



EQUIS STANDARDS AND CRITERIA:

2020 UPDATES – PUBLISHED SUMMER 2020

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FOREWORD

EFMD revises the documentation supporting EQUIS periodically and updates are normally in the Spring of each calendar year, taking effect from the start of the following January. The 2020 updates have been published a little later than normal (Summer 2020). The following is an overview of the updates made as part of the 2020 publication, together with an assessment of the significance of the change.

NB: This document represents QED's interpretation of the EQUIS Updates. We recommend that you view the updated documents directly – which are available from EFMD's website:

- [EQUIS Standards and Criteria \(2020\)](#)
- [EQUIS Process Manual \(2020\)](#)
- [EQUIS Process Manual Annexes \(2020\)](#)
- [EFMD Guidelines and Position Papers \(2019\)](#)
- [Other EQUIS Documents](#)

In addition, EFMD has provided its own summary of the main changes to the Standards. This document (in tabular format) is available from the [EFMD website here](#).

A summary of the changes is provided below, followed by a more detailed listing.

SUMMARY OF CHANGES

The majority of changes in the 2020 EQUIS Documents are not significant. The change most likely to impact Schools relates to additional guidance on the preparation of the Student Report. Specifically, EFMD has clarified that:

- The report should be 'comprehensive' – on the issues of key accreditation interest. (These are indicated by the guiding questions for the student report within Annex 10 of the EQUIS Process Manual Annexes);
- EFMD has extended its previous direction that the Student Report be compiled independently of the School, to independently of the School or any other external guidance. ***"...students should work on their own without detailed guidance or monitoring by the School or involvement of any other source of external support (i.e. no selection of students, no conducting of interviews or editing of the Student Report by the School). During the subsequent meetings with the Peer Review Team, the students should be prepared to attest to the independence of the process of producing the Student Report not having been infringed"***.
- The EQUIS Office has now indicated that it reserves the right to return any Student Reports that do not follow the required procedure (for later resubmission by the School);

A full list of the changes is provided below, with a summary note on the significance of the change where relevant.

EQUIS STANDARDS AND CRITERIA

CHAPTER 3: STUDENTS

- Additional guidance has been provided in the Student Report. EFMD has clarified that the Student Report should be produced without a) any involvement from the School's leadership or b) other external guidance. In effect, this signals a strong indication from EFMD that they wish the Student Report to be compiled completely independently by students, and without any support from School Management or external facilitators.
- Documents/Information for the Base Room: For Alumni, EFMD requests 'a description of the School's Alumni Association (e.g., members, chapters, services, activities, events, donations, etc. in the past 5 years)'. As in the previous standards, an Alumni Directory is still suggested for inclusion, if available.

(No change for Standards etc. However, potential significance for process: May impact Schools that previously relied on the use of external facilitators to co-ordinate the Student Report through Student Focus groups or similar.)

CHAPTER 5: RESEARCH & DEVELOPMENT

- An additional paragraph has been added to the introduction of this Standard (*paragraph 2*), to acknowledge the criticism that management research does not always succeed on closing the gap between research and practice – and clarifies that EQUIS strives to focus on both 'rigour' (or 'credibility of evidence') and 'relevance' (or 'usefulness of the knowledge').
- It also clarifies the expectation that a School's research framework is embedded in its environmental context (*Introduction – paragraph 4*).
- Publication of practice-oriented research in leading news outlets – such as the FT or the Economist – has been recognised as potential credible evidence of impact on practitioners (*page 43 – 2. Practice-oriented Research*)
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(Should not constitute a substantial change – though some Schools may need to add these types of outlets to their research publication data systems.)

There are no other material changes to the EQUIS Standards and Criteria.

EQUIS PROCESS MANUAL

SECTION 3: THE EQUIS ACCREDITATION PROCESS

- **Stage 2 – The Briefing Visit:** The estimated timing of the initial Briefing Visit has been extended to within six months of receipt of formal Application for Entry into the EQUIS process (previously EFMD aimed to complete these within three months).

(Minor potential timing change only)

SECTION 5: GUIDANCE FOR SELF-ASSESSMENT

- **3.3 – Student Report:** EFMD has articulated its clear expectation that students will independently compile the Student Report. Some Schools have sought to balance the independence of the Student Report with the desire to support students in its preparation (particularly in busy student periods, or for students for whom English is a second language). EFMD has requested that no support is provided from the School leadership or from external sources. *"It must be stressed that the student group should compile the Student Report independently without involvement of the School's leadership or other external guidance. The School should therefore not monitor the discussions leading up to the writing of the report and should also not be involved in the assembly of the report, other than initiating the process. If it is apparent that this independent process has not been strictly followed, the submitted Student Report may be returned to the School by the EQUIS Office for subsequent resubmission. Comments on the quality and content of the Student Report will form a specific section of the Peer Review Report to the EQUIS Accreditation Board."*

(Potential significance: May impact Schools that previously relied on the use of internal teams or external facilitators to co-ordinate the Student Report through Student Focus groups or similar.)

SECTION 6: GUIDANCE FOR PEER REVIEW

- **2.4 Base Room:** EFMD has now requested that the Base Room should not be used as the main meeting room for conducting interviews, other than in exceptional cases (and only then if 'sufficiently spacious'). This means that Schools should have two rooms available for the Peer Review Team: one as the Base Room and the second for interviews etc (with an occasional third room for any parallel meetings, as per the agreed Peer Review Visit Schedule). QED recommends that any exceptions to this are agreed with the Chairperson of the Peer Review Team.

(Potential Administration Significance for Schools that previously combined the functions of the Base Room and Meeting Room)

There are no other material changes to the EQUIS Process Manual.

EQUIS PROCESS MANUAL ANNEXES

ANNEX 2: EQUIS DATASHEET

- Table 1 (Faculty) has some changes:
 - Row relating to 'Number of Female Core Faculty' is deleted, as already captured within the standard column descriptors;
 - 'Number of Nationalities' is now required by 'Female' and overall.

ANNEX 3: EQUIS FEE SCHEDULE

- Details of all fees for 2020 are provided. Most fees have increased in the region of 1.4%. The full fee schedule is also [available here](#).

ANNEX 4: BRIEFING VISIT FORM

- The visiting EQUIS expert is now asked to explain her/his recommendation for the selected programme as part of the Briefing Visit Report.

ANNEX 5: ELIGIBILITY EVALUATION FORM

- The visiting EQUIS Advisor is now asked to explain her/his recommendation for the selected programme as part of the Eligibility Evaluation Form.

ANNEX 9: INFORMATION AND DOCUMENTS TO BE PROVIDED IN THE BASE ROOM

- No changes have been made here, but note the additional guidance for Alumni provided under Standard 3 above, where EFMD requests "a description of the School's Alumni Association (e.g., members, chapters, services, activities, events, donations, etc. in the past 5 years)".

ANNEX 10: TEMPLATE FOR THE STUDENT REPORT

- As indicated in other sources, the initial guidance for the student report has been extended to clarify EFMD's expectation that this report is independently completed by students: "Note that the School should only initiate the process. Then, students should work on their own without detailed guidance or monitoring by the School or involvement of any other source of external support (i.e. no selection of students, no conducting of interviews or editing of the Student Report by the School). During the subsequent meetings with the Peer Review Team, the students should be prepared to attest to the independence of the process of producing the Student Report not having been infringed"

ANNEX 19: COMMUNICATION POLICY

- Minor re-wording to confirm that the EQUIS label and logo are only used by accredited institutions AND only for activities which have been accredited/included in the accreditation. This includes internally and on any publicity material etc...

For advice and further details on any of the above, please contact the QED Accreditation Team at info@QEDaccreditation.com.

