

EVALUATION STANDARDS FOR THE GOVERNANCE AND EDUCATION POLICY OF FOREIGN HIGHER EDUCATION INSTITUTIONS

Governance and education policy



September 2025

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PREAMBLE

This framework is intended for higher education institutions whose primary mission is teaching.

This evaluation makes it possible to assess the impact of the institution's strategic and operational orientations on the fulfilment of **its missions of teaching, student support and community engagement**.

This framework defines the context in which the institution conducts its self-evaluation and in which the experts appointed by Hcéres conduct the external evaluation.

The evaluation framework for the governance and education policy of foreign higher education institutions is structured around three levels.

- **Fields:** they define the overall scope of the evaluation. Each Field is associated with several standards.
- **Standards:** they express the expectations of the evaluation. They are expressed through an action that puts the institution in a specific situation.
- **Questions:** these specify the content of the standards, but are not necessarily exhaustive.

This framework is based on international best practices and falls within the general framework of principles defined at European level. Hcéres, a member of the European Association for Quality Assurance in Higher Education (ENQA) and registered in the European EQAR register, is committed to respecting the common principles set out in the Standards and guidelines for quality assurance in the European Higher Education Area (ESG).

The evaluation of the implementation of the education policy will include the analysis of a sample of study programmes selected in consultation between Hcéres and the institution being evaluated.

The evaluation aims above all to be useful and adapted to the specific context of each institution, taking into account its specific characteristics and the adjustments they require. Following preliminary discussions with the institution, certain issues may be examined in greater depth due to their strategic importance for the institution.

Finally, the external evaluation will be based on an analysis of the self-evaluation report, supplemented by annexes, and on a visit by a committee of experts. A methodological guide is provided to assist institutions in preparing for this process.

FIELD 1. POSITIONING AND STRATEGY

Standard 1. The institution defines its institutional positioning.

- **Q1:** What position does the institution hold within the higher education sector in its field, and at which levels does it consider itself to be relevant (local, national or international)?
- **Q2:** What role does the institution intend to play in the medium term in relation to other institutions that it considers comparable or that it takes as a reference? What is its longer-term ambition, the target it wants to achieve in line with its identity, position and role?
- **Q3:** Does external communication express the institution's values and commitments? Does it contribute to its attractiveness to students, teachers and administrative staff? How does the institution measure its results?

The evaluation will be based on any policy or institutional document that specifies the organisation's values, mission and objectives.

Communication will be evaluated based on the variety of media used, the content that best represents the institution, and audience measurements carried out by the institution (e.g. presence and visibility on social networks).

Standard 2. The institution defines a strategy based on its positioning, which is broken down into operational objectives and monitored.

- **Q1:** When developing its strategy, does the institution formalise its priorities in the following areas: education policy, student life and campus life, community engagement?
- **Q2:** Is this strategy broken down into realistic operational objectives and translated into action plans?
- **Q3:** Does the management team put in place indicators to monitor the implementation of these action plans? What are these indicators?
- **Q4:** Does the institution formalise an action plan and indicators for sustainable development and social responsibility?

The evaluative judgement shall be based on an overall assessment of the strategic plan. Similarly, all internal strategic documents that contribute directly to its implementation will be analysed. The evaluation will particularly focus on analysing the milestones and indicators associated with the implementation of the institution's strategy. If one exists, the decision-making dashboard will be used to assess the relevance of the chosen indicators in relation to the strategy and how effectively the institution monitors them.

Standard 3. The institution is developing a partnership policy as part of its strategy.

- **Q1:** What are the main structural partnerships for the institution at local, national and international levels with other public or private higher education institutions? Do they enable the implementation of specific teaching activities?
- **Q2:** Within the framework of its partnerships, what measures has the institution put in place to support and develop the incoming and outgoing mobility of its staff and to promote the hosting of guest lecturers in order to boost its teaching activities?
- **Q3:** What have been its key partnerships with the economic, social and cultural sectors and with local authorities? What has been the impact of these partnerships?
- **Q4:** How does the institution monitor its various partnerships and assess their role in implementing its overall strategy? *The evaluation will be based on an analysis of the number and quality of partnerships, as well as a mapping of these partnerships.*

The socio-economic, societal and cultural impact evaluation will focus particularly on the integration and social advancement of students, regional economic development through innovation and vocational training, and involvement in public debate.

For international partnerships, institutions are invited to present and prioritise truly transformative agreements concluded with other higher education institutions, describing mobility in particular in the context of degree agreements, double degrees, etc.

FIELD 2. GOVERNANCE, MANAGEMENT AND OPERATIONAL IMPLEMENTATION OF THE STRATEGY

Standard 4. The institution's governance is based on an organisation, internal communication and an information system that are all aligned with its strategy.

- **Q1:** How is the institution organised and structured? To what strategic and operational end?
- **Q2:** Do the governance arrangements in place allow for a sufficient level of responsiveness and rapid and effective implementation of decisions?
- **Q3:** What factors enable the institution to demonstrate the effectiveness of its governance, in terms of both the management team's performance and its relationships with supervisory bodies and funders?
- **Q4:** Do governance bodies encourage all stakeholders, particularly students and staff, to participate in the life of the institution?
- **Q5:** Does the institution believe that it has enabled its staff to gain a broad understanding of its strategy and priorities? How does the institution contribute to creating or maintaining a shared sense of belonging among staff?
- **Q6:** How does the information system meet the institution's management objectives and needs? What measures have been put in place to ensure its effectiveness?
- **Q7:** Is the information system deployed effective and does it comply with the best cybersecurity practices?

The evaluation will be based on an analysis of the organisation's institutional structure. This will include an evaluation of the relevance of the internal structure (establishment statutes, constituent entities, components, departments, services and internal regulations), as well as the general and functional organisational charts. All documents attesting to the organisation's reliability and governance will also be reviewed, including letters of engagement/mandates, the role of management meetings in strategic and operational steering, the number of meetings per year of the main governance bodies, the allocation and role of the various departments and directorates, and so on. The fluidity of operations can be evaluated by analysing the role of councils, commissions, committees and working groups in enabling the institution to implement its strategy. This analysis may be based on a study of council and commission minutes and how effectively they are disseminated to the relevant staff and students.

Internal communication must also be considered from the perspectives of both staff and students, as well as the relevance of the media used to implement it.

The efficiency of the information system will be analysed, as will any improvements made by the institution, such as infrastructure, software coverage, technical solutions, security, and the rector's dashboard with a selection of key data and indicators.

Standard 5. The institution implements its strategy based on a budget plan that ensures the financial sustainability of its activities.

- **Q1:** Does the institution have a sustainable economic model that enables it to achieve its objectives and carry out its missions? How is this reflected in the budget and, where applicable, distributed among the institution's departments or missions? Has the institution structured or formalised exchanges with departments or units to define the terms and conditions for the distribution of resources?
- **Q2:** Does the institution monitor its financial situation? How does it ensure its reliability?

- **Q3:** Does the institution consider its own resources to be sufficient? If so, why, and are they sustainable? If not, what action plan has been devised to increase or sustain them? How does the institution evaluate the role of tuition fees and any public subsidies it receives?
- **Q4:** Are structural choices (investments, changes in the wage bill, new courses, etc.) subject to multi-year budget forecasts?

The economic model can be analysed using the business model presented in the management dashboard (or any other budgetary and financial monitoring tool) at institution level and, where applicable, at department or unit level.

The role of financial and accounting departments as well as the internal audit/quality assurance department, will be analysed, as will the tools they use, such as the investment plan, staff training plan, training programme development plan and training price list. This will help to measure the reliability of budget forecasts and the institution's financial trajectory.

The financial health of the institution can be analysed using financial analysis indicators such as results, self-financing capacity, cash flow and the weight of major types of expenditure and revenue by nature. If the institution has appointed an external auditor, their report can also be used for this analysis.

Standard 6. The institution's human resources policy and development of social dialogue reflect its strategy and contribute to the quality of life at work for its staff.

- **Q1:** How does the institution's human resources policy enable it to develop its strategy and activities? How does it evaluate the quality of staff recruitment and its attractiveness? Where applicable, what results have its efforts to increase the proportion of permanent academic staff and the number of PhD holders within the institution produced?
- **Q2:** How does the institution evaluate the composition and evolution of its academic staff, distinguishing between the different statuses and their respective teaching and administrative obligations?
- **Q3:** How does the institution develop the skills of its staff and support their career paths?
- **Q4:** Does the institution consider that it has established a social dialogue that increases staff engagement and responds to aspirations for a better quality of life at work?
- **Q5:** How does the institution incorporate gender equality, inclusion, and anti-discrimination and anti-sexist and anti-sexual violence policies into its human resources strategy? Has it implemented listening and reporting mechanisms to address these issues, or support mechanisms for staff experiencing difficulties?

The institution's strategy will be analysed in terms of its human resources. This analysis will be based on key framework documents, such as employment policies, forward planning of jobs, staffing and skills, and management guidelines. It will also consider data relating to the status, functions and duties of staff, as analysed by the institution.

The impact of the recruitment policy will be evaluated in terms of its attractiveness, management ratio and gender, in line with the institution's strategic objectives. The social dimension of the human resources policy will be evaluated using qualitative methods (analysis of social dialogue bodies' work, remuneration and promotion guidelines, training plans, disability plans, occupational risk prevention plans, and quality of life at work plans).

Standard 7. The institution incorporates a real estate policy into its strategy to support its development.

- **Q1:** How does the institution evaluate the state of its real estate assets?
- **Q2:** Which indicators, tools and staff are available to evaluate the operating, maintenance and renewal costs, as well as the occupancy rates, of a property portfolio, especially when the institution does not own the property?
- **Q3:** How are real estate planning and financing developed? How are the institution's strategy and its needs in the areas of education policy and campus life taken into account in this planning?
- **Q4:** How does the institution ensure that its buildings are accessible to people with disabilities?

- **Q5:** How does the institution enhance the value of its property portfolio?
- **Q6:** How does the institution evaluate and improve the environmental impact of its property portfolio?

The condition, structure and geographical organisation of the property portfolio will be evaluated using quantitative data (total square metres, number of sites and buildings, accessibility rates, etc.), identifying any constraints on the implementation of the institution's strategy. Where possible, the evaluation of the property policy will be based on planning documents such as long-term property and development master plans, ecological and energy planning, and environmental certifications.

The capacity to carry out real estate projects with a strategic impact will be evaluated based on an analysis of their financing arrangements (e.g. internal investment programmes, public subsidies and provisions) and their effective monitoring.

The quality of property management will be analysed in light of the organisation of support functions and indicators of property portfolio performance, such as day-to-day management costs, maintenance and renovation costs, investment costs, property income and expenditure, and occupancy rates.

Where applicable, the institution will be asked to provide information on the environmental impact of its activities, including the role played by real estate, such as the institution's carbon footprint, audit reports and a breakdown of buildings by energy class.

Standard 8. The institution has a comprehensive quality policy.

- **Q1:** Has the institution defined a comprehensive quality policy? Are staff and students involved in this policy? Does the policy result in any labels or certifications being awarded?
- **Q2:** Does the institution have a centralised body responsible for managing quality assurance? Does it ensure the dissemination of a quality culture among departments or units?
- **Q3:** What tools for continuous enhancement have been put in place?
- **Q4:** How does the institution follow up on any recommendations from previous external or internal evaluations?

The evaluation will be based on elements describing the quality assurance policy, elements framing its implementation, and summaries of the follow-up to recommendations.

FIELD 3. EDUCATION POLICY AND IMPLEMENTATION

Standard 9. The institution has an education policy and a quality educational offer that are consistent with its positioning and strategy.

Characterisation and implementation of the education policy

- **Q1:** Is the education policy consistent with the institution's strategy and the national qualifications framework?
- **Q2:** How does the institution assess the structure of its educational offer, including the articulation of different cycles, the flexibility of learning pathways, the bridges between study programmes and the degree of multidisciplinarity?
- **Q3:** In developing its educational offer, how does the institution take into account the existing study programmes in similar disciplinary fields in the local or national environment, where applicable, as well as the region's social, economic and/or cultural needs?

The effectiveness and relevance of the education policy will be evaluated by linking its most salient features to the institution's positioning and strategy, such as the framework for graduation and/or the recognition of study programmes, interdisciplinarity, or double degrees, etc.

The academic partnerships that support the programme will be emphasised, as will the potential participation of economic, social, and/or cultural stakeholders in the programme's development and teaching activities.

Scientific approach and documentation policy

- **Q4:** How do the study programmes raise students' awareness of the scientific approach and the values of research integrity and ethics?
- **Q5:** How do documentation policy and resources effectively serve the needs of the programmes?
- **Q6:** How do teachers use research to improve their teaching?

The institution will present its documentation services and activity indicators, such as physical and online access. It will also present a list of online subscriptions and resources available to the academic staff for accessing disciplinary conferences or research work.

Internationalisation of study programmes

- **Q7:** How does the institution support students in acquiring intercultural and international skills through international mobility and/or innovative teaching methods (COIL, etc.)?
- **Q8:** How does the institution promote the teaching of foreign languages and in foreign languages?

The international dimension of education policy will be addressed through international cooperation initiatives, as described in Field 1, and the resulting flows. This will also include the proportion of courses offered in foreign languages and the number of courses offered exclusively or partially in foreign languages.

Work-based learning

- **Q9:** Does the institution provide practical preparation for its students' entry into the job market?
- **Q10:** How are students trained in entrepreneurship?
- **Q11:** Does the institution consider the development of continuing education to be a strategic priority? If so, how does this translate in terms of admission procedures, supervision and learning design?
- **Q12:** Is the volume of vocational courses appropriate? How does the institution mobilise its socio-economic or academic partnerships to develop these courses?

The institution will evaluate the place of these teaching methods in its education strategy based on data on enrolment figures for lifelong learning and changes in its own resources linked to this type of training. Information on student integration, both quantitative and qualitative, will also enable the socio-economic and regional impact of its educational offer to be evaluated.

Standard 10. The institution develops a set of institutional mechanisms to ensure the pedagogical quality of its study programmes and to encourage academic staff to diversify pedagogical practices.

- **Q1:** To what extent do the educational organisation and programmes promote educational progress and consistency between objectives, content, teaching methods, expected results and their evaluation methods? How is the skills-based approach implemented?
- **Q2:** What conclusions does the institution draw from its educational innovation policy (e.g. teaching methods, configuration of teaching spaces according to needs, digital resources and distance learning, etc.)?
- **Q3:** How does the institution support and train its teachers in innovative teaching practices?

The pedagogical quality of the study programmes and their development will be analysed using the following indicators: deployment of a skills-based approach; development of student-centred teaching methods, such as project-based learning and flipped classrooms; digitisation of teaching; and promotion of skills acquired by students within and outside the curriculum.

Standard 11. The institution analyses the attractiveness and performance of its educational offer, as well as students' pathways to promote their success from their initial orientation to their entry into the labour market.

- **Q1:** At what level and for what type of programme does the institution consider it most important to be attractive? What are the criteria for measuring its attractiveness? How have these criteria helped to enhance the attractiveness of the programmes in line with the priorities defined?
- **Q2:** Are the public information and student guidance systems effective and relevant to the institution's objectives in terms of both the attractiveness of its programmes and support for success?
- **Q3:** What indicators – success, professional integration, etc. – does the institution have at its disposal? Are these publicly available?
- **Q4:** What measures is the institution taking to develop its programmes in terms of professional integration?

The institution will describe the information, guidance and communication systems it has put in place for its study programmes, as well as the impact these systems have had on improving the programmes' attractiveness to different audiences, such as secondary school pupils, students (including international students) and continuing education trainees. Data on trends in applications and enrolments among these groups will be used to inform this analysis.

Success rates by qualification (per year or cohort) will be analysed alongside repeat, dropout and reorientation rates in relation to the educational resources devoted to supporting success. This data is publicly available.

Professional integration will be analysed by describing the types of integration (within or outside the field of acquired skills) and the average incomes of young graduates in relation to their level of qualification.

Standard 12. The institution defines a process for evaluating its study programmes. This is part of a continuous enhancement approach.

- **Q1:** Does the institution organise student evaluations of courses and take the results of these evaluations into account in its development?
- **Q2:** Does the institution have a consultative body, such as an advisory board, comprising students and individuals from outside the programme? Does this body meet regularly to analyse the programme's results and contribute to its internal evaluation?

- **Q3:** Does the institution have a strategy for the external evaluation of all or some of its programmes by national or international agencies?

FIELD 4. COMMUNITY ENGAGEMENT AND THE DEVELOPMENT AND SUPPORT OF STUDENT LIFE

Standard 13: The institution defines and implements a community engagement policy

- **Q1:** What objectives and action plans has the institution defined for developing a community engagement policy? What strategic partnerships are they based on, and what are the mutual benefits? Have indicators been formulated to monitor the achievement of these objectives?
- **Q2:** What human, physical and financial resources are required for the management and implementation of the community engagement policy? In particular, how do the mechanisms for designing and organising these activities encourage societal engagement and citizenship among students?
- **Q3:** How does the community engagement policy relate to the institution's other missions? To what extent does it contribute to the quality of education?
- **Q4:** Are there mechanisms in place at the institution to evaluate the relevance and impact of community engagement activities at local, regional or national levels? Are the socio-economic and cultural benefits recognised by the institution's internal and external stakeholders?

The institution will describe action-oriented training processes linked to real-life situations, enabling knowledge to be applied directly within selected communities to resolve local, regional or national issues. Examples of these initiatives include advisory or technical assistance services, volunteering or internships with a community learning dimension, outreach activities and collaborative projects that contribute to community capacity building and priority development needs.

Standard 14: The institution supports the development of student and campus life, student involvement in governance, and promotes student well-being.

- **Q1:** What are the strategic orientations underlying the institution's student and campus life development policy and what resources are allocated to it?
- **Q2:** How does the institution incorporate gender equality, inclusion, anti-discrimination, anti-sexist and anti-sexual violence policies into this policy? Can the institution demonstrate significant results in this area? What steps does it take to promote equal opportunities, such as welcoming scholarship students into courses and engaging with students with specific needs?
- **Q3:** Does the institution have the necessary facilities to promote a high-quality student and campus life, such as accommodation, cultural and sporting activities, and health services?
- **Q4:** How do student and alumni associations contribute to the development of student life? What proportion of resources is allocated to supporting student-led associations and initiatives?
- **Q5:** How is student involvement in the governance and decision-making bodies of the institution recognised, valued and encouraged?

Key indicators will include data such as the amount of funding allocated to student and campus life in its various aspects (social, physical and mental health, culture and sport), the percentage of scholarship recipients and the proportion of students with disabilities. The same applies to student participation in governing bodies and the recognition of student engagement.

The quality of student life and experience will also be evaluated, taking into account material and environmental conditions, the implementation of mechanisms to detect, support and accompany psychologically vulnerable students, and the implementation of initiatives to raise awareness and provide training for staff on student well-being.

APPENDIX

Compliance of Hcéres' standards with the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG)

ESG standard	Hcéres standard
1.1 – Policy for quality assurance	Standard 8, Standard 9, Standard 12
1.2 – Design and approval of programmes	Standard 4, Standard 9, Standard 10
1.3 – Student-centred learning, teaching and assessment	Standard 8, Standard 9, Standard 10, Standard 12
1.4 – Student admission, progression, recognition and certification	Standard 10, Standard 11
1.5 – Teaching staff	Standard 6, Standard 9
1.6 – Learning resources and student support	Standard 5, Standard 6, Standard 9, Standard 10, Standard 11, Standard 12
1.7 – Information management	Standard 4, Standard 5, Standard 6, Standard 7, Standard 9
1.8 – Public information	Standard 1, Standard 4
1.9 – Ongoing monitoring and periodic review of programmes	Standard 9, Standard 10, Standard 11
1.10 – Cyclical external quality assurance	Standard 8