EFMD Programme Accreditation System
The EFMD Accreditation for International Degree Programmes in Business and Management

2018 EPAS
PROCESS MANUAL ANNEXES
The EPAS documents are revised periodically and it is the responsibility of the Institution to always use the latest version of the documents. Older versions of the EPAS documents are only an acceptable reference with the prior approval from the EPAS Office. The EPAS documents are updated annually at the beginning of each calendar year.
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<td></td>
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<td>95</td>
</tr>
</tbody>
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ANNEX 1

EPAS Application Form
I, the undersigned __________________________ (Name)

____________________________________________ (Position)

representative of ________________________________ (Name of Institution)

confirm the application of my organisation to go through the EPAS process – EFMD Programme Accreditation System for the following programme(s):

____________________________________________________________________________ (name of first programme (set))

____________________________________________________________________________ (name of second programme (set))

I confirm the accuracy of the information supplied in the EPAS Datasheet (dated ............... and any subsequent revisions) and agree that my Institution will pay the EPAS fees as they fall due through the process. I also confirm that we will accept the accreditation process, the results of this process and the decisions of EFMD aisbl in respect of the accreditation. EFMD aisbl, its directors, employees, consultants, dependent or independent, voluntary or not, shall not be liable on tortious or contractual basis for any direct or indirect, foreseeable or unforeseeable damages resulting from the accreditation process, the conception and implementation of the standards, systems or procedures, nor for the accreditation decision. The afore-mentioned shall also not be liable for the use by the Institution of the recommendations nor for any delay in the accreditation process.

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

General Terms and Conditions

1. The signatory of this Application Form certifies he/she is a representative who is authorised to commit her/his Institution to go through the EPAS Process for the abovementioned programme(s).
2. The fees payable for the EPAS process are defined in the EPAS Fee Schedule effective at the date of submission of the Application Form.
3. The reviewed Institution will be charged directly by the visiting experts for their travel, accommodation and other direct expenses for 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 the date of the invoice.
5. The fees are exempted from Belgian VAT according to art. 196 Directive 2006/112/CE if the member is liable to VAT in another country of the European Union (reverse charge), or if the member is established in a country outside the European Union.
6. In case the Institution 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.

Signature: ___________________________________________ Date: _______/_______/_________

Stamp of the Institution:
Name of Institution:  .................................................................................................................................
Faculty/Department (if applicable): ............................................................................................................
Address including Post/Zip Code:  ..............................................................................................................
..............................................................................................................................................................
..............................................................................................................................................................
City and Country:  ........................................................................................................................................
Telephone: ...........................................  Fax: ..........................................................

VAT Identification Number (Please provide for invoicing purposes): ..........................................................
(see art. 5 of General Terms and Conditions on previous page)
ANNEX 2

EPAS Datasheet
The Datasheet is intended to provide succinct factual information about the Institution and the applicant programme(s) that allows them to be assessed against the EPAS Eligibility criteria. Data about the Institution should be limited to that strictly necessary to understand the programme(s). Descriptions should be clear, concrete, concise and compelling. There should be many more facts and data than opinions. EPAS 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 for one programme or 18 pages for two programmes (with a font size not smaller than 10). Please make sure that this document contains page numbers. For Institutions applying to EPAS for the first time, it should be noted that no additional information provided by the Institution besides that contained in the Datasheet and in the Advisor’s Eligibility Evaluation will be conveyed to the EPAS Committee. All the sections, descriptions and instructions of this document should not be deleted when filled in.

1. Institution name, address and website

Please give the name of the entity within which the applicant programme(s) is located, for example a free-standing business school or a faculty, school or department within a university. If the entity is part of a larger institution, please also name that institution.

Name of the applicant Institution offering the degree(s) to be reviewed:
Address:
Website:

2. EFMD membership status of the applicant Institution

Full or Affiliated Membership: OR Date of EFMD membership application:
(delete as appropriate)

Name of larger Institution (if any):

3. Programmes/Programme Sets to be assessed for accreditation

Up to a maximum of 2 programmes (or programme sets) can be submitted at one time. A programme set is defined as a suite/group of related programmes with a common structure (normally a core of at least 40% of the taught courses that are taken by all students, i.e. excluding projects and theses. Electives that may be common across the programme set but are not taken by all students are not accepted as core).

Name of Programme/Programme set (1):
Name of Programme/Programme set (2):
Please provide detailed information for each applicant programme/programme set by completing the attached pro-forma.

4. Head of the Institution

Please also provide address if different from above:

Name:
Job title:
Tel:
Email:

5. EPAS Project Leader at the Institution

This person should act as the central point of contact for EFMD for all issues concerning the current EPAS accreditation.

Name:
Job title:
Tel:
Email:
6. Brief description of the Institution

Institutional Aspects: Indicate whether it is a public or private institution, whether it is a freestanding business school or a faculty, school or department within a university. Describe the authority for degree awarding powers, e.g. Ministry of Education, University. None but market recognition. Give an indication of the Institution’s current strategic direction including 3 key strategic objectives (please provide measurable milestones for the next 5 years). Provide a table with institutional financial data (in Euros) for the past 5 years showing total revenue, total expenditure and the surplus (add an explanation if surpluses have been falling significantly in recent years or annual surpluses are negative). Provide also the projections for the next 3 years and the proportion of total revenues represented by each applicant programme. Identify key strengths of the Institution and show how these relate to the applicant programme(s). Please limit to 1 page.

Financial Performance:

Table 1

<table>
<thead>
<tr>
<th>All figures in € 1000</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Expenditure</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Surplus</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
</tbody>
</table>

Notes:

Table 2

<table>
<thead>
<tr>
<th>Forecast figures:</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Expenditure</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Surplus</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Revenue relating to:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Programme 1</td>
<td>€ (% of total)</td>
<td>€ (% of total)</td>
<td>€ (% of total)</td>
</tr>
<tr>
<td>Programme 2</td>
<td>€ (% of total)</td>
<td>€ (% of total)</td>
<td>€ (% of total)</td>
</tr>
</tbody>
</table>

7. Programme management system of the Institution, particularly for the applicant programme(s)

Current internal organisation and main committees: key academic and administrative positions – often best expressed diagrammatically. Show how the main decision-making processes influence programme management and direction. Identify 3 key issues currently demanding management attention with respect to each applicant programme.

8. The Degree Programme Portfolio

Briefly describe the Institution’s strategy for its overall programme portfolio including executive education (if applicable). Complete the table below for all programmes or suites of programmes offered by the Institution. Indicate clearly with an asterisk (*) in column 1 the programme(s) that are being put forward for EPAS accreditation.

Table 3

<table>
<thead>
<tr>
<th>Duration</th>
<th>Year in which programme started</th>
<th>Delivery Mode: Full time/Part time/Distance Learning/Off-shore</th>
<th>Does the programme require previous work experience? Yes/No</th>
<th>Primary language(s) of instruction</th>
<th>Total number of currently enrolled students across all years of the programme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generalist Masters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specialised Masters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Total number of full-time degree students in the Institution:
Total number of part-time degree students in the Institution:
Total number of full-time equivalent students in the Institution:

\[ \text{i.e. taking account of part-time fractions, for example a one-year programme taken by a PT student over a period of 3 years = } \frac{1}{3}\ \text{FT student} \]

Executive Education volume per year:

Table 4

<table>
<thead>
<tr>
<th>No. of programmes offered (open enrolment):</th>
<th>No. of programmes offered (customised):</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of participant days (open enrolment):</td>
<td>No. of participant days (customised):</td>
</tr>
<tr>
<td>Revenue in Euros (open enrolment):</td>
<td>Revenue in Euros (customised):</td>
</tr>
</tbody>
</table>

Notes
1. The number of participant days is calculated by adding up for all Executive Education programmes the number of participants x duration in days.

9. 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 Institution and used on the applicant programme(s). If you believe that it is extremely difficult to fit your faculty into the typology below, use your own classification and typology preceded by a clear description of the qualifications, experience and dedication that apply to each type. Occasional speakers are not considered faculty, even if academically qualified. Definitions are given further below.

Table 5

<table>
<thead>
<tr>
<th>Core faculty</th>
<th>Institution wide</th>
<th>First Applicant Programme</th>
<th>Second Applicant Programme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of academic staff members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of staff members by academic rank (e.g. full professors, associate professors, etc.):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full professors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate professors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant professors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-time equivalent (FTE)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of female core faculty</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% holding a doctoral degree</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of different nationalities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of core faculty with foreign professional or study experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ratio FTE students / FTE core faculty</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of core faculty hired (FTE) in last 3 years</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of core faculty departed (FTE) in last 3 years</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Adjunct faculty</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total number of adjunct faculty</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-time equivalent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of total teaching hours taught by adjunct faculty</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Visiting professors in current year</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number from foreign institutions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of total teaching hours taught by foreign visiting professors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number from domestic institutions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of total teaching hours taught by domestic visiting professors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Teaching and research assistants</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- on short-term contracts</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes**

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

**10. Research or other intellectual development activities**

Provide an overview of the research, innovation, pedagogical development or other intellectual development activities of the faculty members that support the programme(s) under review. A table should be included showing the numbers of different outputs produced by Core Faculty that support the programme(s) over the past 3 years. The output classification should include publications in international and national peer reviewed journals, other international and national research publications, accepted papers at conferences (peer reviewed and other), case studies, and other publications. Give a sample list of at most 10 publications (references) and any other evidence of ongoing research. Please provide the average teaching load per capita per year of core faculty and indicate what percentage of their workload is allocated to research.

**Research Output**
Table 6

<table>
<thead>
<tr>
<th>Research Type</th>
<th>Year t-2</th>
<th>Year t-1</th>
<th>Year t</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Practice-Oriented Research Articles</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Academic Research Articles (peer-reviewed)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Articles on Pedagogic Development and Innovation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Published Case Studies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Papers in academic conferences (peer-reviewed)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Papers in professional conferences</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Other R&amp;D Publications</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: t represents the latest year for which data is available. Please replace column headers with actual years.

List 10 Sample References of core faculty teaching on the programme (published within the past 5 years). In the case of joint papers, underline the authors who belong to the applicant programme’s faculty:

1. tba
2. tba
3. tba
4. tba
5. tba
6. tba
7. tba
8. tba
9. tba
10. tba

11. Internationalisation

Overview of the principal aspects of the Institution’s international dimension (faculty, student body, strategic alliances, international partners etc.) applicable to the applicant programme(s). This should include the names of key exchange or internship partners and the numbers of outgoing and incoming students to the applicant programme(s).

Student Mobility:

Table 7

<table>
<thead>
<tr>
<th>Student Mobility</th>
<th>Year t-2</th>
<th>Year t-1</th>
<th>Year t</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Programme 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- # of outgoing students</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- outgoing students as a % of total in the year group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- # of incoming students *</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicant Programme 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- # of outgoing students</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- outgoing students as a % of total in the year group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- # of incoming students *</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Headcount of incoming students no matter how many courses/modules each take.

12. Overview of the principal links with the corporate world

Overview of the corporate connections of your Institution that are applicable to the applicant programme(s). This should include the numbers of students on each applicant programme that undertake a project or internship period in the corporate world and the length of those study periods. It should also provide information on the programme’s faculty involvement in the corporate world and, conversely, practitioner input to the programme(s).
13. Ethics, responsibility and sustainability (ERS)
Overview of the principal aspects of the Institution’s coverage of ERS (institutional policies, adoption of codes of best practice, faculty specialisation and research, ERS-related partnerships and alliances, etc.) relevant for the applicant programme(s).

14. Accreditation or recognition by national and/or international agencies
Of the Institution and/or submitted programme(s).

15. National standing
Provide evidence that the Institution and submitted programme(s) have a strong national reputation. Please include information on the positioning in the national environment (e.g. rankings if available, audit outcomes, comparative (national) entry exam results), main competitors, strategic group to which the Institution belongs and also the main competitors of the applicant programme(s).

16. International reputation
Provide factual evidence in one paragraph that the Institution and submitted programme(s) are known and respected abroad (e.g. exchange partners, corporate recruiters, and international rankings).

17. Quality assurance processes
Briefly describe the institutional quality assurance processes (e.g. approval, monitoring and review processes) as they apply to the applicant programme(s).
Please complete the following pro forma for each programme (or programme set) submitted for EPAS accreditation.

Name of the Institution:
Name of the Programme (or Programme Set):

18. Basic details of the submitted Programme (or Programme Set)

Table 8

| Year in which the programme first graduated students: |  |
| Delivery modes (e.g. FT, PT, distance, modular, e-learning): |  |
| Number of graduates in each of the last 2 years: | (e.g. 2016: X; 2015: Y; ) |
| Length of programme in years: |  |
| Primary language of instruction: |  |
| Percentage of programme taught in other named languages: |  |
| Percentage of the common structure (if a programme set): |  |

Notes
1. Graduates: The programme must have been producing graduates for at least two cohorts (over at least 2 years), except where this programme is a variant on a long established programme, e.g. moving from a 5 year pre-Bologna programme to a 3+2 or 4+1 B/M/D structure. There must be a minimum of 30 graduates in total over the last 2 years for eligibility.
2. Programme set: In the context of EPAS, a programme set is defined as a suite of programmes with a common structure and core. The common core must normally be at least 40% in order for the set to be eligible. If a programme set is being submitted for EPAS accreditation, please estimate the percentage of the programme's taught courses/modules which could be considered as common to all programmes within the set, i.e. must be taken by all students, excluding projects and theses. Electives that may be common across the programme set but that are not taken by all students are not accepted as part of the common core.

19. Profile of applicants and student intakes into 1st year of study (for the 3 most recent years) for each mode of delivery and intake

Table 9

<table>
<thead>
<tr>
<th>Current year</th>
<th>Last year</th>
<th>Second last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of formal applicants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of applicants who were offered a place</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of offers accepted by applicants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of students actually enrolled in current 1st year intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average no. of years work experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Least no. of years work experience on the programme</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes
1. In the case of one intake per year, the no. of students actually enrolled in the first year should be the same as the enrolment nos. in the 1st programme year of the next table. Normally, there should be a minimum of 25 (20 for specialist programmes) students for eligibility for each mode of delivery and intake. This minimum must be met throughout the accreditation process and accreditation period.
2. The no. of years of work experience is not applicable for Bachelor or first degree programmes.

20. Profile of current student year groups for each mode of delivery and intake

There should be a separate table for each mode of delivery and intake unless they are fully integrated. The table should refer only to degree-seeking students.

<table>
<thead>
<tr>
<th>Programme Year/Intake</th>
<th>Enrolment numbers</th>
<th>% rate of progression (^1)</th>
<th>% of females</th>
<th>% foreign students</th>
<th>Number of nationalities</th>
<th>Average age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd</td>
<td>90</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3rd</td>
<td>81</td>
<td>73.63%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5th</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall totals(^2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

% of students that graduated in time on the final year

Notes

1. **% rate of progression** = % passing from previous year’s enrolment and progressing into current year. For a 1-year programme, please give the percentage of students that graduated within one year. See example of calculation below:

   This is an example for a three-year programme with annual intake. The intake last year was 100 in year 1 of which 90 progressed to year 2. Last year there were 110 in year 2 of which 81 progressed to year 3. Therefore, the % rate of progression from year 1 to year 2 is 90/100 = 90\% and from year 2 to year 3 is 81/110 = 73.63\%.

2. The number here should be equal to the total number of currently enrolled students across all years of the applicant programme.

21. Programme Summary

Brief description of the programme. In addition, a diagram or table should be provided showing the overall programme structure. Where appropriate, show how the applicant programme meets the EQUAL guidelines. Please limit to 2 pages.

1. Entry requirements:

2. Programme objectives, i.e. the general programme aims:

3. Intended Learning Outcomes (ILOs), i.e. what the students should know, should be able to do and how they are expected to behave by the end of the programme:

4. Curriculum rationale for the ordering of courses across semesters/blocks or years of study to indicate intellectual progression. Curriculum structure and list of courses and/or modules including credits (ECTS if applicable) and teaching/learning hours. In the case of a programme set, please indicate which courses/ modules belong to the common core. In the case of two or more intakes per year, give attendance of compulsory courses/modules per semester during the last 2 academic years:
5. Organisation of teaching (e.g. regular distribution or weekend blocks). In the case of multiple intakes per year, explain how the intellectual progression is maintained:

6. Personal development of students:

7. International learning experience:

8. Corporate learning experience:

9. ERS-related learning experience (programme objectives, ILOs, ERS-dedicated courses, transversal ERS coverage, etc.):

10. Graduate job placement statistics:

For initial accreditations:
- A draft Datasheet should be sent by e-mail (epas@efmd.org) to the EPAS Office at the EFMD Quality Services Department in Microsoft Word format so that the EPAS Team may comment and discuss with the Institution possible next steps. Please do not attach brochures or appendices.
- Non-EFMD members must apply for membership before requesting feedback on the draft Datasheet.
- Final Datasheets must be received in PDF electronic format by the deadline notified by the EPAS Office for the target EPAS Committee meeting date. Missing this deadline will cause submission of the application to the Committee to be delayed until the following meeting. The Advisor should send his/her Eligibility Evaluation to the EPAS Office at the same time.

For both initial accreditations and re-accreditations:
- An updated Datasheet should be sent to the EPAS Office together with the Self-Assessment Report and the Student Report at least eight (8) weeks before the start of the Peer Review Visit. Institutions should always use the latest version of the Datasheet template available on the EFMD website unless they are told otherwise by the EPAS Office.
ANNEX 3

EPAS Fee Schedule
This fee schedule covers new EPAS applications and re-accreditation applications submitted in 2018. For accredited Institutions starting the re-accreditation process in 2018, no eligibility fee will be due. The fee schedule at the time of the (re-)application remains valid throughout that cycle of the Institution’s accreditation process.

**ADMINISTRATIVE FEES**

**Application Fee**

Invoiced upon receipt of a formal application to EPAS. For accredited programmes, due at the time of starting the re-accreditation process.

**Eligibility Fee**

Invoiced only upon a **positive** Eligibility decision by the EPAS Committee and due 30 days after the date on which the Committee granted Eligibility. **This fee is charged only to Institutions in the initial accreditation cycle, not to those starting a re-accreditation cycle.**

**Review Fee**

Review of first programme (or programme set)  €14,440
Review of second programme (or programme set)  €3,840

**Accreditation Fee**

1\textsuperscript{st} programme:  €960 per year or  €4,800 for 5 years
2\textsuperscript{nd} programme:  €960 per year or  €4,800 for 5 years
The accredited Institutions have 2 options regarding payment of the Accreditation Fee:

**Option 1**: The above amount can be paid in annual instalments of € 960 (or € 1,920 when 2 programmes have been accredited) each year no later than 30 days after the date on which the Accreditation Board conferred the EPAS label.

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

**EXPENSES**

Travel, lodging and other direct expenses incurred by Peer Reviewers are to be paid without delay by the Institution.

Peer Reviewers are advised to book their flights at the earliest opportunity to minimise the costs to the Institution. Peer Reviewers should ask approval from the Institution before ticket purchase, copying the EPAS Office, and should endeavour to keep the costs as low as possible (a maximum of € 6,000 is envisaged but cannot be considered as the norm).

**CANCELLATION, POSTPONEMENT AND LATE PAYMENTS**

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

b) The EPAS Office may cancel or postpone the Peer Review Visit
   - if the Self-Assessment Report (SAR), Datasheet and Student Report are inconsistent, have significant problem areas or are submitted with major delay; or
   - if it is evident that the programme(s) do not meet the eligibility criteria as set out in the EPAS Process core documents; or
   - if the visit is not conducted in an orderly manner even if the Peer Review Team (PRT) is already on site, with the explicit agreement between the EPAS Office, the Chairperson and another member of the PRT.

The Institution will have to cover any non-refundable costs incurred by the Peer Reviewers (e.g. flight tickets) up to the time of cancellation or postponement of the visit.

Any postponement, re-scheduling or cancellation of the Peer Review Visit by the Institution or the EPAS Office will require the payment of an administration fee of € 1,500 should this occur more than 6 months in advance of the planned PRV date. A fee of € 5,000 will be charged should this occur within less than 6 months from the scheduled PRV date.

In order to advance in the accreditation process, an Institution must be up to date in all its payments to EFMD.
ANNEX 4

EPAS Re-Accreditation Application Form
I, the undersigned ____________________________ (name)
______________________________________________ (position)
representative of ________________________________ (name of Institution)
confirm the application of my Institution to go through the EPAS process – EFMD Programme Accreditation System for the following programme(s):
____________________________________ (name of first programme (set))
____________________________________ (name of second programme (set))

I confirm the accuracy of the information supplied in the Re-Accreditation Application Form (dated ………………. and any subsequent revisions) and agree that my Institution will pay the EPAS fees as they fall due through the process. I also confirm that we will accept the accreditation process, the results of this process and the decisions of EFMD aisbl in respect of the accreditation. EFMD aisbl, its directors, employees and consultants, dependent or independent, voluntary or not, shall not be liable on a tortious or contractual basis for any direct or indirect, foreseeable or unforeseeable damages resulting from the accreditation process, the conception and implementation of the standards, systems or procedures, nor for the accreditation decision. The afore-mentioned shall also not be liable for the use by the Institution of the recommendations nor for any delay in the accreditation process.

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

**General Terms and Conditions**

1. The signatory of this Re-Application Form certifies he/she is a representative who is authorised to commit her/his Institution to go through the EPAS Process for the abovementioned programmes.
2. The fees payable for the EPAS process are defined in the EPAS Fee Schedule effective at the date of the final submission of the Re-Application Form.
3. The reviewed Institution will be charged directly by the visiting experts for their travel, accommodation and other direct expenses for 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 the date of the invoice.
5. The fees are exempted from Belgian VAT according to art. 196 Directive 2006/112/CE if the member is liable to VAT in another country of the European Union (reverse charge), or if the member is established in a country outside the European Union.
6. In case the Institution 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.

Signature: ____________________________________________ Date: ______ / _____ / ________

Stamp of the Institution:
Name of the Institution: ……………………………………………………………………………………………………………………………
Faculty/Department (if applicable): …………………………………………………………………………………………………………………
Address including Post/Zip Code: ………………………………………………………………………………………………………………………
……………………………………………………………………………………………………………………………………………………………………
……………………………………………………………………………………………………………………………………………………………………
City and Country: ……………………………………………………………………………………………………………………………………………
Telephone: ……………………………… Fax: ……………………………
VAT Identification Number (Please provide for invoicing purposes): ……………………………………………………………………………
(see art. 5 of General Terms and Conditions on previous page)
This Re-Accreditation Application is intended to provide succinct factual information about the Institution and the applicant Programme(s) that allows them to be assessed to ensure continuing Eligibility. It should indicate any significant changes that have occurred since the last accreditation visit. If the EPAS Directors identify any problematic issues, this Application may be referred to the EPAS Committee. Descriptions and facts should be clear, concrete, concise and compelling. The total length of the document should not exceed 8 pages for one programme or 10 pages for two programmes (with a font size not smaller than 10).

All the sections, descriptions and instructions of this document should not be deleted when filled in.

1. Institution name, address and website

Please give the name of the entity within which the applicant programme(s) is located, for example a freestanding business school or a faculty, school or department within a university. If the entity is part of a larger institution, please also name that institution.

Name of the applicant Institution offering the degree(s) to be reviewed:
Address:
Website:

2. EFMD membership status of the applicant Institution

Full / Affiliated Membership:
(delete as appropriate)

Name of larger Institution (if any):

3. Programmes/Programme Sets to be assessed for accreditation

Up to a maximum of 2 programmes (or programme sets) can be submitted at one time. A programme set is defined as a suite/group of related programmes with a common structure (normally a core of at least 40% of the taught courses that are taken by all students, i.e. excluding projects and theses. Electives that may be common across the programme set but are not taken by all students are not accepted as core).

Name of Programme/Programme set (1):
Name of Programme/Programme set (2):

Please provide detailed information for each applicant programme/programme set by completing the sections below.

4. Head of the Institution

Name:
Job title:
Tel:
Email:

5. EPAS Project Leader at the Institution

This person should act as the central point of contact for EFMD for all issues concerning the current EPAS accreditation.

Name:
Job title:
Tel:
Email:
6. Brief description of the Institution

Institutional Aspects: Indicate any significant structural, organisational or financial changes that have occurred since the last accreditation visit that may have impacted the programme(s) under EPAS review. Give an indication of the Institution’s current strategic direction including 3 key strategic objectives (please provide measurable milestones for the next 5 years).

Financial Performance:

Table 1

<table>
<thead>
<tr>
<th>All figures in € 1000</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Expenditure</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Surplus</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
</tbody>
</table>

Notes:

Table 2

<table>
<thead>
<tr>
<th>Forecast figures:</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Expenditure</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Surplus</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Programme relating to:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Programme 1 (% of total)</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
<tr>
<td>Programme 2 (% of total)</td>
<td>€</td>
<td>€</td>
<td>€</td>
</tr>
</tbody>
</table>

7. Programme management system of the Institution, particularly for the applicant programme(s)

Indicate any significant changes since the last accreditation visit.

8. The Degree Programme Portfolio

Indicate any significant changes since the last accreditation visit. In particular, indicate if any of the programmes or degree pathways previously accredited by EPAS have been put into or taken out of a programme set or suite. Please indicate whether any degree pathways have been added to the programme(s) to be re-accredited that were not assessed in the previous accreditation visit.

9. Faculty

Indicate any significant changes since the last accreditation visit, particularly to the academic structure of the Institution that may have impacted the programme(s) under EPAS review.

10. Research or other intellectual development activities

Indicate any significant changes since the last accreditation visit.

11. Internationalisation

Indicate any significant changes since the last accreditation visit.

12. Overview of the principal links with the corporate world

Indicate any significant changes since the last accreditation visit.

13. Ethics, responsibility and sustainability (ERS)

Indicate any significant changes since the last accreditation visit.

14. Accreditation or recognition by national and/or international agencies

Indicate any significant changes since the last accreditation visit, particularly gaining accreditation from non-EFMD bodies.
15. National standing

Indicate any significant changes since the last accreditation visit.

16. International reputation

Indicate any significant changes since the last accreditation visit.

17. Quality assurance processes

Indicate any significant changes since the last accreditation visit.
Please complete the following pro forma for EACH programme (or programme set) submitted for EPAS re-accreditation.

Name of the Programme (or Programme Set):

18. Basic details of the submitted Programme (or Programme Set)

Table 3

| Year in which the programme first graduated students: |
| Delivery modes (e.g. FT, PT, distance, modular, e-learning): |
| Number of graduates in each of the last 2 years: (e.g. 2016: X; 2015: Y) |
| Length of programme in years: |
| Primary language of instruction: |
| Percentage of programme taught in other named languages: |
| Percentage of the common structure (If a programme set) *: |

* In the context of EPAS, a programme set is defined as a suite of programmes with a common structure and core. The common core must normally be at least 40% in order for the set to be eligible. If a programme set is being submitted for EPAS accreditation, please estimate the percentage of the programme’s taught courses/modules which could be considered as common to all programmes within the set, i.e. must be taken by all students, excluding projects and theses. Electives that may be common across the programme set but that are not taken by all students are not accepted as part of the common core.

19. Profile of applicants and student intakes into 1st year of study (for the 3 most recent years) for each mode of delivery and intake

There should be a separate table for each mode of delivery. If you have more than one intake per year, please add sub-columns for each intake. If intakes are on a continuous basis, please enter the intake per year and indicate it.

Table 4

<table>
<thead>
<tr>
<th>Current year</th>
<th>Last year</th>
<th>Second last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of formal applicants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of applicants who were offered a place</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of offers accepted by applicants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of students actually enrolled, current 1st year intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average no. of years work experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Least no. of years work experience on the programme*</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Not applicable for Bachelor or first degree programmes.

20. Programme summary

Indicate any significant changes to the programme since the last accreditation visit. In addition, a diagram or table should be provided showing the overall programme structure, highlighting the common core for a programme set (if applicable).

The EPAS Re-Accreditation Application should be sent to the EPAS Office at the EFMD Quality Services Department by e-mail in Microsoft Word format at least 12 months before the expiry of the current Accreditation (e-mail: isabel.ramos@efmd.org).
ANNEX 5

Information & Documents to be provided in the SAR
A further description of each criterion listed below can be found in the document entitled EPAS Standards & Criteria. It should be noted that for the review of two programmes (or programme sets), sections 1 and 5 are common to both programmes but sections 2, 3 and 4 should be written separately (in sequential manner) for each programme.

### Section 1. The Institution in its National and International Context

<table>
<thead>
<tr>
<th>SAR REQUIREMENTS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 The institutional context</td>
</tr>
<tr>
<td>None</td>
</tr>
<tr>
<td>1.2 Resources and facilities</td>
</tr>
<tr>
<td>Brief description of IT resources and of other facilities (appendix)</td>
</tr>
<tr>
<td>1.3 Faculty</td>
</tr>
<tr>
<td>Aggregate data on all faculty members (whether core, adjunct, professional or visiting faculty) teaching in the applicant programme(s) by grade/category, age, gender, qualifications/doctorates, extent of research activity, international background, corporate interactions</td>
</tr>
</tbody>
</table>

### Section 2. Programme Design

<table>
<thead>
<tr>
<th>SAR REQUIREMENTS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 Programme objectives and target markets</td>
</tr>
<tr>
<td>Web site address for programme publicity</td>
</tr>
<tr>
<td>2.2 Curriculum design</td>
</tr>
<tr>
<td>The overall programme rationale, definition and matrix of ILOs – the description of the structure and design should be brief but explicit</td>
</tr>
<tr>
<td>2.3 Design of delivery modes and assessment methods</td>
</tr>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

### Section 3. Programme Delivery & Operations

<table>
<thead>
<tr>
<th>SAR REQUIREMENTS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1 Student recruitment</td>
</tr>
<tr>
<td>Tables of student profiles (updated from Datasheet)</td>
</tr>
</tbody>
</table>
3.2 Pedagogy  None
3.3 Personal development of students  None
3.4 International aspects  List of international academic partners and business institutions, and the nature of the partnerships
3.5 Corporate interactions  List of corporate links and their nature (the information must be presented in a sufficiently detailed form so that the strength and quality of corporate interactions can be evaluated at the module level)
3.6 ERS  None

Section 4. Programme Outcomes

SAR REQUIREMENTS:

4.1 Quality of student/participant work  Module pass rates for the core courses and overall progression statistics for the last 3 years

4.2 Graduate quality and career placement  a) Final graduation statistics for the last 3 years including grade profile where appropriate (e.g. % merit/distinction or honours grades)
     b) Table of proportions of graduates employed within 3 or 6 months of completing the programme and distribution of starting salaries
     c) Table of sample job functions
     d) Data, where available, on career progression profiles

4.3 Alumni  Data, where available, on % membership and activity levels of the alumni association and career progression profiles

4.4 Programme reputation  None

Section 5. Quality Assurance Processes

SAR REQUIREMENTS:

5.1 Design and review processes  Chart showing the QA process sequence

5.2 Quality assurance on operations  Tables of summary student evaluations of teaching
ANNEX 6

List of Required Documents for the Base Room
A further description of each criterion listed below can be found in the document entitled *EPAS Standards & Criteria*. All documents (preferably in English) can be provided digitally.

### Section 1. The Institution in its National and International Context

#### 1.1 The institutional context

**BASE ROOM EXHIBITS:**

- a) Strategic plan
- b) Financial statements – previous 3 years’ accounts and next year’s budget
- c) Policy documents on the international learning experience, corporate connections and ERS
- d) Relevant Institution brochures
- e) Minutes of the Management Committee meetings for the past year
- f) External audit reports, evidence of ranking

#### 1.2 Resources and facilities

None

#### 1.3 Faculty

Faculty list of the applicant programme by subject area with a table of all the modules/courses taught by each member and their CVs/resumes

### Section 2. Programme Design

#### 2.1 Programme objectives and target markets

**BASE ROOM EXHIBITS:**

- a) Programme brochure
- b) Minutes from Committees dealing with programme strategy, design/reviews and modifications for the past year

#### 2.2 Curriculum design

Formal documentation on programme specification and module descriptions as shown on p. 31

#### 2.3 Design of delivery modes and assessment methods

- a) Programme schedule for each year of study
- b) Table of number of students registered for each course
- c) Assessment regulations
### Section 3. Programme Delivery & Operations

| 3.1 | Student recruitment | **BASE ROOM EXHIBITS:**  
|     |                     | a) Sample of selection interview template, if appropriate  
|     |                     | b) Documentation on induction processes  

| 3.2 | Pedagogy | Samples of learning materials (see the selected courses of faculty members on p. 32) and additional academic readings  

| 3.3 | Personal development of students | Handbooks and guidance notes  

| 3.4 | International aspects | None  

| 3.5 | Corporate interactions | None  

| 3.6 | ERS | a) Policy documents related to ERS  
|     |     | b) Syllabi and sample of course materials  
|     |     | c) Sample of student project papers or theses with ERS focus  

### Section 4. Programme Outcomes

| 4.1 | Quality of student/participant work | **BASE ROOM EXHIBITS:**  
|     | Samples of course materials (a binder for each course) including exam papers (including resits), course work assignments, etc. and student answers to those assessments plus summary marks for each sample assessment (see the selected courses of faculty members on p. 32). The PRT should be able to track from the questions set to the answers given by the students to the summary marks schedule (see below).  

| 4.2 | Graduate quality and career placement | None  

| 4.3 | Alumni | Brochures and programmes for alumni activities  

| 4.4 | Programme reputation | Press rankings and clippings  

### Section 5. Quality Assurance Processes

| 5.1 | Design and review processes | **BASE ROOM EXHIBITS:**  
|     | a) Audit reports from regulatory agencies or statutory/professional bodies (if any)  
|     | b) Documentation on programme approval or validation and periodic review reports  

5.2 Quality assurance on operations

a) Evidence of monitoring assessments

b) Samples of completed student evaluation forms

The Base Room requirements for each programme (or programme set) being assessed:

- Programme structure document including programme objectives, overall Intended Learning Outcomes (ILOs) and the rationale for the curriculum structure showing how the design will achieve the programme objectives and ILOs.

- Descriptions of the assessment regime and grading system.

- List of courses.

- Intended Learning Outcomes and syllabus for each course.

- Access to online material regarding course organisation and delivery.

- Teaching evaluations (summary) by students for each course. Evaluations for faculty members selected for interview by the PRT should be highlighted.

- Learning materials and student work: One course should be selected for each of the 8-10 faculty members attending for interview with the PRT. In addition, a further 6 courses from other faculty members should be provided. The portfolio of courses selected should have broad subject coverage of the programme as a whole and be approximately a 60:40 mix of core and elective courses, where applicable. Where possible, at least half of the courses should be in English. The complete portfolio (where possible) of all courses in the programme should also be available on the web.

Materials should be provided for each course (normally for the last 2 years) as follows:

1. Learning materials should be provided for each of the selected courses to include the course notes, slides or hand-outs, case studies, textbooks, journal readings.

2. Student work should be sampled based on mark or grade schedules or distributions (list of student names with marks or grades) within the selected courses. Note that mark schedules must be provided for each of the selected courses. For each of the courses selected above, the following student work should be provided:
   - the assignments/exams set
   - a sample of 6 graded/written student scripts matching those assignments/exams. These 6 scripts should include the highest mark, the lowest mark and 4 from close to the pass mark for the course (i.e. marginal scripts). If there are no failed papers, the sample should consist of the 2 highest and the 4 lowest marks or grades.

3. A sample of 12 graded final dissertations or internship reports as appropriate (e.g. Masters theses, undergraduate dissertations, internship reports) should also be provided, with 3 each with the highest and lowest marks/grades and 6 with mid-level marks.
ANNEX 7

EPAS Template for the Student Report
This Report is intended to gather input from students of EPAS applicant programmes on issues of key interest in the EPAS accreditation process. Sections 2, 3 and 4 of this form should be completed per programme (or programme set) submitted. A further description of each criterion listed below can be found in the document entitled EPAS Standards and Criteria. The following questions should be discussed by a representative group of about 10 students (ideally coming from different stages in the programme and, if possible, including some exchange students) and the answers summarised in the boxes below. The length of the response expected is indicated by the size of the box although answers can be longer if necessary but the overall length of the report should be between 6 and 10 pages. Students should compile the report without any direct involvement of the Institution or its employees. Note that the Institution should only initiate the process. Then, students should work on their own without detailed guidance or monitoring by the Institution (i.e. no selection of students, no conducting of interviews or editing of the Student Report by the Institution).

Name of the Institution:

Name of the Programme (or Programme Set):

Date:

1. INSTITUTIONAL AND ENVIRONMENTAL CONTEXT

How well is the programme (or programme set) supported within the Institution? In your reply, please consider:

- The reputation of the Institution – both at a national and international level
- The quality of the Institution’s marketing towards prospective students
- The adequacy of the faculty in terms of size, qualifications, international experience and their links with latest research and with relevant corporations
- The resources and facilities made available to students of the programme (or programme set)
2. PROGRAMME DESIGN

Make a brief assessment of the overall design of the programme (or programme set) in terms of:

- Its target market and its strategic fit within the Institution
- The clarity and appropriateness of the programme’s Intended Learning Outcomes
- The effectiveness of the programme’s different delivery modes (e.g. full-time, part-time, etc.), where appropriate
- The design of the assessment methods employed during the programme
- An appropriate fit between programme structure and programme objectives

3. PROGRAMME DELIVERY AND OPERATIONS

How well is the programme (or programme set) delivered and managed? Please consider:

- The effectiveness of the recruitment and induction processes
- The quality of the learning materials and range of teaching methods employed
- The quality of the teaching
- The focus on personal development
- The exposure to internationalisation and to the corporate world
- The coverage of ethics, responsibility and sustainability (ERS)
- The quality of the administrative staff
- The quality of programme handbooks and guidance
4. PROGRAMME OUTCOMES

How well does the programme fulfil your expectations? i.e.
- Does it achieve the Intended Learning Outcomes?
- How well is it considered against other similar programmes? (e.g. by potential employers, national and international reputation)
- What support do students receive from the Institution in securing employment upon graduation?
- Has the programme been worthwhile to you?

5. QUALITY ASSURANCE PROCESSES

To what extent can students contribute to the ongoing quality improvement of the programme? i.e.
- Are students asked to assess the quality of the teaching?
- Is feedback given on issues raised by the students?
- Is there opportunity for students to actively participate in the running of the programme?
- Are there opportunities for students to advise on programme structure and its review?

Please list the students who participated in the compilation of this report, including their year and programme of study (including delivery mode where appropriate, e.g. part-time, full-time).
ANNEX 8

EPAS Visit Schedule Templates
Guidelines for Drafting the Visit Schedule

1. Applicant Institutions will be contacted well in advance of the Peer Review Visit with the request to submit a draft visit schedule. They should do so in a timely fashion. Draft schedules need to be received by the EPAS Office no later than eight (8) weeks prior to the Peer Review Visit. The EPAS Office will send the agreed schedule to the Peer Review Team no later than two (2) weeks prior to the visit.

2. The draft schedule must be based on the relevant template provided in the following pages, depending whether one or two programmes (or programme sets) are being assessed. Deviations should be explicitly justified when submitting the draft schedule and will only be accepted in very exceptional circumstances. The Institution may not erase any text provided with the template and shall therefore only amend the document in the appropriate places.

3. The Institution shall not contact the Peer Review Team or its Chair in advance of the visit to change the schedule.

4. The draft schedule must contain the names of all session participants as well as their titles/roles, so that the EPAS Office can evaluate the appropriateness of their inclusion.

5. Peer Review schedules shall be designed so that Peer Review Teams can interact with as many individuals as possible. Multiple appearances in several sessions must therefore be avoided, unless these individuals have multiple functional roles. If several programmes (or programme sets) will be reviewed, participants of the faculty sessions shall not overlap as well.

Admissible exceptions are e.g.:

a. There are no restrictions on who can participate in the feedback session.

b. Directors of the applicant programme (or programme set) will typically participate in the opening session as well as the session with the programme management team. While it is normally expected that quality assurance and programme management responsibilities be functionally separated, small institutions may have assigned quality assurance responsibilities to the programme director as well. In this case, the programme director can make an exceptional third appearance in the quality assurance session.

6. Audio or video recording of the interviews and feedback session is strictly forbidden.
Template for Visit Schedule: 1 programme (or programme set)

Name of the Institution:

Name of the programme (or programme set):

Date of the visit:

**Day 0**

19:30 Dinner at hotel in private room for the Peer Review Team (PRT) alone to set the visit agenda

**Day 1**

09:00 - 10:00 Dean/Director and senior management team: Institutional mission and strategy; national context for the programme; programme fit with mission; market positioning of programme and marketing; international and corporate world perspectives; other resources allocated to the programme under review; for re-accreditation visits, progress towards the areas for improvement/development objectives.

10:00 - 10:45 Heads of academic subject areas (or equivalent) relevant to the programme: faculty profiles: qualifications, relevant research and scholarship; workload allocation and teaching loads; evaluation and development of faculty including faculty pedagogic capabilities.

10:45 - 12:15 Peer Review Team assessment of programme materials and student work *

12:15 - 13:00 Buffet lunch in Base Room – Peer Review Team alone for discussions

13:00 - 14:30 Programme Director and management team: programme objectives & target markets; curriculum rationale and design; learning, teaching and assessment strategy; delivery and assessment methods; student selection; faculty management re programme delivery; corporate learning experience; international learning experience; infrastructure and resource support; programme marketing; graduate employment; stakeholder feedback; for re-accreditation visits, progress towards the areas for improvement / development objectives.

14:30 - 14:45 Break

14:45 - 16:00 Faculty staff teaching on the programme who deliver a particular course(s)/module(s) in the programme*: list by subject area with a table of all the modules/courses taught by each faculty member; qualifications and experience; relevant scholarly activity; pedagogical approaches; student support (PRT split into 2 groups of 4-5 faculty).

16:00 - 17:00 Peer Review Team further assessment of programme materials and student work
17:00 - 17:45 Students on the programme: student experience. (PRT split into 2 groups of 6 to 10 students, including some students responsible for writing the Student Report).

17:45 - 18:30 Alumni/graduates from the programme: student experience; programme value added; job profiles; support for and from alumni (6-8 alumni with 2 PRT members).

17:45 - 18:30 Corporate links: employers of programme graduates, providers of internships or placements, regular visiting speakers/lecturers (6-8 corporates with 2 PRT members).

19:30 Dinner at hotel in private room for the Peer Review Team alone for discussion and preliminary evaluation

**Day 2**

09:00 - 09:45 Resources relevant to the programme:
- Group 1 - information & library resources; technology for pedagogy
- Group 2 - financial resources, generalised student support & services
(PRT split into 2 groups)

09:45 - 10:15 Site visit

10:15 - 11:00 Staff responsible for Quality Assurance: quality processes and systems covering teaching quality, assessment consistency, programme reviews.

11:00 - 11:30 If required by the PRT, further discussion with the Programme Director

11:30 - 14:00 Peer Review Team alone for further assessment of programme materials and student work and for final discussions and preparation of feedback, including buffet lunch

14:00 - 14:30 Oral feedback to the Institution

* The courses to be selected for evaluation in the Base Room are specified in the EPAS Process Manual (see Annex 6). The selected teaching materials, assignments set and examples of students' work will relate to particular faculty members. These are the faculty members who should be interviewed in the faculty session at 14:45 on Day 1. The materials will be assessed both before and after discussions with the programme management team and the faculty members.
Template for Visit Schedule: 2 programmes (or programme sets)

Name of the Institution:

Name of programme (or programme set) 1:

Name of programme (or programme set) 2:

Date of the visit:

Day 0
19:30 Dinner at hotel in private room for the Peer Review Team alone to set the visit agenda

Day 1
09:00 - 10:00 Dean/Director and senior management team: Institutional mission and strategy; national context for the programmes; programme fit with mission; market positioning of the programmes and marketing; international and corporate world perspectives; other resources allocated to the programmes under review; for re-accreditation visits, progress towards the areas for improvement/development objectives.

10:00 - 10:45 Heads of academic subject areas (or equivalent) relevant to programmes: faculty profiles: qualifications; relevant research and scholarship; workload allocation and teaching loads; evaluation and development of faculty including faculty pedagogic capabilities.

Programme (set) 1:

10:45 - 12:15 Peer Review Team assessment of programme (set) 1 materials and student work *

12:15 - 13:00 Buffet lunch in Base Room – Peer Review Team alone for discussions

13:00 - 14:30 Programme Director and management team: programme objectives & target markets; curriculum rationale and design; learning, teaching and assessment strategy; delivery and assessment methods; student selection; faculty management re programme delivery; corporate learning experience; international learning experience; infrastructure and resource support; programme marketing; graduate employment; stakeholder feedback; for re-accreditation visits, progress towards the areas for improvement / development objectives.

14:30 - 14:45 Break

14:45 - 16:00 Faculty staff teaching on programme (set) 1 who deliver a particular course(s)/module(s) in the programme*: list by subject area with a table of all the modules/courses taught by each faculty member;
qualifications and experience; relevant scholarly activity; pedagogical approaches; student support (PRT split into 2 groups of 4-5 faculty).

16:00 - 17:00 Peer Review Team further assessment of programme (set) 1 and preliminary assessment of Programme set 2 materials and student work

17:00 - 17:45 Students on programme (set) 1: student experience (PRT split into 2 groups of 6 to 10 students, including some students responsible for writing the Student Report).

17:45 - 18:30 Alumni/graduates from both programmes (a mixed group): student experience; programme value added; job profiles; support for and from alumni (8-10 alumni with 2 PRT members).

17:45 - 18:30 Corporate links for both programmes: employers of programme graduates, providers of internships or placements, regular visiting speakers/lecturer (8-10 corporates with 2 PRT members).

19:30 Dinner at hotel in private room for the Peer Review Team alone for discussion and preliminary evaluation of Programme (set) 1

**Day 2**

**Programme (set) 2:**

09:00 - 10:30 Programme Director and management team: programme objectives & target markets; curriculum rationale and design; delivery and assessment methods; student selection; faculty management re programme delivery; corporate learning experience; international learning experience; infrastructure and resource support; programme marketing; graduate employment; stakeholder feedback.

10:30 - 11:45 Peer Review Team assessment of programme (set) 2 materials and student work

11:45 - 13:00 Faculty staff teaching on programme set (2) who deliver a particular course(s)/module(s) in the programme*: list by subject area with a table of all the modules/courses taught by faculty member; qualifications and experience; relevant scholarly activity; pedagogical approaches; student support (PRT split into 2 groups of 4-5 faculty).

13.00 - 13.45 Buffet lunch in Base Room – Peer Review Team alone for discussions

13:45 – 14:30 Students on Programme (set) 2: student experience (PRT split into 2 groups of 6 to 10 students, including some students responsible for writing the Student Report).

14:30 - 15:30 Peer Review Team further assessment of programme (set) 2 materials and student work *

15:30 - 16:30 Resources relevant to both programmes:
- Group 1 - information & library resources; technology for pedagogy
- Group 2 - financial resources, generalised student support & services
(PRT split into 2 groups)

16:30 - 17:00 Site visit

17:00 - 17:30 If required by the PRT, further discussion with the Programme Directors

19:30 Dinner at hotel in private room for the Peer Review Team alone for discussion and evaluation of Programme (set) 2

**Day 3**

09:00 - 10:00 Staff responsible across all programmes for Quality Assurance: quality processes and systems covering teaching quality, assessment consistency, programme reviews

10:00 - 12:00 Final discussions and preparation of feedback

12:00 - 12:30 Oral feedback to the Institution

* The courses to be selected for evaluation in the Base Room are specified in the EPAS Process Manual (see Annex 6). The selected teaching materials, assignments set and examples of students’ work will relate to particular faculty members. These are the faculty members who should be interviewed in the faculty sessions at 14:45 on Day 1 and 11:45 on Day 2. The materials will be assessed both before and after discussions with the programme management team and the faculty members.
ANNEX 9

EPAS Quality Profile
EPAS QUALITY PROFILE
1 programme (or programme set)

Name of the Institution:

Name of the Programme (or Programme Set):

Date of the evaluation:

The quality standards for each of the criteria should be assessed against the three definitions in the table below. For a programme (or programme set) to be accredited, it is likely that most entries in the table will ‘Meets Standard’, with only a few ‘Below Standard’ and some ‘Above Standard’.

<table>
<thead>
<tr>
<th>Definition</th>
<th>Description</th>
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<tr>
<td>Meets Standard</td>
<td>The programme satisfies the EPAS standard in this area as defined in the EPAS Standards and Criteria document. Most positive assessments are expected to fall in this broad category. It is not to be interpreted as meaning that the programme is mediocre or that it barely qualifies at a minimum level.</td>
</tr>
<tr>
<td>Above Standard</td>
<td>The programme demonstrates outstanding quality in this dimension, well above the level required to satisfy the EPAS standard in this area, and can even be considered as an example of “best practice”.</td>
</tr>
<tr>
<td>Below Standard</td>
<td>The programme is judged to be below the threshold of the EPAS standard in this area.</td>
</tr>
<tr>
<td>N/A</td>
<td>Not considered applicable and/or relevant to the programme concerned.</td>
</tr>
</tbody>
</table>

Note
Decisions on accreditation by the EPAS Accreditation Board are based on the Peer Review Report, Quality Profile (QP) and Criteria Evaluation Form (CEF).
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<td>Mission and strategy in its national &amp; international context</td>
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<td>1.1.2</td>
<td>Availability of resources to implement the strategy</td>
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<td>1.1.3</td>
<td>Present positioning relative to its programme competitors</td>
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<td>1.1.4</td>
<td>Internal institutional governance &amp; management</td>
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<td>1.1.5</td>
<td>Institutional culture re internationalisation</td>
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<td>1.1.6</td>
<td>Institutional culture re corporate focus</td>
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<td>1.1.7</td>
<td>Institutional culture re ERS</td>
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<tr>
<td>1.2</td>
<td>Physical resources and facilities for the programme(s)</td>
</tr>
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<td>1.2.1</td>
<td>Learning environment (e.g. classrooms, study spaces, library)</td>
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<tr>
<td>1.2.2</td>
<td>IT: e-learning platform, databases, computer access, etc.</td>
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<td>1.3</td>
<td>Faculty for the programme(s)</td>
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<td>1.3.1</td>
<td>Adequacy of faculty: qualifications, size and subject profile</td>
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<td>1.3.2</td>
<td>Faculty intellectual contribution (e.g. research) to teaching</td>
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<tr>
<td>1.3.3</td>
<td>Teaching ethos towards academic depth &amp; rigour</td>
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<td>1.3.5</td>
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<td>1.3.7</td>
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<td>2.2.4</td>
<td>Balance of academic and managerial dimensions</td>
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<td>2.2.5</td>
<td>Inclusion of external guidelines (e.g. EQUAL, PRME)</td>
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<td>2.2.6</td>
<td>Up-to-date design incl. opportunities for integrated learning</td>
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<td>2.2.7</td>
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<td>2.2.8</td>
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<td>2.2.9</td>
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<td>Appropriateness of delivery methods (e.g. FT, PT, modular, online)</td>
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### 4.3 Alumni

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<td>Support for and from the programme’s alumni association</td>
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### 4.4 Programme reputation

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<td>4.4.1</td>
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### REPEATS OF ASSESSMENTS FROM PREVIOUS CHAPTERS

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### Sect. 5 Quality Assurance Processes

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### 5.2 Quality assurance on operations

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<td>5.2.3</td>
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<td>5.2.4</td>
<td>Feedback to students on assessments</td>
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*NB: The shaded boxes in Section 4 are a repeat from previous chapters and should not be double counted.*
EPAS CRITERIA EVALUATION FORM
1 programme (or programme set)

Note
The EPAS Criteria Evaluation Form (CEF) is intended to be a working document for Peer Reviewers to help them build up their assessment of the Programme(s) during the on-site visit. It will also serve as a basis for the drafting of the Peer Review Report following the visit. The members of the Peer Review Team (PRT) must complete at least those sections rated ‘above’ or ‘below’ standard and comment on those aspects that ‘marginally meet the standard’.
A fuller description of each criterion listed below can be found in the document entitled EPAS Standards and Criteria, which should be read in conjunction with this checklist.

Name of the Institution:

Name of the Programme (or Programme Set):

Date of the evaluation:

1. Institutional Context

<table>
<thead>
<tr>
<th>SECTION</th>
<th>Institutional strategy and management</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Mission and strategy in its national &amp; international context</td>
</tr>
<tr>
<td>1.1.1</td>
<td>Availability of resources to implement the strategy</td>
</tr>
<tr>
<td>1.1.2</td>
<td>Present positioning relative to its programme competitors</td>
</tr>
<tr>
<td>1.1.3</td>
<td>Internal institutional governance &amp; management</td>
</tr>
<tr>
<td>1.1.4</td>
<td>Institutional culture re internationalisation</td>
</tr>
<tr>
<td>1.1.5</td>
<td>Institutional culture re corporate focus</td>
</tr>
<tr>
<td>1.1.6</td>
<td>Institutional culture re ERS</td>
</tr>
<tr>
<td>1.2</td>
<td>Physical resources and facilities for the programme(s)</td>
</tr>
<tr>
<td>1.2.1</td>
<td>Learning environment (e.g. classrooms, study spaces, library)</td>
</tr>
</tbody>
</table>
1.2.2 IT: e-learning platform, databases, computer access, etc.

1.3 Faculty for the programme(s)

1.3.1 Adequacy of faculty: qualifications, size and subject profile

1.3.2 Faculty intellectual contribution (e.g. research) to teaching

1.3.3 Teaching ethos towards academic depth & rigour

1.3.4 Internationalisation of the faculty

1.3.5 Faculty engagement with the corporate world

1.3.6 Faculty engagement with ERS

1.3.7 Faculty management (e.g. workload, performance, development)

2. Programme Design

SECTION

2.1 Programme objectives and target markets

2.1.1 Coherence of programme objectives & fit with institutional context

2.1.2 Appropriateness of target markets & intended graduate profile

2.1.3 Marketing/promotion of the programme (including institutional context)

2.2 Curriculum design

2.2.1 Clarity of programme rationale

2.2.2 Specification of Intended Learning Outcomes (ILOs)

2.2.3 Programme structure and content/coverage

2.2.4 Balance of academic and managerial dimensions
### 2.2.5 Inclusion of external guidelines (e.g. EQUAL, PRME)

### 2.2.6 Up-to-date design including opportunities for integrated learning

### 2.2.7 International focus of the programme

### 2.2.8 Responsiveness to corporate needs

### 2.2.9 Coverage of ERS and other trends in society

### 2.3 Design of delivery modes and assessment methods

#### 2.3.1 Appropriateness of delivery methods (e.g. FT, PT, modular, online)

#### 2.3.2 Structure and balance of in- to out-of-class learning

#### 2.3.3 Quality of programme management & administration

#### 2.3.4 Quality of student handbooks, etc.

#### 2.3.5 Assessments methods explicitly designed to match ILOs

#### 2.3.6 Range of student assessment methods

#### 2.3.7 Focus on individual assessment

### 3. Programme Delivery and Operations

### SECTION

#### 3.1 Student recruitment

#### 3.1.1 Appropriateness of entry criteria & their application in selection

#### 3.1.2 Quality of incoming students – qualifications & experience

#### 3.1.3 Internationalisation of the student body
### 3.1.4 Enrolment and induction processes

### 3.2 Pedagogy

#### 3.2.1 Quality of teaching & learning delivery

#### 3.2.2 Pedagogical innovation (e.g. use of e-learning platforms)

#### 3.2.3 Quality of the teaching/learning materials

#### 3.2.4 Focus on student centred learning

### 3.3 Personal development of students

#### 3.3.1 Quality of overall personal development

#### 3.3.2 Individualised learning support from faculty

#### 3.3.3 Development of transferable intellectual skills

#### 3.3.4 Quality of support services (e.g. counselling, international office)

### 3.4 International aspects

#### 3.4.1 Quality of overall international learning experience

#### 3.4.2 Quality of the international partners & exchanges

#### 3.4.3 Student take up of opportunities to study/work abroad

#### 3.4.4 Preparation as potential international managers

### 3.5 Corporate interactions

#### 3.5.1 Quality of overall corporate learning experience

#### 3.5.2 Teaching input from practitioners

#### 3.5.3 Other corporate involvement (e.g. provision of internships)
### 3.5.4 Take up of opportunities for project-based work, internships

### 3.6 Ethics, Responsibility and Sustainability

#### 3.6.1 Quality of the overall ERS learning experience

#### 3.6.2 Linkage of ERS to the students’ future roles as managers

## 4. Programme Outcomes

### SECTION

#### 4.1 Quality of student/participant work

##### 4.1.1 Objectivity & rigour in the assessment process

##### 4.1.2 Confirmed achievement of ILOs

##### 4.1.3 Standards of student exams/coursework

##### 4.1.4 Standards of student theses/projects/dissertations

##### 4.1.5 Evidence of academic depth

##### 4.1.6 Progression and pass rates meet international norms

#### 4.2 Graduate quality

##### 4.2.1 Quality of graduates meets programme objectives

##### 4.2.2 Quality of career placement services

#### 4.3 Alumni

##### 4.3.1 Support for and from the programme’s alumni association

#### 4.4 Programme reputation

##### 4.4.1 Evidence for programme reputation
## 5. Quality Assurance Processes

<table>
<thead>
<tr>
<th>SECTION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>5.1 Design and review processes</strong></td>
<td><strong>5.1.1 Institutional QA systems</strong></td>
</tr>
<tr>
<td><strong>5.1.2 Programme design/review &amp; approval process</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5.1.3 Inclusion of different stakeholder perspectives</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5.1.4 Internal annual programme review</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5.1.5 External periodic fundamental review processes</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5.2 Quality assurance on operations</strong></td>
<td><strong>5.2.1 Student feedback on teaching &amp; programme quality</strong></td>
</tr>
<tr>
<td><strong>5.2.2 Monitoring of teaching quality by programme management</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5.2.3 Monitoring of the assessment regime for consistent standards</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5.2.4 Feedback to students on assessments</strong></td>
<td></td>
</tr>
</tbody>
</table>
### EPAS CRITERIA EVALUATION FORM

#### Overall Assessment

**Name of the Institution:**

**Name of the Programme (or Programme Set):**

**Date of the evaluation:**

<table>
<thead>
<tr>
<th>Does the Programme qualify for EPAS Accreditation?</th>
<th>YES or NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please state the Programme’s:</td>
<td></td>
</tr>
<tr>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>If yes, for what period should accreditation be awarded?</td>
<td>3 YEARS or 5 YEARS</td>
</tr>
<tr>
<td>In the case of a 5-year recommendation, please state your suggestions for the Development Objectives to be followed by the Institution during the accreditation period.</td>
<td>1.</td>
</tr>
<tr>
<td>In the case of a 3-year recommendation, please state your suggestions for the Areas for Improvement required from the Institution in order to maintain accreditation.</td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
<tr>
<td>Other comments:</td>
<td></td>
</tr>
<tr>
<td>Please identify one activity of the Institution which could be considered as good/best practice.</td>
<td></td>
</tr>
</tbody>
</table>

*Note: If you did not see an example of good or best practice during the review, then please leave this section blank.*

EPAS Process Manual Annexes 56
ANNEX 11

EPAS Doctoral Accreditation
1. Definition and Scope of Doctoral Programmes

The EPAS system covers so-called first doctorates, which may be pursued after successfully completing a Bachelors programme (e.g. US/UK PhD/DBA programmes) or a Master’s programme (e.g. Continental European doctorates). The scope is therefore confined to programmes leading to a PhD, DBA or Doctor equivalent and excludes advanced doctoral qualifications (e.g. Habilitation leading to a Dr. habil or DSc).

The scope of EPAS only extends to formal degree programmes at the doctoral level. In addition to writing a thesis, they must include a taught component, which prepares students to conduct individual research.

2. Characteristics of Doctoral Degrees

The following characteristics are drawn from the EQUAL Position Paper on Doctoral Degrees\(^2\) in Business and Management and the Dublin Descriptors (JQI Oct 2004). Doctoral degrees are third cycle degrees (Bologna framework) and therefore above the level of Masters degrees or equivalent. Students being awarded doctoral degrees should have demonstrated:

- A systematic understanding of a field of study and mastery of the skills and methods of research associated with that field
- The ability to conceive, design and implement a substantial process of research with scholarly integrity
- A contribution through original research that extends the frontier of knowledge by developing a substantial body of work, some of which merits national or international refereed publication
- The capability of critical analysis, evaluation and synthesis of new and complex ideas
- The ability to communicate with their peers, the larger scholarly community and with society in general about their areas of expertise
- The ability to promote (within academic and professional contexts) technological, social and cultural advancement in a knowledge-based society

Doctoral degrees in Business and Management can place emphasis on the development of new knowledge and theoretical perspectives and this will normally lead to PhD or DPhil or similar titles. They can also be oriented towards a significant contribution to the enhancement of applied/professional practice through the application and/or development

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\(^2\) New EQUAL Guidelines on Doctoral Degrees were published in 2016 and are included in the latest version of the document “Guidelines & Position Papers: Supporting Material for the EQUIS and EPAS Accreditation Systems” which can be downloaded from the EFMD website.
of theoretical frameworks. Where this is the main orientation, this will normally lead to the DBA or similar title.

3. **Eligibility**

For a doctoral programme to be eligible to enter the EPAS process, it must have the following characteristics:

a. A formally structured format, e.g. research methods and advanced theory courses (possibly embedded in a separate Research Masters programme) usually delivered by research-active faculty
b. Appropriate entry criteria (recognising country differences)
c. At least 3 years of graduates with at least 10 graduates over a 3-year period (replaces Item 6*)
d. Minimum aggregate intake of 20 students for the past 3 years (replaces Item 7*)
e. Offered within a strong research environment in which most faculty should be actively involved in research
f. Supervising faculty should normally themselves have doctorates and should have a strong track record of conducting high quality research appropriate to the subject.
g. Next to the advancement of knowledge, doctoral research should be practically relevant in its specific context (replaces Item 9*).

Unless stated otherwise above (marked *), the general EPAS eligibility criteria apply (see Section 4.1 of the EPAS Process Manual).

4. **Review Criteria (following the EPAS Programme Accreditation Framework)**

The criteria will follow the structure of the EPAS Programme Accreditation Framework and, unless stated otherwise in this Annex, the general EPAS criteria will also apply. The following criteria amplify and clarify the standard EPAS criteria in the context of doctoral programmes. They are often put in question form allowing the Peer Review Team to use their judgement according to circumstances.

**Institutional Context**

a. **Sustainability**
   - Does the Institution offer a vibrant research environment so as to sustain a doctoral programme?
   - Does the Institution have sufficient resources (e.g. research student funding) to sustain the programme in the longer term?

b. **Faculty**
   - Are faculty members actually involved in the programme doctorally qualified? In particular, do faculty acting as main or chief supervisors hold doctoral degrees? If not, do they have a significant and current research record?
   - Are the faculty members involved in thesis supervision themselves research active and are they publishing academically on a regular basis? Are they supervising doctoral research projects in their specialist area of expertise?
   - Do the supervisors have sufficient supervisory experience and/or training?
   - Do they have sufficient time capacity to supervise their current number of doctoral students?
• How are the faculty managed relative to the doctoral programme? For example, how is it decided who is involved in the programme (either teaching or supervising); how do faculty develop from junior to senior supervisors; what incentives are offered (e.g. supervision included in work load allocations)?

c. Resources / Infrastructure
• Is funding available to students for research purposes (e.g. data collection) and for attending research conferences?
• Are there opportunities for students to earn additional income through teaching or other academic activities?
• How effective have the Institution and/or the students been in the past in obtaining research funding in support of doctoral research projects?
• Is satisfactory research space made available to students, e.g. own desk or office?
• Are IT services received by students satisfactory? Is there sufficient access to information resources (e.g. research library, databases, statistical software)? (The Institution should benchmark itself against international state-of-the-art in tabular form.)

Programme Design

a. Curriculum design
• Do students receive an adequate training in research methods enabling them to carry out independent research at the thesis stage of the programme?
• Does the curriculum include taught subject-based classes designed and appropriate for doctoral students?
• Are there other formal learning / personal development activities?
• What are the formal research supervision arrangements? How often can students expect to have discussions with their supervisors?

b. Delivery modes
• Can students study part time? If so, how does the programme operate for taught classes and how is supervision made effective?
• Are doctoral students treated equally in terms of research supervision, funding, assistantships etc.?

c. Assessment design and progression
• How is student progress monitored? What are the criteria for progressing to the next stage? What are the processes (e.g. annual presentation before a committee or jury) for progress decisions?
• What format of thesis is expected from doctoral students (e.g. monographic thesis vs. 3-paper format)? Why is this format chosen by the Institution?
• How is the final assessment made? Is there an oral defence of the thesis? Are external assessors involved in this assessment?
• How are theses outcomes made available to the wider research community?

Programme Delivery & Operations

a. Student recruitment
• What are the entry requirements and is a Master’s degree or equivalent a necessary pre-requisite?
• Do students have to submit a draft research proposal as part of their application portfolio? How important is this proposal for the selection decision?
b. Pedagogy
- Are the teaching methods and learning materials appropriate for a doctoral-level programme?
- Do students receive a sufficiently broad introduction to the literature in their field of specialisation (e.g. finance)?
- What guidance and support do students receive in understanding the literature underpinning their thesis-related research?

Programme Outcomes

a. Assessment output
- Have the graduates from the programme generally met the Descriptors for third cycle degrees stated in Section 2 above?
- What is the quality of the student theses?
- Do student theses have appropriate academic depth?
  - Is there a sound methodology based on a wide and deep bibliography?
  - Were the research questions well specified?
  - Was the theoretical or empirical work carried out rigorously?
  - Were reasonable conclusions drawn?
  - Were wider implications and possibly applications discussed?
  - Were lines of further research envisaged?
  - Was there a contribution to knowledge or practice?
- Do students normally publish academic journal articles from their doctoral research?
- What are the completion rates (% of intake) and times to completion?

b. Personal development – qualities and attributes
- To what extent have students developed as independent researchers?
- Have they developed teamwork skills for collaborative research?
- Have they acquired a culture of publishing in journals?
- Have they had the opportunity to develop teaching skills?
- Have they had the opportunity to act as student mentors or perhaps project supervisors at lower levels?
- To what extent do doctoral students conduct research supplementary to writing their thesis?

c. Career impact
- For those targeting an academic career, what has been their initial job profile? Which Institutions made job offers and at what level? What impact have past graduates made in their first 5 years after graduation?
- For those targeting a professional career, in what types of organisation and in what roles have graduates been employed after graduation? What has been their career progression in the first 5 years after graduation? What impact have they made on their employer’s organisation?
d. Doctoral programme reputation
   • What evidence is there for the reputation of the programme nationally and internationally?

Quality Assurance Processes

   • What QA features, additional to the normal academic QA systems in the Institution, apply to the doctoral programme?
   • Does the Institution have formal ethics guidelines for research, which also apply to the doctoral programme? Has the Institution established an Ethics Committee to enforce these guidelines and how effective is enforcement?
   • Has the Institution appointed a Committee or an Ombudsman to ensure that conflicts between supervisors and doctoral students are resolved in a fair manner?

5. Peer Review Visit

In the case of a PhD programme, the EPAS Office may replace the corporate member of the Peer Review Team by a fourth academic.

The visit will follow a specific template (to be provided by the EPAS Office) similar to the normal template with the following modifications:

   • Session with programme management reduced to 60 minutes
   • No session with corporate partners
   • Two consecutive faculty sessions, one with faculty active in the taught part of the programme and one with supervisors of doctoral theses
   • Additional time in the Base Room for reading of theses, etc.

6. Base Room Requirements

Additional materials need to be supplied in order for the Peer Review Team to evaluate the quality of doctoral thesis work:

   • The Institution is asked to supply doctoral thesis abstracts for either the 30 most recent graduates or all graduates for the past 5 years (whichever number is lower). The EPAS Office will then select 12 for which the following information in hard copy should be supplied:
     o a copy of the doctoral thesis
     o a copy of the current CV (if available)
     o copies of publications derived from the doctoral thesis
     o other major publications since graduation

   The thesis abstracts should be sent to the EPAS office together with the draft visit schedule 6 weeks before the date of the Peer Review Visit.

   • The Institution is asked to supply a tabular listing of all current faculty supervisors, which includes
     o research performance for the past 3 years as judged by the Institution
o completed supervisions for the past 5 years as well as current supervisions, possibly differentiated between different supervisory roles (e.g. first or second reader).

- The Institution is asked to supply a table matching numbers of research-active faculty with the numbers of doctoral students in the different subject areas covered by the programme.
ANNEX 12

EPAS Review of Off-Campus Provision including Distance, Online, Technology Enhanced and Blended Learning Programmes
Additional issues for consideration by Reviewers

Off-campus programmes are defined as programmes that are delivered to students who do not normally attend classes at one of the Institution’s main campuses. The delivery mode may entail a mix of delivery of teaching or learning materials in hard copy or electronically; teaching by tele- or video- or e-conferencing, or by brief intensive teaching sessions delivered locally, or none at all; student support at a distance or locally; assessment locally or centrally by electronic or hard copy means.

It is recognised that the terms Distance Learning (DL), Online Learning (OL), Technology Enhanced Learning (TEL) and Blended Learning (BL) may entail delivery of learning in very different ways in different institutions. The normal EPAS Standards and Criteria apply to such Distance, Online and Blended Learning programmes or to traditional programmes with distance/online/blended components. These guidelines can also include on-campus programmes run by institutions with virtual (“fly-in”) faculty. However, the following non-exhaustive list of additional issues should also be considered:

1. Institutional Context

- What is the strategic rationale for this mode (DL/OL/TEL/BL) of delivery?
- How well is it resourced and supported by the Institution? In particular, is the technology state-of-the-art and is the support infrastructure of good quality?
- Is the e-learning platform satisfactory for this mode of delivery and does it allow for ease of interactive communication between faculty and students, and within student cohorts?
- Do off-campus students have good access to academic learning and support materials?
- Has the Institution’s core faculty been sufficiently developed to deliver in this mode? If non-core faculty (including local off-campus) members are used, how do they compare to the core faculty in terms of quality and how are any quality differences justified?
- What processes exist for the development of DL/OL/TEL/BL study materials? What incentives exist to encourage faculty to develop such courses and how is this reflected in the Institution's workload management system?
2. **Programme Design**

- Are the degree award, its academic standards and its curriculum equivalent to the Institution's on-campus offerings, particularly when using the same degree title?
- When offering the same degree on and off campus, are the programme objectives and ILOs the same; are the component courses and their ILOs broadly similar; are the assessment methods similar and should they lead to the standards of student work being comparable?
- What adjustments does the Institution apply to the management of DL/OL/TEL/BL programmes? How well do these adjustments address the challenges of operating programmes in DL/OL/TEL/BL mode?

3. **Programme Delivery & Operations**

- Are the selection criteria for students applying to the programme the same across delivery modes? Is the quality of off-campus students comparable with on-campus students?
- Do off-campus students have an induction into learning methods for DL/OL/TEL study? What academic and welfare support mechanisms are in place for them?
- How effective is the interaction between students themselves and with faculty and programme management? Does it enhance learning?
- What is the quality of the learning materials and how well are they designed to support DL/OL/TEL/BL delivery?
- What are the differences in teaching/learning methods for the DL/OL delivery? Do these lead to a broadly similar learning experience at least in terms of achieving the overall ILOs?
- How are projects and theses supervised?
- How are the students' international and corporate learning experiences facilitated?

4. **Programme Outcomes**

- Is the standard of actual student work comparable to on-campus provision?
- Are effective processes in place to ensure that work submitted is the student’s own work?
- Do grading or degree results compare across delivery modes?

5. **Quality Assurance Processes**

- What systems are in place to ensure that the quality of off-campus programme/courses meet the standards of on-campus provision?
- What methods are used to monitor teaching/learning quality?
- What methods are used to ensure the integrity of the student assessment methods?
- How are the views of off-campus students collected and integrated into the periodic reviews of the programme?
ANNEX 13

EPAS Annual Progress Report Form
### EPAS ANNUAL PROGRESS REPORT FORM

<table>
<thead>
<tr>
<th>Name of the Institution:</th>
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</table>

<table>
<thead>
<tr>
<th>Name of the Programme (Set):</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Date of Accreditation Decision:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Areas for Improvement of the Programme (Set):</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
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</table>

<table>
<thead>
<tr>
<th>Progress Report 1:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date:</td>
</tr>
<tr>
<td>Submitted:</td>
</tr>
<tr>
<td>Feedback Provided:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall assessment of progress:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Above Expectations</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Progress Report 2:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date:</td>
</tr>
<tr>
<td>Submitted:</td>
</tr>
<tr>
<td>Feedback Provided:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall assessment of progress:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Above Expectations</td>
</tr>
</tbody>
</table>

*(Information above added by EFMD Quality Services)*
Guidelines:

- The Institution should be aware that the achievement of progress is a very important dimension in re-accreditation decisions of the EPAS Accreditation Board. The Accreditation Board may deny re-accreditation if the Institution has shown insufficient effort in addressing the Areas for Improvement and no tangible progress has been achieved for most of them.

- The EPAS Progress Report Form represents a living document enabling Institutions to record relevant changes and initiatives for the programmes (or programme sets) accredited within the EPAS system. These reports, including the feedback, are an important part of the documentation received by the PRT for re-accreditation. In the first year, plans for action should be stated at minimum and, in the second year, tangible progress must be reported backed by factual evidence.

- The Institution will receive a customised progress report form at least 9 months prior to the submission deadline. Only this customised form may be used for progress reporting by adding text in the appropriate boxes. When completing the form, please do not delete any sections and do not change the formatting of this template.

- The Institution is expected to address the headings of each text box with a succinct but informative summary of the programme developments. It is essential that all arguments are supported by factual evidence and that the effectiveness of developmental initiatives is evaluated on the basis of tangible impact. Normally the length of the report should not exceed 8 pages for 1 programme (or programme set) and 12 pages for 2 programmes (or programme sets) excluding any appendices.

- The Institution may support its arguments with internal documents, which can be added as separate appendices. This option should however be used very selectively. The Institution should be aware that the next Peer Review Team will receive past progress reports without any appendices.

- A formal overall rating for each Area for Improvement of the progress report includes the following categories:
  
  o **Above Expectations**: The Institution appears to be making significant progress. At the present state and given the evidence presented, the Institution is expected to deal with the Areas for Improvement to the full satisfaction of the EPAS Accreditation Board.
  
  o **Meets Expectations**: The report is sufficiently detailed and demonstrates that the Institution is making sufficient progress. At the present state and given the evidence presented, there is a reasonable chance that the Institution will be able to deal with most of the Areas for Improvement to the full satisfaction of the EPAS Accreditation Board.
  
  o **Below Expectations**: The report is sufficiently detailed, but shows that the Institution is making insufficient progress in addressing the Areas for Improvement. At the present state and given the evidence presented, the Institution is unlikely to satisfy the expectations of the EPAS Accreditation Board.

- In addition, a formal overall rating of the whole report has been introduced:
  
  o **Above Expectations**: Overall progress exceeds the expectations of the EPAS Accreditation Board
  
  o **Meets Expectations**: Overall progress meets the expectations of the EPAS Accreditation Board
  
  o **Below Expectations**: Overall progress fails to meet the expectations of the EPAS Accreditation Board
  
  o The report may be deemed **Not Acceptable** if it is excessively vague and lacks factual support in key areas. In this case, the Institution is asked to revise and resubmit the progress report within 4 weeks after receiving the initial feedback.
**FIRST PROGRESS REPORT Year 2018-2019**

### Strategic Developments within the Institution and/or the programme (set)

#### Description of strategic developments within the Institution/programme (set)

Add text here…

Feedback from the EPAS Office:

---

### Area for Improvement 1 <Description added by EPAS Office>

#### Description of progress towards the Area for Improvement

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

Feedback from the EPAS Office:

<table>
<thead>
<tr>
<th>Above expectations</th>
<th>Meets expectations</th>
<th>Below expectations</th>
</tr>
</thead>
</table>

### Area for Improvement 2 <Description added by EPAS Office>

#### Description of progress towards the Area for Improvement

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

Feedback from the EPAS Office:

<table>
<thead>
<tr>
<th>Above expectations</th>
<th>Meets expectations</th>
<th>Below expectations</th>
</tr>
</thead>
</table>

### Area for Improvement 3 <Description added by EPAS Office>

#### Description of progress towards the Area for Improvement

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

Feedback from the EPAS Office:

<table>
<thead>
<tr>
<th>Above expectations</th>
<th>Meets expectations</th>
<th>Below expectations</th>
</tr>
</thead>
</table>
### Other Developments

<table>
<thead>
<tr>
<th>Description of Other (Relevant) Developments</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Add text here…</td>
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Feedback from the EPAS Office:

### Overall Feedback Year 2018-2019

<table>
<thead>
<tr>
<th>Overall Feedback</th>
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ANNEX 1 - Student Intake Numbers

Please complete the table below and provide data on the profile of applicants and student intakes into the 1st year of study (for the 3 most recent years) for each mode of delivery and intake. There should be a separate table for each mode of delivery. If you have more than one intake per year, please add sub-columns for each intake. If intakes are on a continuous basis, please enter the intake per year and indicate it.

<table>
<thead>
<tr>
<th></th>
<th>Current year</th>
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<tbody>
<tr>
<td>No. of formal applicants</td>
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<td>No. of students actually enrolled in current 1st year intake</td>
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<td>Average no. of years work experience</td>
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<td>Least no. of years work experience on the programme</td>
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Notes
1. There should be a minimum of 25 (20 for specialist programmes) students for eligibility for each mode of delivery and intake. This minimum must be met throughout the accreditation process and accreditation period.
2. The no. of years of work experience is not applicable for Bachelor or first degree programmes.

Feedback from the EPAS Office:
## SECOND PROGRESS REPORT Year 2019-2020

### Strategic Developments within the Institution and/or the programme (set)

**Description of strategic developments within the Institution/programme (set)**

Add text here…

Feedback from the EPAS Office:

### Area for Improvement 1 <Description added by EPAS Office>

**Description of progress towards the Area for Improvement**

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

Add text here…

Feedback from the EPAS Office:

<table>
<thead>
<tr>
<th>Above expectations</th>
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### Area for Improvement 2 <Description added by EPAS Office>

**Description of progress towards the Area for Improvement**

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Add text here…

Feedback from the EPAS Office:

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### Area for Improvement 3 <Description added by EPAS Office>

**Description of progress towards the Area for Improvement**

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Feedback from the EPAS Office:

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<td>Other Developments</td>
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<td><strong>Description of Other (Relevant) Developments</strong></td>
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**Feedback from the EPAS Office:**


ANNEX 14

Policy on Collaborative Provision and Joint Programmes
POLICY ON COLLABORATIVE PROVISION AND JOINT PROGRAMMES

An increasing number of Institutions run degree programmes in collaboration with partner institutions in which the lead or parent Institution (normally the Institution seeking accreditation) makes the final award, i.e. awards the degree or diploma. Sometimes awards are made jointly. The partners may be located in the same country or offshore; they may be educational institutions, including universities, or commercial or professional organisations. Since this activity is increasing, due both to demands of mass higher education and the income generating opportunities open to business schools, EFMD has developed this policy statement on how this type of provision will be evaluated.

There are various forms of collaboration, which include for example; pure distance learning delivery, face-to-face teaching by the parent at the partner institution, fully franchised programmes taught by the partner, jointly owned and delivered programmes. In practice, there are often blurred boundaries between delivery mechanisms.

I - Single Programmes

a) **Home institution’s awards**: Any programme submitted for EPAS review which also includes collaborative or off-campus delivery methods must include assessment of those methods in the EPAS process. The assessment process will follow the normal EPAS process but will also involve evaluating the Quality Assurance processes in place for the off-campus provision including host partners. However, the accreditation, once awarded, only applies to the home institution’s programmes and the EPAS logo may only be used on that institution’s publicity materials.

b) **Another institution’s awards**: If the programme submitted for EPAS review leads to a degree award from another institution (e.g. validated degree, jointly taught degree), then the submitting home institution must have a significant degree of control (at least equal shares) over the programme in terms of its design, admissions decisions, delivery, assessment of students and the final award decisions. Without that degree of control, the programme will not be eligible for EPAS accreditation. The purpose of this policy is that institutions must have the right and ability to make such changes to the programme as required during the EPAS process. If declared eligible, the other institution will be also expected to take part in the EPAS process, e.g. involvement in writing the Self-Assessment Report and attendance at the Peer Review Visit. Once accredited, the EPAS logo may be used only on the submitting home institution’s programme publicity materials.

c) **Joint programmes with joint ownership and awards**: If the programme under review is owned jointly with one or more partners who all have some control over the programme in terms of design, delivery, assessment and award granting, then the revised process explained below will apply. Once accredited, the EPAS logo may be used on the programme publicity materials of all the partner institutions.
II - Joint Programmes with Collaborating Partners

1. Background

EPAS normally assesses and accredits single programmes (or suites of programmes) from individual institutions. These programmes must have a significant international perspective. Joint programmes offered by international consortia naturally have an international perspective and EPAS has modified its processes in order to accredit such programmes. This section gives the EPAS definition of joint programmes and explains the revisions to the normal EPAS processes required to carry out the assessment of such programmes.

2. Definition of Joint Programmes

A joint programme is defined as having the following characteristics:

a) It is offered by a stable consortium or partnership of two or more institutions. Each of the partner institutions must be a member of EFMD and only partner institutions that are members of EFMD can have a joint programme accredited by EPAS.

b) It is jointly designed.

c) It is jointly taught either in one location or in several places.

d) For example, the students stay in one location but each of the partners provides teaching input at that location or the students move from one location to another and are taught by the receiving institutions or some combination thereof.

e) It is jointly assessed to the extent that all partners agree the forms of assessment in each location and agree the overall assessment for each student when conferring their awards.

f) The degree is awarded by all the institutions jointly with a common degree certificate which must list all the partners that are EFMD members. However, EPAS recognises that, for legal or regulatory reasons, institutions may also have to award their own degrees.

Franchised and validated degrees offered by off-campus or offshore partners are not included in this definition. They are covered by the EPAS processes for awards from another institution explained above in section I.

3. Revised Process

a) The application must be led by one Institution (as the main contact point) but signed by all partners. The lead Institution would normally either be the leader of the consortium or association or be the institution at which the larger or core proportion of the programme is taught.

b) The Self-Assessment Report needs to include the relevant background on all partners and the rationale for the joint programme. The maximum length of the report may therefore be extended as specified by the EPAS Office.

c) The Peer Review Visit should be based at the lead Institution but may include a shorter visit to all or some of the other partners (depending on the size of the consortium). All partners should be represented at the main visit. The EPAS Office will decide on which other Institutions should be visited, if any. Visits to any
additional campuses should take place prior to the visit to the main campus. Such visits would take about a day and parallel the agenda of the main visit, i.e. meet faculty, students, alumni, etc. The subsidiary visits could be made by one or two members of the Peer Review Team. The EPAS Office will provide a revised template for the visit schedule as appropriate.

d) A key aspect of the review will be the quality assurance processes that operate across Institutions of the programme. Very clear evidence is required in this area, e.g. common operating procedures, committee minutes, common exam boards, cross representation on assessment processes, etc.

e) **In terms of fees, the lead Institution will be invoiced but the partnership would decide how to split the fees among them.** The application fee for the consortium will be the basic EPAS fee. The review and accreditation fees for the consortium will be calculated as follows: the basic EPAS fees plus 10% per partner institution. For example, a consortium of 4 partners will be invoiced for 130% of the review and accreditation fees.

f) Once the programme is accredited, any changes to the partnership members must be notified immediately to the EPAS Office which may then decide that a re-accreditation process may be appropriate.
ANNEX 15

Policy on Major Restructuring of an Accredited Programme
A major restructuring of an EPAS accredited programme may affect its quality to a significant extent. The Dean or Programme Director should in this case inform the EPAS Office without undue delay. The purpose is to provide an opportunity for assessing whether the accreditation should be reviewed. A few examples of a major restructuring are a complete re-design of a single programme resulting in structural change and significantly different content, merger of the single programme within a broader programme suite or set, or significant change in the core component of an accredited suite or set of programmes. The definition of major restructuring also extends to any form of institutional disruption with a substantial impact on programme operations. An example is an Institution in financial distress implementing cost-cutting measures with tangible effects on programme quality.

- As soon as the plans for a significant restructuring of an EPAS accredited programme are confirmed and are expected to become operational, the Dean (or Programme Director) should write to the EPAS Office describing the planned restructuring. The information should be provided not later than the date on which the restructuring will be formally implemented.

- An ad-hoc committee involving at least two of the EPAS Directors will preliminarily determine whether the reported restructuring is considered to be major or minor. For this purpose, a minor restructuring is one that
  a. is unlikely to affect the quality of the programme so as to require changing its accreditation status (5 year or 3 year), or
  b. alters the nature of the programme so moderately that a new accreditation process is clearly not required.

A conference call or a personal meeting with the Dean or Programme Director may be required in order to clarify or amplify the information provided.

- If the ad-hoc committee members above unanimously agree that the restructuring is minor, the Institution will be informed and its next EPAS re-accreditation will take place as originally planned.

- If the ad-hoc committee members above do not unanimously agree that the restructuring is minor, it will be considered major and the Institution will be informed that the process described below will be applied to them.

- Within three months of the date on which the major restructuring was formally approved by the Institution, the Institution will send to the EPAS Office an updated Application Datasheet reflecting the new structure and a brief report (up to 5 pages), describing the major differences between the old and the new versions of the programme.
• The Application Datasheet, the brief report on major differences, and a commentary written by an EPAS Director will be submitted to the EPAS Accreditation Board (AB) at its next meeting to decide on the accreditation status of the restructured programme. The decision, made by a simple majority vote of the EPAS AB members attending, can be:

a. **Temporary suspension of the programme’s EPAS Accreditation** until it goes through a new accreditation process.
   This decision will be based on one or more of the following reasons:
   o The new programme is substantially different from the one originally accredited.
   o The new programme no longer satisfies the EPAS Eligibility criteria.
   o The quality of the new programme is perceived to be substantially lower in one or several of the quality dimensions in the EPAS accreditation process.
   The Institution will continue to appear in the list of EPAS Accredited programmes with the label “Accreditation temporarily suspended due to major restructuring”. It will do so under its new name if the name of the programme has been changed.

b. **Maintenance of EPAS Accreditation** until its original period of validity expires; i.e. the AB does not accept the ad hoc committee recommendation.

• When the Institution has had its EPAS accreditation temporarily suspended by the EPAS AB, it must go through a new accreditation process within one year, i.e. it will need to go through the Self-Assessment and Peer Review phases.

• Any new accreditation will in principle be considered an initial accreditation although the EPAS AB will, at the appropriate time, not only decide what kind of accreditation will be granted but also whether the EPAS records should show it as the initial accreditation of the “new” restructured programme or as another re-accreditation of the “old” but restructured programme.

• The processes described may accelerate or delay the planned re-accreditation of a programme. For example, a programme that was accredited one year ago for 5 years and that is formally implementing a major restructuring in 6 months may have to go through a re-accreditation before the time of its last accreditation expires. On the other hand, a programme that was accredited 2 years ago for 3 years and that is formally implementing a major restructuring in 6 months may be entitled to postpone its originally planned accreditation for up to a further year. The justification for a delay is that a major restructuring may require some time to become embedded.

• Once the EPAS AB has made the decision to temporarily suspend the programme’s accreditation due to a major restructuring, the annual Accreditation Fee for any remaining period of the previous accreditation will no longer be due. Thus if paid annually, no more payments will be due and, if paid in advance, monies paid for the remaining period will be credited towards any new fees due. Full fees will be charged for the new cycle, i.e. the Application Fee, the Review Fee and new annual Accreditation Fees as appropriate.
ANNEX 16

EFMD Confidentiality Agreement
EFMD

CONFIDENTIALITY AGREEMENT

IN RELATION TO:

EPAS – EFMD PROGRAMME ACCREDITATION SYSTEM

Name of the Institution:
(delete if not relevant)

Date of the Visit:
(delete if not relevant)

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

I also agree to declare any potential conflicts of interest in accordance with the Policy on Potential Conflicts of Interest for EFMD Peer Reviewers.

Signature:  
Date:

NAME
TITLE
ORGANISATION
ADDRESS
ANNEX 17

Policy on Potential Conflicts of Interest for EFMD Peer Reviewers
POLICY ON POTENTIAL CONFLICTS OF INTEREST FOR EFMD PEER REVIEWERS

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 Institution 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 Institution to declare any actual or potential conflict of interest as soon as possible to the EFMD Quality Services Department.

Some sources of potential conflicts of interest may include:

1. The following types of relationships, current or past, with the Institution 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 Institution or any of its current or recent leaders.

3. Reciprocity: one of the members of the Institution 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 Institution to encourage him or her to volunteer to be a peer reviewer of the Institution.

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 Institution assessed and the reviewer’s own Institution, etc.) surrounding the situations described above. For example, working for one of the several partners of the Institution to be assessed will not be usually considered as a source of conflict of interest.
Once the conflict of interest is declared, the **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 Institution, the Quality Services Department will ask the Institution 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 Institution, 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 Institution. When the source of the conflict of interest needs to be kept confidential, this should also be made explicit.

The EFMD Quality Services (QS) Department will also maintain and regularly update an open register of the additional external interests of all QS Directors. As these individuals work with EFMD as part-time consultants, they are likely to be involved in other business school activities. When these conflict with their QS responsibilities, they will declare the conflict of interest and not take any part in any stage of the accreditation process of the Institution concerned.
ANNEX 18

Policy on Use of EPAS Accreditation for Publicity
POLICY ON USE OF EPAS ACCREDITATION FOR PUBLICITY

Purpose of the policy

To ensure that

- The EPAS label and logo are applied only to the Institutions whose programmes have been accredited
- The logo is not applied to partner Institutions (except in the case of a joint programme delivered by a consortium as described in Annex 14)
- All accredited Institutions apply the EPAS brand in a consistent way
- Publicity of EPAS is informative

Use of the EPAS logo

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

The logo may not be used on co-branded materials (e.g. programme brochures) with partner institutions such as for off-shore or off-campus provision. However, such materials may mention EPAS accreditation of the parent Institution in text inside the brochure.

The use of the EPAS logo must always conform to the EFMD guidelines. The EPAS logo must always include the word “EPAS” in capital letters since this acronym is the official name.

Use of comments from the Peer Review Report

The Peer Review Report may not be published and no extracts or other data from it may be quoted in the Institution’s publicity materials. If an Institution wishes to publicise parts of the Report (e.g. for a national accreditation body), it must first receive agreement from the EPAS Office.

The Dean or Director of the Institution, through the Institution’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 Institution. 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 EPAS Accreditation

When public reference is made to EPAS, Institutions should (where possible) either provide a brief overview of EPAS accreditation or provide a reference or link to the EPAS 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 Institutions that have been accredited or re-accredited.

Promotion of EPAS Accreditation

Effective promotion of EPAS accreditation by the Institution will help to reinforce the reputation of EPAS in the marketplace. Schools may start publicising their EPAS accreditation or re-accreditation as soon as they receive official notice (orally or written) from the EPAS Office. It is the collective effort of all EPAS accredited Institutions that will produce a more long lasting and effective impact. The following are examples of how an Institution might promote EPAS accreditation to its constituencies:

- Include the EPAS Accredited logo on the homepage of the accredited Institution’s website with a description of what EPAS stands for and a direct link back to the EPAS section of the EFMD website.

- Arrange interviews for the Dean to discuss with journalists the accreditation and value it brings to the Institution. Explain what EPAS is, what the key criteria are and how this process will bring lasting benefits to the Institution.

- 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 Institution, 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 Institution; include it in internal communication, student and alumni magazines, distributed in printed or in electronic form. If the Institution has an active social media platform, post announcements on Twitter, Facebook, LinkedIn, etc. Perhaps interview the Dean and post this as a podcast/video message.

- For EPAS 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 Institution or the Dean communicating the news verbally. The EPAS community represents some of the very best Institutions in the world and students need to understand what an achievement gaining accreditation is.

- 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 EPAS Accredited logo on all printed material, brochures and stationary where the accredited Institution is mentioned, following the above regulations.

In all external communications (addressed to candidates, recruiters, media, corporate contacts, etc.) talk about the value of EPAS Accreditation as a key achievement of the Institution.
ANNEX 19

Appeals Procedure
1. Any Institution can present an appeal against decisions on eligibility and accreditation. The Institution should notify its intention to appeal by means of a letter addressed to the Director General of EFMD not later than one month after the date of the meeting of the relevant body at which the decision being appealed was made. Otherwise, the Institution will be deemed to have accepted the decision, thereby giving up any possibility of appeal at a later stage.

2. As soon as the letter notifying the intention to appeal is received, the decision being appealed will be suspended and the Institution will return to the status it had before this decision was made until the appeal process comes to an end.

3. The Institution making an appeal must substantiate its claim that there are grounds for review beyond a mere expression of disagreement with the decision. It should submit a detailed statement of its reasons for believing that the decision should be reversed. This full appeal should be submitted in writing to the Director General of EFMD not later than two months after the date of the meeting of the relevant body at which the decision being appealed was made. The Director General of EFMD will immediately forward the appeal to the President of EFMD.

4. An Institution failing to act as indicated above will be considered to have definitively renounced its intention to appeal. The suspension of the decision will then be cancelled and the decision will be enacted.

5. The President of EFMD then appoints three members of the EFMD Board, one of whom will be the Chair, to serve as a special Appeals Committee mandated to examine the appeal.

6. The Appeals Committee will study the arguments and the supporting material provided by the Institution and consult as appropriate orally or in writing.

7. The Appeals Committee will first of all seek to establish whether there are substantive grounds for reviewing the decision being appealed. Substantive grounds for review of a decision may be of two kinds:
   a) Matters of procedure where it can be demonstrated that the documented process may not have been respected
   b) Substantiated evidence that the decision was unjustified in the light of the information made available at the time of the assessment.

3 Decisions to remove the accreditation of a school or programme will not be reflected in the list of accredited schools or programmes until this one-month period ends.
8. The Appeals Committee does not take a position on the appropriateness of the decision. It may conclude that there are grounds for review, in which case it requests that the decision-making body re-examines the case during its next meeting, or that there were failures in the process and that the process should be repeated from the stage where the failure occurred. Otherwise it may conclude that the appeal should be rejected.

9. The Appeals Committee will communicate its conclusions in writing to the EFMD President and to the EFMD Director General who will inform the Institution and the EFMD Quality Services Department not later than 3 months after receipt of the Appeal.

10. When the Appeal process comes to an end, the decision reached will become final.

11. If the outcome of the Appeal process is that the Institution is invited to undergo another Peer Review Visit, the review must take place within 12 months of the Appeals decision and a review fee will be charged at the rate pertaining on the date of that Appeals decision.

12. A deposit of 15,000 Euros is required when submitting the substantiated appeal. Once the substantiated document is received, the invoice will be issued. The deposit will be refunded if the appeal is upheld. If the appeal is rejected, the deposit will be donated to a charity proposed by the Institution and agreed by EFMD Quality Services.
Further Information and Contacts

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

http://www.efmd.org/EPAS

Alternatively, you can contact the EFMD Quality Services Office:

epas@efmd.org