We will ensure the confidentiality of data provided to EFMD and processed in the framework of the EDAF system. In comparative benchmarking tools, the School’s data is only reported in aggregate, such that no individual school’s data is identifiable.

Learn more about our privacy policy at https://efmdglobal.org/privacy-policy.
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A – EFMD GN Deans Across Frontiers

1. Introduction to EDAF

1. EDAF – EFMD GN Deans Across Frontiers

EFMD has a mission to promote excellence in business and management education worldwide. This is partly fulfilled by its existing accreditation systems, EQUIS and EFMD Programme Accreditation (formerly known as EPAS). However, EFMD also has a responsibility to support all levels of schools, whether they be members of EFMD or not.

The mentoring system EFMD GN Deans Across Frontiers (EDAF) is designed to assist Business Schools in their development. EDAF aims to assist the Schools through a mentoring system of the School’s senior management based on a prior assessment of the School. The term “Business School” or “School” is to be interpreted as any organisational unit, either free-standing or part of a larger institution, that is primarily concerned with business and management education and development.

EDAF is a further endeavour of EFMD to raise the standard of management education worldwide. It complements the EFMD accreditation systems (EQUIS and EFMD Programme Accreditation – formerly known as EPAS) and is targeted at Business Schools that do not yet have the chance to benefit from the accreditation systems. These can be Business Schools in different stages of quality development. Participating schools that cannot afford to cover the costs of EDAF may apply for a partial funding.

The process involves an in-depth assessment of the Business School through international comparison and benchmarking using established criteria. Following this assessment and at the request of the School, a Mentor, who has been a member of the Peer Advisory Team (PAT) and advised the School in preparing the Self-Assessment Report (SAR) and Peer Advisory Visit (PAV), will be available to work closely with the School as an advisor for an initial period of 2-3 years. Together they will work towards agreed development objectives to improve various aspects of the Business School following one of two paths:

- **Path A: Institutional Development**
- **Path B: Bridging the Gap towards Accreditation**

Upon completing the EDAF process, the School will receive the EDAF Certificate recognising its commitment to quality improvement.

The EDAF process looks into a wide range of quality dimensions as shown in the EDAF Business School wheel on the next page.
The EDAF framework views the School as a wheel with a hub containing the Senior Management Team (SMT) who develop and implement strategy and who coordinate a number of interlinked activity spokes. The hub and spokes are located within the rim which is the environmental context. The context is taken as a given but the activities or operations are within the control or influence of the senior management team. These activities can be assessed for quality and the senior management team can be assessed for their effectiveness in leading and managing the School. The assessment of the School's activities includes:

- Management and resources (including strategic positioning, management structures and processes, people, infrastructure and facilities, financial management systems, etc.)
- External linkages (corporate, international, public agencies, executive education, community, marketing, etc.)
- Programmes (portfolio, curricula, assessment methods, quality of teaching)
- Students and graduates (entry requirements, intake quality, graduate quality, jobs)
• Faculty (qualifications, faculty management issues, recruitment, development, corporate links etc.)

• Intellectual activity (research, pedagogy, consultancy, output quality etc.)

In addition, the senior management is assessed in terms of issues such as leadership, management style, management systems and appointment processes. The strategic planning process is also reviewed along with SMT's ability to implement the strategic plans and to manage operations effectively.

While taking into account the environmental context, the assessment identifies strengths and weaknesses along these quality dimensions. The role of the Mentor is to give advice on how to develop within the School’s own individual context.

2. EDAF – One facet of EFMD’s social impact

Economic development depends on an educated and trained workforce including the management cadre to give leadership and direction. The management cadre must possess the knowledge and skills of business and management. Business schools are essential in order to ensure that the countries’ organisations (private, public, NGO) are able to acquire and utilise resources efficiently so as to achieve national and institutional goals. The quality of business schools impacts directly on the quality of management in any economic region.

EDAF is inspired by the EFMD accreditation systems EQUIS and EFMD Programme Accreditation (formerly known as EPAS) and shares some of their essential elements. Both systems are truly international in their design and EDAF follows their approach to diversity. The assessment of a business school has to consider the educational, cultural and political environment in which it operates and relate it to a wider international context. This rules out classical, single context advisory schemes but necessitates a flexible and customised approach. Hence, EDAF does not place an emphasis on any particular model of business school. Business schools in the EDAF process may range from private schools focusing on postgraduate and executive education to public universities with a broad portfolio of undergraduate and postgraduate programmes.

3. EDAF – Addressing diverse needs of business schools

EDAF acknowledges that business schools have different capacities and diverse interests. In order to get the most out of EDAF, a two-path approach has been introduced in 2019. The objectives and related outcomes of the two EDAF paths are listed in the graphic below.
4. Benefits of the EDAF process

- A structured process of reflection by the Senior Management Team on the key attributes of the School according to a defined framework;

- Thorough assessment and context-based analysis by a high-level Peer Advisory Team as a starting point for the mentoring process;

- Systemised approach to mentoring with quality assurance, progress tracking and defined assessment criteria by highly experienced advisors/mentors and thus access to the expertise of the EFMD network through international benchmarking and comparison;

- Facilitated access to the EFMD network for Schools that embark on the path Institutional Development (Path A of the EDAF process) and are not yet members of EFMD (free EFMD affiliated membership for 3 years);

- Direct link to international accreditation processes including EFMD’s own (EQUIS and EFMD Programme Accreditation – formerly known as EPAS) for Schools that embark on the path Bridging the Gap towards Accreditation (Path B of the EDAF process);

- Obtaining EDAF Certification which is an internationally recognised label that confirms a commitment to quality improvement (the EDAF Label).

---

1 The full EDAF process is described in more detail in chapter C of this Manual.
2. Management of EDAF

EDAF is the mentoring system of EFMD Global Network (EFMD GN). EDAF is operated by the Quality Services Department of EFMD with the strategic support of the EDAF Committee. The EFMD GN Board appoints the members of the EDAF Committee. EDAF Committee members, Peer Advisors and Mentors are required to sign a confidentiality agreement.

1. The EFMD GN Board

The EFMD GN Board approves EDAF policy, criteria and procedures based on the proposals submitted by the Quality Services Department after consultation with the EDAF Committee. It also appoints the members of the Committee (see the EFMD GN website for current members)².

2. EFMD Quality Services

The Quality Services Department manages the EDAF process and provides the administrative services for the system.

3. The EDAF Committee

The EDAF Committee, composed of international academic representatives, advises the EDAF Director on the strategic development of EDAF. All major decisions concerning policy, criteria and procedures are submitted to the EDAF Committee for consultation. The EDAF Committee vets applications and approves the Eligibility of schools wishing to enter the EDAF process. It also decides upon the granting of EDAF funding.

The EDAF Committee meets three times a year (in January, May and September) at the request of the EDAF Director, who chairs the meetings. A detailed description of the Role and Functioning of the EDAF Committee and a current Members’ list can be consulted on the EFMD GN website.

The EDAF Committee can form several subcommittees according to its needs such as a Fundraising, Quality Monitoring or Fund Allocation subcommittees.

4. Peer Advisory Teams and the Mentor

Each Peer Advisory Team (PAT) is composed of three or four members with experience in the organisation and delivery of business and management programmes. The composition of the PAT will depend on the size and type of applicant School. The members of the PAT will normally come from different countries. Each team includes:

• The Chair of the Peer Advisory Team: an academic (Dean or Former Dean) normally from a different country from the Business School being assessed;

• The designated Mentor (previously approved by the School): an academic (often a Dean or former Dean) normally from a different country from the School being assessed

• 1-2 academic representatives (Deans, Associate Deans or Former Deans) of which one will come from the same country or region where the School is located – this person should be familiar with the local educational environment and thus be able to advise the external team members on national issues. Should it be impossible to find a local academic, he/she will be replaced by an international team member.

The Peer Advisory Team is responsible for carrying out a comprehensive assessment of the Business School against the EDAF Criteria – during the so-called Peer Advisory Visit – and consequently for delivering its assessment via the Peer Advisory Report.

One member of the Peer Advisory Team will serve as the Mentor for a two to three-year mentoring period after the visit. The Mentor will be appointed after the Eligibility decision and will engage with the School before the Peer Advisory Visit to support the Institution in its preparation. After the visit, the Mentor will advise the Business School on how to progress in the different EDAF assessment areas throughout the mentoring period taking into account the path chosen by the School (Path A: Institutional Development or Path B: Bridging the Gap towards Accreditation).

The following diagram illustrates the EDAF stakeholders:
B – EFMD Membership, EDAF Eligibility and EDAF Funding

1. EFMD Membership and the EDAF Community

The EFMD aims to assist a wide range of Business Schools, even though EFMD usually provides its services only to its members. However, the EDAF system is also open to non-EFMD members. The only additional requirement for non-members wishing to enter the EDAF process is to submit two Referee Forms (see Annex 3, EDAF Process Manual Annexes).

2. EDAF Eligibility

A Business School wishing to take part in the EDAF process must meet the following criteria at minimum:

1. It must be a higher education institution (or part thereof) that delivers degrees recognised nationally:
   - Awards degrees;
   - Has a mission appropriate for a higher education institution;
   - Has a primary focus on education in general management or business administration;
   - Can demonstrate sufficient institutional stability and resources.

2. The senior management of the School should have some autonomy in managing its staff and budget as well as in the design and running of its programmes.

3. The School should offer at least one degree programme from the following segments: Bachelors (first degree), Masters (second degree), MBA, Doctoral programmes.

4. There should be sufficient number of students in the Business School to make it a viable Business School.

5. The School should have a reasonable number of core faculty so as to fulfil its mission. Faculty should cover the main fields of management and are expected to undertake some form of intellectual activity, e.g. research, case study development, authoring textbooks, etc.

6. The School should have adequate support services.
3. EDAF Funding: Financial Support for Business Schools

EFMD understands that some business schools may not be able to afford the full payment of all the EDAF administrative fees. Therefore, a school has the opportunity to apply for some EDAF funding that will grant a fee reduction for part of the process fees. However, Schools will in any case have to pay the direct expenses. These include the accommodation and travel expenses of the advisors and the Mentor.

To apply for a fee reduction that is financed by the EDAF Community, the School should complete an EDAF Funding Application (see Annex 2, EDAF Process Manual Annexes) and submit it together with the EDAF Application Datasheet (see Annex 1, EDAF Process Manual Annexes). This form allows the EDAF Committee to assess to what extent a business school is eligible for funding. The EDAF Committee, which takes the funding decision, will consider a variety of criteria:

- The availability of funds that EFMD can distribute;
- The financial situation of the applicant Business School;
- The environmental context;
- The EDAF path that the School is interested in pursuing:
  - Schools embarking on *Institutional Development* path may be granted a reduction of the Visit Fee and the Mentoring Fees;
  - Schools embarking on *Bridging the Gap towards Accreditation* path may be granted a reduction of the Visit Fee only.
C – The Process

1. The EDAF Assessment and Mentoring Process

The EDAF process is designed to improve quality of Business Schools through assessment and mentoring. The School must first demonstrate that it meets the Eligibility Criteria (see section B2) and be accepted by the EDAF Committee into the process. Thereafter a Mentor is appointed to support the School in the preparation of the Self-Assessment Report and the Peer Advisory Visit. Following an assessment by an international Peer Advisory Team, the School and the Mentor will engage into a mentoring relationship for a period of two to three years. The length of the mentoring period will depend on the path chosen by the School after the visit and the specific needs of the School; it can be adjusted according to the School’s needs. Indeed, after the visit and upon the recommendation of the PAT the School will decide whether to pursue a path of *Institutional Development* (Path A) or a path of *Bridging the Gap towards Accreditation* (Path B). The two paths have different features, as explained further below. From the application until the end of the mentoring relationship the entire process is expected to last four to five years.

The different stages of the EDAF process are summarised in the table below:

<table>
<thead>
<tr>
<th>Stage 0: Enquiry</th>
<th>- Documentation provided</th>
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<tbody>
<tr>
<td></td>
<td>- Questions answered</td>
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<table>
<thead>
<tr>
<th>Stage 1: Draft Application</th>
<th>- Submission of draft Application Datasheet</th>
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<tr>
<td></td>
<td>- Feedback by EDAF Office</td>
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<table>
<thead>
<tr>
<th>Stage 2: Formal Application</th>
<th>- Submission of final Application Datasheet (and other documents, if applicable – e.g., Funding Application Form)</th>
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<tr>
<th>Stage 3: Eligibility</th>
<th>- Examination of application by EDAF Committee &amp; Eligibility Decision</th>
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<tbody>
<tr>
<td></td>
<td>- Assessment of Funding Needs &amp; Decision on EDAF Funding</td>
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<tr>
<th>Stage 4: Self-Assessment with mentoring support</th>
<th>- Appointment of EDAF Mentor</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>- Drafting of Self-Assessment Report</td>
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<tr>
<td></td>
<td>- Advisory assistance by EDAF Office and Mentor</td>
</tr>
</tbody>
</table>
| Stage 5: Peer Advisory Visit and Peer Advisory Report | - 4-day Peer Advisory Visit of a 3 or 4-person team including Mentor  
- Peer Advisory Report by team based on EDAF Criteria |
|------------------------------------------------------|------------------------------------------------------------------|
| Stage 6: Mentoring and Progress Tracking              | - Confirmation of mentoring path: Path A: *Institutional Development*  
- Path B: *Bridging the Gap towards Accreditation*  
- Mentoring (2-3 years)  
- Regular visits and contact with Mentor  
- Annual Progress Reports with Mentor’s feedback |
| Stage 7: Conclusion: EDAF Certificate                 | - Award of EDAF Certificate  
- Schools that followed Path A have the possibility to extend the mentoring for 1 more year, if they wish  
- Schools that followed Path B have the possibility to pursue EQUIS accreditation or EFMD Programme Accreditation (formerly known as EPAS) |

### Stage 0: Enquiry

This is the first contact between the Business School and the EDAF Office and precedes the formal application process. It is an informal stage in the process and typically takes place through enquiries by email or telephone or meetings at EFMD events and other conferences where EDAF representatives are present.

The EDAF representative informs the School about the EDAF process and answers questions that it may have in this respect. The School will provide basic information to the EDAF representative so that non-binding preliminary advice can be offered to the management of the School.

If EDAF is believed to be appropriate, the EDAF representative will encourage the Business School to submit a draft application. The EDAF representative will also give advice if it is appropriate to apply for an EDAF funding and on potential ways to EFMD membership if required.
Stage 1: Draft Application

A draft EDAF Application Datasheet contains basic factual information about the Business School, its programme portfolio, activities and organisation. This allows a preliminary assessment of the quality of the School against the EDAF Criteria. A copy of the Datasheet should be provided to the EDAF Office in Word format to allow for directly annotated feedback.

The EDAF Application Datasheet should be completed in a clear and concise manner and should be a maximum of 15 pages including any annexes. The EDAF Office can provide advice as required on completing the document. The EDAF Office will also point out any unclear points and omissions. Feedback from the EDAF Office will normally be given within 3 weeks of receipt of the application. The Business School should then revise its Application Datasheet appropriately.

Whatever the views offered by the EDAF representative, they will have been offered simply as advice. The Business School can subsequently apply for Eligibility and the advice offered to the School at this stage will not be part of the information on which Eligibility will be based.

Stage 2: Formal Application

A Business School that wishes to enter the EDAF process sends a revised EDAF Application Datasheet to the EDAF Office. If the School wishes to apply for an EDAF funding it should send also a Funding Application (Annex 2, EDAF Process Manual Annexes). In addition, if the School is not a member of EFMD, it should include two EDAF Referee Forms (Annex 3, EDAF Process Manual Annexes).

Upon receipt, the revised EDAF Application Datasheet will be checked again and, once it can be considered final, it will be presented to the EDAF Committee for the Eligibility decision.

This formal application must be received at least 4 weeks prior to the target EDAF Committee meeting. Missing this date will cause submission of the application to the Committee to be delayed until the following meeting.

Upon receipt of the formal application the applicant Business School will be invoiced for the application fee for stages 1-3 of the EDAF process. The EDAF Committee will only consider the application once the invoice has been paid.

The eligibility and funding decision (if applicable) to be made by the EDAF Committee will be based entirely on the data provided in the Application Datasheet, Funding Application (if applicable) and Referee Forms; no other material will be submitted to the Committee.

Stage 3: Eligibility

The Eligibility and Funding Decision

The EDAF Committee meets 3 times a year, approximately every 4 months, to make Eligibility decisions. A Business School can usually expect to be presented to this
Committee for Eligibility at the next available date if its Application Datasheet is received not less than 4 weeks in advance of this date.

The EDAF Committee will base the Eligibility (and Funding, if applicable) decision on its understanding of the information supplied in the Application Datasheet (and Funding Application Form, if applicable). There are three possible outcomes for the EDAF Eligibility decision:

a) Eligible without EDAF funding;
b) Eligible with EDAF funding (with specifications about level and conditions of the financial support);
c) Not eligible for reasons to be given.

For more detailed information on eligibility and guidelines for EDAF funding, please refer to chapter B3 of this Manual.

The EDAF Director will report the outcome of the Committee decision to the Business School in writing within 1 week of the Committee meeting.

After the Eligibility Decision

Being declared Eligible signifies that the Business School’s application to enter the EDAF process has been formally accepted and that the EDAF Office will work with the School towards its objectives of quality improvement. It may therefore advance to Stage 4 of the EDAF process: Self-Assessment.

After a positive Eligibility decision, the EDAF Office will appoint a Mentor to support the School in the next stages of the process. The Office will propose a potential Mentor to the School for their approval. At the start of this relationship the Mentor and the School are required to complete the EDAF Mentoring Contract (see Annex 15, EDAF Process Manual Annexes).

A Business School that receives a positive Eligibility decision is expected to communicate its plans for the Self-Assessment and Peer Advice stages, ideally after consulting the designated Mentor. The Peer Advisory Visit (PAV) should take place within 2 years from the Eligibility decision.

Business Schools that are declared Not Eligible cannot be reconsidered for Eligibility by the EDAF Committee within 2 years of the initial decision. This is considered to be the minimum time a school will need to make the necessary improvements to achieve Eligibility.

Stage 4: Self-Assessment with Mentoring Support

After the Business School is declared Eligible, it should carry out an extensive self-assessment and write a Self-Assessment Report (SAR) covering the EDAF Criteria as described in the EDAF Assessment Criteria document and in accordance with the Guidance for Self-Assessment in chapter C2.

The process of Self-Assessment is expected to take between six to nine months. During this period, the School may request advice and assistance from the EDAF Office in preparing its Self-Assessment Report. The assigned Mentor will also advise
and support the School in the finalisation of the Self-Assessment Report and the preparation of the Peer Advisory Visit.

The SAR forms are the basis for discussion by the Peer Advisory Team with the Business School. The length of the Self-Assessment Report should be a maximum 120 pages including annexes.

The School should send the report first to the EDAF Office (soft copy), together with an updated Application Datasheet (see Annex 1, EDAF Process Manual Annexes) at least eight weeks before the date set for the Peer Advisory Visit. The EDAF Office will check the documents for completeness. Upon confirmation from the EDAF Office, the School should send the final documents to each member of the Peer Advisory Team in hard copy (printed double sided) and in soft copy (PDF format) and once again to the EDAF Office in soft copy only (PDF format). The hard copies of the documents should be A4 size and may be bound in different ways (e.g. wire, spiral or comb bound), but should not be placed in ring binders. The EDAF Office will provide the postal addresses of the Peer Advisors.

EFMD recommends that as soon as possible the School should appoint a Project Leader to manage the self-assessment process and organise the drafting of the report.

It is important to note that, should a Self-Assessment Report be considered inadequate as a preparation for the Peer Advisory Visit, the visit may be postponed. In this situation, any additional costs incurred (e.g. rescheduling of Peer Advisors’ flights) will be at the expense of the School.

The School authorises EFMD to use the Self-Assessment Report for research purposes and aggregate reporting. Anonymity and confidentiality are assured in such cases.

**Stage 5: Peer Advisory Visit and Peer Advisory Report**

A team of 3-4 Peer Advisors will visit the Business School to conduct an assessment of the School’s standing against the broad criteria areas of the EDAF Business School Wheel model and to draw up recommendations for future development.

As soon as the School is clear about the time it will require to produce the Self-Assessment Report, it should ask the EDAF Office to schedule the Peer Advisory Visit. The date of the visit should be determined at least 8 months in advance and should take place within 2 years of the eligibility decision. In estimating the date for the visit, the School must take into account that the Self-Assessment Report should reach the EDAF Office at least eight weeks before the date on which the Peer Advisory Visit will start. The School must also make sure that all its internal approval procedures and requirements are met before proposing a date. The visit should take place at a time when courses from the School are taking place within the School so that the Peer Advisory Team can meet students.

The date of the Peer Advisory Visit will be agreed between the Business School and the EDAF Office, since often it must take into account the availability of the potential members of the Peer Advisory Team. Rescheduling is only permitted for unforeseeable and major causes and will most likely produce a considerable delay in the mentoring process. In cases of postponement, the School will have to cover all expenses incurred by the advisors (e.g. flight tickets…) up to the time of cancellation or postponement.
of the visit. In addition, the School will be charged an EFMD administration fee (see Annex 4, EDAF Process Manual Annexes).

When suggesting the date of the visit, the School is also required to identify one selected programme. This selected academic degree programme will receive a more detailed and rigorous assessment by the Peer Advisory Team during the visit. For more details, see chapter 4 of the EDAF Assessment Criteria.

Eight weeks before the Peer Advisory Visit, the Business School should also send to the EDAF Office a proposal for the schedule of the visit (as a Word document) prepared in accordance with a) the guidance for the Peer Advisory Visit provided in chapter C3 of this Process Manual and b) a template sent in advance by the EDAF Office (see Annex 8, EDAF Process Manual Annexes). The EDAF Office will review this schedule and propose changes if necessary.

The composition of the Peer Advisory Team (which will include the designated Mentor previously agreed by the School) is proposed by the EDAF Office and is to be agreed by the applicant School.

The Peer Advisory Visit lasts normally 3,5 days. During the visit, Peer Advisors will meet a wide variety of people representing the different activities and interests of the School.

At the end of the visit, the Chair presents to the management of the School the Peer Advisory Team’s preliminary conclusions and recommendations for quality improvement during an oral feedback session.

The Chair then drafts the Peer Advisory Report (PAR) and sends it to the other advisors for suggestions and amendments. This normally takes about six weeks. The Peer Advisory Report sets out the Team’s final assessment of the School against the EDAF quality criteria. The report will give advice for potential improvement to the School. This report functions as the baseline for the mentoring process and will help to set development objectives for the School. In case the School has indicated its intention to use EDAF for the Path B: Bridging the GAP towards Accreditation, the report will also state specific recommendations for the Mentor and the School on the most important areas to work on. A template for this report can be found in chapter C3.

The draft report will be sent to the School within 6-8 weeks after the Peer Advisory Visit for comments and confirmation of factual accuracy. Factual errors will then be corrected by the Chair of the Peer Advisory Team in liaison with the EDAF Office. The final version of the report will then be returned to the School.

The Peer Advisory process is described in detail in chapter C3 of this Manual entitled Guidance for the Peer Advisory Visit.

**Stage 6: Mentoring and Progress Tracking**

Once the Peer Advisory Report has been finalised, the core mentoring process can begin. The process is carefully designed to build on the learning obtained from the Peer Advisory Visit and to help the School develop along the improvement lines recommended during the visit. During the Peer Advisory Visit the School will have had the chance to get to know the designated Mentor (if that has not happened before). After the visit, Mentor and Mentee will usually agree on formally entering the
core mentoring process. The core mentoring period will be envisaged for a duration of 2-3 years initially, depending on the path chosen by the School and its specific needs.

The Mentor should visit the School within three months of the approval of the final EDAF Peer Advisory Report. Using the Peer Advisory Report as guidance and the previously chosen/defined EDAF Path, the School and the Mentor together will define consistent EDAF Development Objectives. These objectives must be submitted to the EDAF Office for approval within three months at the latest after the visit of the Mentor.

The School will be expected to write a short Annual Progress Report, on which the Mentor will provide written feedback. This formal process is designed to maintain momentum and it may be a condition for any future funding. The School must submit the report (using the template in Annex 12, EDAF Process Manual Annexes) to the Mentor one year, two years and three years after the core mentoring period started.

The Annual Progress Reports should summarise the progress made towards the achievement of the defined EDAF Development Objectives together with any general improvements relevant to the School. The Mentor should provide his or her feedback within one month. The Mentor will submit by email his or her feedback on the report to the School and the EDAF Office. The reports will also be submitted to the EDAF Committee for information. The EDAF Committee monitors the quality of the progress reports. When the School fails to provide the Progress Report on time or when the EDAF Committee considers that insufficient achievement is shown, it has the possibility of ending the mentoring process.

The third progress report will summarise the overall improvement that the School achieved throughout the whole period of the EDAF process. In his or her feedback, the Mentor can assess to what extent progress has been achieved. In the case of Schools which have chosen the Path Institutional Development, the Mentor will report on the progress made vis-à-vis the set development goals. In the case of Schools which have taken the Path Bridging the Gap towards Accreditation, the Mentor will report on the progress on the areas determined by the PAR.

The mentoring process is described in more detail in chapter C4 of this Manual.

**Stage 7: Conclusion: EDAF Certificate**

At the end of the mentoring process, the School will receive an EDAF Certificate recognising its participation in the EDAF process and its commitment to quality improvement. The Certificate will normally be awarded at a ceremony taking place during the EFMD Annual Conference.
2. Guidance for Self-Assessment

1. Purpose of the Self-Assessment

The EDAF Business School Wheel model and supporting documentation provide an external yardstick against which the Business School can measure its performance and the effectiveness of its processes and structures. The thoroughness with which the self-assessment is carried out and the breadth of involvement will determine a large part of the added value of this quality improvement tool.

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

a. Provide an opportunity for the School to take stock of its situation;

b. Carry out a comprehensive strategic assessment for the School;

c. Provide a critical self-assessment;

d. Provide a basis for the Peer Advisory Visit;

e. Point out areas in which the School considers the advice of the Mentor and assessment team as particularly helpful.

2. The Self-Assessment Process

The Mentor appointed by the EDAF Office and agreed by the School after the Eligibility decision will support the School in the preparation of the Self-Assessment Report and the Peer Advisory Visit.

The overall self-assessment process will probably take between six and nine months. The members of the Peer Advisory Team must receive the Self-Assessment Report at least 6 weeks before the date of the Peer Advisory Visit (after approval from the EDAF Office). Hence the report must be sent to the EDAF Office 8 weeks before the start of the visit at the latest for an initial check. Upon approval from the EDAF Office, the School should send the report to the Peer Advisory Team.

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

2.1. Responsibilities

EFMD recommends that as soon as possible the School should appoint a Project Leader to manage the process and organise the drafting of the report. The EDAF Project Leader should be suitably qualified and resourced to carry out the work.

2.2. Communication

At an early stage, the management team will need to provide a full explanation within the Business School of the aims of the Self-Assessment exercise, of its role in the wider quality improvement process and of the criteria against which the School is being measured. The assessment process should involve all key stakeholders, who will need to understand the process if they are to contribute fully to the
implementation of a rigorous self-assessment. Effective communication with these parties should be maintained throughout the process.

The self-assessment is an ideal opportunity for the School to obtain commitment from key stakeholders to secure resources and improve quality. Considerable care must therefore be taken to present the results of the self-assessment in a balanced, realistic and honest way. The conclusions should state clearly, what needs to be done to continue progress towards the achievement of the School’s strategic goals. It must also provide the basis for an assessment by the Peer Advisory Team.

2.3. **Methodology & Planning**

In order to complete the Self-Assessment process within the required time frame, a detailed plan will need to be developed at the beginning of the EDAF process.

The detailed project plan should contain details of the main stages of the assessment, methods to be employed, key issues to be addressed, responsibilities and participants, as well as time frames. The key stages of the assessment process will need to be accompanied by the systematic collection of data to support the process.

There is no pre-established format for the approach to be adopted when conducting the self-assessment. **With the help of the Mentor, the School should develop a plan that meets its own specific needs.**

However, the following criteria should be considered when approaching the self-assessment process:

- **Systematic process:** the self-assessment should be well planned, thorough and comprehensive. The assessment should be driven by a methodology seeking to answer key questions, rather than simple application of a tick-box approach.

- **Objectivity and balance:** the self-assessment exercise should result in a balanced statement of current strengths and weaknesses, opportunities and threats and a determination of the action needed to address these issues. The School should not in any way restrict itself to the EDAF criteria or guidance and it should use as many sources of information as possible.

- **Participation:** in collecting data and evaluating the results of the self-assessment, the School should involve a variety of groups to agree key conclusions and recommendations. This is not just a way of improving objectivity, but also a way of improving communication and commitment to the findings.

2.4. **Structuring the Report**

Alongside the formulation of the detailed project plan, the Business School should also determine the eventual format of the Self-Assessment Report, taking into account the requirements of EDAF in terms of the content to be covered (as shown in paragraph 3 below).

3. The Self-Assessment Report

Annexes, which amplifies the criteria). The overall report should be a unified piece of work, rather than a collection of separate individual reports. The report should contain the following elements:

a. **Cover Page**

The cover of the Self-Assessment Report should clearly state the full name of the Business School and the date of submission to the EDAF Office.

b. **Statement of Accuracy**

The first page of the Self-Assessment Report should contain a statement confirming the accuracy of the report signed by the Head of the Business School. His or her title must be made explicit.

c. **Executive Summary**

An Executive Summary should be included in the beginning of the report.

d. **Main Content**

The format of the Self-Assessment Report should follow the 10 chapters of the EDAF Assessment Criteria document. **It is not necessarily expected that the School should answer every question.** The School is expected to provide their own conclusions from the self-assessment process about the dimensions being considered in each section, in the way they feel most appropriate. However, it is expected that the key issues that are relevant for a comprehensive assessment of the School should be carefully addressed. Mentor can provide important advice in the process of producing the SAR in order to make the subsequent visit as productive as possible.

The EDAF Assessment Criteria are formulated in qualitative terms. However, the information provided by the School should, where appropriate, allow an assessment of the quantitative positioning of the School in relation to each criterion.

The report should be written in English but in the case that it is possible to compose a Peer Advisory Team that is fluent in any other given language the language regime may change. A School is only allowed to submit a report in a different language after **prior approval** of the EDAF Office.

**Annexes and Supporting Documents**

Annexes to the Self-Assessment Report should be limited to materials strictly necessary for a proper understanding of the report and should not lengthen the Self-Assessment Report. Bulky and less essential material should be placed in the (digital or physical) Base Room for consultation during the visit either as hard or soft copy.

**Distribution of the Self-Assessment Report**

The School should send the Self-Assessment Report and accompanying documents (an updated Datasheet) first to the EDAF Office in soft copy for initial approval. Upon confirmation from the Office, the School should send the documents to each of the Peer Advisors in hard copy (printed double sided) and in soft copy (PDF format).
3. Guidance for the Peer Advisory Visit

1. Introduction

This section explains the overall process of peer assessment and is intended to be a guide for all the parties involved: the Business School, the Peer Advisory Team and the Mentor.

1.1 Composition of the Peer Advisory Team

Each Peer Advisory Team is composed of three or four members with experience in the organisation and delivery of business education. The EDAF Office will decide on the size of the Peer Advisory Team after the Eligibility decision. The members of the PAT will normally come from different countries. Each team includes:

- The Chair of the Peer Advisory Team
- The designated Mentor: an academic (often a Dean or former Dean) normally from a different country from the School being assessed
- 1-2 academic representatives (Deans, Associate Deans or Former Deans) of which one will come from the same country or region where the School is located and will act as the 'local' academic member

One member of the team will act as chair. In each team, there should be one academic who is familiar with the local educational environment and can explain the contextual background of the School for the benefit of the Peer Advisory Team. Ideally as many team members as possible should speak the local language, as this will maximise the effectiveness of the Peer Advisory Team.

Particular care is given to the selection of the Mentor and the School will be consulted on the choice before designating a Mentor. The Mentor should speak the local language of the School and both parties should feel comfortable with the final choice, as the mentoring relationship represents a strong commitment for both parties in terms of time and financial resources.

Prior to participation in a Peer Advisory Visit, advisors will have signed a general confidentiality agreement with respect to the information provided to them in the context of the assessment. It should be noted that the Peer Advisors volunteer their time but will claim reimbursement from the School being assessed for travel and accommodation costs as well as other expenses related to the visit.

1.2 Objectives of the Peer Advisory Visit within the EDAF process

The objectives of the Peer Advisory Visit are as follows:

- To engage in a constructive dialogue with the School
- To seek additional information as necessary in order to establish a comprehensive understanding of the School
- To confirm and/or challenge the main issues raised in the School’s Self-Assessment Report
- To make an overall assessment of the School against the EDAF Criteria
- To provide recommendations and confirm the objectives that are consistent with the path the School has chosen for future development and quality
improvement which will form the basis and starting points for the Mentor/School relationship.

In carrying out an EDAF Peer Advisory Visit, it is important that all parties begin the process with a clear idea of what the Peer Advice process is designed to achieve. The success of the visit rests on a number of conditions being met by all those involved in the process, e.g.:

- The allocation of a trustworthy and credible Peer Advisory Team to the School;
- Thorough preparation by the School through the production of a Self-Assessment Report;
- Careful reading of the Self-Assessment Report by the Peer Advisory Team;
- Clear relationships and expectations of all parties involved;
- Open discussions free of excessive formality between the Peer Advisory Team and the key stakeholders of the School;
- The presentation of confidential feedback in a professional manner.

2. Preparation for the Visit

2.1 Reading Materials for the Peer Advisors

The following documents are sent to each member of the Peer Advisory Team:

1. Names and addresses of the members of the Peer Advisory Team
3. Self-Assessment Report and an updated Datasheet (sent by the School directly to the Peer Advisors once the documents have been approved by the EDAF Office)

2.2 Study of the Self-Assessment Report by the Peer Advisors

The School should send copies of the completed Self-Assessment Report and updated Datasheet to the members of the Peer Advisory Team at least 6 weeks before the start of the Peer Advisory Visit, once it has received approval from the EDAF Office.

It is very important that each member studies this report carefully before the team comes together for the Briefing Meeting on the evening before the Peer Advisory Visit. In preparation for this preliminary meeting, each member should attempt to answer the questions listed below:

- Are all the areas covered by the EDAF Business School Wheel adequately addressed in the report?
- What further information is required?
- Is the report sufficiently self-critical and analytical?
- Is the School’s local context clearly explained?
- Are the problems the School is facing 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 EDAF criteria?
- What are the main issues that will require careful analysis during the visit?
- Has the School indicated preliminary interest in pursuing a specific path from the two-path framework?

By answering these questions, each team 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 Peer Advisory Visit is put together in such a way that there will be ample opportunity to further investigate these initial findings and consequently to confirm or refute them.

The Chair should seek to collect the impressions of the other team members during the first evening in order to identify further information that should be supplied by the School and to prepare the main focus of the interviews.

2.3 Logistics of the Visit

The School is expected to make all necessary arrangements for accommodation and local transportation for the Peer Advisors.

The members of the Peer Advisory Team arrange their own international travel according to the general guideline that 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 that lasts 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, as long as 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.

Peer Advisors are advised to book their flights at the earliest opportunity to minimise the costs to the School. Advisors should ask for approval from the School before ticket purchase should the price be higher than 3,500 Euro. However, should the School be a recipient of an EDAF funding, advisors are asked to book economy class tickets even if circumstance a) or b) applies.

The above travel guidelines are also applicable to the Mentor's annual visits to the School.

Accommodation should be provided by the School, be of reasonable standard and be close to the School. Unless exceptional circumstances exist (for example infrequent flights), Schools should expect to cover the costs of 4-5 nights and other expenses. For Peer Advisors travelling for longer than 5 hours, Schools are expected to cover the cost of one or two additional nights. The School may also have to cover items such as visa, travel insurance and vaccinations.

Lunches should be rapid, involving a minimum of disturbance. There is a definite preference for on-site buffet lunches.

The schedule for the visit, which normally lasts 3,5 days, is very tight, so maximum use of the time is essential. Table nameplates for interviewees should be prepared for each meeting.

It is accepted that some parts of the discussions can be supported by electronic means as long as the overall quality of the process is not diminished. If there would be agreement between the Chair and the School the schedule of the visit could be modified accordingly. The EDAF Office should be notified in advance of the proposed changes which should typically involve a reduced time for the physical presence of the PAT.
2.4 The Base Room

The School should make available a physical or digital Base Room for the duration of the visit, which should normally serve as the main committee room used for meetings. The room provided for the team should:

- be spacious
- include a table for meetings
- possess a large table for laying out documents
- provide a telephone connection and computers with Internet access
- be free from disturbance

All documents for the visit should be made available in this Base Room in hard or soft copy. Guidance on which documents to place in the Base Room can be found at the end of each chapter of the EDAF Assessment Criteria document (see also Annex 7, EDAF Process Manual Annexes).

3. Setting up the Schedule

3.1 General Structure of the Visit

The visit will normally begin with the Peer Advisory Team meeting the night before, the first full day then beginning at 9.00 am. Overall the visit lasts normally 3.5 days (start: usually Monday afternoon) and should not extend beyond 2:30 pm (or later in the afternoon, if needed) on the last day (usually Thursday).

Guidance on the detailed visit schedule is given in the following section. However, the following items deserve a special mention:

a. The initial Briefing Meeting with the Team

The work of the Peer Advisory Team will normally begin with a briefing meeting held on the late afternoon before the first day of the visit. It is essential that the team be alone for this meeting.

The purpose of this meeting, which will normally begin at 5:00 pm, is to allow:

- briefing of the Peer Advisory Team by the Chair (can be followed by a short briefing on the process and cooperation to date done by the mentor)
- agreement on the working methods and allocation of responsibilities within the Peer Advisory Team. For example, the Chair will normally delegate the chairmanship role to his/her fellow team members for some meetings
- review of the Self-Assessment Report and identification of the key issues
- review of the visit schedule and preparation of the next day’s meetings
- identification of any supplementary information to be requested

The School will be required to book a suitable place for this meeting, preferably a separate meeting room in the hotel.

This meeting will be followed by an informal dinner of the PAT with the Dean for initial introduction and acquaintance.
b. Informal dinner with the Dean

This is an opportunity for the PAT to get acquainted with the Dean in an informal way before the official start of the visit the following morning. This is also an opportunity for confirmation of the schedule and arrangements for the visit.

c. Introductory session open to all members of the School

The visit should start with an introductory session open to all members of the School to explain the purpose of the EDAF process.

d. Initial meeting with the School’s Senior Management Team

A meeting with the Senior Management Team of the host School will follow. The Peer Advisory Team can share with the key representatives of the School their initial impressions after reading the Self-Assessment Report and any requirements for additional information. It is important that sufficient time be allowed for this session in order to maximise the effectiveness of subsequent meetings.

This initial session is also an opportunity for the School to present its current situation and challenges. It would be quite appropriate to list the key difficulties the School is facing in order to guide the Peer Advisory Team. However, it is also important to stress that using the time as some form of marketing presentation is very unhelpful. This is the only meeting in which a short presentation by the Dean is allowed (maximum 20 minutes).

e. Final Team Meeting

The team will be allocated a couple of hours alone towards the end of the visit (final day) to formulate its assessment.

f. Final Debriefing Meeting with the Business School

The visit finishes with a second meeting with the Senior Management Team. This session closes the Peer Advisory Visit and enables the Chair to make a provisional summary of the team’s conclusions. It is followed by a discussion with the SMT of the findings of the Peer Advisory Team and a preliminary definition of development objectives aligned with the chosen path.

g. Entertaining the Peer Advisory Team

There is no time for the School to entertain the Peer Advisory Team during their visit.

3.2 Detailed Visit Schedule

The Peer Advisory Team should be allowed sufficient time alone throughout each day to debrief themselves after a series of meetings and to prepare for the next round. It must be remembered that the team also needs time to read the materials made available in the digital or physical Base Room.

In all cases, the final visit schedule will be agreed between the School and the EDAF Office. The visit schedule should clearly indicate the names and titles of all the participants. The School must send the first version of the draft schedule to the EDAF Office 8 weeks before the date of the Peer Advisory Visit, together with the SAR and updated Datasheet.
As a general principle, the Peer Advisory Team expects to see individuals once only unless they have more than one functional role. The sessions should not include too many participants (normally a maximum of 8) so as to allow for meaningful discussions.

The visit schedule template can be found as a separate Annex to this Manual (see Annex 8, EDAF Process Manual Annexes).

4. The Peer Advisory Visit

The visit schedule should be structured such that the Peer Advisory Team has the opportunity to question people involved in the School being assessed. Although the meeting contents may apparently overlap or duplicate in some cases, this is to allow for different responses from different sets of interviewees. At the beginning of the visit, a short presentation (20 minutes maximum) may be made by the Dean, but no other presentations are expected since the Self-Assessment Report should be self-explanatory and is the basis for the Peer Advisory Team’s questions.

All meetings and discussions will usually be conducted in English. However, in exceptional cases and depending on the availability of enough Advisors who speak the local language, the language of the visit may be changed. The School will have to indicate at the beginning of the EDAF process if they wish the process to be held in a language different from English.

All meetings and discussions should be conducted without the use of simultaneous translation. Face-to-face meetings are more productive in all regards. At the same time, video-conferences can be accepted as long as reliable technology can be provided by the School. Exceptionally, simultaneous translation may be allowed but only with the prior approval of the EDAF Office.

4.1 Preparation for interviews

The total time available for the visit is extremely limited and the team should make good use of its time. Team members need to be conscious about the role of a particular session in the overall process for the assessment, i.e.:

- Team members need to prepare for interviews and must be therefore allowed adequate preparation time.
- The team should consider the possibility of asking for additional information from the School to facilitate their assessment.
- Throughout the interviews, individual team members should be working towards the overall assessment and need to crosscheck facts and complete adequate documentation. This will make their work much easier when summarising their findings and writing the final report.

4.2 Periodic Debriefing

At the end of each major session, it is essential that the members of the Peer Advisory Team allow themselves enough time to consolidate their findings and to complete all relevant paperwork. Regular debriefing sessions are allocated throughout the visit for this purpose. These meetings are also necessary to check that the Peer Advisory Team is on track for a complete coverage of all the EDAF Criteria and that it is working steadily towards the final assessment.
5. Assessment and Feedback during the Visit

5.1 Individual Assessment and Consolidation of Findings

Completion of the assessment forms (Institutional Development Profile and Criteria Assessment Form, respectively Annexes 10 and 11, EDAF Process Manual Annexes) will be an ongoing process for each Advisor throughout the visit. The Peer Advisory Team has allocated time towards the end of the visit schedule to complete the documentation and to formulate their assessment and accompanying recommendations. The Chair will normally set aside time at the beginning of this period for individual team members to complete the Institutional Development Profile, since it will be an essential tool in consolidating their findings during the final assessment meeting.

There are many different approaches adopted by different quality organisations and individual Chairs, but experience shows that the use of a rigorous procedure for collecting perceptions is useful to implement a process for arriving at a consensus opinion while identifying discrepancies between the perceptions of different team members.

The EDAF Institutional Development Profile helps the team to arrive at an objective assessment, and also fulfils the School's need for feedback on its development needs relative to its positioning in the international marketplace.

5.1.1 The EDAF Criteria Assessment Form

The EDAF Criteria Assessment Form (CAF) is a working document that will help Peer Advisors to build up their own personal assessment of the School. It will serve as a basis for the drafting of the Peer Advisory Report. The items listed follow the order in which they appear in the corresponding chapter of the EDAF Assessment Criteria document where a fuller explanation of the criteria will be found. Peer Advisors should refer to the Supplement to the EDAF Assessment Criteria document (Annex 5, EDAF Process Manual Annexes) in case of doubt as to what is meant.

Peer Advisors will normally complete their comments on the Criteria Assessment Form as the visit progresses. It is very important that this process is carried out rigorously, since the final report will be in large part a synthesis of the documents completed by the different members of the Peer Advisory Team. Advisors are asked to write a full commentary at least in those boxes relating to items with a high or low scope or development, describing what they have observed. It is not sufficient to build up a profile of the School while responding with single adjectives or yes/no.

5.1.2 The EDAF Institutional Development Profile

The EDAF Institutional Development Profile (IDP) is used to summarise the team’s overall conclusions on the list of key areas in each chapter of the EDAF Assessment Criteria document. The items listed correspond exactly to those listed in the Criteria Assessment Form. The IDP form requires the team to agree on one of four possible assessments for each criterion, the choices being “low scope for development”, “medium scope for development”, “high scope for development” or “N/A” (non-applicable). Guidance on these assessments is given in the IDP itself.
The Institutional Development Profile is used to structure the work of the Peer Advisory Team when it meets at the end of the visit to reach agreement on its assessment. At the beginning of this preliminary assessment, the Chair will invite the members of the team to make a personal assessment against each assessment criterion. The normal procedure is for each member of the Peer Advisory Team to complete the document alone before any discussion takes place on the assessment of the different items. It is only when each member has committed him/herself to an initial judgement that the Chair opens the debate in order to work towards a common position that will be entered onto a consolidated version of the Institutional Development Profile. This procedure will rapidly indicate where complete agreement exists among the team members and will also clearly reveal the areas that require careful discussion.

Once the final consolidated version of the Institutional Development Profile has been agreed, it will no longer be modified unless there are exceptional reasons for doing so. Any change will then require the explicit agreement of all members of the team. The document will be attached to the Peer Advisory Report.

Based on the analysis of the Criteria Assessment Form and the Institutional Development Profile, the Peer Advisory Team will come up with a suggestion regarding the path to be followed and a list of recommendations and areas for improvement, which will form the baseline for the mentoring process.

5.2 The Feedback to the Business School

A formal oral feedback session to the Business School at the end of the Peer Advisory Visit is a scheduled part of the programme. The Chair of the Peer Advisory Team should give this feedback to the senior management team. The whole Peer Advisory Team is expected to be present during the feedback so as to support the Chair by presenting a united front.

The debriefing

The oral presentation 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 down' the visit in the right way. Giving feedback is a skilled task, both for individuals and schools. 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
- enumeration 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 panels to distinguish between feedback provided informally and that contained in a more formal report. There are sometimes findings and conclusions that may not really be suitable for a more public report. The Chair should take this opportunity to indicate the recommendation of the PAT regarding
the path (Path A or Path B) that the School would like to follow during the subsequent mentoring stage.

The Chair should stress that the feedback represents a form of interim report, since some conclusions may be modified following a full consultation with his/her colleagues, including possible referral of some points to the School’s Dean/Director. The subsequent discussion is an opportunity to begin to formulate the future development objectives for the School with the involvement of the designated Mentor. The choice of path for the mentoring stage should also be indicated and explained.

6. Peer Advisory Report

The Peer Advisory Report is the culmination of the assessment process and is the major reference document for the following mentoring process. The report will have considerable impact on activities concerning the Business School and so great care should be taken with the wording of key sections, especially where the comments are critical.

6.1 Formulating the Report

The Chair of the Peer Advisory Team is responsible for writing the Peer Advisory Report using the EDAF Institutional Development Profile and Criteria Assessment Form as a basis. The report should follow the Self-Assessment Report structure.

The Chair should prepare a summary of the Criteria Assessment Form (based on the individual Peer Advisory Team members’ forms), which in particular should amplify any items that have high scope for development on the Institutional Development Profile. The written report should include a general assessment, strengths and weaknesses, and a list of suggestions for improvement. It should include also the summary assessment forms (Institutional Development Profile and Criteria Assessment Form) as appendices. The report should also clearly identify areas of development which will be subject of the mentoring process. Strengths and weaknesses as well as suggestions for improvement are critical pieces for schools planning to embark on Path B (Bridging the Gap towards Accreditation).

6.2 Procedure for the Advisory Report

1. The Chair consolidates comments from the team, using the written summaries in the EDAF Criteria Assessment Form and the minutes of the oral presentation.
2. The Chair writes a draft of the report and circulates it to the team for comment.
3. The Chair amends the report, taking into account the comments received from the other members of the Peer Advisory Team, and sends the revised draft, including the Institutional Development Profile and Criteria Assessment Form and the recommended areas of development to the EDAF Office. The report will be edited by the EDAF Office.
4. The revised version is submitted to the School for comment.
5. The School responds to any factual inconsistencies or misunderstandings and returns it to the EDAF Office.
6. Following receipt of comments from the School, changes may be made and the final report will be completed by the Chair in collaboration with the EDAF Office.
7. This final version is sent to the School and the Peer Advisory Team members and the EDAF Committee.
8. While the School clearly has the right to decide on who should be given access to the Report within the School, it is desirable that it be circulated as widely as possible both to close the feedback loop and to encourage future participation in the EDAF process. The report and its recommended areas of development will be the starting baseline for the mentoring process.
Peer Advisory Report Template

1. **Introduction**
   - Composition of the Peer Advisory Team
     - name, position and country of each Advisor
     - any additional comments on the Peer Advisory Team
   - EDAF History
     - date of application
   - Institutional Background
     - in particular, scope of the assessment
   - Acknowledgement and Organisation
     - comments on the Self-Assessment Report
     - organisation of the visit and flexibility of the Business School
     - acknowledgements

2. **General Assessment (Analysis following the EDAF Framework³)**
   - Feedback on chapters 1-7 of the EDAF model including recommendations based on the oral feedback of the Peer Advisors and summarised in the consolidated EDAF Criteria Assessment Form
   - Succinct factual information to support the judgement of the Peer Advisory Team, particularly for areas identified with “medium” or “high” scope for development in the EDAF Institutional Development Profile

3. **Strategy and Senior Management**
   - Feedback on the assessment of strategy development and recommendations on the Senior Management Team (chapters 8-10 of the EDAF model)

4. **Path Choice**
   - This section includes a recommendation on the proposed path that the School could follow in the mentoring stage
     - Path A: Institutional Development
     - Path B: Bridging the Gap towards Accreditation

5. **Conclusion**

Appendix 1: EDAF Institutional Development Profile

Appendix 2: EDAF Criteria Assessment Form

³ The EDAF Framework is referring to the EDAF Business School Wheel on page 4.
7. Roles and Responsibilities

7.1 Responsibilities of the EDAF Office at EFMD

- to liaise with the School throughout the process
- to appoint a Mentor after a positive Eligibility decision
- to set the date of the Peer Advisory Visit in agreement with the School
- to advise and assist in the self-assessment process
- to ensure there is adequate time between the receipt of the Self-Assessment Report and the date of the Peer Advisory Visit (usually at least 8 weeks)
- to establish the schedule for the Peer Advisory Visit in liaison with the School
- to designate the members of the Peer Advisory Team and to secure the necessary agreement from the School
- to brief the Peer Advisory Team on the requirements of the EDAF assessment and to confirm receipt of all necessary supporting materials
- to ensure the School has made the necessary logistical arrangements for travel, accommodation and special requests
- to check the SAR for completeness before the School sends it to the members of the Peer Advisory Team
- to facilitate and finalise the Peer Advisory Report in liaison with the Chair of the Peer Advisory Team and the Director of the School
- to ensure that the EDAF process assessment forms are completed by the School and the Peer Advisors

7.2 Responsibilities of the EDAF Project Leader within the Business School

- to liaise with the EDAF Office throughout the process
- to consult regularly the mentor during the process of producing the Self-Assessment Report
- to coordinate the self-assessment process and the preparation of the Self-Assessment Report
- to ensure the timely production of the materials for the Self-Assessment Report, including annexes and supporting documentation to the main report
- to send to the EDAF Office the SAR and an updated Datasheet at least 8 weeks before the date of the visit
- upon confirmation from the EDAF Office, to distribute the final Self-Assessment Report to the members of the Peer Advisory Team at least 6 weeks before the date of the visit
- to establish the schedule for the Peer Advisory Visit in collaboration with the EDAF Office
- to make the necessary practical logistical arrangements for the visit, including local travel and accommodation
- to reimburse all travel and accommodation costs for the Peer Advisory Team in a timely fashion
- to ensure adequate access to key stakeholders during the visit of the Peer Advisory Team
- to check the final Peer Advisory Report for factual inconsistencies
- to complete the EDAF Process Assessment Form for Business Schools and return it to the EDAF Office
- to actively take part in establishing the schedule of the mentor’s visits
7.3 General responsibilities of the individual Peer Advisory Team members

The specific responsibilities of the Mentor are listed in Section 4 (Guidance for the Mentoring Process).

Before the visit

- to liaise with the EDAF Office and the Chair of the Peer Advisory Team on the requirements of the EDAF Peer Advisory Visit
- to prepare themselves adequately about the objectives of the assessment and the criteria used by a thorough reading of the EDAF documents (especially Annex 5, EDAF Process Manual Annexes)
- to read the Self-Assessment Report carefully and carry out a preliminary SWOT analysis against the EDAF criteria
- to make appropriate and timely travel arrangements in accordance with the guidelines given by the EDAF Office
- to convey to the School and the EDAF Office details of their travel arrangements and any special requirements they may have regarding travel and accommodation
- to arrive on time to participate in the team initial briefing meeting

During the visit

- to ensure adequate preparation for all meetings
- to be present throughout the entire Peer Advisory Visit
- to fulfil specified and agreed responsibilities within the team, such as the provision of specialist expertise
- to act as the main spokesperson for some sessions, as agreed with the Chair
- to document their own findings clearly enough to support the work of the Chair
- to operate in the spirit of consensus - if they disagree with the decisions arrived at by the team, they must nonetheless abide by that consensus

Following the visit

- to hand in to the Chair all relevant documentation relating to their personal assessment (notably the EDAF Criteria Assessment Form) within 1 week after the visit
- to contribute to the drafting of the final report
- to provide all requested documentation required for reimbursement of travel and accommodation to the School
- to complete the EDAF Process Assessment Form for Peer Advisors and return it electronically to the EDAF Office
- to make arrangements for the destruction of all sensitive materials relating to the visit following acceptance of the final report
- to avoid expressing any opinion or communicating the results of the assessment to any person outside the Peer Advisory Team and the EFMD EDAF Office

7.4 Additional responsibilities of the Chair of the Peer Advisory Team

Before the visit

- to check in advance of the Peer Advisory Visit if the Self-Assessment Report is adequate, and, if necessary, to request additional information from the School
During the visit

➢ to brief the members of the team on the Peer Advisory process at the initial Briefing Meeting
➢ to act as the main spokesperson for the Peer Advisory Team
➢ to ensure adequate preparation for the meetings
➢ to determine the delegation of lead responsibilities within the team
➢ to divide up some sessions and responsibilities among team members
➢ to lead the Peer Advisory Team towards a set of conclusions during the visit
➢ to ensure that the members of the team complete the assessment documents before the end of the visit or within 1 week thereafter
➢ to hold a meeting of the Peer Advisory Team, usually on the evening of the last full day, during which the team agrees on its conclusions and recommendations
➢ to run the debriefing for the School during the final meeting

Following the visit

➢ to collect documentation made by the Peer Advisory Team relating to the satisfaction of the core criteria, in particular the EDAF Institutional Development Profile and the EDAF Criteria Assessment Form
➢ to draft a first version of the report and circulate it to the other members of the team for comments
➢ to send the revised report within 6 weeks of the visit to the EDAF Office, which will edit the report and then forward it to the School and invite them to comment on the accuracy of the text
➢ to accommodate changes to the report where necessary in consultation, if appropriate, with the other members of the Peer Advisory Team
➢ to send the final report to the EDAF Office for submission to the School

7.5 Role of Local Advisors

The local Advisor is familiar with the local educational environment and can explain the contextual background of the School and programme for the benefit of the Peer Advisory Team. Normally he or she should speak the language of the country and is selected in agreement with the School being assessed.
4. Guidance for the Mentoring Process

The mentoring process is the core of the EDAF process. It is essential that Mentor and School find a common basis to work on as this increases the effectiveness of the process for both sides. As this mentoring relationship is a strong commitment for both sides in terms of time and resources, the right fit between School and Mentor is essential.

1. The Selection of the Mentor

After the School has been declared eligible, the EDAF Office will suggest a potential Mentor to the School. The Mentor will have significant experience in the field of management education. Usually he or she will be a Dean or former Dean that may also have experience with development work. It is important that the Mentor has a particular interest in the country and region as this increases the motivation that is necessary to commit to such a long-term work relationship. Ideally the Mentor should speak the working language of the Business School.

Once the School has agreed on the designated Mentor, both parties will be asked to sign an EDAF Mentoring Contract (see Annex 15, EDAF Process Manual Annexes) to formalise their commitment. The Mentoring Contract will cover the period comprised between EDAF eligibility and certification. If needed, both parties can later agree to extend the mentoring period.

The School and the Mentor have then the possibility to get to know each other via phone, video-conference or email to get an idea of the other side’s expectations. The School may also wish to invite the Mentor to visit them. This helps to spot any strong disagreements between both sides at an early stage.

The Mentor will provide advice and support to the School in the preparation of the SAR and the visit.

The designated Mentor will also be part of the Peer Advisory Team. During the Peer Advisory Visit, Mentor and School will have the possibility to get to know each other even further. If the visit takes places to the satisfaction of both parties, the mentoring stage can start immediately afterwards. If not, the EDAF Office will work with the School to identify an alternative Mentor.

2. The Role of the Mentor

The role of the Mentor is purely advisory and not executive. The School can rely on the Mentor’s advice but remains the decision-maker. As such, the extent of advisory activity is a matter for mutual agreement between the Dean/Director of School and the Mentor. It is likely that the Mentor will be able to advise on:

- the development of various activity areas within the School (within and outside the EDAF Business School wheel)
- the senior management structure
- the SMT’s management style and culture
- the personal development of the SMT members
The role should also have a networking perspective to make available contacts in other business schools, perhaps using the EFMD network.

Every mentor-mentee relationship will be different and it is the responsibility of both sides to find a working pattern that both consider effective.

3. The Mentoring Process

Taking into account the assessment of the Peer Advisory Team, the Mentor and the School will define development objectives that the School wishes to achieve in the next 2-3 years according to the Path (A: Institutional Development or B: Bridging the Gap towards Accreditation) chosen by the School. The agreed objectives should be submitted to the EDAF Office within 3 months at the latest after finalisation of the Peer Advisory Report.

The Mentor should visit the School at least annually for 3-4 days for discussions with the Dean and other relevant people. The visit may be reduced in time provided there are alternative and reliable means of facilitating the discussion between Mentor and School, e.g. video-conferencing tools. The first visit of the Mentor (in case there has not been a visit already during the self-assessment phase) should take place within three months of the approval of the final EDAF Peer Advisory Report. Between visits there will be periodic contact with the Dean and the EDAF Project Leader by email, telephone, video-conferencing etc. to discuss progress and issues that may arise. Throughout the mentoring period the Mentor is likely to be involved with the Institution for up to 12 working days in total (spread over the time span as needed).

The School will be expected to write a short Annual Progress Report on which the Mentor will provide written feedback. This formal process is designed to maintain momentum and it can be a condition for any future funding.

4. Responsibilities of the Mentor

While fulfilling his or her role, the Mentor should keep in mind that he/she has just an advisory role and that he/she should always behave diplomatically respecting the culture of the School. This includes formulating criticism in a constructive and encouraging way. Among his/her responsibilities are:

- to liaise with the School throughout the process
- to come to an agreement with the School about the extent of the advising activity
- to support the School in the preparation of the Self-Assessment Report and the organisation of the Peer Advisory Visit
- to give advice on how to develop the School further (specifically taking into account the path chosen) and on the Senior Management Team’s management style
- to visit the School for 3-4 days once a year, while making appropriate and timely travel arrangements in accordance with the guidelines sent by the EDAF Office
- to provide feedback on the School’s progress reports
- to use his or her network and contacts for the benefit of the School
- to treat all the information received from the School in a confidential and trustful manner
5. Responsibilities of the Business School

- to accommodate and welcome the Mentor in an appropriate manner
- to engage into a constructive dialogue with the Mentor
- to deliver the progress reports completely and on time
- to pay the process fees as applicable
Further Information and Contacts

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

https://efmdglobal.org/assessments/business-schools/edaf/

Alternatively you can contact the EDAF Office: edaf@efmdglobal.org.