



EQUIS STANDARDS AND CRITERIA:

2019 UPDATES – PUBLISHED MARCH 2019

CONTENTS

Foreword	2
Summary of Changes	2
EQUIS Standards and Criteria	3
General	3
Table 1: Changes to supporting Documents	3
Table 2: Updates relating to change from "Corporate Connections" to "Connections with Practice"	4
Chapter 2: Programmes	4
Chapter 6: Executive Education	5
Chapter 7: Resources and Administration	5
Chapter 8: Internationalisation	5
Chapter 9: Ethics, Responsibility and Sustainability (ERS)	5
Chapter 10: Connections with Practice	5
EQUIS Process Manual	6
General:	6
Section 6: Guidance for Peer Review	6
EQUIS Process Manual Annexes	7
Annex 2: EQUIS DataSheet	7
Annex 3: EQUIS Fee Schedule	7
Annex 8: Information & Documents to be provided in the SAR	7
Annex 9: Information and Documents to be Provided in the Base Room	7
Annex 11: EQUIS Quality Profile	7
Annex 12: EQUIS Criteria Evaluation Form	7

FOREWORD

EFMD revises the documentation supporting EQUIS 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 EQUIS Updates. We recommend that you view the updated documents directly – which are available from EFMD's website:

- [EQUIS Standards and Criteria \(2019\)](#)
- [EQUIS Process Manual \(2019\)](#)
- [EQUIS Process Manual Annexes \(2019\)](#)
- [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 2019 EQUIS Documents are not significant. The following are the changes most likely to impact schools:

- The transversal theme 'Corporate Connections' has been replaced by 'Practice Connections', to better reflect the wider scope of engagement with a range of stakeholder organisations and individuals. This change has been accompanied by more strongly worded expectations in terms of strategy and resources to support practice connections – particularly in Chapters 7 and 10 of the EQUIS Standards and Guidance. This has a potential significance for any Schools where this area is under-developed. The changes arising under this provision have been summarised in Table 2.
- The Position Paper 'Assessing the Degree of Internationalisation of a Business School' (previously in the [EFMD Guidelines and Position Papers](#)) has now been included within Standard 8 (Internationalisation) directly, in a new section, "Further Guidance on Assessing Internationalisation". This is a useful addition.
- Some changes have been made to the data requirements – reflecting General Data Protection Rules (GDPR) and other changes. These have been summarised in Table 1.
- In the DATASHEET (EQUIS Process Manual Annexes – Annex 2), several of the Table 4 (Faculty) requirements now require a gender breakdown.

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

GENERAL

- A privacy statement has been added to the first page of the Standards, just reflecting EFMD's compliance with normal confidentiality requirements etc.
- Throughout the documents, "corporate connections" has been replaced by "Connections with Practice", to better reflect the wider engagement with business organisations (including government, public sector, 3rd sector etc).
- Changes have been made to some data requirements, to comply with General Data Privacy Rules (GDPR). For example, some documents are now required in the Base Room only – not attached to the SAR. Similarly, faculty names do not have to be recorded on faculty tables: it is permissible to use an alternative identifier (such as generic numbering system). These are summarised in Table 1 (rather than by Chapter).

TABLE 1: CHANGES TO SUPPORTING DOCUMENTS

Guidelines relating to the provision of the following documents have been updated. These include changes made as a result of GDPR.

Chapter	Document	Previous Standards	2019 Standards
1	Context Governance and Strategy	List of members in the School's Governing Body or Advisory Report	Required in SAR Now required in Base Room only.
2	Programmes	Selected Programme Documentation	6 samples of Student Work were required (2 highest, 2 mid-level and 2 lowest marks) 6 samples required: 2 highest marks, 2 marginal marks (close to pass mark) and 2 lowest. If there are no fails, then 2 highest and 4 lowest are required.
4	Faculty	Summary List of Core Faculty	Names were required on the document Names are no longer required: faculty should be identified in an alternative manner (Faculty Member 1, 2 3 etc) <i>QED Comment: Some schools currently present sensitive information (such as age and nationality) in summary format only. It is unclear whether this change will satisfy the needs of those schools under their individual institutional GDPR requirements. QED recommends that Schools continue to act in accordance with internal GDPR policies, explaining in a footnote to the SAR where relevant.</i>
5	Research	List of the "best 10 articles" (School's choice)	Traditionally required within the SAR This requirement has been removed.
5		List of Research Committee members	Required in SAR Now required in Base Room only.
10	Connections with Practice	New	n/a Additional documentation is required in the Base Room, evidencing (where appropriate) outputs from the School's work with its major connections. (See Chapter 10 below also)

TABLE 2: UPDATES RELATING TO CHANGE FROM "CORPORATE CONNECTIONS" TO "CONNECTIONS WITH PRACTICE"

Chapter	Section/Reference	Comment	
1	Context Governance and Strategy	k: Connections with Practice (page 15)	The section has been reworded to focus more on the School's "engagement with practice and its intended influence on practice" (rather than just "the corporate dimension"). The first guidance question has been explicitly widened to ask "which practitioners..." participate in the School's governance structure (rather than "do business leaders.....participate in its governance structures")
2	Programmes	j – Relevance of Connections with Practice (page 25)	The guidance has been reworded to better articulate the relevance and relationships between programmes and the practice of business and management.
3	Students	i – Connections with Practice (pages 34-35)	The guidance has been reworded and extended to better outline EFMD's focus on the "relevance of the practice of business and management to the student experience".
4	Faculty	f – Connections with Practice (page 40)	Minor updates only
5	Research	e – Connections between R&D and the world of practice (pages 47-48)	Additional guidance questions added, seeking information on: i) the direct involvement of practitioners in the work of research centres. ii) The involvement of practitioners in the research outputs of the school.
6	Executive Education	n/a	n/a
7	Resources and Administration	j – Connections with Practice (page 63)	A new section has been added to focus on the resources and structures supporting the School's engagement with practice
8	Internationalisation	Assessment Criteria (end Page 67)	Focus is on describing a School's connections to the international world of practice (rather than to the international corporate world). Additional guidance questions are added to support the development of focus in this area.
9	ERS	See Chapter 9 below	See Chapter 9 below
10	Connections with Practice	See Chapter 10 below	See Chapter 10 below

(Some changes may impact schools that have less developed connections with practice – particularly in relation to Standards 7 and 10)

CHAPTER 2: PROGRAMMES

- Additional guidance relating to the selected programme has been given in the last paragraph of the introduction. EFMD has clarified that the summary of the selected programme in the SAR should include "for example, objectives, structure, components, quality assurance, evaluation and impact".

CHAPTER 6: EXECUTIVE EDUCATION

- EFMD has added additional guidance to deal with the potential exclusion of Executive Education from the EQUIS accreditation process (page 53). In essence:
 - All Exec Education activities have to be described in the SAR (even if these are of negligible size), using the criteria outlined in the standards;
 - If the EQUIS committee excluded Executive Education (for Schools going through the initial accreditation cycle), the Schools is STILL REQUIRED to summarise Executive Education activity.
 - If the School believes that the Exec Education activities fall out of scope, it can provide an argument to this effect and this will be considered by the Peer Review Team. EFMD suggests that Schools use the guidance questions provided in the Standard to structure this argument.
 - Schools in a reaccreditation cycle are required to indicate whether there have been any significant changes to their Executive Education activities (and to summarise these changes where relevant).

(Some changes: May impact schools that consider Executive Education to be out of Scope)

CHAPTER 7: RESOURCES AND ADMINISTRATION

- An additional requirement has been added to focus on the resources allocated to supporting connections to practice. (See Table 2 above also).

(Should not constitute a substantial change, as this was implied under previous versions of the Standards)

CHAPTER 8: INTERNATIONALISATION

- An additional sentence is added to the opening paragraph (to the Introduction) stating that the "...challenge here is to describe exactly what is meant by the term 'internationalisation' and to indicate how best to assess it". A new paragraph has also been added (3rd paragraph) further outlining the concept of internationalisation.
- The Notes to the chapter no longer make reference to the Position Paper 'Assessing the Degree of Internationalisation of a Business School' (previously in the [EFMD Guidelines and Position Papers](#)). This content has been added to Standard 8 directly, in a new section, "Further Guidance on Assessing Internationalisation" (pages 69-71). This is a useful addition and brings more focus onto this helpful guidance note.

(Should not constitute a substantial change: clarification only)

CHAPTER 9: ETHICS, RESPONSIBILITY AND SUSTAINABILITY (ERS)

- A new assessment criterion has been added, requiring Schools to describe "...the nature and extent of organisations' contribution to the School's ERS priorities". Some guidance questions have been added to support this. (page 73).

CHAPTER 10: CONNECTIONS WITH PRACTICE

- The Standard has been revised to clarify that it relates to the School's engagement with a range of stakeholders. It also confirms that the "flows of influence are two-way". The revised standard lists five key areas to be included in a strategy, to include:
 - Impact on students;



- Impact on organisational and societal stakeholders;
 - Impact on academic activities (both education and research);
 - Developments that will continue to enable deeper engagement, connectivity and impact; and
 - The relationship between Connections with Practice and the other transversal themes (ERS and Internationalisation).
- The Introduction and Assessment Criteria have been modified to reflect the revised standard.
 - Additional documentation is required in the Base Room, evidencing (where appropriate) outputs from the School's work with its major connections.

(Potentially Significant: May impact schools that have less developed connections with practice)

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

EQUIS PROCESS MANUAL

There are no material changes within the EQUIS Process Manual.

GENERAL:

- References to 'corporate connections' have been generally updated to 'connections with practice'.

SECTION 6: GUIDANCE FOR PEER REVIEW

- Section 1.1 (Composition of the PRT): Narrative relating to the School's opportunity to veto a member of the PRT for reasons of conflict of interest has been reduced. This includes removing the commitment of the EQUIS Office to inform the individual concerned. This appears in line with practice, whereby schools may raise a concern about a potential veto before formally requesting one. (This appears to be a clarification, and not a reflection of any change in practice).
- Section 5.11 (Other Interactions with the Peer Review Team: EFMD clarifies that any ad hoc meetings are attended by at least two members of the PRT "to maintain transparency of the process".

EQUIS PROCESS MANUAL ANNEXES

ANNEX 2: EQUIS DATASHEET

- Confirmed that the cover sheet and appendices 1-3 do not count against the 16 page limit. (Previously only appendices 2 and 3 were listed as outside of the 16-page limit).
- In the introductory section, the wording, requesting that no changes are made to the text of the document, has been updated. It now requires that *"all the sections, descriptions and instructions of this document should not be deleted..."*
- Under "The Degree Programme Portfolio" and "Name of the Selected Programme", the reference to *"not off-shore programmes"* has been changed to *"but no programmes abroad"*.
- Table 1 (Faculty) has some changes:
 - The table requires a breakdown of gender for criteria in the first column of the table (Schools are required to provide a 'female' and 'total' figure for each line).
 - % proportions of female core faculty, doctoral degree holders, faculty teaching in Exec Education, non-nationals, and core faculty with foreign experience have been replaced by the requirement to provide numbers.
- *"Overview of the Principal Links with the Corporate World"* has been updated to reflect the World of Practice.
- Appendix 1: Confirmed that data should relate to the last two completed years (not last 24 months).
- Table 7 (Practice-Oriented Research): EFMD confirms that the table may include both ranked and unranked publication types (previously only unranked publication types were specified).
- Appendix 2: EFMD confirms that data should relate to the last completed academic or calendar year.

ANNEX 3: EQUIS FEE SCHEDULE

- Details of all fees for 2019 are provided. Most fees have increased in the region of 2% - 3%.

ANNEX 8: INFORMATION & DOCUMENTS TO BE PROVIDED IN THE SAR

- Updates reflect the standards and the list provided in Table 1 above.

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

- Updates provided reflect the standards and the list provided in Table 1 above.

ANNEX 11: EQUIS QUALITY PROFILE

- Small number of updates to align with any changes to the EQUIS Standards and Guidance.

ANNEX 12: EQUIS CRITERIA EVALUATION FORM

- Some updates made to align with any changes to the EQUIS Standards and Guidance.

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

