



# International Education Agent Procedures

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<b>Version</b>	1.0
<b>TRIM file number</b>	09/XXXX
<b>Short description</b>	A procedure on the recruitment and management of international education agents.
<b>Relevant to</b>	All employees
<b>Responsible officer</b>	Director, Division of Marketing Manager, Office of International Relations Director, Division of Student Administration
<b>Responsible office</b>	Division of Marketing Office of International Relations Division of Student Administration
<b>Date introduced</b>	5, September, 2009
<b>Date(s) modified</b>	
<b>Next scheduled review date</b>	5, September, 2011
<b>Related University documents</b>	International Education Agent Policy
<b>Related legislation</b>	ESOS Act 2000

## 1.0 Prospective agent enquiries (solicitations)

The following procedures outline how the University deals with prospective agent enquiries:

- Info.csu receive agent enquiries either directly from the agent or forwarded by other areas of the University
- Info.csu email a template response indicating the University is not taking on any new agents, but still will accept student applications from agents. However they are required to sign an Interim IRR agreement. To obtain an Interim IRR agreement they must contact the International Marketing Officer (IMO).

### Attachments

1. Initial email response

## 2.0 Interim agents

- Non appointed agents may still submit applications but they are required to sign an Interim IRR agreement. To obtain an Interim IRR agreement they must contact the International Marketing Officer (IMO).
- On request the IMO sends a template email with the Interim IRR Agreement and commission information. The IMO records who the Interim IRR email goes to (agent email address and the date sent).
- If Admissions receive an application from a non-approved agent without a signed interim IRR agreement they email a template response to agents asking them to contact the International Marketing Officer for this Agreement. Admissions also cc the student to ensure they are aware that their agent isn't approved by CSU.
- All interim IRR agreements are stored with OIR so commission payments can be made if appropriate.

The Interim IRR's do not receive hardcopy marketing material or an agent certificate.

**Responsibility:** Info.csu, Marketing Division

### Attachments

1. Interim IRR agreement
2. Commission information
3. Interim Agent spreadsheet
4. Admission response requesting Interim agreement.

### 3.0 Recruitment of new agents

The preference of the University is to sign up new IRR's if they are successful in the IRR selection process.

In general, the following must apply in order to initiate a new IRR agreement:

- IRR agreements must support and promote the strategic plan of Charles Sturt University.
- IRR agreements should be carefully chosen based on the following criteria:
  - quality and reputation (check with other institutions for reference)
  - professional in their dealings with admission staff
  - offices operations (if possible a CSU staff member visit at least one of their offices)
  - the feasibility of sustaining regular and long-term student recruitment for the University (evidence of potential)

The International Marketing Officer will determine the appointment of new IRR's in consultation with OIR and Student Administration. Recommendations for new IRR's can also be put forward by marketing staff, academics, OIR and course providers eg. Study group Australia.

#### IRR selection process

1. IMO emails IRR Application Form to agent based on recommendation
2. IMO receives completed IRR Application Form from agent and saves electronic file in S:\Administrative\Marketing\International Marketing\Agents\Agent Applications for Consideration and prints a hard copy
3. IMO sends response acknowledging receipt of IRR Application Form
4. IMO does two referee checks via email (referees must be another Australian University or AEI) and the agency must be rated satisfactory. If not, agency in question is notified they did not pass the referee check.
5. IMO may do a cross check with the relevant AEI office (email AEI office). CSU will generally automatically accept PIER trained agents (AEI approved). Qualified Education Agent Counsellors list: <http://www.pieronline.org/geac/> and the AAERI agents list: <http://www.aaeri.org/>
6. IMO will complete a Due Diligence form and forward supporting documentation to OIR for the contract development process (including contact details). Documents provided to OIR:
  - IRR Application Form
  - Referee Checks and all other supporting documents/emails
  - Due Diligence Form

**Responsibility:** International Marketing Officer, Marketing Division

#### **4.0 Contract development process**

1. OIR sends out IRR agreement to agent via email
2. OIR receives IRR agreement back from agent
3. OIR Manager signs two copies
4. OIR forward one copy to the new IRR (along with an IRR certificate and introduction letter outlining they are an official IRR and who their points of contact are for Admissions, Marketing, and Invoicing)
5. OIR file one copy on OIR hardcopy file on TRIM
6. OIR notifies Marketing and Student Admissions the agency is now an approved IRR, with start and finish dates. Found in S:\Administrative\Office of International Relations\Agents\Agent Management
7. OIR enter IRR details into Banner and TRIM filing system
8. OIR notifies Marketing and Admissions when this process is completed
9. OIR provide information regarding the invoicing procedures

**Responsibility:** Office of International Relations (OIR)

#### **Attachments**

1. IRR Application Form
2. Referee checks
3. Due Diligence form
4. Sample Contract
5. Sample Certificate

#### **5.0 Induction and training of new IRR's**

All new IRR's must be notified about their obligations to recruit students to the University in accordance with the National Code and provided with current marketing and training materials to ensure the most correct information is provided to prospective international students. Notification re recruitment obligations is included in the agent application form, the agent agreement, the summary of responsibilities document and during training.

1. IMO sends a summary of responsibilities document along with appropriate marketing materials and request form to new IRR
2. IMO logs a job with the IT Service Desk to obtain a username and password for the new IRR in order to complete the IRR Online Training through INTERACT.
3. IMO provides the username and password to the new IRR and explains how INTERACT works and the need to complete the test a maximum of 2 months after signing the IRR Agreement.
4. IMO enters IRR details in Microsoft Outlook IRR email distribution list (to send bulk email notifications & updates)
5. IMO add IRR details on the International website  
[http://www.csu.edu.au/division/internat/Utilities/find\\_a\\_local\\_rep.htm](http://www.csu.edu.au/division/internat/Utilities/find_a_local_rep.htm)
6. Create a reminder in Microsoft Outlook to follow up IRR with an email 1 month and 2 weeks prior to the test needing to be completed.

7. When the email notification from INTERACT is sent re IRR successfully completing the test, save on file.

**Responsibility:** International Marketing Officer, Marketing Division

### **Attachments**

1. Summary of responsibilities
2. Sample Agent Materials Pack
3. International Marketing Materials Order Form
4. Email advising of user name and password

## **6.0 Marketing support**

### **Marketing materials**

On an annual basis (usually when the new international prospectus is completed) IRR's are sent a letter asking them to replace the previous year's marketing material with the new marketing material provided.

IRR's can request additional materials throughout the year using a Marketing Materials Request Form. These are processed on an individual basis.

### **Use of Logo**

Approved CSU International Recruitment Representative's (IRR's) are permitted to use the CSU name and logo (according to the IRR agreement) for promotional and recruitment purposes in their materials, advertisements and website. All materials must abide by the ESOS Act, National Code, AVCC Guidelines and in country rules and regulations. Permission for IRR's to use the CSU name or logo must be sought by the Director of Marketing, or nominee prior to publishing. If permission has not been obtained and the materials are published, the IRR is in breach of their agreement. When a breach of agreement occurs the IRR is sent an email, given a warning and reminded of the requirement for permission. If there is a second breach then the IRR in question will be considered for termination of agreement.

Any materials produced by agents and approved by CSU are placed in a register.

### **Agent Contact**

An Agent contact Schedule ensures agents received regular communication with the University. This consists of emails, updates and newsletters. The email updates identify new courses or changes to admission or marketing processes. Agent newsletters include CSU's highlights, achievements and good news stories. These emails go to both IRR's and IDP offices.

Visits are undertaken by marketing and Academic staff whenever possible. These involve updates, face to face training, material checks and general information sharing.

**Responsibility:** International Marketing, Marketing Division in consultation with other areas as required.

### **Attachments**

1. Update of materials letter
2. Logo guidelines for agents
3. Agent Contact Schedule
4. Samples of contact pieces
5. Marketing material Register

## **7.0 Application Process**

If a student has elected to go through an IRR, they must be cc'd in on any correspondence to the applicant from the University. The steps for handling IRR's through the processing of an international student application are as follows:

1. IRR's must insert their details in the IRR box on the right hand side of the application form or in the box provided in the online admissions form. Admissions check the agent details in Banner and link the student application to the IRR. If Admissions receive an application from a non-approved agent they email a template response to the agent. Admissions email the agent and ask them to contact the International Marketing Officer for an Interim IRR Agreement. Admissions also notify the student that their agent isn't approved by CSU.
2. Admissions send a receipt notification to applicant cc the agent. They are told of the estimated turnaround time on application and credit assessment
3. Admissions send the 'Letter of Offer' to applicant cc the IRR etc. along with other important information including eg pre-departure, accommodation etc.
4. IRR sends 'Acceptance of Offer Form' and the 'Payment Form' back to Admissions
5. Admissions process the Confirmation of Enrolment (CofE). When the CofE is completed Admissions notifies the student cc the IRR.

**Responsibility:** Student Administration

### **Attachments**

1. Letter of offer
2. Admissions template
3. Acceptance of Offer form
4. Payment Form
5. Notification of CofE

## 8.0 Payment of Commissions

Before a commission is paid the agency must either:

1. have an IRR agreement with CSU, or
2. have signed CSU's Interim IRR agreement for the student they are claiming commission for, or
3. be an IDP office.

Commissions can only be paid after the census date (31 March or 31 August) according to rates outlined in IRR agreement. For recruitment of offshore (distance education) students the commission is paid per subject/per session, for the recruitment of on campus students the commission is paid per year.

The process for commission payments is as follows:

1. OIR receive an invoice from an IRR along with a completed TT form (if they want to be paid by Telegraphic Transfer), otherwise they are paid by cheque.
2. OIR may also receive invoice from an Interim IRR. If the invoice submitted is not in the correct format OIR should send them info re invoicing requirements. File found in: S:\Administrative\Office of International Relations\Agents\Agent Commission
3. OIR checks that the invoice meets minimum requirements as per invoice template eg. must be on agency letterhead, has heading 'Tax Invoice for International Recruitment Representative Commission', has a reference (eg. invoice no.), has the date and states the gross amount of commission to be paid.

***\*If the agent is claiming for more than one student they can attach a spreadsheet with a list of students they recruited (including the student ref no., family name, given name, DOB, name of course, and commencement date)***

4. OIR checks all student enrolment details on Banner and then prints copy of each student's transcript.
5. OIR checks the hard copy folder (with commission payments in it) that the commission hasn't already been paid and whether the commission rate should be higher due to the sliding scale for numbers over 10 students per session.
6. OIR writes up a CSU Purchase Requisition for the commission payment with funds coming out of A102 332 344.
7. OIR sends all paperwork (eg. Invoice, TT Form, Student Transcripts, Purchase Req) to CSU Accounts Payable and keep copy for own record (in hard copy folder)

8. OIR adds commission payment date to Student Admissions intake spreadsheet located in S:\Administrative\Student Administration\Admissions Office International

This process can take up to 4 weeks

**Responsibility:** Office of International Relations (OIR)

### **Attachments**

1. Commission information

## **9.0 Reporting and Compliance**

An IRR review must be undertaken every 2 years. The review will be based on performance of the IRR's.

Performance will be assessed according to:

- the number of applications submitted by the IRR in a two year period,
- the conversion rate from applications to offers to enrolments,
- the interaction CSU has had with the IRR,
- the potential for future recruitment through the IRR,
- the results of the student satisfaction survey of CSU IRR's, and
- Compliance.

Should an IRR be consistently performing low in any of these area, Marketing will decide whether the IRR agreement is renewed for another 3 years.

Reports from Banner (eg. SWRAGNL & SWRAGST ) should provide key information such as:

- No. of applications, offers and acceptances each IRR has generated
- No. of applications, offers and acceptances each non-approved agent has generated
- List of current approved IRR and their details (eg. agency name, contact name, address, phone, fax, email, website, agreement start & finish date, comments)
- List of Interim IRR's and their details (eg. agency name, contact name, address, phone, fax, email, website, comments)

### **Compliance**

All IRR's are notified about their obligations to recruit students to the University in accordance with the National Code in their agent application form, their agent agreement and during training. Admissions are required to notify Marketing and OIR in relation to IRR's who are not complying with the National Code. Information is gathered via both systems anomalies (ie PRISMS) and through complaints or comments from students who may advise of incorrect agent information when requesting for Release Letters or appealing other administrative action. Admissions are responsible for surveying

international on campus students in their first semester regarding their satisfaction with their agent.

**Responsibility:** International Marketing, Marketing Division in consultation with Student Administration.

### **Attachments**

1. Sample review
2. Student Satisfaction Survey
3. Sample reports from Banner

## **10.0 Termination and end of agreement**

In consultation with Marketing and Admissions, OIR will terminate an IRR agreement according to:

### ***Non compliance:***

1. CSU receives a report of an IRR's unethical behaviour that results in breaching the National Code/ESOS legislation and CSU policy etc. from a CSU Student, Government Agency, Australian Education Provider or from a staff member who has experienced non-compliance first hand/via advertising or publicity.
2. IMO and OIR investigate allegation and if there is substantial evidence provided the IRR must be automatically terminated with no warning.
3. When the IRR agreement is terminated due to non-compliance the agent entry in Banner must be flagged 'do not accept any student applications from this agent' (in comments section).

### ***End of agreement period***

1. If an IRR contract is ended and they do not pass the IRR review based on performance OIR are notified by Marketing.
2. OIR sends a letter to the IRR stating the agreement has ended and CSU will not be renewing their agreement. The letter will request that the CSU logo and name be removed from all agent promotional materials and website, and the agency can no longer officially recruit for the University.

The IRR is contacted one month prior to the contract end date to report that because they have not successfully recruited into CSU and CSU will not be renewing their contract.

**Responsibility:** Office of International Relations (OIR)

### **Attachments**

1. Termination letter

## 2. End of agreement letter