



# EPAS STANDARDS AND CRITERIA:

UPDATES AS AT JANUARY 2019

EFMD revises the documentation supporting EPAS periodically and updates are normally provided at the start of each calendar year. The following is an overview of the updates made as part of the 2019 publication, together with an assessment of the significance of the change. Whilst most changes are unlikely to be significant, there are a small number which should be considered by institutions within the accreditation process OR preparing for re-accreditation.

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

- [EPAS Standards and Criteria \(2019\)](#)
- [EPAS Process Manual \(2019\)](#)
- [EPAS Process Manual Annexes \(2019\)](#)
- [Other EPAS Documents](#)

A summary of the changes is provided below, plus a quick review of the changes on a standard by standard basis.

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## SUMMARY OF CHANGES

The majority of changes in the 2019 EPAS Documents are not significant. The following are the changes most likely to impact schools:

- The documents have been amended to reflect the wider focus on 'external organisations' and 'connections with practice' rather than 'corporate connections': (i.e. including public bodies, third sector etc);
- More attention has been given to TEL (Technology Enhanced Learning) and the guidance has been amended to include specific reference to TEL in several places (including Annex 13 in the [EPAS Process Manual Annexes](#)). From a practical perspective:
  - Institutions must now include all those connected with the design or facilitation of TEL programmes on their faculty list (See 1.3 below)
  - Access to the Institution's VLE is now required four weeks in advance of a PRV for online programmes. (See 1.2 below)

If your Institution has significant TEL, QED suggests that you read the detailed updates below and refer to the relevant EPAS documents.

- There are now two versions of the Data Sheet for initial applications: a 'One Programme' and a 'Two Programme' version. Similarly, there are also two versions of the Re-accreditation Application.
- Within the datasheet (Part C – 16), EFMD has traditionally asked Institutions to provide a list of 10 sample references of core faculty teaching on the programme. This has been modified to ask for '*10 Sample Research Publications of core or visiting faculty teaching on the programme...that have impacted the programme content*'. This has **potential significance** for institutions where research hasn't traditionally been linked back to the applicant programme.
- A new Annex has been added to provide additional guidance on drafting and assessing Intended Learning Outcomes (ILOs) within the EPAS process. (Annex 7 in the [EPAS Process Manual Annexes](#))
- For Institutions that have two programmes (or programme sets) within the accreditation cycle, two Student Reports (one for each programme or programme set) are now required (i.e. NOT a combined report as previously).
- A small number of additional requirements have been added for the Base Room (See Annex 6 on detailed notes below).

## CHANGES TO EPAS STANDARDS AND CRITERIA

### CHAPTER 1: THE INSTITUTION IN ITS NATIONAL AND INTERNATIONAL CONTEXT

#### 1.1: THE INSTITUTIONAL CONTEXT

- The wording of the last sentence of the standard has been slightly modified to say that the Institution should be able to demonstrate a clear commitment to '*developing strong links with corporates and external organisations generally*' rather than just '*developing corporate activities*'. This is further expanded in the second last bullet point under *b) The Institution*, to include entities like corporations, public entities and the third sector.
- Under part *b) The Institution*:
  - the second bullet point has been extended to include consideration of the link between the institutional mission and the provision of TEL (Technology Enhanced Learning).

- An additional bullet point has been added to require schools to describe the internal governance and management and related decision-making processes. These must also be evaluated in terms of effectiveness in contributing to the overall strategy and portfolio.
- The second last bullet point has been modified (in line with the change to the wording of the standard) to ask "To what extent are external organisations (e.g., corporations, public entities, third sector) involved in the Institution's ethos and activities?" (Previously, the focus was on the corporate world)
- Base Room data requirements have also been updated. Policy documents are required to reflect the focus on 'connections with the world of practice', rather than 'corporate connections'

**(Should not constitute a substantial change: clarification only)**

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## 1.2 RESOURCE AND FACILITIES

- An additional Data requirement has been added for the BASE ROOM: 'In case of an online programme, access for PRT members to the relevant VLE platform should be granted at least 4 weeks prior to the PRT visit'. In QED's experience, most schools would have provided this access during the PRV anyway, with some already providing it in advance. It should not represent a significant change.

**(Should not constitute a substantial change: possible minor administration impact)**

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## 1.3 FACULTY

- The wording of the standard has been updated to reflect the focus on 'practice' rather than 'corporate activities'. Faculty should have links to 'practice nationally and internationally' rather than to 'international and corporate communities'. This is a natural extension of the changes in 1.1.
- The third-last bullet point has been modified slightly to reflect the expectation that faculty are 'generally speaking' sufficiently well connected to the world of business and management.
- Base Room requirements have been updated to clarify that where 'TEL is present, and especially for online programmes per se, those elements that have been designed or facilitated by others should also be included' in the Faculty list (with CVs etc). Historically, some schools have sought to exclude such faculty from their reporting and this appears to just clarify the requirement for all faculty to be included in the CV/resume listing.

**(Should not constitute a substantial change: clarification only. May cause issues for some schools if they have traditionally omitted this portion of faculty from the CV list and faculty statistics)**

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## NOTES

- Additional clarification has been added to the definition of 'Internationalisation' to explain that it is not just about the numbers of nationalities represented within students and faculty. Cross references have been made to two position papers (Papers G and H in the 2019 version of '[Guidelines and Position Papers](#)'). These papers are also listed on page 26 of the Standards).
- Cross-reference is made to a new [Process Manual Annex](#) on TEL (Annex 13)

**Throughout the standards, previous references to corporate activities have been updated to reflect 'connections with practice'. These have (thus) NOT been generally included in further updates noted below.**



## STANDARD 2: PROGRAMME DESIGN

It is not mentioned directly in the Standards, but worth noting that a new Annex 7 on Intended Learning Outcomes has been provided in the [EPAS Process Manual Annexes 2019](#).

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### 2.2: CURRICULUM DESIGN

- Part d, 'Other curriculum design aspects' now includes EOCCS (EFMD's Online Course Certification System) as one of the potential 'external guidelines' for consideration in the context of curriculum design.

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### 2.3: DESIGN OF DELIVERY MODES AND ASSESSMENT METHODS

- Generally, more emphasis is placed on the need to report appropriately on TEL/blended learning etc.
- Reference to blended learning is cross-referenced to the new Process Manual on TEL (Annex 13)
- Institutions are now required to explain or comment on:
  - the balance between synchronous and asynchronous learning processes. (The phrases 'synchronous' and 'asynchronous' are explained within notes at the end of the chapter).
  - the management of online programmes specifically in the context of overall programme management;
  - the system to 'ensure authenticity in the case of online programmes' (in the context of ethics around assessments)

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### NOTES

- The notes have been extended to include definitions of blended learning, distance learning, online learning, asynchronous learning and synchronous learning. The explanations are broadly in line with similar definitions found more widely.

***(Should not constitute a substantial change: as the clarifications represent the 'spirit' of the original standards)***

## STANDARD 3: PROGRAMME DELIVERY AND OPERATIONS

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### 3.1 STUDENT RECRUITMENT

- Data requirements have been updated to clarify that the selection of interview templates (for the Base Room) can include video where relevant.
- Institutions should also provide online materials for the induction of off-campus students where appropriate.

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### 3.2: PERSONAL DEVELOPMENT OF STUDENTS

- The first example transferable intellectual skills (second bullet point) has been updated to say 'digital environment' rather than 'various media'.
- The requirement to explain opportunities for group work has been extended to include reference to working in virtual teams.
- An additional bullet point has been added to request Institutions to show how learning analytics are collected and used (where applicable).
- Base Room requirements now include learning analytical reports (presumably where available).



### 3.4: INTERNATIONAL ASPECTS

- There is a slight increase in focus on TEL, where Institutions are required to explain how the international learning experience is enhanced by technology (rather than how TEL supports the development of international interactions for the programme, where applicable).

***(Primarily for clarification and should not constitute substantial change, though does reflect increasing attention to TEL and this is something that Institutions might wish to monitor).***

### EQUAL GUIDELINES

The list of EQUAL Guidelines and various position papers has been updated (page 26). These can be found [HERE](#)

### CHANGES TO EPAS PROCESS MANUAL

Overall, following the changes in the EPAS Standards, traditional references to 'corporate links' and similar have been updated to reference 'connections with practice' and similar. These amendments have not been individually listed below.

#### SECTION 1: INTRODUCTION TO EPAS

- In Section 1.3.1 (Programme Scope), the paragraph explaining that institutions which are EQUIS accredited cannot apply for EPAS eligibility has been removed. This paragraph also stated that *'EQUIS accredited schools should not play the role of lead Institution'* in instances where programmes offered for EPAS assessment are run by a consortium which includes non-EQUIS schools. The deletion of the paragraph suggests that EQUIS accredited schools may now play the role of lead Institution.
- Section 1.3.2 has a minor, but potentially interesting, amendment. The word 'currently' has been added to the sentence *'The two accreditation systems [EPAS and EQUIS] are currently separate and cannot be considered as being comparable to one another'*. The rest of the paragraph references EDAF (as before) and EOCCS (new addition). This amendment suggests that EFMD may be considering whether some of the four systems might be combined in the future.

#### SECTION 2: MANAGEMENT OF EPAS

In Section 2.6 (EPAS Advisors), there are some minor changes:

- Previously, Institutions were responsible for the costs etc of *'necessary'* visits: this has been changed to *'useful'* visits and readers are cross-referenced to Section 6.2.3. QED believes that this is unlikely to change the practical application of this piece of guidance: Institutions tend to welcome constructive contributions from their EPAS Advisors.
- The Eligibility Evaluation and Assessment Evaluation have been clarified as 'Pre-Eligibility Assessment Evaluation' and 'Pre-Review Assessment Evaluation' respectively. QED regards this as a change in title, not in substance.

#### SECTION 3: THE EPAS ACCREDITATION PROCESS



- In Stage 4: the Eligibility Decision:
  - the sentence confirming that application deadlines are published on the EFMD website has been removed. Thus Institutions will need to rely on their EPAS contacts to provide the relevant dates. (In practice, many schools already did this).
  - EFMD confirms that the advisor who supported the school will be kept informed of the Eligibility Decision.
  - EFMD confirms that in the cases of reapplication to the process, the 'new application' fee schedule will apply.
- In Stage 5, Self-Assessment, the guidelines now state that the SAR must be written in not less than Arial Size 10 (or the equivalent). Previously, it suggested a minimum font size 11.
- In Stage 7, Accreditation, the guidelines confirm that the pre-review period Advisor (if used by the school) will be informed of any accreditation decision.
- Generally, in Stages 7 and 8, the improvements specified by the Accreditation Board (for Institutions being awarded a 3-year accreditation) are referred to as '*Areas of Required Improvement*' (rather than '*Areas of Improvement*') to better reflect the fact that Institutions are obliged to accept the development objectives set by the Accreditation Board.

## SECTION 5: GUIDANCE FOR SELF-ASSESSMENT

- The minimum font size is reiterated as Arial Size 10 or the equivalent.
- Section 5.3.3 on the Student Report requires that:
  - a **separate student report** is compiled for each programme/programme set being reviewed. (A maximum of two programmes/programme sets can be reviewed in each cycle). Previously, only one (combined) student report was required.
  - That some students involved in the report must be at the PRV (i.e. Institutions 'should ensure' – not 'try to ensure'...)
- Section 5.3.4 advises that the EPAS Office can advise on the appropriate Datasheet template to be used each year (as these are regularly updated). QED notes that the most updated version is usually available on the EPAS website [HERE](#). NB: A separate datasheet is now required for each programme (or programme set), NOT a combined one as previously.

## SECTION 6: GUIDANCE FOR PEER REVIEW

- If TEL is a key component of the programme to be assessed, then EFMD will expect to include an academic with expertise in TEL within the PRT.
- In Section 6.2.3, additional clarity has been given to reviewers' expenses: This does not change previous guidelines, but reminds all users that only travel, lodging and other direct expenses incurred by reviewers in connection with the visit should be reimbursed and that any other extra expenses not directly related to the review will not be covered by the Institution. (QED considers this is in response to a small number of situations where Institutions are being asked to cover additional expenses of reviewers that are not directly related to the review).
- In Section 6.2.4 (The Base Room) EFMD has added a note to say that it abides by a GDPR policy (to be found [HERE](#)) and that the host Institution is responsible for providing all documents necessary for the visit.
- Section 6.3.1 emphasises that there is no time for the host Institution to entertain the PRT (as in previous guidance notes) but adds a sentence to say that the Dean and/or EPAS project leader is permitted to welcome the PRT and meet them informally just before the initial briefing dinner (usually the evening before the PRV commences). This may only be done if the PRT agrees.



- Section 6.3.2 has additional guidance for sessions that include remote participants (such as visiting faculty, students of online programmes, alumni and practitioners). It notes that it is the host Institution's responsibility to ensure that the relevant technology works smoothly.
- Section 6.4.2.5 (Meeting with Faculty Members): Previously EFMD outlined its expectation that visiting faculty were expected to be available for interview in person and that no interviews were permitted by teleconference or video conference. This guidance has been updated to recognise that sometimes this isn't practical. It now states that in programmes where they provide the primary delivery, visiting faculty '*are available for interview preferably in person and certainly remotely*'.
- In 6.4.2.6 (Meeting with Students), Institutions are required to ensure that students of online programmes being assessed are available for interview (either in person or remotely).
- In 6.7.1 (Responsibilities of the EPAS Office), the requirement to 'make the necessary logistic arrangements with the Institution for travel, accommodation and special requests' has been removed. This is now just listed as the responsibility of the EPAS Project Leader (within the host Institution).

## CHANGES TO EPAS PROCESS MANUAL ANNEXES

### ANNEX 1: EPAS APPLICATION FORM

- Note, the version of the application form in the Annexes is for an initial EPAS application. (A word version of the form is available [on the website](#).)

### ANNEX 2: EPAS DATASHEET

- Two versions of this form are now provided by EFMD. Links to the WORD versions of these forms are below:
  - [EPAS Application Datasheet One Programme](#)
  - [EPAS Application Datasheet Two Programmes](#)

The Annex only carries a copy of the first document (One Programme version)

- The documents are similar in structure. The layout has been updated to reflect three distinct sections:
  - Part A: General Information
  - Part B: Information about the Applicant Programme (Set)
  - Part C: Information about the Institution
- The information sought is similar to previous versions of the datasheet but has been re-ordered to fit appropriately into the sections outlined. Key differences are:
  - Part B - 10. Programme Summary: This is cross-referenced to Annex 7 on ILOs in the EPAS Process Manual.
  - Part C - 11. Brief Description of the Institution: Under *Financial Performance* – Institutions are asked to add explanatory notes as needed and to explain any variation in exchange rates.
  - Part C - 13: A new section 'Technology Enhanced Learning' has been included.
  - Part C - 14. The Degree Programme Portfolio: On Table 7 (previously Table 3), applicants are now asked to ensure that the total number of enrolled students across all years of the applicant programme must be equal to the number provided in Table 3 in *Part B (Profile of current student year groups for applicant programme)*
  - Part C - 15. Faculty: EFMD has added a note to Table 9 to recognise that some items in the table (such as % of total teaching hours) may not apply to online programmes.
  - Part C - 16. Research or other intellectual development activities: Traditionally, EFMD has asked Institutions to provide a list of 10 sample references of core faculty teaching on the programme.

This has been modified to ask for '10 Sample Research Publications of core or visiting faculty teaching on the programme...that have impacted the programme content'. This has a double implication: it is now possible to include publications from visiting faculty BUT only publications **that have impacted the applicant programme content** may be included. This has **potential significance** for institutions where research hasn't traditionally been linked back to the applicant programme.

- **Part C – 17. Internationalisation:** The requirements here are the same as in previous years, other than a suggested tabular format for student mobility numbers is now held in Section B. 9 – Student Mobility (as Table 4). EFMD also clarified that this section of the data sheet should also include joint programme initiatives.
- **Part C – 18. Overview of the principal links with the world of practice:** EFMD now outlines examples of data that can be provided to support links with the world of practice.

#### ANNEX 3: EPAS FEE SCHEDULE

- Details of all fees for 2019 are provided. Increases are in the order of 1.8% - 2%. There are no changes to cancellation and late payment fees (re Peer Review Visits).

#### ANNEX 4: EPAS RE-ACCREDITATION APPLICATION

- Two versions of this form are now provided by EFMD. Links to the WORD versions of these forms are below:
  - [EPAS Re-Accreditation Application Form One Programme](#)
  - [EPAS Re-Accreditation Application Form Two Programmes](#)

The Annex only carries a copy of the first document (One Programme version)

- The documents are similar in structure, and laid out more clearly in sections:
  - Part A: General Information
  - Part B: Information about the Applicant Programme (Set)
  - Part C: Information about the Institution
- The information sought is similar to previous versions of the datasheet, but has been re-ordered to fit appropriately into the sections outlined. Key differences are:
  - **Part C - 10. Brief Description of the Institution:** Under *Financial Performance* – Institutions are asked to add explanatory notes as needed and to explain any variation in exchange rates.
  - **Part C - 11:** A new section '*Technology Enhanced Learning*' has been included.
- Participants are asked not to change the formatting of the documents

#### ANNEX 6: LIST OF REQUIRED DOCUMENTS FOR THE BASE ROOM

Additional requirements have been identified:

- **Section 1.2 - Resources and Facilities:** In the case of online programmes, PRT members should be given access to the relevant VLE programme at least 4 weeks before the PRV;
- **Section 1.3 – Faculty:** CVS and lists must include those involved in the design and/or facilitation of TEL activities.
- **Section 3.1 – Student Recruitment:** Sample of video interviews to be provided where relevant.
- **Section 3.3 – Personal Development of Students:** Learning analytical reports to be provided where available.



#### ANNEX 7: EPAS ANNEXE ON INTENDED LEARNING OUTCOMES

EFMD notes that ILOs are frequently assessed as an area for improvement, and thus is providing additional guidance to assist Institutions directly. The guidance covers a) Drafting ILOs (including guidance for mapping) and b) the value of ILOs to different stakeholders.

#### ANNEX 8: STUDENT REPORT TEMPLATE

No significant change, other than to note that a separate report is required for each programme/programme set.

#### ANNEX 8: EPAS VISIT SCHEDULE TEMPLATES

- Additional guidance has been added to confirm that Institutions are not permitted to alter the sequence of the meetings. In situations where scheduling clashes might require some alteration, QED recommends that this is discussed with the EPAS Office and/or Chair of the PRT directly.
- Day 0: 15 minutes has been allocated to the optional welcome/brief introductions (Dean etc and PRT at the Hotel before the initial Briefing Dinner).

#### ANNEX 13: EPAS REVIEW OF TECHNOLOGY ENHANCED LEARNING (TEL) PROVISION INCLUDING...

- Title and content of this document has been updated to reflect focus on TEL (previously existed as Annex 12)

#### ANNEX 14: EPAS PROGRESS REPORT FORMS

- The EPAS Midterm Progress Report Form has been added to the Annex (from page 85)

#### ANNEX 15: POLICY ON COLLABORATIVE PROVISION AND JOINT PROGRAMMES

- In instances where the programme submitted for EPAS review leads to a degree award from another institution (such as a validated degree), EFMD has upgraded its expectation that the partner institution will seek EPAS accreditation if declared eligible (i.e. has moved from '*will be also expected to take part in the EPAS process*' to '*must also take part in the EPAS process*').

#### ANNEX 19: POLICY ON USE OF EPAS ACCREDITATION FOR PUBLICITY

- Reference to Annex 14 in the opening bullet points should state Annex 15.
- EFMD no longer offers to provide a data file so that members can 'send a postcard or letter' to all members to announce their accreditation. (The suggestion has been removed from the Annex).

**For advice and further details on any of the above, please contact the QED Accreditation Team at [info@QEDaccreditation.com](mailto:info@QEDaccreditation.com).**