



Working Relationship Rubric for AIRC Certified Agents & Admissions Professionals Engaged in Partnerships:

A Self-Evaluation Tool for Agency Employees Working with Institutions

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Abstract:

The following document is for AIRC Certified student recruiting agents to self-evaluate their relationships with institutions and the admissions professionals they do business with. This tool is meant to accompany the AIRC best practices and is not a binding code of conduct. The goal of the document is to help those in the AIRC community become cognizant of their actions and expectations in order to improve working relationships.

Methodology:

2017 AIRC Graduate Practicum Intern Jake Reckford conceived of the rubrics after doing a evaluation of existing AIRC resources as part of a needs assessment. While there were numerous documents contained in the AIRC resource library for members and agencies, the documents were mostly concerned with best practices, recruiting tools, sample contracts, practical documents and arguments concerning “the agent debate.” Mr. Reckford identified that there were no existing resources or tools for those already engaged in the agent-institution working relationship to avoid miscommunications and breakdowns .

With that in mind, Mr. Reckford began conceiving of projects that would be of use to people in this demographic. As part of his Design and Assessment course at the Middlebury Institute of International Studies, he took part in a presentation by American Association of Colleges and Universities Director of Global Learning and Institutional Change Dr. Dawn Whitehead about student development rubrics. Using Dr. Whitehead’s templates, he began to conceive of how a working relationship might be demonstrated visually on a rubric, and with the guidance of AIRC Associate Director Jennifer Wright began to create the following document.

Essential to the creation of this document was that it be a useful and practical document for AIRC members. Mr Reckford reached out to numerous members of the AIRC community for their input and recommendations. Representatives from large and small agencies from 4 different continents were consulted, as well as employees from public and private universities in the U.S. As a result, the document reflects a consensus of interests and issues deemed important to individuals committed to collegial and transparent, collaboration between agents and institutions.

	Needs Improvement	Good	Excellent
Communication (on behalf of students)	Sporadic and random communication with institution during application process	2-3 day turnaround between e-mail or phone communications	Daily contact with institutions regarding student application and status when there is a change during the application process
Timeliness	More than one week between e-mail responses	3-5 day response time between e-mail responses	Less than 24 hours response time between e-mail responses, Monday- Sunday
Familiarity	Struggles to recite basic information about institution partner	Able to recite basic information about institution partner	Able to recite detailed, accurate information on location, prices, important dates, etc of institution
Training on Institutional Processes	Agent trains its advising staff on institution processes on an as-needed basis	Agent trains its advising staff on new institution processes from time to time, or as the institution requests	Agent regularly invests time learning new institution processes, shares processes with advising staff, and corresponds with institution to avoid misunderstandings with students and admissions professionals
Student Knowledge of Institution Pre- Departure	Students have little or no training or information sessions regarding the institution and host community from the agency before departure Students are unaware of others from sending country that will be attending the institution	Agent has a conversation with the student outlining expectations and reality of the host institution and community Students are given brochures and promotional items from the institution Students are sent a list of other students from the agency going to the same area or institution	Agency sends all available information regarding the institution to the student and has multiple conversations about host institution, community and climate Students sign a letter demonstrating they understand the type of institution and location they are going to Agency connects outgoing students from the same area via social media group or in person meetings
Finding the "Right" Students	Agency sends students regardless of fit or preparedness for the institution	Frequently sends students who are prepared and fit in their specific program	Consistently and accurately vets students for institution programs before application

Commitment to Students	Operates with the primary goal of increasing enrollment and retention numbers for agency	Meets student and institution expectations for the admissions process	Proactively works to ensure student and institution needs are met
Enrollment Targets	Consistently does not meet enrollment targets	Usually meets targets for enrollment	Meets targets for enrollment without compromising student fit
Testing/ Transfer Process	Agent sends students who have limited knowledge of language testing and school transfer processes	Agent sends students who are aware of the English testing process at institution and know the options for students who do not test into degree program	Agent sends students who are highly informed of the pathway process and are prepared for the language and academic testing upon arrival
Agent Onboarding	Contractual agreement is signed and students get set immediately	The agency signs an initial contract and conducts an initial training	The agency signs an initial contract and conducts an ongoing training
Invoicing System	Uses non-standard invoice and payment templates with unclear student information and small number of details	Uses a combination of agency and institution invoices to request process payments	Uses a clear and easy to read template with student information prominently displayed
Adherence to Articulated Agreements	Sometimes	Always but continues to engage with partner after agreement expires	Actively works to ensure no agreements are broken and works with institutions to renew agreements before expiration



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A Self-Evaluation Tool for Institution Employees Working with Agencies

	Needs Improvement	Good	Excellent
Institutional Buy- In & Integration of Agents Into Institution Recruiting Plan	<ul style="list-style-type: none"> -Institution administration expresses concerns about working with agent -Agents are a minimal extension of recruitment plan -Administration has little value for international student enrollment or the transparency involved in the admissions process 	<ul style="list-style-type: none"> -Institution employees conduct business with agent in a trusting and cordial manner -Overall recruitment plan uses but does not depend on agents -Administration appreciates international student enrollment and strives to increase enrollment numbers, regardless of source 	<ul style="list-style-type: none"> -Agency has total trust from the institution to ethically advise students on the admissions process -Agency plan and overall international recruitment plan are integrated and receive support from administration -Administration views and has stated publicly that international student enrollment and admissions transparency are a high priority
Communication Between Agents and Institutions	<ul style="list-style-type: none"> - Communication occurs between agents & institution contacts with no prior history of professional cooperation -Little knowledge of the cultural background or cultural attitudes towards work of the agent 	<ul style="list-style-type: none"> -A cordial working relationship is developed between institution contact and agent -Knows preferred work style and cultural attitudes toward work of overseas counterpart 	<ul style="list-style-type: none"> - All interactions between admissions and agent are forthright, cohesive and honest- Each deals with issues actively and immediately -Knows preferred work style and the cultural attitude toward work of overseas counterpart, and actively works to accommodate partner
Ensuring Agents are Informed About the Institution and Its Admissions Process	<ul style="list-style-type: none"> -The agency can only seek out information about the institution online or in past materials -Important institution information is conveyed online or on recently published materials. 	<ul style="list-style-type: none"> -Conversations between agent and institution occasionally take place over a call or video conference regarding admissions processes at the institution -Institution releases occasional newsletter updates for overseas agent partners 	<ul style="list-style-type: none"> -Proactive and regular communication (either face-to-face or via call) to agent about institution strategic plans, enrollment goals, changes in processes, unique offerings and trends in the market - Institution newsletters are regularly sent to agencies via e-mail

Staffing	-Institution has a small number of contacts with minimum experience and expertise to assist agents in admissions process.	-Institution staff is well versed in admissions processes and is able to communicate with agents on an as needed basis.	-Institution staff are all familiar with agency contacts and are confident, consistent and informative when communicating with agents, as well as well-informed of the education and credential system of agency country.
Travel	-Institution representative has traveled to agency country and met with representatives in the past.	-Institution rep travels once every one or two years to meet with agency partners.	-Institution rep travels at least twice per year, for marketing events so prospective students can engage with someone with intimate knowledge of campuses and programs
Assigning Contact Relationships	-Unclear roles at institution regarding who should speak to agents.	-Institution assigns agent communication to a specific department member (Primary contact and back-up).	-Institution-agent communication is clearly designated, and agent always knows the specific individual at the institution to communicate with
E-mail Communication Response Time	-2-3 days -Institution will only communicate with agent during US business hours.	-24 hours -Primary institution contact sets up routine designated times to communicate with agents during agent business hours.	-Less than 1 hour response time during business hours -Primary contact is flexible and works with agent to find mutually agreeable times to speak.
Application Turnaround	One week +	2-4 days	24 hours
Payment & Invoicing	-Payments are received on an inconsistent basis. -Hard to read invoices or multiple invoices in different formats are sent to agent.	-Payments are received on a consistent basis, with one or two exceptions. -Institution sends agent a specific invoice template on agreed upon dates.	-Payments to agency are always on time and accurate. -Aesthetically pleasing and clear invoices are consistently used and sent 1-2 weeks ahead of payment schedule.

ROI	<p>-Agency sends students at a rate lower than the enrollment goals set by contractual agreement.</p> <p>-Resources are allocated with little regard for high-performing markets or institutional goals.</p>	<p>-Agency meets goals set by contractual agreement.</p> <p>-Resources are allocated to high-return markets.</p>	<p>-Agency exceeds enrollment goals set by contractual agreement.</p> <p>-Resources are allocated to high-return markets that fit into institutional goals.</p>
Student Preparation	<p>-Upon arrival students sent by the agency have unrealistic expectations of institution & its staff, and are not prepared with the maturity and English language skills to succeed in US higher education.</p> <p>-Students arrive uninformed of English proficiency requirements and steps toward degree programs.</p>	<p>-Students sent by the agency have acceptable levels of English, are prepared for US higher education study and have realistic expectations of the institution experience and campus way of life.</p>	<p>-Students sent by agency arrive with excellent written and spoken English skills and are well-versed in issues related to the institution, local area and culture upon arrival.</p> <p>-Students who arrive without required English proficiency understand ESL enrollment will be required and add time and expense to their educational goals.</p>
Agent Performance Tracking	<p>-No records besides contracts and agreements are kept.</p>	<p>-Agent performance records are kept by the university.</p>	<p>-Use a consistently updated computer software system to track agent #s.</p>
Student Status Tracking	<p>-Agents get updates about their admissions status through e-mail communication with the institution.</p>	<p>-Students <i>and</i> agents get updates about their admissions status through e-mail communication with the institution.</p>	<p>-Institution has an online admissions portal on the admissions website where students and agents can view their status.</p>
Credential Evaluation (If applicable)	<p>Institution has few resources to vet credentials</p> <p>Institution does not require documents to be reviewed by an external party</p>	<p>Primary contact at Institution is well versed in credential evaluation</p> <p>Institution uses professional credential evaluation service</p>	<p>Agent, Institution and (if needed) professional evaluator work together to evaluate credentials and trust each other to make informed decisions</p>