



EUROPEAN QUALITY IMPROVEMENT SYSTEM



# THE EQUIS PROCESS MANUAL

## Annexes

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## **ANNEX 1**

### **Application Form to EFMD EQUIS**



Application Form to

**EFMD EQUIS**

**European 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 – European Quality Improvement System.

I confirm the correctness of the information supplied in the EQUIS datasheet (dated ..... and any subsequent revisions) and agree that my School will pay the EQUIS fees as they fall due through the process. I also confirm that we will accept the results of the process without holding EFMD liable for any consequential results that may arise from the accreditation decision and process, nor for our making use of any recommendations that may be given during the process.

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

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Stamp of the organisation:

Organisation: .....

Department: .....

Address including Post/Zip Code:.....

.....

.....

City and Country: .....

Telephone: ..... Fax: .....

VAT Identification Number (Please provide for invoicing purposes): .....

(see art. 6 of General Terms and Conditions on page 2)

## General Terms and Conditions

1. The signatory of this Application Form certifies he/she is a representative who is authorised to commit her/his organisation to go through the EQUIS Process.
2. Fee Schedule:  
The total fee for the EQUIS Process is 21,600€ (non-accreditation); 29,700€ (3-year accreditation) or 35,100€ (5-year accreditation) for applications submitted between 1 January 2008 and 31 December 2008

**Initial payment: 8,100€**, due 30 days after the Application data sheet has been approved by the EQUIS office for presentation to the EQUIS Committee for eligibility

**Main payment: 13,500€**, due 30 days after receipt of the Self-Assessment Report

**Final payment:**

if accreditation for **5 years: 13,500€**

if accreditation for **3 years: 8,100€**

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 2.700 Euro, each year not later than 30 days after the date on which the Awarding Body conferred the EQUIS label. Option 2: The above amount can be paid at once no later than 30 days after the date on which the Awarding Body conferred the EQUIS label. Annual instalments are not further required.

3. The reviewed School will be charged directly by the visiting experts for their travel, accommodation and other direct expenses for the on-site briefing visit, 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 of presentation of the invoice
5. The fees are exempted from Belgian VAT according to art. 21, par. 3, 7°, d, of the VAT code if the member is liable to VAT in another country of the European Union, 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 courts of Brussels are competent.

## **ANNEX 2**

### **EQUIS Datasheet**

# EQUIS Datasheet

## Dated/updated:

*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. The total length of the document should not exceed 15 pages. No additional information provided by the School besides that contained in the Datasheet will be conveyed to the EQUIS Committee.*

### School: name, address and website

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*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:

### Head of the School

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*Indicate Job Title (Dean, Director, CEO, President, etc). Provide also address only if different from above*

Name:

Job Title:

Tel:

Email:

### Head of EQUIS Accreditation Project at School

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*Provide also address only if different from above*

Name:

Job Title:

Tel:

Email:

### General Description of the School

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*Limit to 1 page.*

**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.*

**Year of founding and most significant historical events up to date:** *Not more than 20 lines.*

### External governance system

Describe its influence and authority on the School. The term « external governance » refers to the external control or decision-making bodies that play a role in shaping the School's destiny. This may be a Governing Body or Board in the case of an independent school or the central University management systems in the case of a university faculty

### Organisation and internal management system of the School

Current internal organisation (divisions, centres, institutes, etc.) – often best expressed diagrammatically  
 Main committees, key academic and administrative positions – often best expressed diagrammatically  
 Main decision-making processes

### Autonomy: strategic and operational

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, and authority for appointing, promoting and rewarding faculty. Indicate whether limits imply just theoretical or practical restrictions.

### The Degree Programme Portfolio

Using the table below describe the School's portfolio of degree programmes within the principal segments: Bachelors, Generalist Masters, Specialised Masters, Doctoral programmes, other postgraduate programmes such as MBAs.

Table of Degree Programmes offered (list each programme or suite of programmes)

	Duration	Year in which programme started	Mode: Full time/ Part time/ Distance Learning/ off-shore	Pre or Post experience	Primary language(s) of instruction	Nr of applicants this year	Nr offered a place this year	Nr of students enrolled this year	Total nr of students	% of registered non-nationals (not including exchange students)	Nr. of outgoing exchange students
<b>Bachelors</b>											
<b>Total</b>											
<b>Generalist Masters</b>											
<b>Total</b>											
<b>Specialised Masters</b>											
<b>Total</b>											
<b>MBAs</b>											
<b>Total</b>											
<b>Doctoral Programmes</b>											
<b>Total</b>											
<b>Other</b>											
<b>Total</b>											
<b>GRAND TOTAL</b>											

Total number of full-time degree students in the School:  
 Total number of part-time degree students in the School:  
 Total number of full-time equivalent students in the School:

## MBA Programmes

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

Average years of experience:

Number of participants with less than 2 years of experience:

### Name of the Selected Programme:

*The School must choose one programme and the EQUIS Committee will choose another for more intensive assessment during the Peer Review. The two Selected Programmes will be confirmed and announced, respectively, by the EQUIS Committee when the School is declared Eligible. The programme chosen by the School should be one of the main programmes offered.*

## 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 and ignore the rest of this section. 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 (like Executive MBAs) in the School Degree Programme Portfolio rather than under Executive Education*

**Organisation and Management of Executive Education within the School:** *(Indicate how does the Executive Education unit report to and interact 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, open vs tailored, online vs on-site vs blended, etc. Mention some of your most successful exec ed programmes)*

Number of participant days in Open Programmes:

Number of participant days in Tailored Programmes:

Five principal national clients and partners:

Five principal international clients and partners:

## Subject or teaching areas or departments

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

## 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.*

**Core faculty** *(Qualified academic staff employed on a permanent basis and for whom the institution is the sole or principal employer. The numbers below should consider only core faculty members)*

- Number of academic staff members:
- Full-time equivalent:
- Number of staff members per academic rank (for example, full professors, associate professors, etc.)
- % holding a doctoral degree:
- % teaching in executive education courses
- % non-nationals:
- Number of different nationalities:
- Ratio FTE students/FTE core faculty

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)

- Number of academic staff members:
- Full-time equivalent:

Teaching and research assistants on short-term contracts:

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)

- Number from foreign institutions:
- Number from domestic institutions:

## Administrative staff

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- Number working in academic programmes and/or academic departments:
- Number working in non-academic support areas:

## Overview of the School's Research activities

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Provide compelling factual data on the quantity and quality of your School's research as viewed by EQUIS (see EQUIS Standards and Criteria). In order to limit your description to 1 page maximum, tables are usually helpful.

## Sources of Funding

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Provide summary information on the current financial resources of the School with a breakdown by sources of funding. Explain the financial relationship with the parent institution or university, if relevant. Financial data should be expressed in Euros. The breakdown should include % for each of undergraduate or Bachelor degrees, MBA, other postgraduate and executive education programmes; % for each of research, other earned income, government or university subsidies.

## National Standing

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The School should provide the evidence it believes most compelling to prove that it has excellent national standing. It should also indicate at least two clearly defined areas of activity for which it enjoys significant recognition for excellence.

Positioning in the national environment, main competitors, strategic group to which the School belongs.

## Accreditation or recognition by national and/or international agencies

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### International reputation

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*Provide evidence in one paragraph that the School is known and respected by (a selection of) peers outside its home country*

### Internationalisation

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*Provide data on the principal aspects of the School's international dimension (faculty, student body, programmes, strategic alliances, international partners etc.) that have not been provided already: Limit your description to 1 page maximum.*

### Overview of the principal links with the corporate world

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*Provide data on the corporate connections of your School that have not been already provided. Limit your description to 1 page.*

### Facilities:

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*Maximum ½ page describing the dimension and quality of your campus(es) including residential facilities, library, databases, computer facilities, etc.*

This EQUIS Datasheet should be sent to the EFMD Quality Services Department in both Microsoft Word (in case we wish to suggest modifications to you) and pdf electronic formats. The official Datasheet at any time will be the last Datasheet in pdf format for which the EFMD Quality Services Department has acknowledged receipt. Please address it to:

Ms. Marielle Van Renterghem  
Coordinator, Quality Services  
EFMD  
Rue Gachard 88/3  
B – 1050 Brussels  
[Marielle.vanrenterghem@efmd.org](mailto:Marielle.vanrenterghem@efmd.org)

**ANNEX 3**

**EQUIS Fee Schedule**



## EQUIS FEE SCHEDULE (April 2008)



### ***For Initial Accreditation:***

#### **Initial Payment: 8.100€**

Due 30 days before the School is due to be presented to the EQUIS Committee for eligibility.

#### **Main Payment: 13.500€**

Due 30 days before the School is due to be presented to the EQUIS Awarding Body for accreditation.

#### **Final Payment**

- If accreditation for 5 years: 13.500€
- If accreditation for 3 years: 8.100€
- 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 2.700 Euro, each year no later than 30 days after the date on which the Awarding Body conferred the EQUIS label.

**Option 2:** The above amount can be paid at once no later than 30 days after the date on which the Awarding Body conferred the EQUIS label.

### ***Re-Accreditation:***

The same fees apply as above.

***Travel, lodging and other direct expenses are to be paid by the institution.***

## **ANNEX 4**

### **Supporting Information & Documents to be provided in the Self-Assessment Report**



**SUPPORTING INFORMATION & DOCUMENTS TO  
BE PROVIDED IN THE SELF-ASSESSMENT REPORT**  
(EQUIS Standards & Criteria, April 2008)



### ***Chapter 1: Context, Governance and Strategy***

- History of the School (1-page summary table)
- Organisation Chart showing reporting lines
- Chart showing the Committee structure
- List of members in the School's Governing Body and/or Advisory Board (indicating name, position, organisation, nationality, year of appointment)

### ***Chapter 2: Programmes***

- A list of international academic partners with an indication of the type of cooperation (joint degree, student exchange, research collaboration, faculty exchange)
- 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 statistical information about the selection and admissions process (applications, offers, acceptances, enrolment, full-time equivalent in the case of part-time students).
- 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.

### ***Chapter 4: Faculty***

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

- A table showing faculty staffing levels over the past five years, including the number of new appointments and the number of departures for each year, with a breakdown by category or rank.
- Distribution of the core faculty by academic department when appropriate.
- A table setting out for the current year the key statistics for the faculty (gender distribution, age distribution, nationality mix, number of Ph.Ds, etc.).

### ***Chapter 5: Research and Development***

- Provide pertinent numeric data on output using the format in Table 2 of the ***EQUIS Standards and Criteria*** document. Explain on the basis of what criteria research production numbers are placed into a particular category. For instance, how are “internationally refereed journals” defined by the School?
- A table listing funds received from research grants, commissioned research or company sponsorship over the past five years
- Membership of the Research Committee

### ***Chapter 6: Executive Education***

- Budgetary information with the breakdown of revenues by open and customised programmes
- Statistical data concerning the number and type of programmes offered, the number of participants, the number of training days, etc. This information is intended to facilitate the Peer Review team’s understanding of the nature and scope of the executive education provision. 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

### ***Chapter 7: Contribution to the Community***

- Examples of community outreach activities

### ***Chapter 8: Resources and Administration***

- Marketing strategy/plan
- The budget for the current year and forecast budgets for coming years where available
- The School’s financial accounts for the last 5 years broken down by main activity area (income statements and balance sheets)

### ***Chapter 9: Internationalisation***

- List of international academic partners showing the nature of relationship (e.g. student exchanges, research collaboration, joint programmes).
- The chapter on Internationalisation should include cross-references to statistical tables included in other chapters, notably as regards students, faculty and research

### ***Chapter 10: Corporate Connections***

- List of the School's principal corporate partners indicating the nature of their relationships
- Provide details of corporate funding when applicable

## **ANNEX 5**

### **Information and Documents to be provided in the Base Room**



**INFORMATION AND DOCUMENTS TO BE PROVIDED IN THE BASE ROOM**  
(EQUIS Standards & Criteria, April 2008)



### **Chapter 1: Context, Governance and Strategy**

- Documents describing the School's strategic plans and related policies (if possible in English).

### **Chapter 2: Programmes**

#### **General Programme Portfolio**

- Teaching and Learning strategy
- List of courses, including course descriptions, aims & objectives, syllabi
- Descriptions of the overall assessment regime and grading system
- Evaluation questionnaires
- Code of Ethical Conduct or similar document

#### **Selected Programmes**

- Programme structure document including programme objectives and Intended Learning Outcomes
- List of courses/classes, Intended Learning Outcomes & syllabus for each course
- Teaching materials (course notes/handouts, case studies, text books, journal readings) for 3 core courses and 3 electives from a cross section of subject areas and a mix of courses taught in different languages where possible. Where there are no electives, the number of core courses should be increased to 6.
- Access to online material regarding course organization and delivery
- Descriptions of the assessment regime and grading system for selected programmes
- For each of the same 6 courses, the assignments/exams set and a sample of 6 graded/marked student scripts matching those assignments/exams
- Sample of 6 graded final dissertations or internship reports (as appropriate)

### **Chapter 3: Students**

- Documents relating to the selection process: information packs, application forms, interview reports, test material, process documents, etc.
- Documents for incoming international students
- Alumni Directory
- A Table showing the profile of each student cohort within the School's degree programmes (previous study, age, gender, percentage of international students, etc.). Indicate also the average number of years of professional experience for MBAs.
- A Table for each programme detailing the job placement record of students graduating in the previous academic year

### **Chapter 4: Faculty**

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

### **Chapter 5: Research and Development**

- Materials published during the past year as reported in Table 2 (Articles, Books, Theses, Reports, Case Studies, Educational materials, etc). These can be made available in hard copy or electronically
- Any written statements regarding research strategy, policy and processes

### **Chapter 6: Executive Education**

- Documents on Executive Education strategy, policy and processes
- Brochures describing the various programmes on offer
- The Catalogue of public, open courses offered
- Examples of customised programme syllabi
- Course material delivered to participants, both electronically and in hard copy.

### ***Chapter 7: Contribution to the Community***

- Policy statements regarding ethics and corporate responsibility.
- Course syllabi or programme descriptions that refer to ethics and corporate responsibility in the educational curricula.
- Documents describing special projects in these areas.
- Information about student-led projects in these areas.

### ***Chapter 8: Resources and Administration***

- Information distributed to students explaining the documentation facilities and services available (in the language of the country and in English).
- HR strategy and policies (e.g. Staff Handbook, New Employees' Induction Pack)

### ***Chapter 9: Internationalisation***

- International strategy and policy documents
- Documents relating to off-shore provision

### ***Chapter 10: Corporate Connections***

- Strategy and policy documents relating to the School's corporate connections

## **ANNEX 6**

### **Template for Student Self-Assessment Report**

**To be added when finalised**

**ANNEX 7**

**EQUIS Quality Profile Sheet**

# EQUIS QUALITY PROFILE

**Name of the institution:**.....

**Date of the evaluation:** .....

The items listed in this **Quality Profile** are abbreviated versions of those set out in the **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 document entitled **EQUIS Standards and 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 institution 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 a model of excellence.

**Below Standard**  
 The School is judged to be below the threshold of the EQUIS standard in this area.

**N/A:**  
 Not considered applicable and/or relevant to the School concerned.

		Overall Quality Evaluation			
		ABOVE standard	MEETS standard	BELOW standard	N/A
Chap 1	Context, Governance and Strategy				
1.1	Understanding of the environment				
1.2	Clarity of the School's legal and institutional status				
1.3	Quality of the relationship with the parent organisation				
1.4	Legitimacy within the national environment				
1.5	Effectiveness of the School's external governance system				
1.6	Input from stakeholders				
1.7	Effectiveness of the internal organisation structures and decision-making processes				
1.8	Student involvement in the governance system				
1.9	Commitment to ethically and socially responsible governance				
1.10	Coherence between external governance and internal decision-making structures				
1.11	Autonomy				
1.12	Shared sense of mission throughout the School				
1.13	Coherent vision of the School's future				
1.14	Strength of the School's values and culture				
1.15	Explicit commitment to ethically and socially responsible behaviour				
1.16	Credibility of the present strategic positioning				
1.17	Understanding of the School's competitive positioning in the market				
1.18	Clarity of the strategic vision for the future				
1.19	Definition of medium-term strategic objectives				

		Overall Quality Evaluation			
		ABOVE standard	MEETS standard	BELOW standard	N/A
1.20	Explicit strategic plan				
1.21	Match between strategic objectives and resources/ constraints				
1.22	Level of strategic risk				
1.23	Effective quality assurance mechanisms to monitor overall performance				
1.24	Involvement of students in quality assurance processes				
1.25	Integration of the international dimension into governance, strategy and culture				
1.26	International credibility				
1.27	Corporate involvement in the School's governance and strategic planning				
1.28	Policies and processes for effective management of the School's interface with the corporate world				
Chap 2	Programmes				
2.1	Coherence of the School's portfolio of programmes				
2.2	Quality of the programme management systems				
2.3	The Programme Design Process				
2.4	Programme content and coverage				
2.5	Definition of objectives and learning outcomes				
2.6	Coverage of corporate ethics and social responsibility				
2.7	Quality of the documents and online material made available to students				
2.8	Integration of general education objectives				
2.9	Opportunities to develop managerial skills				
2.10	Opportunities for practical work				
2.11	Quality of programme delivery				
2.12	Focus on learning				
2.13	Programme innovation				
2.14	Integration of new technologies				
2.15	Rigour of the assessment regime				
2.16	Quality of the student's work				
2.17	Programme monitoring and review processes				
2.18	International positioning of the School's programmes				
2.19	International content of the School's programmes				
2.20	Compatibility with other international systems				
2.21	Availability of courses in English (where appropriate)				
2.22	Joint programmes delivered with international partners				
2.23	Opportunities for study abroad				
2.24	Quality assurance of off-shore or franchised operations (where appropriate)				
2.25	Responsiveness to corporate needs in the design and delivery of the School's programmes				
2.26	Practitioner input into the School's programmes				
2.27	Integration of themes relating to global responsibility and sustainable development				
Chap 3	Students				
3.1	Quality of incoming students				
3.2	Match between intake profiles and the target profiles for graduating students				
3.3	Student admission processes				
3.4	Access for socially disadvantaged students				
3.5	Preparation for entry into the School's programmes				
3.6	Completion rates				
3.7	Counselling services for students				
3.8	Individualised learning support for students				

		Overall Quality Evaluation			
		ABOVE standard	MEETS standard	BELOW standard	N/A
3.9	Support for the personal and professional development of students				
3.10	Student awareness of issues related to business ethics and corporate social responsibility				
3.11	Availability of records concerning the job placement of graduates				
3.12	Appropriate level of entry into the job market for graduates				
3.13	Quality of the careers office				
3.14	Quality of the School's relations with its alumni				
3.15	Internationalisation of the student body				
3.16	Readiness of students to manage in an int'l context				
3.17	Service provided to international students				
3.18	Corporate involvement in the above student related processes				
Chap 4	Faculty				
4.1	Size of the core faculty				
4.2	Composition of the core faculty				
4.3	Qualification of the core faculty				
4.4	Quality of the non-core faculty				
4.5	Adequacy of total available resources				
4.6	Faculty management system				
4.7	Workload management				
4.8	Recruitment and induction				
4.9	Appraisal, Review and Promotion				
4.10	Faculty development processes				
4.11	Internationalisation of the faculty				
4.12	International visiting faculty				
4.13	International standing of the faculty				
4.14	Appropriate links between the faculty and the corporate world				
4.15	Faculty exposure to the corporate world				
Chap 5	Research & Development				
5.1	Clear policy				
5.2	Strength of the research culture				
5.3	Effective organisation and management of the School's research activities				
5.4	Adequacy of support processes and resources				
5.5	Time allocated to research				
5.6	Quality of the research output				
5.7	Effective evaluation of research activity and output				
5.8	Contribution to the relevance of teaching programmes				
5.9	Distinctive expertise				
5.10	Explicit policy for innovation and development				
5.11	Achievements in the area of innovation and development				
5.12	International scope and recognition of research				
5.13	Relevance to companies and their managers				
Chap 6	Executive Education				
6.1	Integration into the School's overall strategy and programme portfolio				
6.2	Integration into the School's organisation chart and management systems				
6.3	Resources dedicated to executive education				
6.4	Coherence of the executive education portfolio				
6.5	Market positioning of the Executive Education offer				
6.6	Quality of the customer relationship management				

		Overall Quality Evaluation			
		ABOVE standard	MEETS standard	BELOW standard	N/A
6.7	Distinction between customers as organisations and customers as individuals				
6.8	Marketing				
6.9	Quality of participant management				
6.10	Understanding of the adult learning process				
6.11	Quality of open programmes				
6.12	Quality of customised programmes				
6.13	Key expertise underpinning the Executive Education offer				
6.14	Measurement of the impact of learning				
6.15	Adequacy of faculty resources				
6.16	Core faculty involvement in executive education				
6.17	Effective management of faculty resources deployed in Executive Education				
6.18	Impact of the School's RDI potential on executive education				
6.19	International development of executive education				
Chap 7	Contribution to the Community				
7.1	Community outreach activities				
7.2	Extracurricular student activities				
7.3	Service to the management education profession				
7.4	Policy regarding business ethics and corporate social responsibility				
7.5	Integration of these issues into the School's programmes and activities				
Chap 8	Resources and Administration				
8.1	Quality of the learning environment				
8.2	Adequacy of auditoriums, classrooms, etc.				
8.3	Adequacy of the School's financial resources				
8.4	Financial viability of the School				
8.5	Effectiveness of the financial management systems				
8.6	Adequacy of the information and documentation services				
8.7	Adequacy of the computer facilities and services				
8.8	Effectiveness of marketing and PR				
8.9	Quality of the administrative staff				
Chap 9	Internationalisation				
9.1	Strategy and policies for internationalisation				
9.2	International dimension in the School's governance				
9.3	Resources allocated to internationalisation				
9.4	Level of international competitiveness and recognition				
9.5	Current level of internationalisation on the home campus				
9.6	Current level of internationalisation outside the School's home country				
9.7	Quality of the School's international academic partners				
9.8	International strategic alliances				
9.9	Exchange programme network				
9.10	International corporate partners				
9.11	Participation in international networks				
Chap 10	Corporate Connections				
10.1	Strategy and policies for managing the interface with the corporate world				
10.2	Customer orientation				
10.3	Quality of the School's links to the corporate world				
10.4	Quality of corporate partners and clients				

## **ANNEX 8**

### **EQUIS Criteria Evaluation Form**

## EQUIS EVALUATION FORM

*This Evaluation Form is intended to be a working document for Peer Reviewers to help them build up their assessment of the School during the on-site visit. 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 and Criteria**, which should be read in conjunction with this checklist.*

### 1. CONTEXT, GOVERNANCE AND STRATEGY

		COMMENTS
<b>The Environment</b>		
1.1	Understanding by the School of the environment in which it operates	
<b>Institutional Status</b>		
1.2	Clarity of the School's legal and institutional status	
1.3	Quality of the School's relationship with its parent organisation or tutelary body	
1.4	Legitimacy within the national environment	
<b>Governance</b>		
1.5	Effectiveness of the School's external governance system	
1.6	Input from stakeholders into the governance system <ul style="list-style-type: none"> <li>• Does the School have an external Advisory Committee?</li> </ul>	

1.7	Effectiveness of the School's internal organisational structures and decision-making processes	
1.8	Student involvement in the governance system	
1.9	Commitment to ethically and socially responsible governance	
1.10	Coherence between external governance and internal decision making structures	
1.11	Autonomy	
<b>Mission, Vision and Values</b>		
1.12	Shared sense of mission throughout the School <ul style="list-style-type: none"> <li>• Is the mission statement appropriate?</li> </ul>	
1.13	Coherent vision of the School's future	
1.14	Strength of the School's values and culture	
1.15	Explicit commitment to ethically and socially responsible behaviour in the management profession	

<b>Current Strategic Positioning</b>		
1.16	Credibility of the School's present strategic positioning	
1.17	Understanding of the School's competitive positioning in the market	
<b>Strategic Direction and Objectives</b>		
1.18	Clarity of the strategic direction for the future <ul style="list-style-type: none"> <li>• Are the School's long term goals clear?</li> </ul>	
1.19	Definition of medium-term strategic objectives	
<b>Strategic Planning</b>		
1.20	Explicit strategic plan for achievement of the strategic objectives <ul style="list-style-type: none"> <li>• Are there appropriate metrics and timeframes within the planning process?</li> </ul>	
1.21	Match between strategic objectives and resources/constraints	
1.22	Level of strategic risk	
<b>Quality Assurance</b>		
1.23	Effective quality assurance mechanisms to monitor overall performance	

1.24	Involvement of students in quality assurance processes	
<b>Internationalisation</b>		
1.25	Integration of the international dimension into the School's governance, strategy and culture	
1.26	International credibility (in terms of governance, autonomy, identity, legitimacy, sense of mission, strategic positioning, access to resources).	
<b>Corporate Connections</b>		
1.27	Corporate involvement in the School's governance and strategy	
1.28	Existence of policies and processes for the effective management of the School's interface with the corporate world?	

## 2. PROGRAMMES

<b>The Programme Portfolio</b>		
2.1	Coherence of the School's portfolio of programmes	
2.2	Quality of the programme management systems	

<b>Programme Design</b>	
2.3	The Programme Design Process
<b>Programme Content</b>	
2.4	Programme content and coverage
2.5	Definition of objectives and learning outcomes
2.6	Coverage of corporate ethics and social responsibility
2.7	Quality of the documents distributed to students or made available on line (syllabi, course descriptions etc.)
<b>Skills Acquisition</b>	
2.8	Integration of general education objectives
2.9	Opportunities to develop managerial skills <ul style="list-style-type: none"> <li>• Team work</li> <li>• Presentation skills</li> <li>• .....etc.</li> </ul>
2.10	Opportunities for practical work, project-based work and internships within the programmes

<b>Programme Delivery</b>		
2.11	Programme Delivery: <ul style="list-style-type: none"> <li>• Diversity of delivery methods</li> <li>• Comparability with good international practice</li> </ul>	
2.12	Focus on learning: <ul style="list-style-type: none"> <li>• To what extent is there an emphasis on learning as well as teaching?</li> </ul>	
2.13	Programme innovation	
2.14	Integration of New Technologies	
<b>Student Assessment</b>		
2.15	Student Assessment <ul style="list-style-type: none"> <li>• Do the programmes have explicit and rigorous assessment criteria?</li> <li>• Is the assessment regime applied with sufficient rigour?</li> </ul>	
2.16	Quality of the students' work	
<b>Programme Evaluation</b>		
2.17	The Programme Monitoring and Review Process <ul style="list-style-type: none"> <li>• Evaluation by students</li> <li>• Faculty and student Committees etc.</li> <li>• Periodic Review</li> </ul>	
<b>Internationalisation</b>		
2.18	International positioning of the School's programmes: <ul style="list-style-type: none"> <li>• Attractiveness to int'l students</li> </ul>	

2.19	International content of the School's programmes	
2.20	Compatibility with other international systems (In the case of European Schools, compatibility with the Bologna reforms)	
2.21	Availability of courses in English (where appropriate)	
2.22	Joint programmes delivered with international partners	
2.23	Opportunities for study abroad through student exchange programmes	
2.24	Quality assurance of off-shore or franchised operations (where appropriate)	
<b>Corporate Relevance</b>		
2.25	Responsiveness to corporate needs in the design and delivery of the School's programmes	
2.26	Practitioner input into the School's programmes	

Societal Relevance	
2.27	Integration of themes relating to global responsibility and sustainable development

### 3. STUDENTS

Target profiles and criteria for selection	
3.1	Quality of Incoming Students <ul style="list-style-type: none"> <li>• Motivation and commitment</li> <li>• Preparedness for the study programme</li> <li>• Diversity of backgrounds</li> </ul>
3.2	Match between intake profiles and the target profile for graduating students
3.3	Student admission and selection processes <ul style="list-style-type: none"> <li>• How appropriate are the selection criteria?</li> <li>• How selective is the School?</li> <li>• What is the quality of the Admissions office?</li> </ul>
3.4	Access to the School's programmes for socially disadvantaged students
Course preparation and progression	
3.5	Preparation of students before entry into the programmes <ul style="list-style-type: none"> <li>• Is assistance available to students who may have particular problems before entering a programme?</li> </ul>
3.6	Completion rates <ul style="list-style-type: none"> <li>• Are completion, failure and drop-out rates acceptable?</li> </ul>

<b>Support and counselling services</b>		
3.7	Counselling services for students as they progress through their programme	
3.8	Individualised learning support for students <ul style="list-style-type: none"> <li>• Tutorials</li> <li>• Coaching</li> </ul>	
<b>Personal and professional development</b>		
3.9	Support for the personal development of students <ul style="list-style-type: none"> <li>• Do the School's programmes and processes encourage personal development?</li> <li>• Does the School help students to define their professional objectives?</li> <li>• Does the School have staff experienced in providing this type of support?</li> </ul>	
<b>Ethics and Values</b>		
3.10	Student awareness of issues relating to business ethics and corporate social responsibility	
<b>Career Placement and Support</b>		
3.11	Availability of detailed records concerning the placement of students in the job market	
3.12	Appropriate level of entry into the job market for graduating students <ul style="list-style-type: none"> <li>• Do employment opportunities meet students' expectations?</li> </ul>	
3.13	Quality of the Careers office <ul style="list-style-type: none"> <li>• What is the level of support provided to students in their search for employment?</li> </ul>	

<b>Alumni relations</b>	
3.14	Quality of the School's relations with its Alumni <ul style="list-style-type: none"> <li>• Does the School adequately utilise the potential of its alumni base?</li> </ul>
<b>Internationalisation</b>	
3.15	Internationalisation of the student body
3.16	Readiness of students to manage in an int'l context <ul style="list-style-type: none"> <li>• How well does the School develop individuals as future international managers?                             <ul style="list-style-type: none"> <li>- Managerial skills</li> <li>- Language skills</li> <li>- Intercultural skills</li> </ul> </li> </ul>
3.17	Service provided to international students <ul style="list-style-type: none"> <li>• Does the School have an international office?</li> </ul>
<b>Corporate links</b>	
3.18	Corporate involvement in the above student related processes

## 4. FACULTY

<b>Faculty Size, Qualification and Composition</b>	
4.1	Size of the core faculty <ul style="list-style-type: none"> <li>• Is the current size of the faculty adequate for the number of students and the range of programmes?</li> <li>• Ratio of core faculty members to full-time students</li> </ul>

4.2	<p>Composition of the core faculty</p> <ul style="list-style-type: none"> <li>• coverage of the principal management education disciplines</li> <li>• adequate range of educational competences</li> <li>• adequate research potential</li> <li>• gender mix</li> </ul>	
4.3	<p>Qualification of the faculty</p> <ul style="list-style-type: none"> <li>• Doctoral qualification</li> <li>• Relevant business/professional experience</li> </ul>	
4.4	<p>Quality of the non-core faculty (part-time, adjunct, practitioners, etc.)</p>	
4.5	<p>Adequacy of total available resources including non-core faculty and practitioners</p> <ul style="list-style-type: none"> <li>• Is there an appropriate balance in the distribution of teaching loads between core and non-core faculty?</li> </ul>	
<b>Faculty Management</b>		
4.6	<p>Faculty Management System</p> <ul style="list-style-type: none"> <li>• Are there formal processes for the management of the faculty?</li> </ul>	
4.7	<p>Workload Management</p>	
4.8	<p>Recruitment and induction</p>	
4.9	<p>Appraisal, Review and Promotion</p>	

<b>Faculty Development</b>	
4.10	Faculty Development
<b>Internationalisation</b>	
4.11	Internationalisation of the Faculty
4.12	International Visiting Faculty
4.13	International standing of the faculty <ul style="list-style-type: none"> <li>• Is the faculty of a sufficient quality to meet the international standards of management education?</li> </ul>
<b>Corporate Links</b>	
4.14	Appropriate links between the faculty and the corporate world
4.15	Faculty exposure to the corporate world (executive education, research, consulting, board membership)

## 5. RESEARCH, DEVELOPMENT AND INNOVATION

<b>Research Activities</b>	
5.1	Clearly stated policy regarding Research, Development and Innovation <ul style="list-style-type: none"> <li>• How is RDI defined within the institution?</li> </ul>

5.2	Existence of a research culture within the School <ul style="list-style-type: none"> <li>• Is research a shared value?</li> </ul>	
5.3	Effective organisation and management of the School's research activities	
5.4	Adequacy of support processes and resources <ul style="list-style-type: none"> <li>• funding</li> <li>• research director</li> <li>• research committee</li> <li>• etc.</li> </ul>	
5.5	Sufficient time allocated to research within faculty workloads	
5.6	Nature and quality of the research output	
5.7	Effective processes for evaluating research activity and output	
5.8	Contribution of research to the relevance and quality of the School's programmes	
5.9	Distinctive expertise for which the School is recognised	
<b>Development and Innovation</b>		
5.10	Explicit policy in the area of development (innovation, new technologies, new delivery modes)?	

5.11	Achievements in the area of innovation and creative development	
<b>International Features of R &amp; D</b>		
5.12	International scope and recognition of RDI	
<b>Links between R &amp; D and the Corporate World</b>		
5.13	Relevance of RDI to companies and their managers	

## 6. EXECUTIVE EDUCATION

<b>Positioning within the School</b>		
6.1	Integration of Executive Education into the School's overall strategy and programme portfolio	
6.2	Integration of the Executive Education activity within the School's organization chart and management systems	
6.3	Resources dedicated exclusively to Executive Education <ul style="list-style-type: none"> <li>• Teaching and admin staff</li> <li>• Physical facilities</li> </ul>	
<b>Product Portfolio</b>		
6.4	Coherence of the Executive Education portfolio	

<b>Marketing and Sales</b>		
6.5	Market positioning of the Executive Education offer <ul style="list-style-type: none"> <li>• Understanding of market needs</li> </ul>	
6.6	Quality of the customer relationship management	
6.7	Distinction between customers as organisations and customers as individual participants	
6.8	Marketing	
<b>Participant Management</b>		
6.9	Quality of participant management <ul style="list-style-type: none"> <li>• Selection</li> <li>• Preparation</li> <li>• Individualised support</li> </ul>	
6.10	Understanding of the adult learning process	
<b>Programme Quality</b>		
6.11	Quality of open programmes <ul style="list-style-type: none"> <li>• Design</li> <li>• Delivery</li> <li>• Evaluation and review</li> <li>• Innovation</li> <li>• Use of new technologies</li> <li>• Responsiveness to corporate needs</li> </ul>	
6.12	Quality of customised programmes <ul style="list-style-type: none"> <li>• Ability to design and deliver programmes in collaboration with companies and organisations</li> </ul>	

6.13	Key expertise underpinning the Executive Education offering	
6.14	Measurement of the impact of learning on individuals and organisations	
<b>Faculty</b>		
6.15	Adequacy of faculty resources (including both core and non core faculty) available for executive education	
6.16	Nature and extent of core faculty involvement in Executive Education	
6.17	Effective management of faculty resources deployed in Executive Education	
<b>Research and Development</b>		
6.18	Impact of the School's RDI potential on Executive Education	
<b>Internationalisation</b>		
6.19	International development of Executive Education	

## 7. CONTRIBUTION TO THE COMMUNITY

<b>Community Outreach</b>	
7.1	Community Outreach Activities
<b>Extra-curricular Student Activities</b>	
7.2	Extra-curricular Student Activities
<b>Services to the Management Education Profession</b>	
7.3	Service to the management education profession
<b>Corporate Responsibility</b>	
7.4	Policy regarding business ethics and corporate social responsibility
7.5	Integration of issues relating to business ethics and corporate social responsibility across the whole range of the School's programmes and activities

## 8. RESOURCES AND ADMINISTRATION

<b>Physical Facilities and the Learning Environment</b>	
8.1	Quality of the Learning Environment <ul style="list-style-type: none"> <li>• Campus and buildings</li> <li>• Cafeteria and restaurant facilities</li> <li>• Student common room facilities</li> </ul>
8.2	Adequacy of the auditoriums, classrooms, breakout rooms, etc.

<b>Financial Resources</b>		
8.3	Adequacy of the School's financial resources	
8.4	Financial viability of the School <ul style="list-style-type: none"> <li>• Are there any major risks in the foreseeable future?</li> </ul>	
<b>Financial Management Systems</b>		
8.5	Effectiveness of the School's financial management systems	
<b>Information and Documentation Facilities</b>		
8.6	Adequacy of the information and documentation facilities (library, data bases, research support systems, inter-library loan services, etc.)	
<b>Computing Facilities</b>		
8.7	Adequacy of the computer facilities and services <ul style="list-style-type: none"> <li>• Installed hardware and software, electronic learning platforms, open-access computer rooms, help desk, etc.</li> </ul>	
<b>Marketing and Public Relations</b>		
8.8	Effectiveness of the School's Marketing and Public Relations	
<b>Administrative Services and Staff</b>		
8.9	Administrative Staff <ul style="list-style-type: none"> <li>• Overall Quality</li> <li>• Human Resource Policy</li> <li>• Management</li> </ul>	

## 9. INTERNATIONALISATION

9.1	Well-defined strategy and policies for internationalisation	
9.2	Presence of an international dimension in the School's governance system <ul style="list-style-type: none"> <li>• Governing Body</li> <li>• Advisory Board</li> </ul>	
9.3	Resources allocated to internationalisation <ul style="list-style-type: none"> <li>• Funding</li> <li>• International office</li> <li>• Director of international affairs</li> </ul>	
9.4	Level of competitiveness and recognition of the School in international markets	
9.5	Current level of internationalisation within the home campus	
9.6	Current level of internationalisation outside the School's home country	
9.7	Quality of the School's international academic partners	
9.8	International strategic alliances <ul style="list-style-type: none"> <li>• Are they appropriate?</li> </ul>	

9.9	Exchange Programme Network	
9.10	International corporate partners	
9.11	Participation in international networks	

## 10. CORPORATE CONNECTIONS

10.1	Strategy and policies for managing the School's interface with the corporate world	
10.2	Overall customer orientation of the School <ul style="list-style-type: none"> <li>• How well does the School manage its relations with companies and organisations?</li> </ul>	
10.3	Nature and quality of the School's links to the corporate world <ul style="list-style-type: none"> <li>• At local, national and international levels</li> </ul>	
10.4	Quality of corporate partners and clients	

## 11. OVERALL ASSESSMENT

	Does the School qualify for the European Quality Label?	YES
		NO
		Under certain conditions

## **ANNEX 9**

### **EQUIS Process Evaluation Form: School**



## CONFIDENTIAL

### The EQUIS Process School Evaluation Questionnaire



*At the end of the accreditation process, once the Peer Review Report has been finalised, you will be asked to fill in an on-line evaluation questionnaire. In the meantime, we would advise that you use this form to record your feedback during or immediately after the Peer Review Visit while the visit is still fresh in your mind and then transfer your answers into the on-line questionnaire later on.*

*The information that you will provide in the on-line questionnaire will be used by the Quality Services Department of the EFMD for the continuous improvement of the system. The questionnaire will remain confidential to Quality Services.*

**Name of the School:**

**Date of the Review:**

#### 1: Overall Satisfaction

Please mark on a scale of 1 to 5: (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	1	2	3	4	5
a) Value to the School of the process as a whole					
b) Satisfaction with the delivery of the process by EFMD					

Comment:

#### 2: Standards and Criteria

Please mark on a scale of 1 to 5: (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	1	2	3	4	5
a) Clarity and completeness of the standards and criteria					
b) Relevance and applicability to your School					

Comment:

#### 3: Administration of the Overall Process

Please mark on a scale of 1 to 5: (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	1	2	3	4	5
a) Design of the administrative process					
b) Clarity of the information and guidance in the EQUIS documents					
c) Efficiency of the EQUIS staff					
d) Prompt availability of help when needed					

Comment:

**4: The Self-Assessment Process**

<b>Please mark on a scale of 1 to 5:</b> (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
a) Value to the School of the Self-Assessment exercise					
b) Clarity of the guidelines for the Self-Assessment Report					
c) Quality of the guidance from the EQUIS staff					

Comment:

**5: The Peer Review Visit**

<b>Please mark on a scale of 1 to 5:</b> (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
a) Guidance by the EQUIS staff in establishing the schedule of meetings					
b) Support from the EQUIS staff for the logistics of the visit					
c) Management of the visit by the Peer Review team					
d) Balance between courteousness and incisiveness in the interviews					
e) Quality of the oral feedback					
f) Overall helpfulness of the Peer Review visit					

Comment:

**6: The Peer Review Team**

<b>Please mark on a scale of 1 to 5:</b> (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
a) Overall quality of the team					
b) Balance between profiles within the team					
c) Quality of the Chairperson					

Comment:

**Please complete this section once the Peer Review Report has been finalised.**

**7: The Peer Review Report**

Please mark on a scale of 1 to 5: (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	1	2	3	4	5
a) Format of the report					
b) Timely delivery of the Peer Review Report					
c) Clarity of the report					
d) Fairness of the report					
e) Value of the report to the School					

Comment:

## **ANNEX 10**

### **EQUIS Process Evaluation Form: Peer Reviewer**



## CONFIDENTIAL

### The EQUIS Process Peer Reviewer Evaluation Questionnaire



At the end of the accreditation process, once the Peer Review Report has been finalised, you will be asked to fill in an on-line evaluation questionnaire. In the meantime, we would advise that you use this form to record your feedback during or immediately after the Peer Review Visit while the visit is still fresh in your mind and then transfer your answers into the on-line questionnaire later on.

The information that you will provide in the on-line questionnaire will be used by the Quality Services Department of the EFMD for the continuous improvement of the system. The questionnaire will remain confidential to Quality Services.

**Name of the Reviewer:**

**Name of the School reviewed:**

**Date of the Peer Review:**

#### **1: Administration**

Please mark on a scale of 1 to 5: (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	1	2	3	4	5
a) Effectiveness of the EQUIS staff in organising your participation in the review					
b) Adequacy of the information given in advance of your participation					

Comment:

#### **2: Standards and Criteria**

Please mark on a scale of 1 to 5: (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	1	2	3	4	5
a) Clarity and completeness of the standards and criteria					
b) Relevance and applicability					

Comment:

#### **3: Documentation**

Please mark on a scale of 1 to 5: (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	1	2	3	4	5
a) Adequacy of the process documentation					
b) Timely delivery of the documents					

Comment:

**4: The Logistics of the On-Site Peer Review**

<b>Please mark on a scale of 1 to 5:</b> (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
a) Travel arrangements					
b) Adequacy of the hotel accommodation					
c) Adequacy of the Base Room					
d) Computer facilities					
e) Support from the School					
f) Support from the EQUIS staff					
g) Hosting by the School					

Comment:

**5: The Peer Review**

<b>Please mark on a scale of 1 to 5:</b> (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
a) Organisation of the Peer Review Schedule of Interviews					
b) Respect for the timing					
c) Quality of the Peer Review team members					
d) Quality of the chairing					
e) Effectiveness of the decision-making process in determining the final recommendation					

Comment:

**6: The Peer Review Report**

<b>Please mark on a scale of 1 to 5:</b> (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
a) Opportunity to provide input into the final version of the report					
b) Quality of the report as a reflection of your experience					

Comment:

## **ANNEX 11**

### **Conflict of Interest Policy**



## Policy on Potential Conflicts of Interest for EFMD Peer Reviewers (September 2007)



The credibility and value of EFMD's quality improvement and accreditation systems depend, inter alia, on ensuring that there is no bias (real or perceived) in favour of or against the School or Programme being assessed. It is therefore necessary to ensure that there is no conflict of interest in the appointment of Peer Reviewers. 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 to declare any actual or potential conflict of interest as soon as possible to the EFMD Quality Services Department.

Some **sources of potential conflict** of interests 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.
4. Hidden agendas: having been approached by the School to encourage him or her 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, even if the reviewer is confident that this will not be the case.

The extent of the potential conflict of interest depends on the specific circumstances (duration and intensity of the relationship, time since occurrence, degree of competition or collaboration between 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, **EFMD Quality Services Department will act 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 Quality Services 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 Quality Services Department will determine whether the Peer Reviewer should be excluded from the specific team.

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

## **ANNEX 12**

### **Communication Policy**



## **POLICY ON USE OF EQUIS ACCREDITATION FOR PUBLICITY** (February 2007)



### ***Purpose of the policy***

To ensure that

- The EQUIS label and logo are applied only to those activities of the institution which is accredited
- The logo is not applied to partner institutions
- All accredited Schools apply the EQUIS brand in a consistent way
- Publicity of EQUIS is informative

### ***Use of the EQUIS logo***

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

The logo may not be used on co-branded materials (eg programme brochures) with partner institutions such as for offshore or off-campus provision. However such materials may mention EQUIS accreditation of the parent institution in text inside the brochure.

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

### ***Use of comments from Peer Review Report***

The Peer Review Report may not be published and no extracts or other data from it may be quoted in the School's publicity materials. If a School wishes to publicise parts of the Report (eg for a national accreditation body), it must first receive agreement from the EQUIS office.

The Dean or Director of the School, through the School's approval procedures, decides to whom internally the Peer Review Report is to be distributed. This extends to parent institutions (if applicable) and to members of committees and advisory bodies established by or for the School. Information in the report should not be taken out of context and EFMD therefore requires that the report be distributed as a complete report rather than in summary or extract form. Recipients should be explicitly warned that the report is confidential and therefore further distribution by them in all or in part is strictly forbidden.

### ***Public reference to EQUIS accreditation***

When public reference is made to EQUIS, 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 will make a distinction between Accreditation granted for a period of 5 years or a reduced period of 3 years. EFMD will provide this information on its website for all Schools that have been accredited or re-accredited.

## **Promotion of EQUIS Accreditation**

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

- Include the EQUIS Accredited logo on the homepage of the accredited School's website with a description of what EQUIS stands for and a direct link back to the EQUIS section of the EFMD website.
- Distribute a Press Release announcing the news to local and national media as well as selected International media (FT, WSJE, Business Week, Latin Trade, IHT, etc) and internet news service providers such as Business Wire / PR news.
- Place an advert in the EFMD business magazine Global Focus and / or in BizEd to announce the accreditation. Send a postcard or letter to all the EFMD members to announce the accreditation – EFMD will provide the data file on request.
- Within the university, spread the news in the internal mail service with a message addressed to all staff and directors; send a message to all professors, students, alumni, recruiters, and business contacts, telling them about the accreditation and what it means for the school; include it in internal communication, student and alumni magazines, distributed in printed or in electronic form.
- For EQUIS accreditation to generate an impact for students, ensuring international recognition of their study programme and qualifications, it is also important to develop collective pride through, for example, placing posters or banners around the School or the Dean communicating the news verbally.
- Arrange an announcement, in the form of a special card / postcard from the Dean, for distribution across the whole network, including university partners, recruiters, executive programmes' participants, and other key contacts.
- Include the EQUIS Accredited logo on all printed material, brochures and stationary where the accredited School is mentioned, following the above regulations.
- In all external communications (addressed to MBA candidates, recruiters, media, corporate contacts, etc.) talk about the value of EQUIS Accreditation as a key achievement of the school.

## Further Information and Contacts

If you have any questions concerning the EQUIS accreditation process, or would like to receive more information, please consult the EFMD website where all documentation is available to download:

<http://www.efmd.org/equis>

Alternatively you can contact the EFMD Quality Services Office:

[equis@efmd.org](mailto:equis@efmd.org)



[www.efmd.org](http://www.efmd.org)

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