

SAMPLE FOR AGENCIES

## APPENDIX B



### AIRC Self-Evaluation Report Form

SAMPLE

**Agency Name** (as it appears on Agency Application Form): List the official name of the agency and if there is a DBA name

**Date of Submission:**                                
  Month    Day    Year

SAMPLE



# Standard 1: Organizational Effectiveness

## 1.1 Mission and Purposes

*Statements of mission and purposes are made public and guide the agency's planning and budgeting, including providing a framework for governance, management and communication. These purposes are further reflected in every aspect of the agency and its activities, organization, and human, financial and physical resources.*

**1.1.1 Provide evidence that the recruitment agency has clear and publicly stated purposes consistent with its mission and appropriate to an agency of international student recruitment.**

**1.1.1.a State the mission, purpose and/or vision statement which appears in the agency's public and/or operational documents:** [Note: A mission statement defines what an organization is, why it exists, and its reason for being. At a minimum, your mission statement should define who your primary customers are, identify the products and services you produce, and describe the geographical location in which you operate. This is different than a motto, which is a brief statement used to express a principle, goal, or ideal.]

(Include a copy of documents that show the mission statement as an Appendix. If the mission is posted on the office wall, please include a photo as an appendix.)

**Type the Mission Statement Here and inform us where it is posted (in materials and on website) and if it is posted physically in the agency office(s).**

**1.1.1.b** Provide a brief statement describing how the mission and purposes guide the agency's organization and services:

**Describe how the mission informs the business activities.**

If the agency decided not to pursue certain activities because it was determined they were outside its mission, please briefly describe these:

**It is interesting to AIRC to note if the agency was ever considering entering into an activity outside of the mission and why this idea was rejected.**

**1.1.1.c** Provide a narrative of how a typical student is provided with counseling and advising for study abroad, from their initial referral to the agency to the submission of their admission application:

**Write a couple paragraphs about how a typical student is served by the agency – what is the process they go through?**

**1.1.2 Provide evidence of long and short-range planning.** Briefly describe below how the agency plans for the short and long term. Provide documentation of the planning process such as: minutes of meetings, a business plan, a strategic plan and/or other evidence of planning. If detailed planning is not documented, provide a written sample of how a plan was implemented:

**AIRC wants to ensure that careful planning takes place with regard to improvements and new plans. This can be demonstrated to us by sharing meeting minutes, retreat notes, Board meeting notes, strategic planning notes or other. If the appendix example of meeting notes are not in English please provide a summary in English.**

## 1.2 Governance and Ownership

*The agency describes in a clear and detailed manner its ownership, governance and organization.*

[Note: By definition a change in a certified agency that constitutes a “Substantive Change” is not subsumed within an agency’s certification. Therefore, in order to determine whether a specific action rises to the level of a Substantive Change requiring review and approval, AIRC must be informed **in advance** of the implementation of any proposed changes that may substantially alter or affect the conditions or operations that existed at the time the agency was granted certification. This includes, but is not limited to, changes in ownership, mission, the nature of institutions served, legal structure, business name of the agency or additions or deletions of offices, branches, franchises or any locations where recruiting services take place. A Substantive Change may also arise from any acquisition of, loss or changes in licenses, permits or authorizations granted by any agency or organization that exercises oversight or supervision over the agency, including but not limited to suspension, removal or other adverse action, including fines or the imposition of any other penalties or restrictions. Upon receipt of a description of an action that may constitute a Substantive Change, AIRC staff will determine whether the action does indeed constitute a Substantive Change and advise the agency accordingly. A change or action determined to constitute a Substantive Change must be reviewed and approved by the AIRC Certification Board **prior to** implementation. Failure to secure timely approval of a contemplated Substantive Change, including failure to report an action that is subsequently determined to constitute a Substantive Change may be grounds for termination of certification or other adverse action. ]

**Please provide at this point in the Self-Evaluation Report (or clearly marked as an Appendix) an organizational chart which includes the owner; what body or individuals are primarily responsible for the agency - e.g., governing board and/or senior staff; and how the agency is otherwise organized to carry out its services. Please include the names of individuals for each part of the chart. Include who is responsible for recruitment services, including sub-agents, if applicable. (How the decision-making process works can be found in Standard 1.3.1.):**

### **1.3 Effective Management**

#### **1.3.1 Decision-Making Processes.**

*The agency is sufficiently organized to accomplish its purposes through organizational structures, policies and procedures.*

**1.3.1.a** Referring to the organizational chart provided in 1.2, describe briefly how the decision-making process flows - i.e., what individuals or groups of individuals make what decisions at what levels:

**Write a description of who is involved in decision-making.**

**1.3.1.b** Provide sample minutes of meetings, company Bylaws, or other documentation representing the decision-making process of the agency. (For example, is decision-making top-down; or are lower-level staff involved? **The purpose of this information is for the agency to show that planning and benchmarking is in effect.**) **List the samples of decision-making processes below and note where they can be found in the Appendix. If decision-making is done by discussion only and not documented, provide a written description of how an example decision was made:**

**1.3.1.c** **List the name of the legal entity that licenses the agency (municipal, canton/province/state and/or country) and/or the agency type of business (incorporated, chartered).**

**1.3.2 Human Resources.** *Employees or other people working for or on behalf of the agency are competent, well informed, reputable and act at all times in the best interests of the applicant and institutions.*

Please provide evidence of how the agency assures the following for all its employees, agent/recruitment counselors and any sub-agents that provide counseling to students.

**1.3.2.a** How does the agency ensure that it employs qualified staff?:

**List job qualifications for branch managers and student counselors.**

**What type of education and experience is required to be considered for a counseling position?:**

**Attach a sampling of c.v.'s for counseling staff and their managers.**

**1.3.2.b** How does the agency train its counselors and other staff when they are hired?

**Describe the training process and attach a sample training itinerary or agenda.**

**1.3.2.c** How does the agency make sure that its employees and counselors have the most current information and training on laws and regulations related to recruiting, immigration, visas, labor regulations, taxation, etc.?

**Describe the training process for these areas and point out where these training topics are in the itinerary or agenda.**

**1.3.2.d** How does the agency make sure that its new and continuing counselors have current information on policies, admission requirements and admission procedures of the agency's institutional partners? (examples may include - through institutional visits, attendance at professional conferences, continuing education and professional reading). **Please provide examples on how and where counselors received training on institutional partners in the last year and how their learning was evaluated:**

**1.3.2.e** Briefly describe how the work of agency staff that counsel students is evaluated and how often these evaluations are conducted:

**Describe the staff evaluation process and how often staff are evaluated.**

**1.3.2.f** If the agency contracts with sub-agents, describe how the work of sub-agents is evaluated and how often evaluations are conducted. (If the agency contracts with sub-agents, it must answer this question AND complete the **AIRC Agency Self-Evaluation Form Supplement on Sub-Agents** found after the **Appendices & Supplemental Information to Self-Evaluation Report** at the end of this form.):

**Sub-agents do not receive certification unless they apply for it separately. However, AIRC certified agencies are accountable for the actions of their sub-agents. It is important for AIRC to know that the use sub-agents is formalized and that training is provided to sub-agents and continuous evaluation of the sub-agent relationship occurs. Describe how the agencies ensures this here.**

## **1.4 Scope of Operation**

**1.4.1** *The agency describes fully all of its activities related to international student recruitment, including its geographic scope.*

**1.4.2** If recruitment activities are one part of a larger organization with diverse purposes, the agency must describe how the recruitment operations function as a distinctive but fully operational unit within the larger organizational context.

**This standard is to ensure that any other agency functions besides recruiting are separated in such a way so that the agency could be stand-alone (it is not relying on other business activities to operate and most staff are not having to focus on different work).**

**1.4.2.a** Carefully describe all recruitment services and activities, including all countries and office locations in which these services are provided and the number of students placed globally last year:

**1.4.2.b** Describe the purposes and activities of the organization which are not related to recruitment:

**1.4.2.c** Are there plans to expand the scope of operations? If so, please describe and comment if the mission of the organization will change:

**1.4.3** *If recruitment activities are carried out by sub-agents, franchisees, or other persons employed or contracted by the agent to transact the whole, or part of the student recruitment process, the agency must describe these relationships:*

[NOTE: If the agency contracts with sub-agents, it must answer questions 1.3.2, 1.4.3, 1.4.3a, 1.4.3b, 1.5.2b AND complete the **AIRC Agency Self-Evaluation Form Supplement on Sub-Agents.**)

**1.4.3.a** **List here any persons or entities that are involved in the recruiting of students for your agency such as sub-agents or sub-contractors. Tell us the nature of the relationship, and whether the sub-agents or contractors sign a memorandum of understanding, consulting agreement, contract or partnership agreement. Include a sample sub-agent contract or MOU as an appendix. Include in an appendix a listing of all sub-agents.**

**1.4.3.b** **Describe sub-agent activities in recruiting students. If activities of different sub-agents vary, describe the varied activities:**

**1.4.3.c** **At what point does a student's application or file transfer from a sub-agent to an agency branch or headquarters for completion and submission to U.S. institutions? In other words describe what typically happens with applications that come from sub-agents.**

## **1.5 Financial Integrity**

**1.5.1** ***Financial Sustainability of Organization.*** *The agency manages its financial resources to maximize the agency's capability to meet its stated purposes for organizational sustainability.*

Although it is not a primary purpose of AIRC to review financial records of an agency, it is important to AIRC that the agency be sustainable in order to serve students and institutions appropriately. Please provide recent documentation which reflects compliance with third party financial review, such as an official response to national financial reporting **(such as income tax reporting)**, or the results of an independent external audit which is no more than 5 years old. Please indicate where in the Appendix documentation can be found. **If the report is in a language other than English please translate the item showing net gain or income.**

**1.5.2** ***Nature of Setting and Collecting Fees.*** *The agency has a schedule of fees for all services rendered student clients which is readily understood and visible to all student clients.*

**1.5.2.a** Provide a complete listing of all fees for recruitment services, including but not limited to counseling, processing applications, visa advising, etc. and sample documentation of where and how this information is made public – including publications, websites, signs, information sheets, etc. If no fees are charged to students for application processing let us know if there are any fees charged at all, for example, for mailing the application, for assistance with scholarship application, etc. and let us know how a student is informed about these fees or the fact that no fees are charged: **Describe fees here and attach the student fee sheet as an appendix, tell us when the students are informed of the various fees and provide any URL that discusses fees.**

**1.5.2.b** If sub-agents of the agency carry out recruitment, **tell us at what point and how the student is informed of agency and sub-agency fees for service.**

**1.5.3** ***Transparent Refund Policy.*** *The agency has a refund policy which is readily understood, publicly posted and visible to all student clients.*

State below the agency's refund policy and provide documented evidence of how it is made public. [Note: If no refunds are provided, there must exist a policy that states this.] **Provide AIRC with the refund policy document and policy. If the document is in a language other than English, please translate it.**

#### **1.5.4 Handling of Student Financial Awards**

*The agency refrains from collecting remuneration from student clients that is conditional upon the receipt of scholarships and financial aid monies awarded by the host or receiving institution, or other scholarship awarding organizations, and is in addition to any remuneration for placement provided by contract with the host institution.*

State below the agency's financial award policy and provide documented evidence of how it is made public:

**This standard requires that the agency does not take any commission or fee from the reward of financial aid or scholarship. The agency needs to demonstrate to AIRC that it does not do this. The agency may charge students to help them apply for scholarships and aid but this charge must be made known to the student and posted on the student fee sheet and any other material that outlines fees.**

# SAMPLE

## **Standard 2: Integrity of Recruitment Process**

**\*\*\* Agencies that use sub-agents must also complete sub-agent supplement form at the end of this Self Evaluation Form.**

### **2.1 Knowledge of the U.S. Education System**

*Agency staff have a strong working knowledge of the education system in the United States, as well as of the specific institutional clients it serves.*

It is critical that agencies can distinguish the fundamental differences between the U.S. educational system and that of other Anglophone systems, in particular the U.K. and Australia. It is expected that all counselors that work with students intending on studying in the U.S. are very familiar with U.S. higher education. AIRC has provided the agency with the Professional Development Manual and the On-Line Training Modules. Please contact AIRC if you need these items sent again.

Please provide a list of staff members that counsel students on studying in the U.S.

**If there are many, please list those that counsel for the US at the head office, or who will be present for the review. This is so that the reviewers can meet these counselors at the review.**

List how these counselors were trained on U.S. higher education: **Provide information on US education training that has been provided, such as attendance at agency training, external training, AIRC manual, etc.**

How are new employees tested on their knowledge of U.S. higher education?: **Show evidence that the agency assesses the knowledge of US education.**

If the agency has additional means for keeping its agent counselors current on U.S. educational practice, provide examples of this: **This relates to on-going training. Is the agency continually training its staff? If so, how?**

## **2.2 Advertising/Marketing**

*The agency represents itself honestly, claims competency when demonstrable, and avoids misrepresentation.*

**Provide AIRC with a descriptive list in this report and provide copies of all electronic and/or printed publications, website addresses and a description of other forms of advertising which describe the agency's recruitment services.**

**If these are in electronic form, place them in the Appendix of this report. If they are in printed form, please deliver by express mail 2 copies of each document to the AIRC Certification office at the time this Self-Evaluation form is submitted.**

## **2.3 Respect for Intellectual Property**

*The agency uses only authorized material, (including logos) from educational institutions.*

[Note: examples of intellectual property for certification purposes are: (a) Copyrightable material produced from creative and scholarly activity, such as text (manuscripts, manuals, books, and articles); videos and motion pictures; music (sound recordings, lyrics, and scores); images (print, photographs, electronic, and art); and computer software (programs, databases, web pages, and courseware); and (c) Trademarked materials, such as words, names, symbols or logos, domain names, trade dress, and slogans or any combination of words which has been adopted by the University to identify itself and to distinguish itself and its sponsorship from others.]

**Provide a policy or statement the agency has related to intellectual property as it relates to advertising for your institutional partners (for example, if you use institutional logos or seals, do you have permission to do so? Where is that permission stated?):**

Describe any past or current issue or complaint the agency has received related to intellectual property and how those were resolved: **If you have had any complaints about logo use, for example, tell us how this was resolved.**

**A sample policy statement follows:**

**[The agency] ensures that all marketing materials or items considered intellectual property that include information about partner institutions are produced with the permission of that institution. No pictures, logos, or information is otherwise produced or created without the express authorization of that partner institution.**

**Information and intellectual property (including pictures, logos, brands and trademarks) from non-contracted or partnered institutions are not included in any marketing material, without the owner's express written permission.**

**This policy is in the personnel manual (or agency operations manual) which is signed by each staff member. Or, This policy is presented to each agency staff person and they sign it to show their agreement.**

## **2.4 Accountability**

**Responsibility.** *The agency takes full responsibility for ensuring compliance with AIRC Standards with any sub-agents, franchisees or any other persons employed or contracted by the agency to transact the whole, or part of the student recruitment process.*

**Note:** A sub-agent is a person or agency business contracted by the applicant agency to transact the whole, or part of the student recruitment process. (Sub-agents may include lead generators, education agents and counselors and fully operational agencies). A franchisee is an individual who purchases the rights to use a company's trademarked name and business mode to do business. AIRC Certification would apply to franchises and any owned agency branches, as long as they operate under the same name as the AIRC applicant agency. AIRC certification does not apply to sub-agents, or any business or individual that is sub-contracted on an ad-hoc, temporary or permanent basis to assist in the recruitment of students.

**2.4.1 Explain how the applicant agency is responsible for its actions in the recruitment process.** Provide AIRC with any past or current issue about which the agency has received complaints and describe briefly what the agency has done to correct this situation.

**If you have had any complaints about customer service, for example, tell us about the incident and how this was resolved.**

## **2.5. Conflicts of Interest**

*The agency manages its relationships with institutions, organizations and students to ensure impartiality and transparency.*

[Note: A conflict of interest occurs when an individual or organization is involved in multiple interests, one of which could *possibly corrupt* the motivation for an act in another.]

Provide AIRC with any policy statement the agency may have about the transparency of its operation, including any official statements, internal training programs or other indications that the agency avoids creating conflicts of interests in its relationships:

**A policy sample follows:**

**[The agency] enforces a policy among its staff that employees avoid conflicts of interest with regard to the services provided to student clients.**

**This policy is in the personnel manual (or agency operations manual) which is signed by each staff member. Or, This policy is presented to each agency staff person and they sign it to show their agreement.**

## **2.6. Transparency and integrity of services rendered**

*The agency conducts itself in a transparent manner where only truthful claims are made and both institutions and students are served in an unbiased manner. (Examples of false claims can include but not be limited to: claiming that using the agency's service is mandatory for admissions; claiming a special relationship with immigration services; inaccurately representing competing institutions and national systems of education; claiming exclusivity of services where none exists; denigrating competing institutions in the United States and other countries.)*

**2.6.1** Provide AIRC with any policy statements, documentation and/or evidence of personnel training programs which state that the agency employees may make only truthful claims and unbiased service to student and family clients and others doing business with the agency:

**A sample policy statement follows: [The agency] enforces a policy among its staff that only truthful claims are made, that all clients are served in an unbiased manner.**

**This policy is in the personnel manual (or agency operations manual) which is signed by each staff member. Or, This policy is presented to each agency staff person and they sign it to show their agreement.**

## 2.7. Appropriateness and accuracy of services rendered

*The agency renders appropriate and accurate services centering on the recruitment, advising and placement of students in postsecondary institutions or programs.*

In the seven areas listed below describe operations and procedures that ensure that recruitment, advisement and placement activities are appropriate and accurate. Provide relevant documentation (representative examples or samples) in the Appendix or at this point in the Self-Evaluation preceded by an explanation of what is included. These services would normally appear in the agency's public documents or materials shared with clients. Additional examples of appropriate and accurate services are welcomed. As part of the AIRC Certification process, a post-placement evaluation by clients will be expected annually, reported through the AIRC Annual Report, and kept on file for re-certification.

**2.7.1.** Indicate how the agency updates and follows the instruction of the U.S. Consulate in regard to immigration procedures.

**Provide examples of who at the agency and how these employees learn about updates to US immigration procedures.**

**Also state here again the success rate for the previous year of visas obtained for students admitted to U.S. institutions:**

**2.7.2.** The agency uses current information about institutions such as their admissions criteria (including language proficiency criteria), program offerings and their academic prerequisites; rate of graduation, tuition and fees; personal expenses; scholarships; health insurance; calendar and academic support services as well as support services for international students; housing opportunities; the grounds on which the student's enrollment may be deferred, suspended or discontinued; work opportunities while a student and upon graduation and other matters of importance to the student. **Provide a representative sample of how this information is shared with student clients either here or in the Appendix. How are staff continually updated on institutional information listed above? List meetings and frequency of trainings for the past year here.**

**2.7.2a** Describe how the agency ensures it has the most recent and accurate materials from institutional partners and that all obsolete documents are removed. If catalogues are in the agency the site reviewers will want to see they are current.

**2.7.3** The agency provides accurate information concerning the specific nature of the institution to which a student is being recruited – such as whether study will be at the parent institution; a branch campus in or outside of the United States; by distance education; a joint degree or twinning program outside of the United States, etc. Please provide a representative sample:

**How are staff continually updated on institutional information listed above?**

**2.7.4** The agency provides accurate information concerning the nature of the academic qualification/degree being received as per location above and degree level. Please provide a representative sample if different from above:

**How are staff continually updated on institutional information listed above?**

**2.7.5.** The agency provides accurate information related to the transferability of academic credit. Provide a sample statement which you share with clients: **How are staff trained on transferability and how do they explain this to their student clients?**

2.7.6 The agency provides accurate and current information concerning the cost of travel to the host institution. Provide a sample of this type of information: **Are staff providing details on the expected costs of travel to the host institution? How is this detail gathered?**

2.7.7 Students who are under the age of 18 in the United States lack many legal rights and need special support. The agency understands the special needs of minor students and provides appropriate services. Describe how the agency does this: **If the agency counsels students under age of 18, are their parents involved? Please describe how this age group is handled?**

SAMPLE

## Standard 3: Student and Family Engagement

### Pre- and Post-Enrollment

#### 3.1 Pre-Enrollment

*The agency carries out its pre-enrollment services with students and their families characterized by the following.*

**3.1.1** *There is a written legal relationship in the form of a contract or agreement with a readily understood and upfront disclosure of services and related fees.*

**Provide an example of a written contract (formal agreement) with a transparent and up-front disclosure of services and related fees and indicate whether this it is standard operating procedure to provide the same contract to each student client:**

**3.1.2** *The agency maintains the confidentiality of records, notes, and client information and discloses confidential information only with written consent from the student on a need-to-know basis.*

Provide evidence that confidentiality of records is maintained: **Show the site reviewers locked cabinets and password protected databases.**

**3.1.3** *In the case of minor students under the age of 18, parents/families are included in the communication process as appropriate and timely.*

**Describe how the agency includes parents in the communication process for students under the age of 18:**

**3.1.4** *Promises or guarantees are made by the agency only when backed by facts that they will be achieved.*

**Does the agency have an operational policy to reflect this standard – that false promises are not made? Provide evidence of this policy:**

**3.1.5** *The agency demonstrates the knowledge that recruitment and admissions in the U.S. educational context are generally prohibited from discrimination based on age, race, gender, sexual orientation, religion, marital status, ethnicity, disability, socioeconomic status, or other reasons.*

**Please demonstrate how agent counselors are trained on this U.S. general admission practice.**

#### 3.2. Post-Enrollment

*The agency carries out its post-enrollment services with students and their families characterized by the following:*

**3.2.1** *The agency keeps individual student records for at least three (3) years for purposes of internal evaluation and AIRC external review.*

**Please indicate here if this is currently an agency practice or describe the agency's plan to commence this practice:**

If the agency does not now keep records for 3 years, please make a plan to do so during the period of AIRC certification and share the plan with AIRC.

**3.2.2** *The agency keeps recent (within 3 years) student/family client satisfaction records on file for purposes of external review.*

Please indicate here if this is currently an agency practice or describe the agency's plan to begin this evaluation practice: [Note: Surveying is required for AIRC Annual Reporting and Recertification.]:

## Standard 4: Institutional Engagement

### Pre- and Post-Recruitment

#### 4.1. Pre-Recruitment

*The agency contracts with or places students at U.S. educational institutions whose accreditation is recognized by the U.S. Department of Education or Council on Higher Education Accreditation (CHEA). The CHEA database can be found here: <http://www.chea.org/search/> U.S. Department of Education database can be found here: <http://ope.ed.gov/accreditation/>.*

**The agency should make it a practice to check on the accreditation of its US prospective partners. Please verify that it does so.**

*Characteristics of these services should include the following:*

**4.1.1** *There is a written legal relationship in the form of a contract or agreement which clearly states the nature of the partnership, scope of respective roles and responsibilities, quality assurance measures to be implemented and method of monitoring the contractual obligations (such as an annual report to the institution on the results of recruitment practices or other mutually agreed stipulations).*

**Provide a sample contract and note where it can be found in the Appendix:**

**4.1.2** *The agency maintains regular contact with institutions which enables consistent and timely communication.*

Describe how the agency assures open and continuous communication: **Show some email thread examples of communication between an agency counselor and ad admissions officer.**

**4.1.3** *The agency maintains the confidentiality of the relationship between institution and agency as agreed.*

Describe how the agency maintains confidentiality of the institutional relationship: **Is the contract kept confidential and are emails kept confidential?**

**4.1.4** *The agency provides legitimate documents to institutions which are properly notarized or attested as to their authenticity.*

**Describe the procedure the agency follows to ensure authenticity of documents and provide an example: For example, are there experts on staff that review documentation, or does the agency use a credential evaluator?, does the agency check with the source (secondary school or bank) as to the validity of the documents?**

**4.1.5** *The agency does not knowingly provide false or misleading records of student academic achievement, preparation, and financial capability. Further, the agency ensures that essays and/or statements of purpose are originally created by the student to whom they are attributed.*

**Describe how the agency checks for authenticity of student documents, including transcripts and financial statements and how it ensures originality of student work. The agency should not produce work for the student and must show AIRC it does not do this.**

Provide examples:

**Describe how the agency explains the importance of authenticity of documents to its student clients and their families:**

## **4.2 Post-Recruitment**

**4.2.1** *The agency keeps recent (within 3 years) institutional client satisfaction records on file for purposes of external review.*

**Please describe this practice or your plan to begin this practice:**

## **Standard 5: Complaints Process**

*The agency has an internal mechanism for processing complaints and making necessary changes in the nature of recruiting services as needed.*

**Provide a detailed description of how the agency processes complaints and uses these for corrective action related to services rendered student and institutional clients:**

## **Appendices & Supplemental Information to Self-Evaluation Report**

Please provide a summary below of what documents you have submitted to supplement this Self-Evaluation report either as an Appendix (if in electronic form) or as separate printed documents. Indicate at which Appendix or page number these can be found. This can include such items as brochures which describe agency services, an example of student records, bylaws, minutes of meetings, contracts, summaries of client satisfaction or other documented evidence of complying with the AIRC Certification Standards.

| List Standard Number | Nature or Title of Documentation (Write Standard number at top of each document) |
|----------------------|--|
|----------------------|--|

## AIRC Agency Self-Evaluation Form Supplement on Sub-Agents

**Note:** A sub-agent is a person or agency business employed or contracted by the applicant agency to transact the whole, or part of the student recruitment process. AIRC Certification does not convey to sub-agents, however, AIRC Certification requires that the Certified Agency is accountable for the actions of the sub-agents as they relate to contracted student recruitment. If any sub-agents have AIRC Certification please list these:

### 2.1 Knowledge of the U.S. Education System

*Agency staff have a strong working knowledge of the education system in the United States, as well as of the specific institutional clients it serves.*

How does the agency ensure that sub-agents it contracts with have a strong knowledge of U.S. higher education?

### 2.2 Advertising/Marketing

*The agency represents itself honestly, claims competency when demonstrable, and avoids misrepresentation.*

**Provide AIRC with samples of sub-agents' marketing materials and where these can be found in the Appendix:**

### 2.3 Respect for Intellectual Property

*The agency uses only authorized material, (including logos) from educational institutions.*

**Describe how the intellectual property policy is enforced with sub-agents (for example, how does the agency undergoing certification make sure the sub-agency does not use institutional logos of main agent partners without permission):**

### 2.4 Accountability

**Responsibility.** *The agency takes full responsibility for ensuring compliance with AIRC Standards with any sub-agents, franchisees or any other persons employed or contracted by the agency to transact the whole, or part of the student recruitment process.*

2.4.1.a Provide AIRC with any past or current issue about which sub-agents have received complaints and describe briefly what the agency has done to correct this situation:

### 2.5. Conflicts of Interest

*The agency manages its relationships with institutions, organizations and students to ensure impartiality and transparency.*

[Note: A conflict of interest occurs when an individual or organization is involved in multiple interests, one of which could *possibly corrupt* the motivation for an act in another.]

**Provide AIRC with any policy statement the sub-agency may have about the transparency of its operation, including any official statements,** internal training programs or other indications that the agency avoids creating conflicts of interests in its relationships:

### 2.6. Transparency and integrity of services rendered

*The agency conducts itself in a transparent manner where only truthful claims are made and both institutions and students are served in an unbiased manner. (Examples of false claims can include but not be limited to: claiming that using the agency's service is mandatory for admissions; claiming a special relationship with immigration services; inaccurately representing competing institutions and national systems of education; claiming exclusivity of services where none exists; denigrating competing institutions in the United States and other countries.)*

2.6.1.a Provide AIRC with any policy statements and/or evidence of training programs provided by the applicant agency to the sub-agents that state that the agency employees may make only truthful claims and unbiased service to student and family clients and others doing business with the agency:

## **2.7. Appropriateness and accuracy of services rendered**

*The agency renders appropriate and accurate services centering on the recruitment, advising and placement of students in postsecondary institutions or programs.*

2.7.1.a Indicate how the agency ensures the sub-agents receive updates and follows the instruction of the U.S. Consulate in regard to immigration procedures.:

2.7.2.b Indicate how the agency ensures the sub-agents keep current about institution programs such as their admissions criteria (including language proficiency), program offerings and their academic prerequisites; rate of graduation, tuition and fees; personal expenses; scholarships; health insurance; calendar and academic support services as well as support services for international students; housing opportunities; the grounds on which the student's enrollment may be deferred, suspended or discontinued; work opportunities while a student and upon graduation and other matters of importance to the student:

**Please provide representative samples.**

2.7.3 The agency provides accurate information concerning the specific nature of the institution to which a student is being recruited – such as whether study will be at the parent institution; a branch campus in or outside of the United States; by distance education; a joint degree or twinning program outside of the United States, etc.

2.7.3.a Indicate how the agency ensures the sub-agents provide accurate information about the specific nature of the institution to which a student is being recruited in the areas as listed in 2.7.3:

**Please provide representative samples:**

2.7.4 The agency provides accurate information concerning the nature of the academic qualification/degree being received as per location above and degree level. Please provide a representative sample if different from above:

2.7.4.a Indicate how the agency ensures the sub-agents provide accurate information concerning the nature of the academic qualification/degree being received as per location above and degree level:

**Please provide a representative samples if different from above:**

2.7.5. The agency provides accurate information related to the transferability of academic credit. Provide a sample statement which you share with clients:

2.7.5.a Indicate how the agency ensures the sub-agents provide accurate information related to the transferability of academic credit:

**Please provide a representative sample.**

**2.7.6** The agency provides accurate and current information concerning the cost of travel to the host institution.

*2.7.6.a* Indicate how the agency ensures the sub-agents provide accurate and current information concerning the cost of travel to the host institution:

**2.7.7** Students who are under the age of 18 in the United States lack many legal rights and need special support. The agency understands the special needs of minor students and provides appropriate services.

*2.7.7.a* Describe how the sub-agents provide appropriate services to minor students.

### **3.1 Pre-Enrollment**

*The agency carries out its pre-enrollment services with students and their families characterized by the following.*

**3.1.1** *There is a written legal relationship in the form of a contract or agreement with a readily understood and upfront disclosure of services and related fees.*

*3.1.1.a* Describe how the sub-agents provide the student service contract to student clients:

**3.1.2** *The agency maintains the confidentiality of records, notes, and client information and discloses confidential information only with written consent from the student on a need-to-know basis.*

*3.1.2.a* Describe how the sub-agents maintain the confidentiality of records, notes, and client information and discloses confidential information only with written consent from the student on a need-to-know basis:

**3.1.3** *In the case of minor students under the age of 18, parents/families are included in the communication process as appropriate and timely.*

*3.1.3.a* Describe how the sub-agents include parents in the communication process for students under the age of 18.

**3.1.4** *Promises or guarantees are made by the agency only when backed by facts that they will be achieved.*

*3.1.4.a* Do sub-agents have an operational policy to reflect this? Provide an example.