available formal documents)
- ◆ List of programmes
- ◆ For each of the programmes:
 - Aims and objectives
 - Programme Intended Learning Outcomes (ILOs)
 - Curriculum structure and rationale
 - List of component courses
- ◆ **Descriptions of the overall assessment regime and grading system** and their relation to the programme ILOs (provide any available formal documents)
- ◆ Teaching evaluation questionnaires for completion by students
- ◆ Description or reports of regular programme reviews
- ◆ Code of ethical conduct or similar document
- ◆ **Description of the pedagogical initiatives or projects or innovations undertaken in the last five years**

Selected Programme

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

- ◆ **Programme structure document including:**
 - **Programme objectives and overall ILOs**
 - **Rationale for the programme structure with a table or diagram showing how the component courses develop academic progression and lead to the attainment of the programme ILOs**
 - **Methods for measuring and evaluating results vs goals in relation to ILOs**
 - **Quality assurance**
- ◆ **List of component courses including for each:**
 - **ILOs**
 - **Syllabus**
 - **Rubrics**
- ◆ **Descriptions of the assessment regime and grading system**
- ◆ Access to online material regarding course organisation and delivery
- ◆ Teaching evaluations (summary) by students for each course

- ◆ Teaching materials and student work: six courses, three core (mandatory) and three electives should be selected for sampling and a folder for each course should be provided. Where possible, **at least half the courses should be in English**. For programmes without electives, electives should be replaced by more core courses.
 - Teaching materials should be provided for each of the six selected courses to include the course notes or handouts, case studies, textbooks, journal readings, videos, projects, other online material.
 - Student work should be sampled based on mark or grade schedules or distributions (list of student names with marks or grades) within the six selected courses. Note that mark schedules must be provided for each of the six selected courses. For each of the same six courses selected above, the following student work should be provided:
 - > the assignments/exams set
 - > 6 graded samples of the major assignment (exam, dissertation, project report, etc.) for each course matching those assignments/exams and illustrating the range of achievement on the part of the students. The PRT needs to see the quality of the students' work and of the assessment/feedback provided. These 6 scripts should include the highest mark, the lowest mark and 4 from close to the pass mark for the course (i.e., marginal scripts). If there are no failed papers, the sample should consist of the 2 highest and the 4 lowest marks or grades.
- ◆ A sample of 12 graded final dissertations or internship reports (as appropriate, e.g., Masters theses, undergraduate dissertations or internship reports) should also be provided, with 3 each with the highest and lowest marks/grades and 6 with mid-level marks. Doctoral programmes as selected programmes should be supported with a broader sample of 18 final dissertations and a supplementary sample of publications documenting the doctoral students' ability to get their doctoral research published.

Chapter 3: Students

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

- ◆ A table for each programme detailing the job placement record of students graduating in the previous academic year

Chapter 4: Faculty

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

Chapter 5: Research

- ◆ Examples of materials published (articles, books, reports, white papers, IP licences, policy reports)
- ◆ Evidence of dissemination via and engagement with social, digital and print media
- ◆ Any documents regarding research strategy, policy and processes
- ◆ Up to five summary examples of the work of research centres, institutes, or collaborative projects, with a maximum of 750 words each
- ◆ Membership of the research or scientific committee

Chapter 6: Executive Education

- ◆ Documents on executive education strategy, policy and processes
- ◆ Materials describing the various programmes on offer
- ◆ The catalogue of public, open courses offered
- ◆ Examples of customised programme syllabi
- ◆ Examples of course material delivered to participants

Chapter 7: Resources and Administration

- ◆ Information distributed to students explaining the documentation facilities and services available
- ◆ Strategy and policies for management and development of staff, e.g., faculty/staff handbook, new employees' induction pack, promotion process and criteria
- ◆ The school's risk management guidelines, if available

- ◆ Marketing strategy/plan

Chapter 8: Internationalisation

- ◆ International strategy and policy documents
- ◆ Documents relating to provisions abroad and multi-campus operations
- ◆ Documents relating to online provision that specifically targets foreign markets, if applicable

Chapter 9: Ethics, Sustainability and Responsibility

- ◆ Representative selection of educational materials (syllabi, teaching materials, assessments, etc.)
- ◆ Representative selection of research outcomes (published articles, research project reports, etc.)
- ◆ School policies and reports relating to ERS
- ◆ Minutes of committee meetings dealing with ERS issues

Chapter 10: Connections with Practice

- ◆ Strategy and policy documents relating to the school's connections with practice
- ◆ Evidence, if appropriate, of outputs from the school's work with its major connection

Artificial Intelligence (AI) Systems

- ◆ Relevant AI-related policy or strategy documents: Please provide (or link to) any policies, guidance, or strategy documents currently in use
- ◆ Overview of approved AI systems and how they are used in learning, assessment, research, and administration
- ◆ Examples of course/assessment materials where AI usage is integrated (and student guidance on acceptable use)
- ◆ Faculty and staff development materials and participation evidence (AI literacy, digital pedagogy, research support, ethical use)

Annex 15

| Student Report
| Template

STUDENT REPORT

This report aims to give students from EQUIS applicant schools the opportunity to comment on how they perceive their school's current strengths and potential future challenges. For these descriptions to be of value to EQUIS, and in particular to the Peer Review Team, it is important that participants express their views freely and do not copy or use text from school reports, promotional material or the institution's website.

The following questions should be discussed by a representative group of students of between 15 and 25 participants. Ideally, students from the school's main programme segments (bachelor, pre-experience master, post-experience master, MBA, doctoral) should be represented. Some exchange students may also be included. Participation of student representatives is not recommended.

The students should write the report without the involvement of the school or its staff. Note that the school should only initiate the process. Thereafter, students work independently, without detailed guidance or supervision from the school or any other external source. In particular, the selection of students, the conduct of interviews or the writing or revision of the Student Report by school staff or consultants is not allowed. In subsequent meetings with the Peer Review Team, students should be able to confirm that they have produced the report independently and have not been guided or influenced in any way.

When completing this report, use the template and add your text after each question. Please do not delete any descriptions, instructions or questions from this document. Please ensure that the total length of the report does not exceed 10 pages.

Name of the school:

Participants:

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

Selection process:

Briefly describe the selection process for the students who contributed to this report.

1. THE STRENGTHS OF THE SCHOOL

In this section, please describe the positive aspects – the strengths – of your school that you are experiencing during your studies. Below are some questions to assist you in doing this. Feel free to add further details to your comments.

- ◆ Is the school contributing strongly to students' professional development? If so, how?

- ◆ Is the school contributing strongly to students' personal development? If so, how?

- ◆ What resources, programmes or extra-curricular activities at the school are helpful for your learning and career goals? Please elaborate briefly.

- ◆ Is there effective personal support given to students (e.g. international placement/career/counselling services) Is anything especially appreciated?

- ◆ If you were to recommend the school to a prospective student, what would you highlight as its greatest advantage?

- ◆ What are the aspects of your experience that should be maintained or developed in the school?

- ◆ Does the school prepare students well for work in an international environment? How strong is the school's focus on transregional or transnational experiences for students? Are new technological opportunities being exploited to facilitate the international exposure of students?

- ◆ Does the school prepare students well to become responsible citizens, with a sound appreciation of ethics and regard for the sustainability of the environment? What aspects of the school's work achieves this?

- ◆ Does the school provide students with a robust practical understanding of business and management? What aspects of the school's connections with practice facilitate this?

- ◆ What are the initiatives taken by the school to ensure that the voice of the students contributes to its ongoing improvement? Some possibilities include information given to students on school objectives, activities and achievements, participation of students in governing and advisory committees, provision of formal mechanisms for regular student feedback and channels through which students can voice their complaints and suggestions spontaneously.

2. FUTURE CHALLENGES

In this section, please outline the key challenges for the school in the future to maintain its current position. Below are some questions to assist you in doing this. Again, feel free to add further details to your comments as necessary.

- ◆ What aspects of the school's curriculum might need particular attention and improvement to prepare for future challenges? What are the reasons for this?

- ◆ Is there anything about your experience at the school that has fallen short of your expectations? Please explain why and consider how this could be addressed in the future.

- ◆ What aspects of the school's resources, programmes or extra-curricular activities would you change to enhance the quality of education and student life? What else could be changed for the school as a whole?

- ◆ What might the school do to enhance further learning outcomes by integrating various learning models? Here are some possibilities: Online learning, virtual classrooms, understanding and using of generative AI, deployment of AR, VR or XR, in student work?

- ◆ If you could change just one thing about the school to improve the student experience, what would it be? Please elaborate briefly.

- ◆ Are there any further activities the school might offer to prepare you better for your future career? Please elaborate briefly

- ◆ What could the school do to prepare students more for work in an international environment? Here are some possibilities: Increasing the diversity of student cohorts or faculty, expanding the global focus of curricula, adopting digital tools, growing international partnerships with business schools and organisations, achieving or maintaining accreditations and rankings, improving its international reputation, supporting students to meet the costs of international study.

- ◆ Is there more the school could be doing to prepare students better to become responsible citizens, with a sound appreciation of ethics and regard for the sustainability of the environment? Here are some possibilities: focussing on waste reduction, recycling, community volunteering or charity work, courses on ethics, EDI initiatives, codes of conduct.

- ◆ What could the school do to augment its connections with the world of practice? Here are some possibilities: Providing real-world experience, keeping faculty current with practice, building and maintaining partnerships, using practice-oriented research for learning and teaching, aligning curricula more closely with the needs of practice, contributing to the improvement of business practice.

- ◆ How might the school better ensure that the voice of the students contributes to its ongoing improvement? Please elaborate briefly.

3. OTHER

Here, students are free to address other topics that they feel may be relevant to EQUIS.

Annex 16

| EQUIS Quality
| Profile Sheet

EQUIS QUALITY PROFILE SHEET

Name of the school:

Date of the Peer Review Visit:

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

Meets standard

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

Above standard

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

Below standard

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

N/A:

Not considered applicable or relevant to the school concerned.

Note

Decisions on accreditation by the EQUIS Accreditation Board (AB) are not based on counting the number of Above and Below ticks in the QP but on the arguments made within the Peer Review Report text particularly noting the key EQUIS standards. While the QP covers all the EQUIS standards, the key standards are more important to the AB than others. Therefore, it should not be expected that all the ticks in the QP carry equal weight in the AB’s discussions.

		Overall Quality Evaluation			
		ABOVE standard	MEETS standard	BELOW standard	N/A
Chap 1	Context, Governance and Strategy				
1.1	Environment				
1.2	Institutional status				
1.3	External governance				
1.4	Internal governance				
1.5	Autonomy				
1.6	Mission, vision and values				
1.7	Current strategic positioning				
1.8	Strategic consistency				
1.9	Strategic process				
1.10	Quality assurance				
1.11	Internationalisation				
1.12	Ethics, responsibility and sustainability				
1.13	Connections with practice				
1.14	Digitalisation				
Chap 2	Programmes				
	OVERALL PROGRAMME PORTFOLIO				
2.1	Coherence of the school's portfolio of programmes				
2.2	Quality of the programme management systems				
2.3	Programme design				
2.4	Pedagogic development and innovation				
2.5	Higher Education skills				
2.6	Acquisition of managerial skills				
2.7	Programme delivery				
2.8	Student assessment				
2.9	Quality assurance systems				
2.10	International attractiveness and content				
2.11	Ethics, responsibility and sustainability				
2.12	Relevance of connections with practice				
	SELECTED PROGRAMME				
2.13	Programme design				
2.14	Quality of students				
2.15	Programme delivery				
2.16	Student assessment				
2.17	International relevance				
2.18	Ethics, responsibility and sustainability				
2.19	Relevance of connections with practice				
2.20	Quality assurance processes				
Chap 3	Students				
3.1	Target profiles, selection criteria and processes				
3.2	Quality of students				
3.3	Preparation for programme entry				
3.4	Support and counselling services				
3.5	Personal and professional development				
3.6	Career support				
3.7	Career placement				
3.8	Alumni relations				
3.9	Internationalisation				
3.10	Ethics, responsibility and sustainability				
3.11	Connections with practice				

Chap 4	Faculty				
4.1	Core faculty sufficiency				
4.2	Quality of core faculty				
4.3	Overall faculty mix				
4.4	Faculty management systems				
4.5	Faculty recruitment and induction				
4.6	Faculty appraisal, review and promotion				
4.7	Faculty workload management				
4.8	Faculty development				
4.9	Internationalisation				
4.10	Ethics, responsibility and sustainability				
4.11	Connections with practice				
Chap 5	Research				
5.1	Research strategy				
5.2	Research activities				
5.2.1	Academic research				
5.2.2	Practice-oriented research				
5.3	Research management				
5.4	International features of research				
5.5	Ethics, responsibility and sustainability in research				
Chap 6	Executive Education				
6.1	Positioning within the school				
6.2	Product portfolio				
6.3	Programme design				
6.4	Marketing, sales and corporate relations				
6.5	Digital integration				
6.6	Participant management				
6.7	Quality of open programmes				
6.8	Quality of customised programmes				
6.9	Measurement of impact				
6.10	Faculty				
6.11	Research				
6.12	Internationalisation				
6.13	Ethics, responsibility and sustainability				
Chap 7	Resources and Administration				
7.1	On-campus facilities and the learning environment				
7.2	Financial performance				
7.3	Financial management				
7.4	Risk management				
7.5	Information and documentation facilities				
7.6	Computing facilities				
7.7	Marketing and public relations				
7.8	Administrative services and staff				
7.9	Internationalisation				
7.10	Ethics, responsibility and sustainability				
7.11	Connections with practice				
Chap 8	Internationalisation				
8.1	International strategy				
8.2	International positioning				
8.3	International dimension in the school's governance				
8.4	Level of internationalisation on the home campus				
8.5	Level of internationalisation outside the home country				
8.6	International alliances and partnerships				
8.7	International connections with practice				

REPEATS OF ASSESSMENTS FROM OTHER CHAPTERS					
1.11	Context, governance and strategy				
2.10	Programme portfolio – international attractiveness				
2.17	Selected Programme – international relevance				
3.9	Students				
4.9	Faculty				
5.4	International features of research				
6.12	Executive education				
7.9	Resources and administration				
Chap 9	Ethics, Responsibility and Sustainability				
9.1	Strategy re. ethics, responsibility and sustainability				
9.2	Internal management systems				
9.3	Contributions to the wider community				
9.4	Community outreach activities (local and global)				
9.5	Contribution to and from the world of practice				
REPEATS OF ASSESSMENTS FROM OTHER CHAPTERS					
1.12	Context, governance and strategy				
2.11	Overall programme portfolio				
2.18	Selected Programme				
3.10	Students				
4.10	Faculty				
5.5	Research				
6.13	Executive education				
7.9	Resources and administration				
10.4	Connections with practice				
Chap 10	Connections with Practice				
10.1	Strategy relating to connections with practice				
10.2	Customer orientation				
10.3	National links to the world of practice				
10.4	Ethics, responsibility and sustainability				
10.5	International links to the world of practice				
10.6	Impact of connections to the world of practice				
REPEATS OF ASSESSMENTS FROM OTHER CHAPTERS					
1.13	Context, governance and strategy				
2.12	Programme portfolio – relevance				
2.19	Selected Programme – relevance				
3.11	Students				
4.11	Faculty				
5.2.2	Practice-oriented research				

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

Annex 17

|EQUIS Criteria
|Evaluation Form

EQUIS CRITERIA EVALUATION FORM

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

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

1. CONTEXT, GOVERNANCE AND STRATEGY

		COMMENTS
1.1	Environment	
	- Understanding by the school of the environment in which it operates - Response of the school to an education market being reshaped by digital technologies	
1.2	Institutional status	
	Clarity of the school's legal and institutional status	
1.3	External governance	
	- Effectiveness of the school's external governance system - Quality of the school's relationship with its parent organisation or regulatory body - Input from external stakeholders into the governance system - e.g., Does the school have external advisory committees?	

1.4	Internal governance	
	- Effectiveness of the school's internal organisational structures and decision-making processes - Internal stakeholder involvement in the governance system (e.g., students, faculty, staff) - Coherence between external governance and internal decision-making structures	
1.5	Autonomy	
	- Degree of independence from parent body - Does the school have reasonable control over its own destiny?	
1.6	Mission, vision and values	
	- Appropriateness of the mission statement - Coherent vision of the school's future - Strength of the school's values and culture - Shared sense of mission and vision throughout the school	
1.7	Current strategic positioning	
	- Credibility of the school's present positioning - Understanding of the school's competitive positioning in the market (e.g., strategic group) - Realistic SWOT analysis - Strategic and tactical role of online or blended forms of teaching and approach to pedagogical innovation	

1.8	Strategic consistency	
	- Consistency of the strategic direction for the future with the mission, vision and values of the school - Alignment of strategic direction and resources/constraints - Are objectives credible and aligned to resources?	
1.9	Strategic process	
	- Inclusivity of the strategic planning process - Explicit strategic plan for delivery of the strategic direction - Are there appropriate milestones and timeframes within the plan? - Are there appropriate reviews of the impact, effect and outcomes of the schools activities or initiatives undertaken to pursue its strategic direction - Recognition of strategic risks (including the challenges of digitalisation)	
1.10	Quality assurance	
	- Effective quality assurance mechanisms to monitor overall school performance - Involvement of students in quality assurance processes	
1.11	Internationalisation	
	- Does the school have a clear purpose for internationalisation? - Integration of the international dimension into the school's governance, strategy and culture	
1.12	Ethics, responsibility and sustainability	
	- Role of ERS in mission and vision - Explicit strategy in place, which is broadly communicated	

	- Adequate resources allocated in support of strategy - Role of digitalisation in the school's ERS strategy	
1.13	Connections with practice	
	- Integration of the corporate dimension into the school's governance, strategy and culture - Participation of practitioners from outside the school (business leaders, entrepreneurs, business-government policy developers) in its governance structures - Existence of an explicit policy for managing its interface with the world of practice relevant to the school's mission - Role of digitalisation in the school's connections with practice	
1.14	Digitalisation	
	- The use of digitalisation as an integral, enabling factor - Digitalisation strategy - Cyber security protection	

2. PROGRAMMES

	OVERALL PROGRAMME PORTFOLIO	
2.1	Coherence of the school's portfolio of programmes	
	- Fit with overall strategic objectives - Balance of programme offerings at different degree levels - Role of online and distance learning - Balance of programme offerings with different delivery modes	

	Measures of the impact of each programme on its target audience	
2.2	Quality of the programme management systems	
	- Quality of programme management and administrative teams - Clear division of responsibilities - Processes for allocating faculty to programmes - School assessment of teaching practices and development done based on students' and other stakeholders' feedback	
2.3	Programme design	
	- Programme design and revision processes - Appropriateness of objectives and intended learning outcomes (ILOs) - Programme content and coverage (incl. knowledge, skills and competencies required in a digitalised world)	
2.4	Pedagogic development and innovation	
	- Explicit policy regarding pedagogic development and innovation - Processes in place for promoting innovation in teaching and learning - Achievements in pedagogic innovation, including new courses, new education materials, and new learning and delivery methods - Number of new teaching-cases - Case Publications - Collaboration and dissemination of pedagogic innovation - School's initiatives and publications related to pedagogic innovation	

	○ Conference presentations, workshops, webinars, or other events focused on pedagogical research findings • Evidence of resources available to support pedagogic innovation • List of recognition and awards for teaching excellence received by faculty • School assessment of long-term pedagogic innovation impact	
2.5	Higher education skills	
	• Integration of general education objectives ○ Conceptualisation ○ Data analysis ○ Critical thinking ○ ... etc.	
2.6	Acquisition of managerial skills	
	• Opportunities to develop managerial skills ○ Teamwork ○ Presentation skills ○ ... etc. • Opportunities for practical work, project-based work and internships within the programmes	
2.7	Programme delivery	
	• Nature and quality of delivery methods • Focus on learning in addition to teaching • Use of modern learning technologies • Quality of course information	

2.8	Student assessment	
	• Clarity of assessment methods and their links to ILOs • Rigour of the assessment regime (including online assessment) • Pass rates and completion rates appropriate to the degree levels	
2.9	Quality assurance systems	
	• Committee structures • Approval processes for new programmes and programme revisions • Monitoring teaching quality • Monitoring of assessment processes • Operational and periodic review	
2.10	International attractiveness and content	
	• Does the school offer programmes, on site or online, which are specifically oriented to the international market? • Does the school impart an international experience to participants, including virtual student exchanges through online collaborative projects, online classes, joint online seminars, and so on? • Does the school use languages strategically to foster cross-border collaboration, attract diverse learners, and support opportunities consistent with its international purpose and strategy?	
2.11	Ethics, responsibility and sustainability	
	• Adequacy of coverage in programmes' design processes, curricular contents and assessments	

2.12	Relevance of connections with practice	
	• Inclusion of perspectives from practice in the definition of learning objectives and into curriculum design • Practitioner input into the programmes (learning objectives, curriculum design, etc.) • Satisfaction of practitioners with school's programmes and graduates • Extent of practitioner input into the delivery of the school's programmes • Existence of joint programmes with practitioners (taught, online)	
	SELECTED PROGRAMME	
2.13	Programme design	
	• Definition of objectives and learning outcomes • Programme content linked to ILOs • Programme innovation • Balance of academic and practical skills	
2.14	Quality of students	
	• Quality of admission processes • Quality of student intake	
2.15	Programme delivery	
	• Quality of teaching • Use of modern learning technologies	
2.16	Student assessment	
	• Clarity of assessment methods and their links to ILOs • Match of the academic depth and rigour of the assessment process with the level of degree being reviewed	

	- Quality of student work in: - Assignments and exams - Theses or project reports - Pass rates and completion rates	
2.17	International relevance	
	- Does the school ensure that the learning materials contribute meaningfully to intercultural development and global mindset? - What are the initiatives put in place to promote meaningful interaction and intercultural development?	
2.18	Ethics, responsibility and sustainability	
	- Adequacy of coverage in programme design, delivery and outcomes - Appropriateness of ILOs and adequacy of coverage in assessments	
2.19	Relevance of connections with practice	
	- Inclusion of perspectives from practice in the definition of learning objectives and into curriculum design - Practitioner input into the programmes (learning objectives, curriculum design) - Satisfaction of practitioners with school's programmes and graduates - Extent of practitioner input into the delivery of the school's programmes - Existence of joint programmes with practitioners (taught, online)	
2.20	Quality assurance processes	
	- Approval processes for programme revisions - Monitoring teaching quality - Monitoring assessment processes - Operational and periodic review	

3. STUDENTS

3.1	Target profiles, selection criteria and processes	
	• Appropriateness of target profiles • Student admission and selection processes ○ How appropriate are the selection criteria? ○ How selective is the school? ○ What is the quality of the admission processes? • Match between intake profiles and the target profile for graduating students	
3.2	Quality of students	
	• Quality of incoming students ○ Motivation and commitment ○ Preparedness for the study programme ○ Diversity of backgrounds ○ Access for socially disadvantaged students	
3.3	Preparation for programme entry	
	• Processes used to prepare students in advance of their entry into their programme of study	
3.4	Support and counselling services	
	• Counselling services for students as they progress through their programme • Individualised learning support for students ○ Tutorials ○ Coaching	

3.5	Personal and professional development	
	- Support for the personal development of students - Do the school's programmes and processes encourage personal development? - Does the school help students to develop professionally? - Does the school have staff experienced in providing this type of support?	
3.6	Career support	
	- Quality of the careers office - What is the level of support provided to students to help define their career objectives and in their search for employment? - Availability of detailed records concerning the placement of students in the job market	
3.7	Career placement	
	- Appropriate level of entry into the job market for graduating students - Do employment opportunities meet students' expectations?	
3.8	Alumni relations	
	- Quality of the school's relations with its alumni - Does the school use the potential of its alumni base adequately?	
3.9	Internationalisation	
	(The recruitment of students from and with experience of other countries.) - To what extent has the school internationalised the classroom on its home campus as evidenced by the intercultural mix of students? - Does the school ensure that the international mix of learners contributes meaningfully to intercultural development and a global mindset? - Does the school leverage the opportunities of virtual mobility for its students?	

3.10	Ethics, responsibility and sustainability	
	• Policies to ensure and support a growing inclusive and diverse student body • Integration into personal development • school and faculty support for student engagement, including extracurricular activities	
3.11	Connections with practice	
	• Influence of connections from the world of practice on student selection • Extent of practitioners' assistance with student related activities (monitoring, shadowing, company visits, organised events, etc.) • Level of input from practitioners in advising students in career aspirations (corporate life, start-up advice, etc.) • Extent to which student and graduate satisfaction with the input they receive from the world of practice is captured	

4. FACULTY

4.1	Core faculty sufficiency	
	• Size of the core faculty ○ Is the current size of the core faculty adequate for the number of students and the range of programmes? ○ Ratio of core faculty members to full-time students • Profile of the core faculty ○ coverage of the principal management disciplines ○ adequate range of educational competences (including competences to teach online) ○ adequate range of research competences ○ gender mix	

4.2	Quality of core faculty	
	• Qualification of the faculty ○ Doctoral qualification ○ Relevant business/professional experience ○ Research activity	
4.3	Overall faculty mix	
	• Quality of the non-core faculty (part-time, adjunct, practitioners, etc.) • Adequacy of total available resources including non-core faculty and practitioners • Is there an appropriate balance in the distribution of teaching loads between core and non-core faculty?	
4.4	Faculty management systems	
	• Faculty management systems ○ Are there formal processes for the management of the faculty?	
4.5	Faculty recruitment and induction	
	• Recruitment policies and processes • Induction processes	
4.6	Faculty appraisal, review and promotion	
	• Appraisal and review policies and processes • Clear promotion criteria	
4.7	Faculty workload management	
	• Processes for workload allocation • Appropriate balance between teaching, research and service to school	

4.8	Faculty development	
	• Opportunities to develop nationally and internationally • Conference attendance • Sabbatical leave	
4.9	Internationalisation	
	• Evidence which shows the faculty's international qualifications, intercultural and linguistic skills and demonstrated ability to teach international audiences • Number of non-nationals (including dual citizens) • Number of faculty with international qualifications and professional experience. • The ability of faculty to teach in languages that support the internationalisation of the school. • The involvement of international visiting professors or adjuncts, on-campus or virtually. • The opportunities for faculty to serve as visiting professors abroad, on-campus or virtually • The involvement of faculty in international academic-related institutions • Participation of faculty in international networks and communities that support quality improvement and collegiate development	
4.10	Ethics, responsibility and sustainability	
	• Integration into faculty development • Adequacy of recognition and support provided by the school for faculty's community and public engagement	

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

5. RESEARCH

5.1	Research strategy
	• Describe the school's overall research strategy and policy. Explain how the research agenda contributes to the strategic objectives of the school. • Is there a clear research strategy and plan that identifies strengths and weaknesses and articulates the current and intended research positioning of the school? • Describe the ways in which research has contributed to the accumulation of distinctive expertise within the school. • What are the principal types of research conducted by the school? • What does the school consider to be its competitive performance in terms of research, nationally and internationally? • How are priorities established within the research strategy? • What are the plans for future development of the school's research?

	- Describe any nationally organised research assessment schemes, such as the ERA in Australia or the REF in the UK. - Are resources aligned with key outcomes?	
5.2	Research activities	
	- Summarise the research conducted by the core faculty over the past five years. - What strengths and weaknesses emerge from this data? - What have been the significant trends during this five-year period? In what areas has progress been made? In what areas has output or its quality declined? - What proportion of the core faculty can be considered active in research and intellectual activity? - Describe the research activities of the non-core faculty to the extent that they contribute to the quality of the school's profile and to its ability to serve its chosen markets. - What role does the school seek to have in relation to the increasing digital impact on research, business and society?	
5.2.1	Academic research	
	- Describe the disciplines or areas of research of the school. - What are the methods used to assess the quality of the school's academic research output? - What is the relative emphasis given to recommendations for academic research assessment such as those proposed by DORA or CoARA, for example? - What is the relative emphasis given to citation indices (e.g. NCI, FWCI) or journal guides (e.g., AJG, ABDC list, FT 50 list, UTD journal list)?	

	• Describe the quantity and quality of academic research using the school's assessment methods. • Describe the school's activities related to external funding applications for academic research projects. • Describe external research income and funding for national and international academic research projects. • Did the level of external funding for academic research projects grow in the last 5 years? If so, by how much? • Describe the extent of faculty involvement in editorships, conference chairing, leadership roles in learned societies or scientific associations.	
5.2.2	Practice-oriented research	
	• Describe any research activities run in collaboration with the world of practice (e.g. companies, policy organisations, not for profit organisations or entrepreneurs). • Describe research activities that are supported by these groups. • Indicate the type of support provided (e.g. financial resources, such as matching funds, financing research centres or doctoral research, or other resources, such as distinctive spaces, and interactions for knowledge exchange). • Are there any joint research centres or endowed chairs? • Is there any direct input from the world of practice into the work of the school's research centres? • How, if at all, does consultancy contribute to the school's knowledge exchange? • Are practitioners involved in the research outputs of the school (for example joint articles, reports, seminars, webinars, commercialisations, digital media	

	contributions, start-ups, incubators & accelerators)? • What is the number and quality of white papers and policy reviews, trade publications, patents, IP licenses, handbooks, and books produced for practice or the broader community? • Provide factual data on the school's involvement in industry, policy or governmental conferences, colloquia, congresses, briefings, and invited speeches. • What use does the school make of digital, social and print media in its wider dissemination of practice-oriented research findings and what evidence is there of target audience engagement with these efforts? • What evidence exists of the school's impact on practice (e.g. demonstrated contributions to policy and legislation)?	
5.3	Research management	
	• Describe how research is organised within the school. • Is there a dean or director of research? • Is there a Research or Scientific Committee? • Are there self-standing Research Centres or Institutes within the school? • To what extent is the research agenda managed? • Describe how research is supported in the school. • Describe how research activity is integrated into the workload of individual faculty members. • What priority level is accorded to research? • How is research valued within the school? • How much time is allowed for research within faculty members' workload?	

	• What is the link between the faculty developmental budget and research policy? • Explain how research is internally funded, if at all (e.g. budgetary allocations, research incentives, sabbatical leave, faculty development initiatives). • How does the school support those faculty applying for external funding? • Describe the processes for monitoring and evaluating research. • What role does research play in the school's recruitment, promotion and retention of faculty? • What methods have been used to attract key research staff to the school in recent years?	
5.4	International features of research	
	International dimensions of the school's research activity: • International scope of the research • Participation in international conferences. • Number of international publications. • Number of international research projects and international grants • Participation in cross-border research networks, consortia, and thematic groups • List of research topics addressing international challenges or informing policy debates, or influencing practice across different countries	

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

6. EXECUTIVE EDUCATION

6.1	Positioning within the school	
	- Integration of executive education (EE) into the school's overall strategy and programme portfolio - Integration of the EE activity within the school's organisation chart and management systems - Resources dedicated exclusively to EE - Teaching and admin. staff - On site facilities and digital tools	
6.2	Product portfolio	
	- Coherence of the EE portfolio - Market positioning of the EE offer - Understanding of market needs - Underpinning key expertise	
6.3	Programme design	
	- Design process for open and customised programmes - Programme delivery methods	

6.4	Marketing, sales and customer relations	
	• Key areas of expertise • Quality of the customer relationship management • Distinction between customers as organisations and customers as individual participants • Marketing • Sales	
6.5	Digital integration	
	• Digital integration in the portfolio of programmes and services	
6.6	Participant management	
	• Quality of participant management ○ Selection ○ Preparation ○ Individualised support • Understanding of the adult learning process	
6.7	Quality of open programmes	
	• Quality of open programmes ○ Design ○ Delivery ○ Evaluation and review ○ Innovation ○ Use of modern technologies ○ Responsiveness to corporate needs	
6.8	Quality of customised programmes	
	• Ability to design and deliver programmes in collaboration with companies and organisations	
6.9	Measurement of impact	
	• Measurement of the impact of learning on individuals and organisations	

6.10	Faculty	
	- Adequacy of faculty resources (including both core and non-core faculty) available for EE - Nature and extent of core faculty involvement in EE - Effective management of faculty resources deployed in EE	
6.11	Research	
	Impact of the school's research potential on EE	
6.12	Internationalisation	
	- Does the school engage in executive education with clients outside its home country and with international clients headquartered domestically? - Does the school impart an international experience to participants through online collaborative projects, online classes, joint online seminars, and so on? - Does the school use languages strategically to foster cross-border collaboration, attract diverse learners, and support opportunities consistent with its international purpose and strategy?	
6.13	Ethics, responsibility and sustainability	
	- Integration into EE offerings - Evidence of impact of EE in relation to ERS	

7. RESOURCES AND ADMINISTRATION

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

	○ Virtual learning environment and digital tools used for learning	
7.2	Financial performance	
	• Adequacy of the school's financial resources to achieve strategic objectives • Financial viability of the school ○ Are there any major risks in the near future?	
7.3	Financial management	
	• Effectiveness of the school's financial management systems	
7.4	Risk management	
	• Effectiveness of the school's risk management activities • Major risks threatening the school's viability in financial or academic terms	
7.5	Information and documentation facilities	
	• Adequacy of the information and documentation facilities (library, data bases, research support systems, inter-library loan services, etc.)	
7.6	Computing facilities	
	• Adequacy of the computer facilities and services, including availability of electronic learning platforms	
7.7	Marketing and public relations	
	• Effectiveness of the school's Marketing Strategy	

7.8	Administrative services and staff	
	- Administrative staff - Overall quality - Human resource policy - Management	
7.9	Internationalisation	
	- What resources are specifically allocated to the management of the school's international activities? - Does the school have an international marketing strategy and resources allocated to it? - Does the school have an adequately resourced international office? - Does the school assess and manages the risks of its international activities and exposure? - Does the school manage any campus outside the home country? Resources allocated to it.	
7.10	Ethics, responsibility and sustainability	
	- Integration into infrastructure planning and management - Integration into operations and administration - Demonstration of the school's advancing inclusion, respect for diversity and the well-being of all in its management policies - School engagement in related staff training and development	

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

8. INTERNATIONALISATION

8.1	International strategy	
	- Does the school have an articulated international purpose and strategy, clarifying its ambition and goals? - What processes and evidence does the school use to monitor progress, learn, and adjust its international strategy over time?	
8.2	International positioning	
	- Level of recognition of the school in international markets - To what extent are its graduates recruited by international organisations to work outside the school's home country?	
8.3	International dimension in the school's governance	
	- How is the international dimension/perspective integrated in the Schools governance? - Does the school have an international advisory board? (Number of members of the governance and advisory structure of the school non-nationals or with evident international experience)	

8.4	Level of internationalisation on the home campus	
	- Demonstration of location-specific realities informing choices, priorities, and factors affecting the practical realisation of the school international ambition at its home campus. - What are the initiatives put in place to promote meaningful interaction and intercultural development?	
8.5	Level of internationalisation outside the home country	
	- School's international activities outside its home country: exchange students abroad, faculty mobility, joint programmes, off-campus operations, etc. (Distribution of the academic activity (core faculty and students) across the different international campuses of the school, if applicable.	
8.6	International alliances and partnerships	
	- School's network of international academic relations. - How are international alliances and partnerships established? - What are the criteria for the selection of organisations targeted for special relationships? - List of key relationships with international organisations. Does the school use membership of international organisations to support its own quality improvement processes? - Number of international foundations, project networks or international thematic initiatives that address global societal challenges	

8.7	International connections with practice and alumni	
	- Does the school explicitly address connections and engagement with the world of practice that are based outside the primary geographic location of the school? - How many of your graduates work outside their home country? - How does the school support, manage and make use of its alumni internationally? - How many of your graduates work in international companies located in the school's home country?	

9. ETHICS, RESPONSIBILITY AND SUSTAINABILITY

9.1	Strategy re. ethics, responsibility and sustainability	
	Strategy for development of ERS - Incorporation of ERS into the overall strategy of the school - Integration of ERS into core activities	
9.2	Internal management systems	
	- Management policies to support the implementation of sustainability practices - Evidence of progress in sustainable operations via metrics and appropriate control systems	
9.3	Contributions to the wider community	
	- Integration of ERS into contributions to academic community, business community and wider society - Services related to ERS for the management profession	

9.4	Community outreach activities (local and global)	
	- Adequacy of school's community outreach and public engagement activities - Level of engagement of the school's faculty, staff, students and alumni in outreach activities - Coverage in School communications - The school's commitment to the global environmental protection agenda	
9.5	Contribution to and from the world of practice	
	- The role that connections with the world of practice play in the ERS agenda of the school - The extent to which the school engages with ERS-related policy and practitioner bodies to support and progress its ERS agenda - The extent to which the school embraces and open eco-system and participates in co-creation of knowledge taking advantages of possibilities offered by digitalised work environments in academia and business	

10. CONNECTIONS WITH PRACTICE

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

10.2	Customer orientation	
	• Systematic management of connections to the world of practice (systems, processes, people) • The extent to which the school's work and activities develop student understanding of the practice and impact of business and management through interaction with a range of organisational and societal stakeholders	
10.3	National links to the world of practice	
	• Nature and quality of the connections at local and national level • Extent to which national connections influence the work of the school (Faculty, students) • Extent to which national connections are influenced by the work of the school	
10.4	Ethics, responsibility and sustainability	
	• The role of connections to the world of practice in enhancing the schools' efforts to internationalise and take forward its ERS agenda • Application of ERS based standards in the assessment of the practice-related activities and relationships	
10.5	International links to the world of practice	
	• Nature and quality of the connections at local and international level • Extent to which international connections influence the work of the school (faculty, students, programme content and delivery) • Extent to which international connections are influenced by the work of the school	

10.6	Impact of connections with world of practice (to and from the school)	
	• The level of impact of the school's work and activities on organisational and societal stakeholders • Extent to which the world of practice impacts on the school's academic activities, in both education and research	

11. OVERALL ASSESSMENT

	Recommendation for EQUIS accreditation: <i>Please mark the recommendation with an X</i>	5-year accreditation: 3-year accreditation: non-accreditation:
	Areas of Required Improvement in case of 3-year accreditation	
	<u>Strengths</u>	<u>Weaknesses</u>

Annex 18

| EQUIS Mid-Term
| Progress Report
| Form

EQUIS MID-TERM PROGRESS REPORT

Name of the school:
Date of accreditation decision:

Areas of Development:	
1	
2	
3	

Mid-Term Progress Report:			
Due Date:	Day/Month/Year		
Submitted:	Day/Month/Year		
Feedback Provided:	Day/Month/Year		
Overall Assessment of Progress:			
Above Expectations	Meets Expectations	Below Expectations	Not Acceptable

(Information above added by EQUIS Office)

Guidelines:

- The school should be aware that the achievement of progress is a particularly important dimension in re-accreditation decisions of the EQUIS Accreditation Board (AB). The AB may deny re-accreditation if the school has shown insufficient effort in addressing the Areas of Development (AoDs) and no tangible progress has been achieved.
- The EQUIS Mid-Term Progress Report Form represents a living document enabling schools to record any relevant changes and initiatives relating to the AoDs within the EQUIS system. This report, including the feedback, is an important part of the documentation received by the Peer Review Team for re-accreditation.
- The school will receive a customised Mid-Term Progress Report Form as soon as the AoDs have been agreed with the EQUIS Office following the AB decision. Only this customised form may be used for progress reporting by adding text in the appropriate boxes. When completing the form, please do not delete any sections and do not change the formatting of this template.
- The school is expected to address the headings of each text box with a succinct but informative summary of developments. It is essential that all arguments are supported by factual evidence and that the effectiveness of developmental initiatives is described based on their tangible impact. **The length of the report should not exceed 15 pages.**

- The school may support its arguments with internal documents, which can be added as appendices. This option should however be used very selectively. The school should be aware that the next Peer Review Team will receive past Mid-Term Progress Report without any appendices.
- A formal overall rating for each AoDs of the Mid-Term Progress Report will be given. The rating categories are:
 - *Above Expectations*: The school is making significant progress. At the present state and given the evidence presented, the school is expected to meet the AoD to the full satisfaction of the AB.
 - *Meets Expectations*: The report is sufficiently detailed and demonstrates that the school is making sufficient progress. At the present state and given the evidence presented, there is a reasonable chance that the school will be able to meet the AoD to the full satisfaction of the AB.
 - *Below Expectations*: The report shows that the school is making insufficient progress in addressing the AoD. At the present state and given the evidence presented, the school is unlikely to satisfy the expectations of the AB.
- In addition, a formal overall rating of the whole report is provided.
 - *Above Expectations*: Overall progress exceeds the expectations of the EQUIS Office.
 - *Meets Expectations*: Overall progress meets the expectations of the EQUIS Office.
 - *Below Expectations*: Overall progress fails to meet the expectations of the EQUIS Office.
 - The report may be deemed *Not Acceptable* if it is excessively vague and lacks factual support in key areas. In this case, the school is asked to revise and resubmit the Mid-Term Progress Report within 4 weeks after receiving the initial feedback.

MID-TERM PROGRESS REPORT Year XXXX

Strategic Developments within the School

Description of strategic developments within the school

Add text here...

Feedback from the EQUIS Office

Area of Development 1 <Description added by EQUIS Office>

Description of progress in the AoD

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

Add text here...

Feedback from the EQUIS Office:

Above expectations

Meets expectations

Below expectations

Area of Development 2 <Description added by EQUIS Office>

Description of progress in the AoD

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

Add text here...

Feedback from the EQUIS Office:

Above expectations

Meets expectations

Below expectations

Area of Development 3 <Description added by EQUIS Office>

Description of progress in the AoD

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

Add text here...

Feedback from the EQUIS Office:

Above expectations

Meets expectations

Below expectations

Other Developments
Description of Other (Relevant) Developments
Add text here...
Feedback from the EQUIS Office:

Overall Feedback: Conclusions and Recommendations Year XXXX		
EQUIS Office feedback:		
Above expectations	Meets expectations	Below expectations

Annex 19

| EQUIS Annual
| Progress Report
| Form

EQUIS ANNUAL PROGRESS REPORT

Name of the school:
Date of accreditation decision:

Areas of Required Improvement:	
1	
2	
3	

Progress Report 1:			
Due Date:		Day Month Year	
Submitted:		Day Month Year	
Feedback Provided:		Day Month Year	
Overall Assessment of Progress:			
Above Expectations	Meets Expectations	Below Expectations	Not Acceptable

Progress Report 2:			
Due Date:		Day Month Year	
Submitted:		Day Month Year	
Feedback Provided:		Day Month Year	
Overall Assessment of Progress:			
Above Expectations	Meets Expectations	Below Expectations	Not Acceptable

(Information above added by EQUIS Office)

Guidelines:

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

- The EQUIS Annual Progress Report Form represents a living document enabling schools to record any relevant changes and initiatives relating to the AoRIs within the EQUIS system. These reports, including the feedback, are an important part of the documentation received by the Peer Review Team for re-accreditation. In the first year, plans for action should be stated at minimum and, in the second year, tangible progress must be reported and backed by factual evidence.
- The school will receive a customised Annual Progress Report Form at least 9 months prior to the submission deadline. Only this customised form may be used for progress reporting by adding text in the appropriate boxes. When completing the form, please do not delete any sections and do not change the formatting of this template.
- The school is expected to address the headings of each text box with a succinct but informative summary of developments. It is essential that all arguments are supported by factual evidence and that the effectiveness of developmental initiatives is evaluated based on their tangible impact. **The length of each report should not exceed 10 pages.**
- The school may support its arguments with internal documents, which can be added as appendices. This option should however be used very selectively. The school should be aware that the next Peer Review Team will receive past Annual Progress Reports without any appendices.
- A formal overall rating for each AoRI of the Annual Progress Report will be given. The rating categories are:
 - *Above Expectations*: The school is making significant progress. At the present state and given the evidence presented, the school is expected to meet the AoRI to the full satisfaction of the AB,
 - *Meets Expectations*: The report is sufficiently detailed and demonstrates that the school is making sufficient progress. At the present state and given the evidence presented, there is a reasonable chance that the school will be able to meet the AoRI to the full satisfaction of the AB.
 - *Below Expectations*: The report shows that the school is making insufficient progress in addressing the AoRI. At the present state and given the evidence presented, the school is unlikely to satisfy the expectations of the AB.
- In addition, a formal overall rating of the whole report is provided.
 - *Above Expectations*: Overall progress exceeds the expectations of the EQUIS Office.
 - *Meets Expectations*: Overall progress meets the expectations of the EQUIS Office.
 - *Below Expectations*: Overall progress fails to meet the expectations of the EQUIS Office.

The report may be deemed *Not Acceptable* if it is excessively vague and lacks factual support in key areas. In this case, the school is asked to revise and resubmit the Annual Progress Report within 4 weeks after receiving the initial feedback.

FIRST PROGRESS REPORT Year XXXX

Strategic Developments within the School

Description of strategic developments within the school

Add text here...

Feedback from the EQUIS Office:

Area of Required Improvement 1 <Description added by EQUIS Office>

Description of progress in the Area of Required Improvement

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

Feedback from the EQUIS Office:

Above expectations

Meets expectations

Below expectations

Area of Required Improvement 2 <Description added by EQUIS Office>

Description of progress in the Area of Required Improvement

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

Feedback from the EQUIS Office:

Above expectations

Meets expectations

Below expectations

Area of Required Improvement 3 <Description added by EQUIS Office>

Description of progress in the Area of Required Improvement

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

Feedback from the EQUIS Office:

Above expectations

Meets expectations

Below expectations

Other Developments
Description of Other (Relevant) Developments
Add text here...
Feedback from the EQUIS Office:

Overall Feedback, Conclusions and Recommendations Year XXXX
EQUIS Office Feedback:

SECOND PROGRESS REPORT Year XXXX

Strategic Developments within the School

Description of strategic developments within the school

Add text here...

Feedback from the EQUIS Office

Area of Required Improvement 1 <Description added by EQUIS Office>

Description of progress in the Area of Required Improvement

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

Add text here...

Feedback from the EQUIS Office

Above expectations

Meets expectations

Below expectations

Area of Required Improvement 2 <Description added by EQUIS Office>

Description of progress in the Area of Required Improvement

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

Add text here...

Feedback from the EQUIS Office

Above expectations

Meets expectations

Below expectations

Area of Required Improvement 3 <Description added by EQUIS Office>

Description of progress in the Area of Required Improvement

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

Add text here...

Feedback from the EQUIS Office

Above expectations

Meets expectations

Below expectations

Other Developments
Description of Other (Relevant) Developments
Add text here...
Feedback from the EQUIS Office:

Overall Feedback, Conclusions and Recommendations Year XXXX
EQUIS Office Feedback:

Annex 20

| Policy on Accreditation
| of Multi-Campus
| Operations

POLICY ON ACCREDITATION OF MULTI-CAMPUS OPERATIONS

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

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

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

Policy for the EQUIS process

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

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

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

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

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

Policy on multi-campus operations

1. A school that is requesting accreditation must include all its campuses as defined by this policy.
2. The school must describe all campus operations (including minority partners) in full as an annex to the Self-Assessment Report (SAR). An informative summary must also be provided in addition to the SAR Datasheet. The description must include:
 - a) Description of activities conducted at each campus location (e.g., degree programmes and non-degree education delivered at each location). This includes a description of how the satellite campus contributes to the strategic objectives of the school.
 - b) Local resource support (e.g., faculty, academic/non-academic support personnel) for each campus location as well as resource sharing policies and practices within the school's campus network.
 - c) Policies, management processes and governance mechanisms in place to control campus activities and to ensure formal coordination of activities within the campus network, evidence of their effectiveness.
 - d) Policies, management processes and governance mechanisms in place to ensure the provision of proper academic quality and to encourage a commonality of academic culture within the school's campus network, evidence of their effectiveness.
 - e) Financial performance of campus satellites and potential risks emanating from different campus locations.
 - f) Development objectives, strategies and milestones for the school's campus network (e.g., plans of opening new campus locations, plans of expanding educational offerings at different campuses, local faculty development plans).

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

3. All data regularly requested for the SAR Datasheet, SAR and ODR must be presented in aggregated form as well as for each campus location separately.
4. If the school operates several campuses with major activity (in terms of faculty and staff assigned to the campus, student/participant numbers in degree and non-degree provision, or income generated), then the main location of the Peer Review Visit (PRV) can vary across accreditation cycles. The decision about where the PRV will take place will be taken by the EQUIS Office after consultation with the school. A visit to another school campus may be added upon the request of the EC. In the case of re-accreditation, it is at the discretion of the EQUIS Office, and this is decided in the feedback to the Re-accreditation Datasheet.

5. The PRV may involve additional campuses at the discretion of the EQUIS Office, which may request further information.
 - ◆ Additional campus visits may for example be required if:
 - > a school going through initial accreditation operates several campuses;
 - > a school going through re-accreditation has added a campus since the last PRV;
 - > on-site resourcing (e.g., faculty, academic and non-academic staff, physical infrastructure) varies within the school's campus network.
 - ◆ PRVs will normally be limited to a maximum of three locations with e.g., the full PRT conducting the major part of the review at the main campus and sub-teams of two reviewers visiting the other campuses.
 - ◆ Separate schedules for the additional visits need to be agreed in advance.
 - ◆ Visits to any additional campuses must take place prior to the visit to the main campus.
6. When deemed appropriate, a PRV may include online sessions with participants located at other campuses, to enhance the PRT's understanding whether EQUIS Standards & Criteria are met.
7. Once the AB has confirmed accreditation, the use of the EQUIS label and logo will only be permitted for activities conducted out on campuses included in the accreditation. Non-compliance may lead to the loss of accreditation. The EQUIS Office may conduct periodic checks, which may potentially involve campus visits of someone from the EQUIS leadership team. The school will be informed of such visits in advance and will not bear any of the costs.

A typical visit schedule for an additional campus visit

In addition to inspecting the facilities, the visit to the other campus may include:

- ◆ Meeting with key representatives of the local management team (including the person responsible for quality assurance, if applicable) – 60 minutes
 Topics to cover:
 - > quality assurance (design, delivery and assessment of local programmes, the quality of local faculty and any local research activities, compared with the main campus)
 - > coordination between campuses
 - > non-programme governance
 - > local resource support, including resource sharing across campus locations
- ◆ Meeting with faculty members/representatives – 45 minutes
- ◆ Meeting with local student representatives – 45 minutes
- ◆ Site visit, 45 minutes

The school should also propose additional individuals the reviewers could usefully meet at the other campus.

Annex 21

| Policy on Accreditation
| of Collaborative
| Provision

POLICY ON ACCREDITATION OF COLLABORATIVE PROVISION

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

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

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

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

Policy for the EQUIS process

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

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

This policy is particularly concerned with collaborative activities leading to a degree award by the school requesting EQUIS accreditation or its parent institution. In other words, if a programme delivered through collaboration is to be awarded accredited status, as part of the portfolio of an EQUIS school, it cannot be significantly different from the programmes delivered by the EQUIS-accredited school solely. Such differences will affect the accreditation status of the applicant school. Some forms of collaborative provision (e.g., dual

degree offerings in support of student outward mobility for the school's main degree programmes) have become a mainstay in management education and are therefore unlikely to warrant special attention under this policy. In contrast, off-campus delivery in cooperation with a lesser reputed or non-academic partner institution will. It is important, therefore, that schools seeking to maintain or gain EQUIS accreditation provide evidence of equivalence of resource and students' experience.

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

Policy for accreditation processes which include collaborative provision

1. A school requesting EQUIS accreditation must include all its collaborative activities as defined by this policy.
2. The school must describe all collaborative activities (including partner institutions) in full as an annex to the Self-Assessment Report (SAR). It is important to specify the nature of the activity and any award resulting from collaborative provision, including whether the award is from either institution or both, or several. Equally important is the specification of how the collaboration delivers the overall school strategy. An informative summary of the programmes, their target markets and pedagogic methods must also be provided in addition to the SAR Datasheet. The Online Document Repository (ODR) must include partnership agreements, policy documents, minutes, (financial) data and any further evidence needed to understand the school's collaborative activities.
3. Where collaborative activity is extensive, it may be necessary to extend the period of the Peer Review to visit a partner institution, interview those responsible for collaborative activities or interview representatives of partner institutions. The focus of such reviews will mirror those undertaken at the 'main' campus or institution. The EQUIS Office may request additional information when the Peer Review Visit (PRV) is planned. Any extension of the PRV Schedule needs to be agreed in advance of the visit to reflect the specific situation of the applicant school.
4. Where the collaborative arrangements for a programme contain a large online component, a full description of how this reflects the applicant school's policies and procedures, learning objectives and learning outcomes, and the monitoring of these is essential.
5. Once the AB has confirmed accreditation, the use of the EQUIS label and logo will only be permitted on the accredited school's publicity materials. It will **not** be permitted on the partner's materials or on joint brochures and advertisements, except where the partner is also EQUIS-accredited.
6. Periodically the EQUIS leadership may conduct checks on partner institutions for collaborative provision. The school will be informed of such visits in advance and will not bear any of the costs.

Annex 22

EFMD Confidentiality
Agreement Form

EFMD – CONFIDENTIALITY AGREEMENT

IN RELATION TO:

EQUIS – EFMD QUALITY IMPROVEMENT SYSTEM

Name of the school under review:

Date of the Peer Review Visit:

(delete if not relevant)

I hereby agree to respect the confidentiality of all information provided to me in the context of my role as a EQUIS Peer Reviewer / Advisor / Expert *(delete as appropriate)* or as a member of the EQUIS Accreditation Board / EQUIS Committee *(delete as appropriate)*.

I further undertake that in carrying out my responsibilities as an EQUIS peer reviewer, advisor or expert or as a member of the EQUIS Accreditation Board or EQUIS Committee *(delete as appropriate)*, I may use artificial intelligence (AI) tools only in ways that fully preserve confidentiality. In particular, I will not upload, input or otherwise disclose to any AI tool or service the EQUIS Datasheet, the Self-Assessment Report and accompanying documents, the Progress Reports or other confidential, proprietary or non-public documents or information provided by the school under review or by EFMD in the context of the accreditation, whether in whole or in part, including extracts or copy-pasted sections.

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

Signature:

Date:

NAME
TITLE
ORGANISATION
ADDRESS

Annex 23

Conflict of Interest
Policy

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

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

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

1. The following types of relationships, current or past, with the school or with one of its closest competitors or collaborators:
 - Graduate
 - Employee
 - Member of the part-time or visiting faculty
 - Consultant, advisor or member of an Advisory Board
2. A current or past personal conflict with the school or any of its current or recent leaders.
3. Reciprocity: one of the members of the school to be reviewed has in the recent past assessed the reviewer's own home institution either in an EFMD review or in some other capacity (in case of a peer reviewer).
4. Hidden agendas: having been approached by the school to encourage them to volunteer to be a peer reviewer of the school.
5. Any other reason that could be perceived by others to bias the judgement of the reviewer, briefing expert, advisor, Accreditation Board or Committee member, even if they are confident that this will not be the case.

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

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

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

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

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

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

Annex 24

Policy and Publicity
Guidelines for the Use
of the “EQUIS” Brand

POLICY AND PUBLICITY GUIDELINES FOR THE USE OF THE “EQUIS” BRAND

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

Your achievement deserves acknowledgement across the management development network worldwide.

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

PURPOSE OF THE GUIDELINES

The guidelines help ensure that

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

PROMOTION OF EQUIS ACCREDITATION

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

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

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

- Include the “EQUIS Accredited” logo on the accredited school’s homepage with a description of what EQUIS stands for and a direct link to the EQUIS section of the EFMD website.
- Include the “EQUIS Accredited” logo on all printed and digital material where the accredited school is mentioned, including brochures, digital banners and stationery, following the below regulations. The EFMD Marketing & Communications department

will provide your school with a custom-made digital banner that may be used for this purpose.

- Arrange interviews with journalists for your dean to discuss the accreditation and explain the value it brings to your school. Highlight the unique added value offered by EQUIS, and explain its key standards and criteria and how this process could bring lasting benefits to the school and your stakeholders.
- Announce the news to local, national and international media and internet news service providers.
- Place an advertisement in EFMD's Global Focus magazine to announce the accreditation.
- Within the school, share the news in the internal mail service with a message addressed to academic and administrative staff. Moreover, send a message to your key stakeholders, including students, alumni, recruiters, and business contacts, informing them about the accreditation and its meaning for the school; include it in internal communication, student and alumni magazines, distributed in printed or in electronic form.
- Post announcements on the school's active social media platforms. You may wish to include an interview with your dean and/or the accreditation manager.
- Arrange an announcement for distribution across the school's network in the form of a special message from the dean to institutional partners, recruiters, executive programmes' participants, and other key contacts. Due to the EU's General Data Protection Regulation, EFMD is not able to provide you with personal contacts of the EFMD member schools' representatives.
- Use EQUIS accreditation to generate maximum impact for students, ensuring international recognition of their study programme and qualifications. To this end, it is also important to develop collective pride, for example, by placing posters or banners around the school or by having the dean communicate the news to students verbally. The EQUIS community includes some of the best schools globally, and students need to understand that it is a significant achievement for their school to gain this accreditation.
- Mention the value of EQUIS accreditation as a key achievement of the school in external communications (addressed to applicants, recruiters, media, corporate contacts, etc.).

POLICY FOR PUBLICITY

Public reference to EQUIS accreditation

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

You may use the following description: “EFMD Quality Improvement System (EQUIS) accreditation is a globally recognised mark of excellence for business and management education. It involves a rigorous evaluation of institutions based on criteria such as academic programmes, faculty quality, research output, and student services. Achieving EQUIS accreditation demonstrates dedication to continuous improvement and adherence to global excellence standards. Its approach to quality assessment is rooted in respect for the diversity of institutional and cultural contexts. Beyond academic rigour, it emphasises international perspective, corporate relevance and ethical leadership. The accredited schools benefit from enhanced institutional reputation, attract seasoned faculty and students, foster academic partnerships and signal to employers that graduates possess a high standard of business education.”

Use of comments from the Accreditation Board letter

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

Use of comments from the Peer Review Report

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

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

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

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

USE OF THE EQUIS LOGO – GUIDELINES

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

Subject to certain restrictions as outlined below, the EQUIS Accredited logo can be used for various purposes, including marketing materials, presentations, promotional items, event materials, and to reinforce the school's corporate identity. It is recommended that when using

any of the logos on your website, a corresponding link should be made to the EFMD homepage (www.efmdglobal.org). EFMD strongly advises all of its members to review the guidelines set out below regarding the terms and conditions for using the EQUIS Accredited logo.

EQUIS Accredited trademarks consist of the following:

EQUIS Accredited logo

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

Formats of EQUIS Accredited logo available on the EFMD website:

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

EQUIS Accredited logo colours

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



Primary Colour



PANTONE
194 C

R 155 G 39 B 67
HTML 9B2743

Secondary Colours



PANTONE
Cool Gray 1

R 217 G 217 B 214
HTML D9D9D6

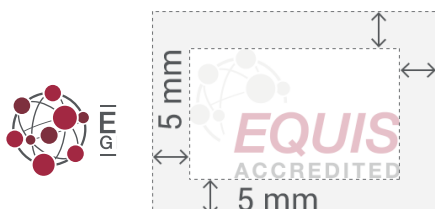


PANTONE
425 C

R 84 G 88 B 90
HTML 54585A

EQUIS Accredited logo: size, protection zone and composition

- If the EQUIS Accredited logo is used with other company logos or identities, it should be equal in size to the other logos and placed with equal prominence.
- When using the EQUIS Accredited logo in communications, there should always be a clear space between the logo and other elements such as other logos, text or images. Please respect a 5 mm border around the logo.



- In order to maintain legibility and consistency when printing, the minimum height of the EQUIS accredited logo should be 18 mm.



- Do not place the EQUIS Accredited logo over any other graphics or distort the logo in any way.
- Do not use the EQUIS Accredited logo with or as part of another logo or symbol to create a unique symbol. The EQUIS Accredited logo is distinct and should always stand alone.
- Do not remove any part of the EQUIS Accredited logo.
- Do not add any words or graphics to the EQUIS Accredited logo.
- Do not add any effects or drop shadows to the EQUIS Accredited logo.

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

Annex 25

Appeals
Procedure

APPEALS PROCEDURE

against decisions on eligibility and accreditation

1. A school seeking EQUIS or EFMD Programme Accreditation may appeal decisions on eligibility or accreditation. The school must notify its intention to appeal by email to the president of EFMD and the Quality Services director within one month of the date on which the official letter from the relevant body was emailed to the school.¹ Otherwise, the school will be deemed to have accepted the decision, and will forgo any possibility of appeal at a later stage.
2. As soon as the notice of intention to appeal is received, the decision under appeal is suspended, and the school reverts to the status it held before that decision, until the appeals process ends.
3. The school must provide detailed reasons and evidence for its claim in a document that demonstrates the existence of substantive grounds for review, beyond a mere expression of disagreement with the decision. These grounds for review are limited to the following:
 - a) the prescribed process was not duly followed;
 - b) the decision-making body failed to take into account information that was available to it at the time the decision was made.
4. A full appeal, based on the grounds set out in the preceding paragraph, must be submitted in writing to the president of EFMD, copying the Quality Services director, within one month of notifying the intention to appeal. The document must not exceed 10 pages and must present substantiated arguments based solely on the information and data available at the time the decision was made, no new information will be considered in the appeals process.
5. A school that fails to proceed as indicated above will be deemed to have definitively renounced its intention to appeal. The suspension of the decision will then be cancelled, and the decision will be enacted.
6. The president of EFMD will, without undue delay after receiving the full appeal, appoint three EFMD Board members to serve as a special Appeals Committee mandated to examine the appeal, and will designate the chair of the Appeals Committee from among the three appointed members. The Appeals Committee may not include any member currently serving in the governance body responsible for the contested decision.
7. The Appeals Committee will study the appeal case and decide by simple majority in one of the following ways:
 - I. It concludes that there are valid grounds for review, in which case it sets aside the contested decision and either:

¹ Decisions to remove the accreditation of a school or programme will not be reflected in the list of accredited schools or programmes until this one-month period ends.

- a) in cases involving a procedural breach, requests that the accreditation process be repeated from the stage at which the breach occurred, or
- b) where it considers that relevant information available to the decision-making body at the time may not have been duly considered, returns the case to that body for re-examination at its next meeting.

II. It rejects the appeal and confirms the contested decision.

8. The Appeals Committee will communicate the outcome of its deliberations, including reasons for its decision, in writing to the president of EFMD, who will inform the school and the Quality Services director no later than three months after receipt of the full substantiated appeal. The decision of the Appeals Committee is final, and not subject to further appeal.
9. When the case is returned to the original decision-making body for re-examination, it shall rely only on the documents submitted in the original proceedings, the full appeal, and the decision of the Appeals Committee. The decision issued on re-examination is final, and not subject to further appeal.
10. If the outcome of the appeals process is an invitation to undergo a further Peer Review Visit, the review must take place within 12 months of the Appeals Committee's decision.
11. A deposit of 15.000 € is required when submitting the full appeal. Once the full appeal is received, an invoice will be issued. The deposit will be refunded if the appeal is upheld. If the appeal is rejected, the deposit will be donated to a charity proposed by the school and agreed by the Quality Services director.

Annex 26

| Policy on Institutional
| Change and
| Restructuring

EQUIS POLICY ON INSTITUTIONAL CHANGE AND RESTRUCTURING

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

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

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

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

- ◆ As soon as institutional change can be assumed to lead to a tangible impact on the school, the head of school writes a letter to the EQUIS Office describing the school's situation and future plans.
- ◆ An ad-hoc committee involving the EQUIS director and two additional members of the EQUIS leadership will preliminarily determine whether the reported institutional change is major or minor. For this purpose, the reported development is minor if
 - a) it is unlikely to affect the quality of the school to require changing its accreditation status (5-year or 3-year) or its eligibility status, or
 - b) it alters the institutional scope so moderately that a new accreditation or eligibility process is clearly not required.

A virtual or a personal meeting with the head of school may be required to clarify or amplify the information provided.

- ◆ If a majority of the ad-hoc committee members agree that the institutional change is major the school will be informed that the process described below will be applied.
- ◆ No later than three months after the date on which the major institutional change is formally implemented, the school must submit an updated datasheet, via the online platform, OX, reflecting the new structure and send a brief report (20-25 pages maximum) to the EQUIS Office, describing the differences between the old and the new structure of the school as well as the resulting ability of the school to satisfy the EQUIS Standards & Criteria.
- ◆ Within three months of receiving this information, an EQUIS expert will meet online with the school's management team to assess the situation. This expert will submit a report to the EQUIS Office. The report should include a recommendation as to whether the new school still satisfies the Eligibility Criteria.
- ◆ The datasheet, the school's report on major differences, and the expert's assessment report will then be submitted to the EQUIS Accreditation Board (AB) or EQUIS Committee (EC) respectively at its next meeting to decide on the accreditation or eligibility status of the changed school. The decision, made by a simple majority vote of the AB or EC attending, can be:

In case of an EQUIS-accredited school:

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

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

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

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

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

In case of an EQUIS eligible school:

- a) Loss of the school's eligibility.

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

- The new school is substantially different from the one originally declared eligible.

- The new school no longer satisfies the Eligibility Criteria.
 - The quality of the new school is perceived to be affected in one or more of the 10 EQUIS quality dimensions.
- b) Maintenance of the school's eligibility until its original period of validity expires; i.e., the EC does not accept the ad-hoc committee's recommendation that this represents a major institutional change.
- ◆ When a school has had its EQUIS accreditation temporarily suspended by the AB, it must go through a new accreditation process as if it had just been declared eligible, i.e., it will need to go through the Self-Assessment and Peer Review stages within two years. The AB may limit this two-year period to a period not shorter than nine months, if it concludes that there is no reason to unnecessarily delay a re-accreditation that otherwise would have taken place earlier. Successful accreditation requires that the school fully satisfies all Eligibility Criteria at the time of the Peer Review Visit (PRV).
 - ◆ The AB will, at the appropriate time, not only decide what duration of accreditation will be granted but also whether the EQUIS records should show it as an initial accreditation or as another re-accreditation.
 - ◆ When a school has lost its eligibility by decision of the EC, it can restart Stage 3 of the EQUIS process as detailed in the EQUIS Process Manual. However, it cannot reapply for eligibility within two years after the EC decision.
 - ◆ The procedure described above does not apply to a situation where an accredited school is forced to officially declare bankruptcy/insolvency or loses its official license for granting academic degrees. In this case, EQUIS accreditation or eligibility is automatically and permanently suspended.
 - ◆ If a school in the EQUIS accreditation process reports a major institutional change between the PRV and the corresponding meeting of the AB, the following procedure will be put into practice:
 1. The AB will deal with the case based on the existing Peer Review Report and the information supplied by the school on re-structuring.
 2. If the AB decision is accreditation, an ad-hoc committee will be formed, and the process detailed above will be carried through.

The process described above may accelerate or delay the planned re-accreditation of a school. For example, a school that was accredited one year ago for 5 years and that is experiencing a major institutional change in the next six months may have to go through a re-accreditation before the time its last accreditation expires. On the other hand, a school that was accredited two years ago for 3 years and that is experiencing a major institutional change in the next six months may be entitled to postpone its originally planned re-accreditation for up to one year. The justification for a delay in the latter case is that it may require some time for the school to appear as a consolidated unit.

Once the AB has made the decision to temporarily suspend a school's EQUIS accreditation due to a major institutional change, the annual Accreditation Fee for any remaining period of the previous accreditation will no longer be due. Thus, if paid annually, no further payments will be due and, if paid in advance, monies paid for the remaining period will be credited towards any new fees due. Full fees will be charged for the new cycle, i.e., the Application Fees, the Review Fee and new annual Accreditation Fees as appropriate.

Annex 27

Special
Re-accreditation

POLICY ON SPECIAL RE-ACCREDITATION

1. Preamble

It is assumed that readers of this document are familiar with the [EQUIS Process Manual](#) for regular re-accreditations.

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

SR has been developed because of three circumstances:

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

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

In summary, SR pursues the following objectives:

- ◆ Continue to evaluate the essential quality aspects.
- ◆ Analyse progress in Areas of Development (AoDs, referred to by earlier EQUIS documentation as Development Objectives) and degree of improvement in quality.
- ◆ Continue to add value in a more focused way.
- ◆ Make the process more focused and less onerous.
- ◆ Continue to provide challenges for continued quality improvement.
- ◆ Contribute learning to the community by analysing good practices of those EQUIS-accredited schools that show a longer record of satisfaction of standards.

This is achieved by means of:

- ◆ A process that is shorter and less demanding in terms of the quantity of information required and the length of the visit to the school.

- ◆ A process that requires more structured and concise information about the essential aspects of the school, its progress and its future development.
- ◆ A Peer Review Team (PRT) involving only two experienced peer reviewers.
- ◆ A process that is less costly for schools from many perspectives.

2. Beginning of the process

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

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

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

- ◆ Formally remind the school that its accreditation expires in less than one year, providing the specific expiration date.
- ◆ Inform the school that it is entitled to go through SR, if it chooses to do so.
- ◆ Highlight that, if the school opts for SR this time, the next re-accreditation will necessarily be a regular re-accreditation.
- ◆ Inform the school, that if SR is chosen, it will be given the opportunity to suggest some areas of strategic development (optional) that it would like to be the focus of the assessment during the Peer Review Visit (PRV).
- ◆ Provide links to the EQUIS documents and forms that are relevant to the school for the SR process in addition to those relevant for a regular re-accreditation.
- ◆ Suggest a period for the PRV (usually 3-4 months before the EQUIS Accreditation Board (AB) meeting date that will consider the re-accreditation decision).
- ◆ Request a response from the school (as indicated below), at the latest twelve months before its accreditation expires, at which time a Re-accreditation Datasheet should also be submitted via the EQUIS online platform, OX.

The email response of the school should include:

- ◆ Its preference for an SR (including topic(s) of assessment focus = optional) or for a regular re-accreditation. In the latter case, the school should follow the guidance of the EQUIS Process Manual for regular re-accreditations and therefore the rest of this document is not applicable.
- ◆ A signed Application Form.
- ◆ Two dates for the PRV in the suggested period.
- ◆ A list of the names and positions of all members of the senior management or executive team of the school.

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

3. Self-Assessment Report (SAR)

As soon as the school has sent the response indicated above and submitted the Re-accreditation Datasheet via the online platform, OX, it is ready to start its self-assessment process. The internal organisation of this stage of the process will benefit from the guidance offered in the EQUIS Process Manual for regular re-accreditations.

The SAR will include:

1. The submission of SAR Datasheet via the online platform, OX

and the production of the following two documents:

2. A Report on Major Developments, organised by EQUIS Chapters (10-20 pages).
 - > This will provide information about the major changes and developments in the school since the last EQUIS accreditation affecting each of the ten EQUIS standards.
 - > In particular, progress on the specific AoDs chosen by the school following its previous re-accreditation should be reported in the corresponding chapter(s).
3. A SWOT Analysis and Executive Summary of the school's 3-5-year Strategic Plan (10-20 pages).
 - > This should convey a succinct strategic analysis of the school organised as Strengths, Weaknesses, Opportunities and Threats, followed by a summary of its strategy, objectives and time horizons.

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

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

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

4. The PRT and the PRV

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

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

The PRT online preparatory meeting (for the members of the PRT only) will take place after the SAR has been received by the members of the PRT, as soon as the two peer reviewers have had sufficient time to read and analyse it, and not later than four weeks before the PRV begins.

The purpose of this dialogue will be to discuss the SAR provided by the school with the following specific objectives:

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

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

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

1. The list of documents or sets of data, if any, to be available in the ODR – the PRT will also inform the school if the additional documents should be available two weeks in advance of the PRV or at the start of the PRV.
2. A meeting schedule specifying the people to be interviewed during the PRV.

The PRV itself will involve one and a half days at the school. See suggested template below.

The head of school is encouraged, but not required, to join the two peer reviewers for lunch on the first day of the PRV as it provides an opportunity to discuss their issues of interest. Therefore, delegating attendance if the head of school is not available, is not expected.

DAY 1

08:00-09:30	PRT breakfast & preparatory meeting (PRT alone)
09:30-10:30	Meeting with the dean of the school
10:30-11:00	Break
11:00-12:30	Meeting with the school's senior management team
12:30-14:00	Lunch with the dean (optional) or PRT alone
14:00-15:30	Meeting with the school's senior management team or middle management

15:30-16:00	Break
16:00-17:00	Meeting 1 – with other stakeholders (to be identified by PRT after their online preparatory meeting)
19:30	PRT dinner alone

DAY 2

09:00-10:00	Meeting 2 – with other stakeholders (to be identified by PRT after their online preparatory meeting)
10:00-11:00	Meeting 3 – with other stakeholders (to be identified by PRT after their online preparatory meeting)
11:00-11:30	Break
11:30-12:30	PRT discussing conclusions
12:30-13:00	Debrief with the dean
13:00-14:00	PRT light lunch at the school (optional)

5. Peer Review Report (PRR)

The PRR will contain:

- ◆ An executive summary containing a general assessment of the school
- ◆ An assessment of progress on the specific AoDs
- ◆ The recommendation to the AB about the re-accreditation of the school. This recommendation can only be:
 - a) a justified proposal for re-accreditation for another 5 years, or
 - b) a justified request that the school's current accreditation be extended temporarily for 1 year and that the school undergoes as soon as possible a full regular re-accreditation to be concluded within twelve months.
- ◆ A detailed analysis of the EQUIS standards that were the focus of the assessment. Where a specific standard was not the focus of assessment, a statement to that effect will suffice.
- ◆ An appendix with the SAR Datasheet.

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

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

6. Decision on Accreditation

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

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

7. Fees

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

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

For all parts of the process that are not described here in detail, the process and rules of a regular re-accreditation will apply.

Annex 28

EQUIS Policy on
Re-accreditation of Schools
with EFMD Programme
Accreditation

EQUIS POLICY ON RE-ACCREDITATION OF SCHOOLS WITH EFMD PROGRAMME ACCREDITATION

The following regulations only concern schools in the EQUIS re-accreditation process.

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

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

The school should indicate its preference in the Re-accreditation Datasheet when starting its re-accreditation process.

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

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

This process will be replaced in the following re-accreditation cycle by a regular re-accreditation process that includes a Selected Programme unless the cycle is a Special Re-accreditation (see [Annex 27](#)).

Annex 29

Policy on Non-
Renewal of Accreditation
of Schools

POLICY ON NON-RENEWAL OF ACCREDITATION OF SCHOOLS

The following process will apply to the re-accreditation of schools previously accredited:

1. When a school learns through the Peer Review Report (PRR) of a recommendation by the Peer Review Team (PRT) for non-accreditation and the school then decides to withdraw from the accreditation process, its name will be removed from the list of accredited schools only six months after the date of the EQUIS Accreditation Board (AB) meeting to which the report would have otherwise been submitted. The school can choose to restart [Stage 2](#) immediately or [Stage 3](#) later. However, it cannot reapply for eligibility within two years after the date of withdrawal.
2. If the AB makes a negative decision, either based on a negative recommendation or by not supporting a positive recommendation in the PRR, the school will be automatically placed on *deferral*, and it will not be removed immediately from the list of accredited schools.
3. The deferral school will be given the option to decide within a maximum of two months of the AB decision date if it accepts the non-accreditation or if it will aim for another full Peer Review Visit (PRV) to take place within one year of the AB decision date. This PRV will require the preparation of a new Self-Assessment Report (SAR) by the school and will involve a new PRT. The date of the new PRV should be fixed as soon as the school decides in this respect.
4. The offer of a new PRV should not be interpreted as recognition that the previous PRT, the AB or anyone else involved from EFMD did not perform as required. Should the school think otherwise, it should appeal the decision rather than opting for the new PRV (see [Annex 25](#)). This new visit is just an additional opportunity granted to the school that faces losing its EQUIS accreditation. The school then must make sure that its new SAR and the information provided to the new PRT persuasively convey the quality of the school according to the established quality framework (the Selected Programme remains the same). The school should therefore pay particular attention to the recommendations made in the latest PRR and in the AB letter of non-accreditation. Both will be part of the documentation provided to the new PRT.
5. No Application Fee will be charged for the new review but the Review Fee applicable in the year of the new review will be charged; subsequent accreditation fees will follow that same Fee Schedule. The Accreditation Fee for the deferral year (i.e., for extension of accreditation) will also be charged, where the Fee Schedule of the cycle when the negative AB decision was taken is applicable. If a school then cancels the PRV during the deferral period, a Cancellation Fee will be charged, and the school will be removed from the accredited list, allowing the six-months grace from the date of the AB decision as indicated below.
6. If the school opts for a new review, it will remain on the list of accredited schools until the AB decides on the second PRR. A negative decision at that time will be final, i.e., it will not be allowed a further deferral period or appeal, and the school will be removed from the list of accredited schools.



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