



Quality Evaluation Program Guidebook

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Effective: Immediately and supersedes all previously published policies and procedures

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Quality Evaluation Coursework

Quality Evaluation (QE) education is a benefit at every point in the value chain. Because we speak the same language, fine and specialty coffee is recognized, and producers are ultimately rewarded for their quality through better access to markets. Perhaps the most exciting thing about Coffee Quality Institute education is that it is applied. Our community uses their skills to evaluate coffee quality to give producers the ability to know their coffee, to give sellers tools to describe their product accurately, and to give buyers confidence that they are purchasing the quality and flavor profile they expect.

QE Classes

Learning CQI Flavor Standards (100 level class)

This is a 1-day, live class that is designed to introduce the CQI Flavor standards.

Summary: It accomplishes this by

Providing a basic understanding of how the senses of taste and smell function
 Introducing and practicing recalling 7 Flavor Standards generally considered to be Positive Attributes

Introducing and practicing recalling 7 Flavor Standards generally considered to be Off-Flavors
 Conducting a practice test that is the same format as the annual flavor calibration.

The attendee will learn how to prepare and recognize CQI Flavor Standards.

Who is it for? Any Q Arabica or Q Robusta Grader wanting to practice for their annual Flavor Calibration. Any person wanting to learn or experience CQI Flavor Standards.

Understanding Taste & Flavor (100 level class)

This 1-day, live class enables the attendee to develop a basic understanding of the human gustatory system and its role in the coffee evaluation process.

Summary: This interactive class will introduce the attendee to the basic functionality and components of the human gustatory system. This knowledge of the functioning of the human gustatory system will then be applied to both a calibration set of aqueous solutions and to coffee samples. Results from the exercises designed to help the attendee identify their own threshold sensitivities to the modalities of: Sweet, Sour, Salt, Bitter and Umami will be applied to the process of evaluating the flavor and balance of coffee. This knowledge of the functioning of the human gustatory system will then be applied to both a calibration set of aqueous solutions and to coffee samples. An attendee of this class will know their threshold sensitivity levels to each of the 5 taste modalities. They will understand how subtle changes in taste modality perceptions can have a significant impact on the final assessment of a coffee's quality.

Who is it for? Novice coffee people who want to understand how their senses work and build

skills to help them excel in quality evaluation.

Sensory Evaluation in Quality Control (200 level class)

This 2-day, live class continues the development of coffee-centric quality evaluation skills by introducing the main sensory tools and testing methods used by large food & beverage companies around the world to standardize and unify their production.

Description: Flavor and quality context is a trained, practiced, and continually evaluated skill. This class works to build this context using sensory reference standards and sensory evaluation techniques. Participants will develop skills to define what quality means in their company and recognize acceptable and unacceptable flavors. They will be introduced to the main sensory testing techniques utilized by food and sensory professionals in academic and industry settings. In this interactive class, learning is facilitated through practice and professional feedback, and builds on basic sensory understanding to establish working knowledge of systematic quality control practices using the most up-to-date tools of the trade.

Who is it for? Coffee people working in procurement, green coffee buying and quality assurance, product development and inventory management. Anyone who needs to understand how to apply professional quality control testing to coffee.

Introduction to CQI Cupping (200 level class)

This 2-day, live class teaches all new coffee people how to set up a cupping and evaluate coffee consistently with CQI's best practices and protocols for Q graders.

Description: Attendees will learn the fundamental mechanics of olfaction (Fragrance & Aroma), gustation (Flavor & Aftertaste), tactation (Body & Mouthfeel) and aroma memory recall. They will apply these fundamental mechanics while learning how to compare and describe coffee attributes. They will be taught how to determine the proper weights and measures of a cupping bowl and to set up a cupping table. We will cup multiple flights of coffee and calibrate our evaluations. An attendee actively participating in this class will know how to properly set up and conduct cuppings with globally recognized protocols. They will also begin to learn the common language of coffee quality descriptors and ways to continue increasing their knowledge and usage.

Who is it for: New coffee people, novice cuppers, or even coffee enthusiasts looking to better understand coffee flavor and how quality is professionally evaluated.

QE Courses

Q Cupping Essentials (200 level course)

This live, classroom course teaches new cuppers the criteria used to evaluate each attribute of the cupping form via experiential activities and theoretical lectures.

Description: Each box on the cupping form will be explored theoretically and will be experienced in multiple methodologies both with and without coffee. A general knowledge exam drawn from the course pre-work and the content delivered in the course, properly completed cupping forms and a mathematic and descriptive calibrations will be the metrics used to validate the attendee's learning and verifying their proficiency. Cuppers earning their Q Cupping Essential certificate will be able to cup consistent with the CQI protocols and procedures and demonstrate a working understanding of the cupping form. They will have developed the foundations of the global common language of quality and know how to apply that language correctly.

Who is it for? QCE is a great course for someone looking to advance their understanding of cupping, a vital skill in the coffee industry. It is ideal for people who need to build the skills necessary to become professional cuppers. This includes Q Grader candidates, quality control staff and coffee product developers, prospective coffee buyers and roasters working with coffee producing partners in the value chain.

Q Arabica Grader Combo (300 level course)

Q Arabica was the first component of the Q system, launched by CQI over 15 years ago. The concept was simple: train everyone in the supply chain to speak a common language of quality. In this way, aiming to elevate quality coffee worldwide and ultimately rewarding producers for higher quality while opening market opportunities.

Description: This course consists of two corresponding parts over six days. In the first part, over 3 days, learners review assumed knowledge and theoretical principles, including practice of all activities. The second part is a 3-day series of exams regarding the material presented. The course includes 20 exams over 9 Modules to test the learners' job-relevant skills including cupping protocols, olfactory and gustatory senses, green coffee defect identification, roast sample level identification and matching pairs of coffee acids. Testing also includes recognizing and recalling CQI Flavor Standards in aqueous solutions. Participants who pass all exams earn a Q Arabica Grader certificate.

Who is it for? Practicing coffee tasters and quality assurance/control professionals looking to gain familiarity with international standards and be recognized with a professional certificate.

Q Robusta Grader Combo (300 level course)

This course was developed in cooperation with the Ugandan Coffee Development Authority (UCDA) and launched by CQI globally to improve the quality of Robusta, including training of coffee professionals in the standards for Fine Robusta.

Description: This course combines training and testing to reinforce learners' understanding of the Q Robusta Grading process while measuring their ability to evaluate Robusta coffee according to the established CQI Fine Robusta standards and cupping form.

This course consists of two corresponding parts over six days. In the first part, over 3 days,

learners review assumed knowledge and theoretical principles, including practice of all activities. The second part is a 3-day series of exams regarding the material presented. The course includes 20 exams over 9 Modules to test the learners' job-relevant skills including cupping protocols, olfactory and gustatory senses, green and roasted grading, organic acid identification, triangulation skills, roast sample level identification, coffee processing evaluation, and general coffee value chain knowledge. Testing also includes recognizing and recalling CQI Flavor Standards in aqueous solutions. Those successfully completing this course will be able to objectively evaluate Robusta coffees based on cup quality and origin and provide feedback on cup nuances, defects and flavors. Participants who pass all exams earn a Q Robusta Grader certificate.

Who is it for? Practicing Robusta tasters and quality assurance/control professionals looking to gain familiarity with international standards and be recognized with a professional certificate.

Q Arabica or Robusta Grader Calibrations (300 level course)

Q Graders must calibrate their coffee evaluation skills every three years. Coffee Calibration verifies their abilities to accurately evaluate coffee quality based upon the globally accepted standards for Fine Robusta and/or Specialty Arabica. Calibration validates a Grader's skill as well as commitment to quality.

Description: The calibration consists of three cupping flights with distinct attributes. All Q Graders must demonstrate calibration by passing at least two of the three flights. Upon passing, the Q Grader certificate is valid for thirty-six (36) months from the date all exams are successfully completed.

Who is it for? Any Q grader wishing to renew their Q certificate and remain an active Q grader.

Q Recertification (300 level course)

Calibration verifies their abilities to accurately evaluate coffee quality based upon the globally accepted standards for Fine Robusta and/or Specialty Arabica. If a Q grader falls out of calibration and they are within 5 years of being certified, they are eligible to take the Recertification course, which re-tests candidates' skills.

Description: The Recertification Course typically lasts 2 days or can be combined with a Q Combo course, in which case it would become 3 days. It consists of the following exams from the Q Grader Course:

- Sensory Skills Exam
- Cupping Skills Exam – comprised of three (3) cupping sessions Washed Process, Natural Process and either Africa or Asia
- Triangulation Skills Exam – three triangulation exams, which correlate to the cupping exams administered.
- Olfactory Skills Exam – Parts A, B, C, D
- Matching Pairs Skills Exam
- Flavor Standards Exam

A Q Recertification candidate may take these exams within the context of a full Q Arabica/Q Robusta Grader course. The instructor must consult with the Recertification candidate regarding the schedule of events for the exam week and arrange for proper tracking through the database.

Who is it for? Q Graders who are out of calibration because they did not attempt or failed their Q Grader Calibration Course and all re-take opportunities

Requirements to join a course or class

Age

The minimum age to attend a CQI Course or Class is 16 years old before the first day of the course. Students aged 16 & 17 must receive authorization from the instructor and parent/legal guardian to attend a CQI course.

Consent

Every class or course attendee must release CQI of any liability by signing the *CQI Education Release of Liability and Assumption of Risk*. This form is mandatory and is a normal part of signing up for courses and classes through the CQI database. Occasionally, when it is impossible for the learner to sign themselves up directly, their educator may ask them to sign a paper copy of this form to submit to CQI.

Course/Class Evaluations

Attendee evaluations are important to CQI and provide us with valuable insight on how we should improve our education programs. We rely on every person to provide honest and anonymous-to-educator feedback so that CQI can continue to meet our goals and mission. You are required to complete this post-class/course evaluation to receive your class participation award or to know the results of your certificate course and/or receive your certificate.

All attendees of CQI courses and classes are asked to participate in the CQI feedback system. All CQI Educators are responsible for ensuring that attendees have the link to CQI's online evaluations. All evaluations are sent directly to CQI and are anonymous to the educator. CQI shares consolidated, anonymized feedback with all educators on a regular basis to ensure Educators have the opportunity to learn and grow from their students' suggestions.

Grades or disputes

Attendees who take courses with graded tests/exams should verify their performance and grades received for a course in their profile in the CQI database. If there is any problem with the posted grade, first contact the instructor to discuss. Officially, attendees are allowed to appeal their exam score(s) up to six (6) months following the last day of their course. If more than six months have passed, the dispute will not be actionable by CQI.

The Q Coffee System

CQI is the only third-party green coffee *quality* evaluation and verification that is globally recognized. The core of CQI's Q Coffee System is built on the cupping skills of the Q Grader.

A green coffee that is Q Certified goes through the CQI Q Grading System. Green grading and cup scoring with the common language of quality provides a transparent, verifiable report certifying that the green coffee has no primary defects, a cup score of 80 points or more and a described flavor profile of the sample roast. That profile and data is documented and can be shared with the coffee farmer and potential green coffee buyers. The objective and standardized evaluation of the Q Grader is essential to maintain the integrity of the Q Coffee System.

CQI continuously monitors Q Graders that have participated in the Q Coffee System and reviews these evaluations. CQI also keeps track of all certified Q Graders in each country including their certificate expiration date. **It is the responsibility of a Q Grader to keep their certificate current if they wish to remain active in the Q Coffee System.**

The Q Coffee™ program is another way to communicate a coffee's quality, this time for consumer products. Q Coffee™ is a consumer quality mark that evaluates and verifies that the coffee has achieved either Specialty or Fine status. It is an identifiable trademark that allows the consumer to differentiate their buying decision.

The Q Course & Exams

Basic Q Rules

Students must pass all written and practical exams in order to achieve their Q Grader certificate.

- The time frame allowed to complete all written and practical exams is eighteen (18) months from the original Q Grader Course enrollment date.
- There are some exams that may be retaken within the same Q Course.
- Cupping skills will require visiting another Q Grader Course to be retaken
- General knowledge exam must be retaken remotely online

For Q Arabica and Q Robusta Graders:

The Q Grader certificate is valid for thirty-six (36) months from the date learners successfully complete all exams. Renewal is accomplished by attending and passing the calibration exam.

Q Course Protocols

COURSES	COURSE LENGTH (DAYS)	OPPORTUNITIES	TIMEFRAMES	CERTIFICATE EXPIRATION
Q Cupping Essentials Course	3	2 Retakes	18 months to complete retakes from original course	3 years from the completion of the course
Q Combo Training and Exam Course	6	2 Retakes	18 months to complete retakes from original course	3 years from the date all exams are passed
Q Exam Course	3	2 Retakes	18 months to complete retakes from original course	3 years from the date all exams are passed
Q Training Course	3 or 4 at the Instructor's discretion	N/A	N/A	N/A
Q Retake Exam Course	Generally, 1 or 2	See rules for Q Combo Training and Exam, and Q Exam	18 months to complete retakes from original course	N/A
Q Calibration Course	1	1 Retake	6 months before the date of certificate expiration	3 years from the date all exams are passed
Q Recertification Course	3 if a stand-alone course. Generally offered concurrent with Q Exams	2 Retakes	18 months to complete retake courses from original course	3 years from the date all exams are passed

Q Exam Retake Policy

Q Retake(s) Permitted During Your Original Course Enrollment:

- Triangles
- Olfactory Recognition
- Green Coffee Grading
- Roasted Coffee Grading
- Sensory Skills
- Sample Roast Identification
- Matching Pairs
- Flavor Standards

A Q Candidate may take any of the above exams up to two (2) additional times during a Q Course. Factors that can reduce the number of retakes offered are the availability of sufficient time, materials and facilities.

The above exams can be retaken in up to two (2) additional Q courses, when the candidate joins as a retaker.

The Q Instructor leading the Q Course has the sole discretion to decide which retake exams are offered and how many opportunities. As a general guide, the prioritization of retake exams is determined by the potential for the student to earn a Q in that course.

Q Retake(s) Requiring Joining an Additional Course:

- Cupping Skills
- General Knowledge Exam (remote)

Cupping tables 1-4 may be retaken up to two (2) additional times in additional Q courses.

Attendees needing to retake the General Knowledge (GK) Exam may do so by signing up as a retake student in a normal Q Course. *The GK Exam may be taken remotely and does not require travel to the actual Q Course to be included in the retake.* Candidate Q Graders needing this exam should contact the Instructor of a Q Course to discuss inclusion in the retakes.

After their initial Q Grader Course, students may request admission into a maximum of two (2) additional Q Grader Exam retakes outside of the original course in order to complete their retake exam(s). There are no restrictions for when a student can begin to retake their exam(s).

ALL retake exams must be completed within eighteen (18) months of the original course date. Students who have not successfully passed all exams within eighteen (18) months of their original Q Grader Course must retake the entire course at a future date.

It is the responsibility of the Q Candidate to know what retake exams they need and how

many Q Exams they may join. It is the instructor's responsibility to verify a retaker's eligibility status BEFORE administering exams.

An instructor may assess if the student needs additional training and/or practice before admitting the student into the Q Grader Course and may so advise the student. The Q Instructor leading the Q Course has the sole discretion to accept or deny admission of a retake student into their Q Course.

Independent retakes

The Flavor Standards Exam retake may be taken remotely and independently, outside of a Q Course.

The CQI Flavor Standards Exam may be retaken up to two times within the 18-month retake period. This exam may be self-administrated, or the candidate may decide to take it within an allowed retake Course.

To self-administer the exam, the student needs to order an individual sized FlavorActiV CQI Q Calibration Test kit, which can be purchased at <https://www.flavoractiv.com/cqi/> and enroll in a CQI In-House course called a Q Grader Flavor Standards Exam Retake.

Q Grader Rules

1. Individuals who have successfully passed CQI's Q Grader exams are certified as a Q Grader.
2. Q Graders hold a professional certificate in coffee grading and evaluation from CQI that qualifies them to perform these functions for fees mutually agreed to by the Q Grader and CQI's In Country Partner.
3. Only individuals with a current Q Grader certificate may use the authorized Q logo and the nomenclature "Q Grader" as a professional credential under the guidelines established by CQI.
4. No person who has held a Q Grader Certificate in the past may represent themselves as a "Q Grader". Current certificates can only be verified in real time by checking the CQI database and list of current Q Graders.

Q Grader Guiding Principles and Code of Ethics

About Coffee Quality Institute

The Coffee Quality Institute (CQI) mission is to improve the quality of coffee and the lives of those who produce it.

CQI transforms the coffee market for the benefit of producers through education and differentiation, by:

- Disseminating and perpetuating a global language of coffee,
- Providing holistic education throughout the value chain that empowers producers, improves quality and market value, and elevates consumer awareness, and
- Creating and supporting market connections.

The Coffee Quality Institute's core values are:

- Respect and empathy,
- To be collaborative and service-focused,
- Diversity and equity,
- Quality and continuous improvement that is driven by science, and
- To stand with producers.

Q Graders should endeavor to always uphold, support, promote, and embody the CQI core values.

As a Q Grader

The following values apply to Q Graders, when grading for CQI or grading privately with Q guidelines:

The Q Coffee Program of the Coffee Quality Institute (CQI) is dedicated to promoting the highest principles of honesty, integrity, fair dealing, and professionalism in the grading and evaluation of coffees.

A Certified Q Grader agrees to:

- Provide an impartial, professional evaluation of any coffees submitted for Q Grading,
- Meet or exceed the professional expectations placed on them by coffee producers, government agencies, customers, or clients,
- Represent their credentials, training, experience, and abilities accurately and honestly, and
- Maintain and advance their knowledge and skills in the technologies and procedures utilized in coffee quality evaluation.

Q Graders Code of Ethics

Business Integrity: Q Graders shall not accept, whether directly or indirectly, bribes or other improper advantages for business or financial gain. Any offer of a bribe must be rejected immediately and reported to appropriate employers or clients, and to the CQI.

Confidentiality: Q Graders protect confidential information and comply with all legal requirements for the disclosure of information affecting the welfare of others.

Honesty: Q Graders shall not make false, misleading, unwarranted statements, representations, or claims.

Conflicts of Interests: Q Graders are expected to avoid personal activities and commercial interests, which could conflict with their responsibilities as Q Graders, and must not seek gain for themselves or others through misuse of their certification. Q Graders shall disclose the existence of any pertinent competitive or conflicting interests.

Compliance - Monitoring - Reporting: Compliance with this Code of Ethics is an essential element of the Q Grading system. Q Graders shall bring to the attention of the CQI any breach or suspected breach of these principles. Please file the grievance through the official CQI channel here: <https://coffeeinstitute.webflow.io/page/cqi-grievance-policy>

Investigation and disciplinary actions

Q Graders may be investigated if ethics violations are alleged. They may be penalized, if necessary, to include suspension of Q Grader status, loss of Q Grader status, or permanent expulsion. The CQI, in its sole and absolute discretion, may deny a Q Grader Certification to any applicant who:

- Fails to provide, in the application and supporting documents, evidence of sufficient knowledge, training or experience,
- Is found cheating or submitting work other than their own during any Q Grader examination or sample evaluation, and/or
- Has made any false statement in connection with documents filed with CQI.

Q Grader Calibration and Recertification

Allotted Timeframes for Q Calibration and Q Recertification

A renewed Q Grader certificate is valid for thirty-six (36) months from the date the Q Grader successfully completes a Q Grader Calibration. For example, if a Q Grader passes a Q Grader Calibration Course June 15, 2023, their Q Grader certificate will be valid until June 15, 2026.

- 1) The Q Grader Calibration Course must be completed and passed every third year. The window to calibrate begins six-months prior to your expiration and must be completed no later than 6 months after your expiration date to obtain a new certificate.
 - a. In the year that a Q Grader Calibration is required, passing the Coffee Calibration Exam must be completed to obtain a new certificate.
 - b. Q Graders failing the Coffee Calibration exam may retake this portion of the course one (1) time in order to renew their Q Grader certificate. They must join and pass another Q Grader Calibration Course within six (6) months of their failure to become certified again.
 - c. Q Graders with a certification start date prior to November 1, 2022 will still have six-months after their expiration to attempt a calibration. Q Graders with a start date of November 1, 2022 or later must complete their calibration attempt prior to their expiration date.
- 2) Q graders who have lapsed in their status and failed to pass their Q Grader Calibration Course will have up to five (5) years from their last certificate expiration date to attend a Q Recertification Course. After five (5) years, they must proceed to take a full Q Course and are not eligible for Q Recertification.

Q Coffee Calibration Details

Being calibrated is necessary for Q Graders, keeping them engaged with any updates or improvements to the Courses. Additionally, calibration ensures a Q Grader's alignment to CQI's Standards for the quality of Specialty Arabica and Fine Robusta coffees. Calibrating re-establishes the parameters of how to identify various quality levels in coffee, ranging from outstanding to very good (specialty grade), and down to commercial grade coffees. The activity consists of a brief presentation, a reference cupping and three (3) cupping exam sessions.

Coffee Calibration exams are required for all Q Graders who would like to remain active and keep their certificate.

During a Coffee Calibration exam, the results of all cuppers are entered into a proprietary evaluation algorithm (The Matrix) to assess their capacity for rating coffee attributes compared to the other cuppers. This method is similar to the method in which they were

evaluated in their Q Grader Exams, however, the allowed deviation is tighter, as the Cuppers are now considered more experienced. The Matrix indicates if the copper is in calibration with the group or not, how consistent they are to themselves and the confidence in their range of scores based on the quality of each of the coffees on the table.

Q Graders must also demonstrate the cupping protocols/standards for a Q evaluation, including: the rule of silent work, objective evaluation of varying grades of coffees, identification of defects, repeat coffees, or lower grade coffees; cupping protocols, green grading standards, identifying flavor attributes, and roasting/quaker tests according to CQI Protocol.

1. A Coffee Calibration exam currently is a one-day (1-day) exercise conducted by a certified Q Grader Instructor in which coffees are cupped in three (3) separate cupping sessions of six (6) samples each:
 - One (1) of the sessions must contain an international mixture of Washed Process Coffees. These coffees will vary in quality.
 - One (1) of the sessions must contain coffees from Africa or Asia. These coffees will vary in quality.
 - One (1) of the sessions must contain an international mixture of Natural Process Coffees. These coffees will vary in quality.
2. Cupping and scoring protocols:
 - The coffees are to be cupped according to the cupping protocols taught by CQI and the scores recorded on the cupping forms used by CQI.
 - The cupping data for each Q Grader is entered into a Calibration Exam Matrix, which automatically calculates the Q Graders' pass/fail scores in regard to group Calibration.
 - Q Graders must receive a passing score of 86 or higher, and report defects accurately on two (2) of the three (3) cupping sessions, as well as show the proper use of the cupping form at all times, in order to renew their Q Grader certificate.

*****NOTE: Maintaining a Q Grader Certificate is required in order to continue Q Grading coffees for an established In-Country-Partner (ICP).***

3. Retaking the Coffee Calibration exam
 - Q Graders failing their first attempt at a Coffee Calibration exam may retake the exam one (1) time and within six (6) months in order to renew their Q Grader certificate.
 - Q Graders failing both the initial Coffee Calibration and Retake exam are required to complete the Q Recertification exams as described below.
 - Q Graders who attempted a Coffee Calibration exam and failed the retake exam or missed the retake window, have five (5) years from their last certificate expiration date to attend a Q Recertification Course. After this period, the expired Grader must take a full Q Course again and is no longer eligible for Q Recertification.

Q Grader Recertification Exams Details

The Q Grader Recertification Course (if organized as a stand-alone course) is a two-day (2 day) course consisting of the following exams:

- **Sensory Skills Exam (same as Q Arabica / Q Robusta Grader course).**
- **Cupping Skills Exam – comprised of three (3) cupping sessions**
- **Washed Mild's (mandatory)**
- **Africa or Asia**
- **Naturals**
- **Triangulation Skills Exam – three triangulation exams, which correlate to the cupping exams administered.**
- **Olfactory Skills Exam – Parts A, B, C, D (same as Q Arabica/Q Robusta Grader course).**
- **Matching Pairs Skills Exam (same as Q Arabica/Q Robusta Grader course).**
- **Flavor Standards Exam**
- **A credentialed Q Arabica/Q Robusta Instructor must administer the course and exams. Exams must be given in exactly the same manner as the original Q Grader course.**

A Q Recertification candidate (student) may take these exams within the context of a full Q Arabica/Q Robusta course. The instructor must consult with the Recertification student regarding the schedule of events for the exam week and arrange for proper tracking through the database.

To successfully complete the Recertification Course, the candidate must pass ALL of the exams. The retake policy for these exams follows the full Q Exams policy. Please refer to the Q Grader Retake Policy.

Candidates failing to complete Recertification Course retake exams as detailed in the Q Grader Retake Policy must retake the Q Grader Training and Exams if they wish to reinstate their Q Grader certificate.