

Implementing Institution-Wide Agent Management

David Parkinson

Dale Yellowlees

Institutional Context

- Medical-doctoral university
- 13 colleges and schools

Language Centre

- Total enrolment of about 23,000
- Historically use of agents undertaken by Language Centre
- Language Centre cost recovery so more "business driven"
- Language Centre an "outlier" so more flexible



Language Centre

- Institutional mistrust of and unfamiliarity with agents
- Language Centre cultivated a diplomatic approach over time
- Increasing awareness of and investment in internationalization
- Fragmentation of campus hard to get leadership
- Creation of SEM Assistant Vice Provost position



Process

- Project Charter established with an executive sponsor
- Purpose to "create and adopt standardized and coordinated student recruitment management practices"
- Examine current recruitment management practices
- Investigate best practices used by other institutions
- Develop standardized principles, guidelines and practices



Deliverables

- Definitions: "agent", "student/faculty ambassador", etc.
- Principles and Best Practices
- Agent screening: application process, evaluation, agreements
- Agent Onboarding: training, resources, communications
- Agent management and issue resolution



Deliverables...

- Commissions: amounts, incentives, invoicing, payments
- Evaluation and feedback
- Renewals
- Agent deployment by market, size of agency, consortia
- Technology: central storage of agreements, information collection and data reporting requirements, technology support

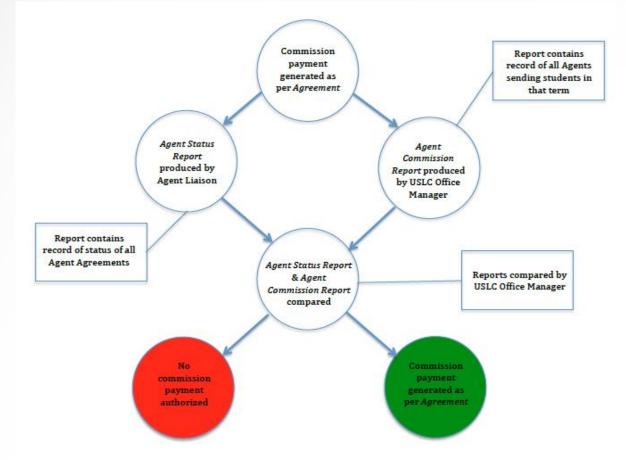


Summary of Bog	et Practies for Agent Management	Key Considerations and Strategies	for Policy and Practice			
Summary of Des						
Categories	NAFSA	Canada	USLC / U of S	UK	Australia	NACAC
Definitions	"An agent is defined as a third-party individual or group that acts in conjunction with and/or on behalf of an education institution as part of a comprehensive strategy for the recruitment of international students." (NAFSA)	"education consultant") refers to an individual or organization offering "education advising services to students and their parents in exchange for a fee (paid by students and their families) and/or a commission (paid by an [educational] institution they represent)"	return for financial consideration."	Export Agents for International Trade10 and this includes: Help to sell goods abroad; Act on the principal's behalf by introducing him/her to overseas customers; Give information and contacts for overseas markets; Identify opportunities	including students, parents, providers and homestay families - providing a pivotal link between them'. Agents can provide the following: 1) promotion, 2) marketing, 3) market research; 4) customer service; 5) alummi services, 6) business development; 7) services for regional or niche markets. (Queensland Dep't of Education and Training)	recruiting international students. Agencies are compensated by the institutions they recruit for, usually contingent upon the referral of enrollees.
Benefits (Pros)	Year round in country representation; knowledge of local language and local context/culture; on- ground intelligence, screen applicants for fit, follow up with local leads, assist with in country logistics and meetings, can be cost effective (good ROI) (NAFSA)	and placement assistance to prospective students and their families. First, agents can provide an efficient, cost- effective way for institutions to recruit in circumstances where and when they lack the time, resources, or acumen to do it themselves. Second, institutions believe that not using agents would put them at a significant competitive disadvantage vis-à-vis other top destination countries like the United States Lastly, institutions use agents as a response to student preference. Students prefer to put their trust in someone that speaks their own language and understands them and their needs.	Year round in country representation; maintain a store front' on behalf of the university allowing daily in-person and on-line access for prospective students and families; knowledge of local language and local context/culture; on-ground intelligence, screen applicants for fit, follow up with local leads, assist with in country logistics and meetings, can be cost effective (good ROI)	competitive; see agents as necessary and them eas "a vital tool" and "a key part of our strategy". Unique resources agents bring; has local connections contacts with government and scholarship agencies, key in some markets. Language competency: strong local/regional knowledge, particularly in large diverse countries Provide quick access to new markets. More cost effective, funding formulas make it easier to get § to pay agent than to hire more staff. Can pre- screen applicants, verification of documents and provide friendly face for distant institution. Assist with visa questions that institution cannot answer	danger; may provide "one-stop shopping" for a student. {Queensland Dep't of Education and Training}	
Concerns (Cons)	Misrepresent institution (purposeful or unintended), purposefully keep institution out of market, ongoing cost of training/materials, overlapping agent territories, potential legal issues, falsification of documents, overcharging students (advising it is going to institution), unknown enrolment variable, damage to relationships, invoicing for students not placed (NAFSA)	of practice and conduct Concerns regarding the potential damage to instituion in branding and reputation	There is always concern that an agency's business objectives might conflict with the university's educational aims (quality of students suitability for the U of S or study abroad in general, etc.). High rate of counselor turnover in some countries. This requires constant attention to training to maintain awareness, commitment and competence.	methodology. Higher risk of legal or regulatory	other ways to market and recruit; following regulations and policies on managing agents; agents may not be regulated; possible damage to	Students can become victims of fraud, and financial damage as well as other adverse outcomes. Students and their parents may not realize that agents are receiving a commission ofrom the insitution as those parents may be paying the agent directly for their advice, a practice otherwise known as 'double-dipping." Insitutions themselves can be exposed to risk if strict accounting and auditing procedures are not in place.



UNIVERSITY OF SASKATCHEWAN

Language Centre





Thank you for your kind attention!



Follow us on WeChat!

David M. Parkinson, MA, M Ed Director U of S Language Centre

d.parkinson@usask.ca

Dale Yellowlees, BA, . B Ed., PG Dip Marketing Coordinator U of S Language Centre

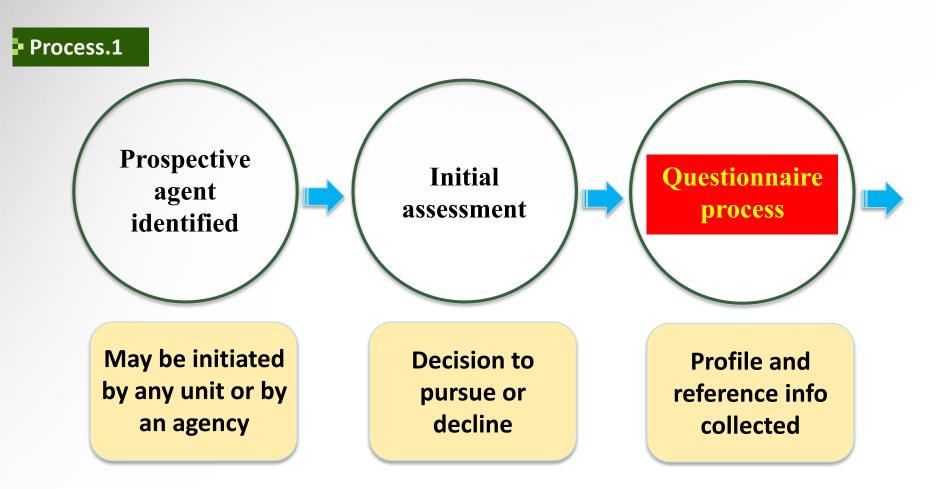
dale.yellowlees@usask.ca



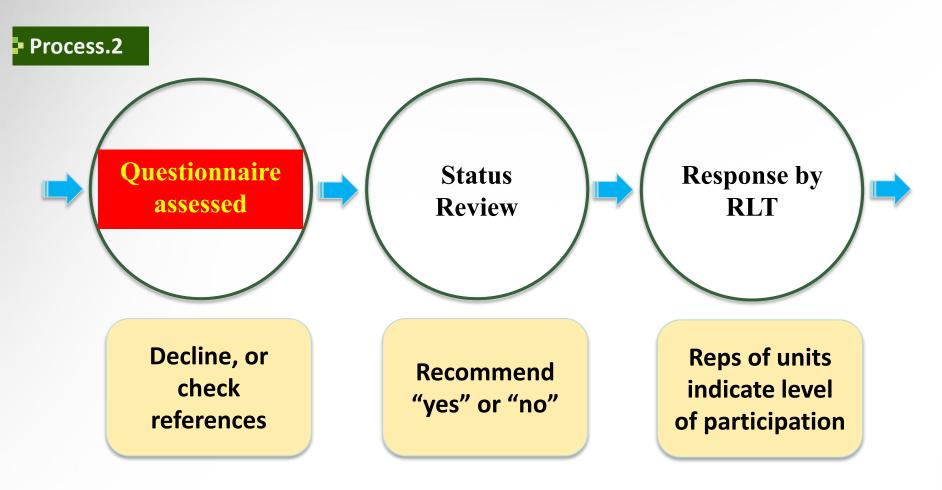
UNIVERSITY OF SASKATCHEWAN Agency Management System



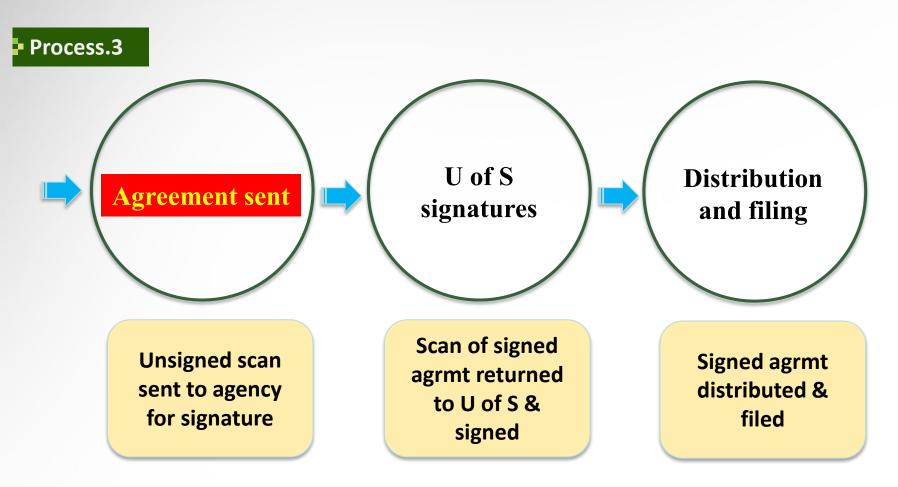






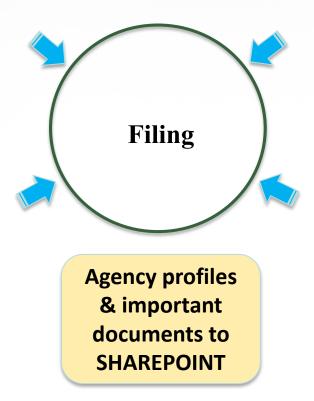






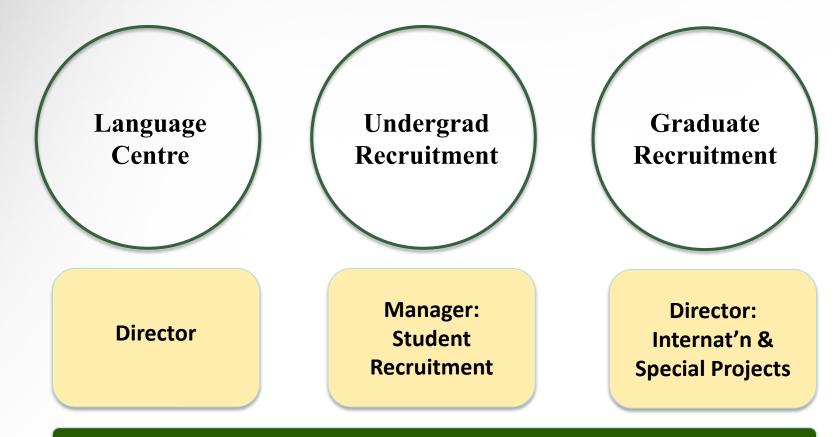








Structure.1



Recruitment Leadership Team



Structure.2

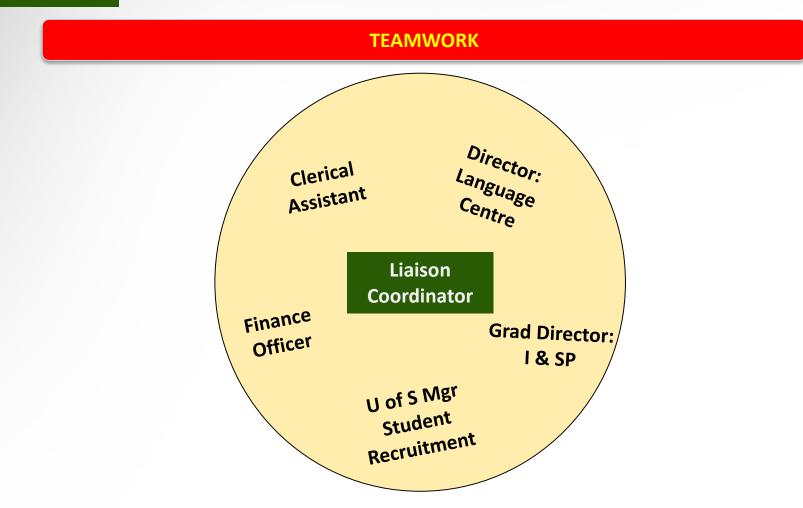
Recruitment Leadership Team

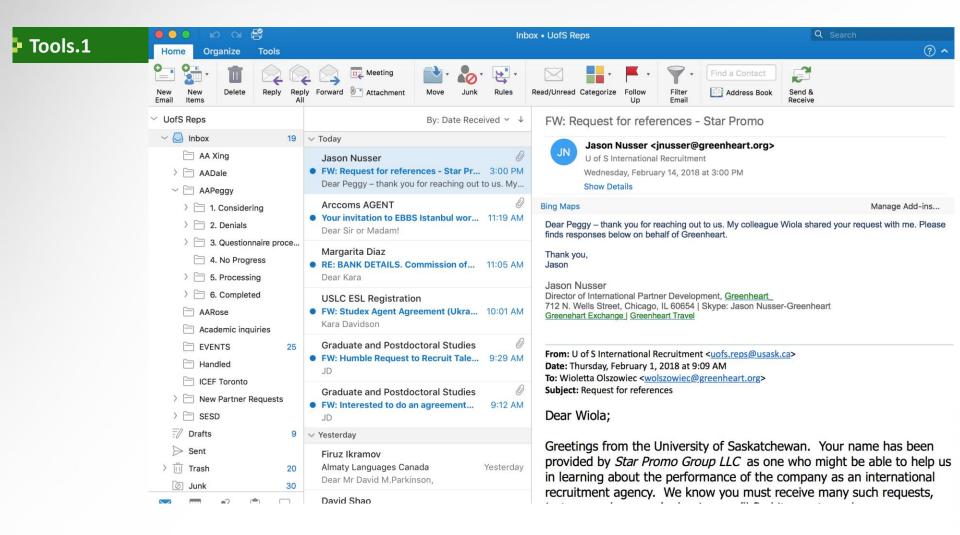


University officers / signatories



Structure.3







Tools.1



- > 📄 1. Considering
- > 📄 2. Denials
- > 🔄 3. Questionnaire proce...
 - 4. No Progress
- > 📄 5. Processing
- > 📄 6. Completed

Tools.1

~ [6 .	Completed
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- 360 Education Group
- AC Estudios En El E...
- AOJI
- ApplyBoard
- Assiston
- Beijing Oxbridge Ed...
- Beijing Zhaolong
- Best Way
- Bijo Overseas-Immi...
- BlueSky (2)
- **Bright Immigration**
- CanAchieve
- Canada Best
- Canada Incredible
- Canadian Education...
- **Canadian Experience**
- Canadian Study Ce...
- Canam Consultants
- Career Mosaic
- **Century Nit Consult**

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 - Global Education All...
 - Global Soc Res & E...
 - GND Advisors Inc.
 - Golden Sky Educati...

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R.K. Law Company

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- Student Excha... JNS Education Con...
- Kamilion, Jpn
- **KEN AFFOLDER** KimOkran

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Student Overseas

Thais Mascarenhas

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True Dream, VN

STUDYLINK

- SmartBE (Studex)
- - Step-Up Overseas



Tools.1



PARTNER QUESTIONNAIRE

PLEASE READ CAREFULLY: Completing this form completely will show the university that your company will take the relationship seriously and will be professional in dealing with your clients and the university. Please provide complete information according to the instructions.

COMPLETE THE FORM AND RETURN IT TO:

agents@usask.ca

Company Name	Date Completed				
What countries will your students come from?					

1. Please provide complete contact information about the company.

Mailing Address				
City/Town	Province/State	Postal Code	Country	
Name and title of person in o	charge	Name and e-mail of person who will communicate with		
		the U of S		
Agency Website		Alternate E-mail		
Telephone Number		Fax Number		



Tools.2

 Please give the names of other universities or major colleges (Canadian universities preferable) who can tell us about your professional relationship. Individuals named must be Canada-based employees of the university and college.

1) University Name					
Contact Person	Telephone Number	E-mail			
2) University Name					
Contact Person	Telephone Number	E-mail			
University Name					
Contact Person	Telephone Number	E-mail			

Tools.3



- 3. Please describe the company, including the following:

 Length of time in business using this name

 Number of offices in your country

 Number of partner offices sending students to you

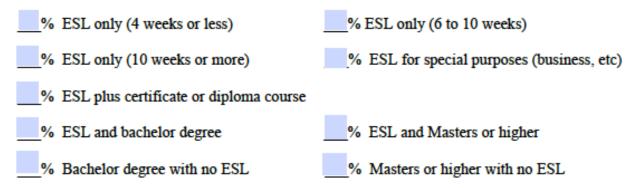
 Number of counselors available to students

 Number of staff who speak and write English

 Number of staff who have studied in Canada

 Number of years the company has sent students to Canada

 Number of students sent to Canada in the last 12 months
- Please tell us about the kinds of students you expect to be able to recruit in the next year. For each category, please estimate the percentage of your clients likely to select each program.





Tools.4

5. Please describe the activities of your company. What services do you provide to students before they go to Canada?

What services do you provide to students after they go to Canada?

- 6. Will students pay fees to your company for the services provided? How much will you charge them?
- 7. Please tell anything special about your company's services, programs or plans for the future.



Tools.5



U of S Recruitment Management Team

Review of Agency Status (to be used only for evaluation re. making an agreement)

New 💽 Renew	\bigcirc	Date	e (yyyy/mm/dd)	
Company		Country		Date of first agreement (yyyy/mm/dd)
PROGRAM AREAS	None LC L	IG Grad	LC + UG LC + Grad	ALL

Relevant considerations (recruitment history, agency network, professionalism, cooperative efforts, etc)

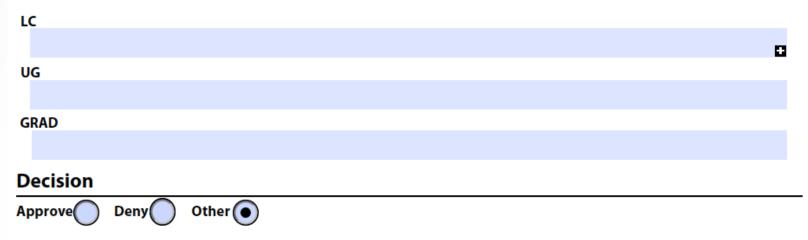




Tools.6

Notes (Any team member may enter relevant information here regarding the agency and the proposed agreement.)

Unit Recommendations (Please enter a brief note indicating your vote. End with your NSID. Format: Dec 20/16: My unit will participate / decline to participate / opppose this agreement. dby 226



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SharePoint					Newsfeed	OneDrive Sites	Yellowlees, Dale	• Ø ?
BROWSE HELP ITEMS LIST	г							FOLLOW
University of Saskatchewan	Vice-Provost Teaching and L Agencies	earning Intranet	Agent Management System •	Committees	Office of the VPTL	Agent Managemen	t Events	Search this
Home	• new item or edit	this list						
Agencies	All Agencies MailChimp	list Test •••	Find an item $ ho$					
Agency Documents	 Agency Name 	Market	Agency Website	Agreement Status	Years In Effect		Curr	ent Agreement
Document Bank		 Nigeria; 	http://www.o3-athletics.org	Declined				
Group Management	Foundation							
Manage Group Membership	101103821 Saskatchewan	 Serbia; Hungary; 	http://iibc.ca	New: In Progress			4/30	0/2020
Manage Groups in IAM Video	Ltd IIBC	Mexico; Philippines; China;						
Site Contents	101133234 Saskatchewan	 Korea, Republic of; 	http://www.pravedu.com	Current	2009,2010,2011,2012,	,2015,2016,2017,201	3 7/10	0/2018
	Ltd.							
	360 Education Group Limited	China;	http://www.360.edu.ca	Current	2015,2016,2017,2018,	,2019	2/3/	/2019
	360 Media	Chile;	http://www.360media.cl	Dormant	2014,2015		5/30	0/2015
	5 River Immigration Services	India;	http://5riverimmigration.com	Declined				



Tools.8	new item or edit this list									
	All Agencies MailChimp list Test ··· Find an item									
	~	Agency Name		Market	Agency Website	Agreement Status	Years In Effect			
		03 Athletics Foundation	•••	Nigeria;	http://www.o3-athletics.org	Declined				
		101103821 Saskatchewan Ltd IIBC		Serbia; Hungary; Mexico; Philippines; China;	http://iibc.ca	New: In Progress				
		101133234 Saskatchewan Ltd.		Korea, Republic of;	http://www.pravedu.com	Current	2009,2010,2011,2012,2015,2016,2017,2018			
		360 Education Group Limited		China;	http://www.360.edu.ca	Current	2015,2016,2017,2018,2019			
		360 Media	•••	Chile;	http://www.360media.cl	Dormant	2014,2015			
		5 River Immigration Services		India;	http://5riverimmigration.com	Declined				



⊧ Tools.9 🕞

\oplus new item or edit this list

All Agencies	MailChimp list	Test	•••	Find an item	Q	
 Agency Na Central Afr Chad 	me rican Republic	Market	•	Agency Website http://www.o3-athletics.org		Agreement Status Declined
Chile				http://iibc.ca		New: In Progress
China			;			
Christmas	Island		L	http://www.pravedu.com		Current
Cocos (Kee	eling) Islands		;	http://www.pravedu.com		Current
Colombia			L	http://www.360.edu.ca		Current
Comoros						
Congo				http://www.360media.cl		Dormant
Congo, The the	e Democratic Rep	oublic of		http://5riverimmigration.com		Declined
Cook Islan	ds					
Costa Rica						Current
Affoldor)						

Tools.10	new item or edit this list								
	All Agencies MailCh	imp list Test 🚥	Find an item						
	 Agency Name 	Market 👕	Agency Website	Agreement Status	Years In Effect				
	101103821 Saskatchewan Ltd IIBC	Serbia; Hungary; Mexico; Philippines; China;	http://iibc.ca	New: In Progress					
	360 Education Group Limited	China;	http://www.360.edu.ca	Current	2015,2016,2017,2018,2019				
	AL International Program Counselling	•••• China;		Dormant	2011,2012				
	Alvis Tsui (FSS) Inc.	 China; Hong Kong; Korea, Republic of; Japan; Taiwan, Province of China; Macao; Viet Nam; Ukraine; Russian Federation; India; 		Current	2015,2016,2017,2018				

Tools.11	⊕ new item or e	dit this list			
	All Agencies MailChi	mp list Test …	Find an ite	m 🔎	
	 Agency Name 	Market T	Agency Website	Agreement Status	Years In Effect
	101103821 Saskatchewan	•••• Serbia; Hungary;	http://iibc.ca	A↓ Ascending	
	Ltd IIBC	Mexico; Philippines;		Z↓ Descending	
		China;		🍢 Clear Filters from Agreement Status	
	360 Education Group Limited	••• China;	http://www.36	Current	2015,2016,2017,2018,2019
	AL	China;		Declined	2011,2012
	International Program			Dormant	
	Counselling Alvis Tsui	···· China;	http://www.fs	Expired	2015,2016,2017,2018
	(FSS) Inc.	Hong Kong;		New: In Progress	,,,,
		Korea, Republic		Renewal: In Progress	
		of; Japan; Taiwan,		Renewal: In Pr Close	ogress
		Province of China;			
		Macao; Viet Nam;			
		Ukraine; Russian			
		Federation; India;			

Tools.12	(+)	new item or	edit	this list					
	All A	gencies MailCl	himp l	ist Test		Find an item	Ø		
	~	Agency Name		Market T	Agency	y Website	Ag	greement Status 🝸	Years In Effect
		Amber Education (Hong Kong) Services Ltd.		Hong Kong; China; Ukraine;	http:/	/amberedu.com		enewal: In rogress	2018
		Archway Immigration & Consulting Services Inc.		China;	http:/	/www.archwayimmigration.cor		enewal: In rogress	2017,2018
		Beijing Promising International Consulting		China;	http:/	/www.picg.org		enewal: In rogress	2014,2015,2016,2017
	~	<u>Can-Achieve</u> <u>International</u> <u>Education</u> Limited		China;	http:/	/www.canachieve.com.cn		enewal: In rogress	2007,2008,2009,2010,2011,2012,2013,2014,2015,2016,2
		Canada Glory Immigration Ltd		China;	http:/	/www.gloryvisa.com		enewal: In rogress	2017
		Chincheng International Education Consulting		China;				enewal: In rogress	2011,2012,2013,2014,2015,2016

Tools.13

Home					
Agencies	Agency Infor	mation			
Agency Documents	Agency Infon	Πατίοπ			
Document Bank	Agency Name *	Can-Achieve International Educa	tion Limited		
Group Management					
Manage Group Membership	Markets	China			
Manage Groups in IAM Video					
Site Contents	Address (street info only)	802 Tower B, Jian Wai SOHO Office Building No. 39 Dongsanhuan Zhonglu, Chaoyang District			
	City	Beijing			
	Province/State		Postal Code	100022	
	Country	China			
	Fax Number	(86) 10-5869-4171			



• Tools.14	Agency Website	http://www.canachieve.com.cn
	Admin Contact	Jim Lin
	Admin E-Mail	jimlin@can-achieve.com.cn
	Commission Contact	
	Commission E-Mail	
	Marketing Contact	Cilla Yang
	Marketing E-Mail	cillayang@can-achieve.com.cn



and the second			
Tools.15	Fax Number	(86) 10-5869-4171	
	Phone Number	(86) 10-5869-9445-8028	
	Agency Website	http://www.canachieve.com.cn	
	Admin Contact	Jim Lin	
	Admin E-Mail	jimlin@can-achieve.com.cn	
	Commission Contact		
	Commission E-Mail		
	Marketing Contact	Cilla Yang	

Tools.16	Agreement Status	Renewal: In Pr	rogress			
	Years In Effect	2006	✓ 2007	✓ 2008	✓ 2009	
		✓ 2010	✓ 2011	2012	✓ 2013	
		✓ 2014	✓ 2015	2016	☑ 2017	
		2018	2019	2020	2021	
		2022	2023	2024	2025	
	Current Agreement Expiry Date	10/3/2017				
	Negotiation Status	Processing Cor	npleted			
	Commission Rate	10%				
	Parties to Agreement	✓ UG			Grad	
	Most Recent Negotiation Status Change Date	7/4/2017				

Tools.17	Agency Documents											
	Туре	Name	Agency	Content Type	Modified	Modified By						
		[Curr] 2014-Oct-03 Can- Achieve Education_Agreement Signed	Can-Achieve International Education Limited	Agreement Document	6/30/2017 9:50 AM	Moan, Peggy						
		[Exp] 2007-Jan-05 Can- Achieve Education_Agreement Signed	Can-Achieve International Education Limited	Agreement Document	6/30/2017 9:50 AM	Moan, Peggy						
		[Exp] 2007-Sep-28 Can- Achieve Education_Agreement Signed	Can-Achieve International Education Limited	Agreement Document	6/30/2017 9:50 AM	Moan, Peggy						
		[Exp] 2008-Oct-03 Can- Achieve Education_Agreement Signed	Can-Achieve International Education Limited	Agreement Document	6/30/2017 9:50 AM	Moan, Peggy						
		[Exp] 2011-Oct-03 Can- Achieve Education_Agreement Signed	Can-Achieve International Education Limited	Agreement Document	6/30/2017 9:50 AM	Moan, Peggy						

UNIVERSITY OF SASKATCHEWAN Agency Management System

Language Centre Undergraduate recruitment

Graduate Studies



Before, were were in a state of uncertain roles, responsibilities and procedures. Now we pull together.

