

Education Agent Policy and Procedures

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**Mae’r ddogfen hon hefyd ar gael yn y Gymraeg / This document is also available in Welsh**

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# Introduction

This document details the policy and procedures for the appointment and management of Education Agents at Cardiff Metropolitan University (Cardiff Met) that support recruitment of international applicants to its programmes.

## **Purpose**

### This policy has been compiled to ensure compliance with the UK Agent Quality Framework (AQF) pledge, launched by British Universities’ International Liaison Association (BUILA), Universities UK international (UUKi), UK Council for International Student Affairs (UKCISA) and the British Council, and signed by Cardiff Metropolitan University.

### The AQF recognises the critical role that recruitment agents and counsellors play in attracting and supporting international students wishing to study in the UK, providing a set of free tools to equip education providers, agents, and students with the knowledge and best practice to maintain quality partnerships across the international student recruitment journey.

### This policy sets out the principles and practices to ensure that the Education Agents recruited are competent, ethical and uphold the reputation of the University and the education systems in which it operates and protects the interests of prospective international students.

### Pledge to the Framework is a commitment by the University to maintain high standards in agent management, ensuring ethical practices, transparency and student-centric approaches.

## **Scope**

### This Policy applies to:

### All staff who are involved in the appointment and management of Education Agents.

### All Approved Education Agents appointed by the University to represent Cardiff Metropolitan University, both onshore and offshore.

## **Definitions**

### **Agent Agreement** means, The written contractual agreement which the university enters into with each Approved Agent it engages to formally represent it.

### **Approved Agent** means, An Education Agent who has entered into an Agent Agreement with the University.

### **Education Agent** means, A person or organisation who recruits international students and refers them to the University. In doing so, the Education Agent may provide education counselling to international students as well as marketing and promotion services to the University.

# Strategy: Selecting and Appointing University Education Agents

## Selecting Agents

2.1.1 Cardiff Met uses Education Agents/advisors (agents) to support the recruitment of international students, in line with sector-wide practice in the UK and internationally.

2.1.2 The use of Education Agents is informed by Cardiff Met’s International Recruitment Strategy, and agent selection is strategically aligned to the institution’s priority markets, regional goals, and operational capacity.

2.1.3 The selection of agents is in line with the university’s internal procurement processes and in adherence to the Procurement Act.

2.1.4 In most cases, prospective agents initiate contact with Cardiff Met. This can be through email, telephone, or during in-country visits. On other occasions, the University initiates the relationship, for example when entering new markets or following a recommendation from a trusted institutional partner or a fellow UK institution.

2.1.4 Cardiff Met may also identify agents through professional events such as ICEF or via academic partnerships where an agent already plays a role in student progression.

2.1.5 Regardless of how initial contact is made, all prospective agents are required to complete a Cardiff Met agent questionnaire. This gathers details on the agency’s history, existing partnerships, student volumes, training accreditation (e.g., British Council), and references.

2.1.6 Following submission, the relevant country manager will conduct a discussion with the prospective agent, either prior to or after questionnaire submission, to assess the suitability of the partnership.

2.1.7 A formal recommendation to appoint is completed by the country manager and submitted to the Regional Manager or Head of International Student Recruitment. If approved, a contract is issued and signed by the Regional Manager and Director of Global Engagement.

### Due Diligence

### 2.2.1 Cardiff Met takes its responsibility for due diligence seriously. All new agents must complete the questionnaire and provide references. These references are then verified and stored on the agent file.

### 2.2.2 The University undertakes an initial vetting of new partners to assess their history, reputation, and compliance with ethical recruitment standards. The British Council's Guidelines and the UK Agent Quality Framework inform this process.

### 2.2.3 Due diligence is ongoing. Performance and conduct are monitored throughout the life of the agreement, with formal reviews conducted at the point of contract renewal and at least annually.

### 2.2.4 If serious concerns are identified at any point, an immediate review will be undertaken, and the partnership may be discontinued or terminated.

## Contracting

### Cardiff Met will enter into a written contractual agreement with the Education Agent, detailing the responsibilities, areas of jurisdiction in which the Education Agent can represent the University, and financial arrangements.

### All the written contractual agreements will be as per the standard Agent Agreement template and will be signed by both Cardiff Met and the Education Agent.

### The written contractual agreement will outline:

#### The responsibilities of Cardiff Met;

#### The responsibilities of the Education Agent, to include the requirement of the Education Agent and its staff to complete the British Council Education Agent and Counsellor Training programme as noted under clause 6 of the Agent Agreement;

#### Cardiff Met’s processes for monitoring and reviewing the activities of the Education Agent in representing the provider, and ensuring the Education Agent is giving students approved, accurate and up-to-date information;

#### Annual student recruitment targets across the duration of the agreement;

#### Areas of jurisdiction in which the Education Agent can represent the University;

#### Financial arrangements between Cardiff Met and the Education Agent;

#### Cardiff Met’s grounds for termination of the written contractual agreement with the Education Agent.

# Training

3.1 Once the contract has been signed, a formal training session is scheduled. Ideally, this training takes place in-country, but it may be delivered via Microsoft Teams if an in-person meeting is not feasible.

3.2 The training covers key aspects of working with Cardiff Met, including the application and admissions process, compliance requirements, and portfolio-specific content. An online agent guide is also shared at the point of contracting to provide immediate reference material.

3.3 All training is recorded in Cardiff Met’s corporate CRM system to maintain a central record of engagement and ensure that agent teams are up to date.

3.4 Ongoing training is essential. Country Managers and regional staff provide updates during in-country visits, and where possible, in-person training workshops are scheduled. Portfolio training is updated regularly and shared through these channels.

3.5 Academics play a vital role in agent training. The International Recruitment Team coordinates an academic calendar of events to engage academic staff in training initiatives. Academics are invited to deliver sessions that offer detailed insights into their programmes, which enhances the agent's ability to accurately advise prospective students.

3.6 Additional training methods include online academic sessions, in-country agent workshops, and the use of communication platforms such as WhatsApp for real-time updates and Q&A support.

# Working with Education Agents

## 4.1 Objective & Target Setting: Each agency contract includes clearly defined recruitment objectives and targets tailored to the market and agent’s potential. These targets form the basis of ongoing collaboration, guiding both strategic and operational activities.

## 4.2 Progress Monitoring: Performance is reviewed regularly through structured check-ins led by the Country Manager or in-country representative. These check-ins aim to assess:

## Progress toward recruitment targets.

## Application conversion rates.

## Marketing and outreach effectiveness.

## In addition to routine monitoring, a formal annual review is undertaken. This ensures that agent partnerships remain aligned with institutional goals, and that performance concerns are identified early and addressed.

## To ensure transparency, all active agents will be listed on our website.

# Supporting: Optimising Education Agents

## 5.1 Relationship Management: Maintaining strong, proactive relationships is key. Cardiff Met supports agents through:

## Regular communication from the Country Manager or Overseas staff.

## Fast responses to application queries.

## Collaborative marketing activity.

## Access to & Training for the online application portal and CAS Shield (Enroly) to view the application journey and support with any outstanding documentation.

## 5.2 Value-Added Support: Agents are treated as partners and receive materials and insights to enhance their representation of the University. Where appropriate, Cardiff Met may:

## Share co-branded marketing content.

## Provide tailored advice for student-facing activity.

## Invite top-performing agents to campus visits or recognition events.

## 5.3 Enhancing Agent Capability: Through continuous engagement, Cardiff Met aims to support the professional development of agents and ensure they are fully equipped to represent the University to prospective students and their families.

# Reviewing: Assessing and Recognising Education Agents

## Cardiff Met will monitor the Education Agent’s performance through regular communication and meetings as well as through designated review points throughout the contract duration.

## The Education Agent’s performance will be evaluated against the Agent Quality Framework and its recommendations.

## Cardiff Met will conduct an annual review of the performance, operations, procedures and practices followed by the Education Agents and record the outcome on the Corporate CRM system. This will include:

### The number of applications;

### The number of offers;

### The number of rejected offers;

### The number of enrolled students across all applicable intakes for that academic year;

### The recruitment target number of students as set out within the Agreement.

### This data will allow Regional Managers to determine whether the Education Agent is meeting performance expectations; If not, then an action plan will be devised to improve performance and discussions will begin with the Education Agent to achieve this.

## Cardiff Met will also conduct a performance review of the Education Agent at the point of contractual renewal, score these a RAG (red, amber, green) rating, and record on the Corporate CRM system. This will include:

### The **conversion rate**, from student applications to enrolled students;

### The **rejected application rate**, looking at the rate of rejected student applications (due to not meeting academic requirements, failing immigration credibility interviews, etc);

### The **non-enroller rate**, looking at the rate of students who have been issued with a CAS to study at Cardiff Met but have not enrolled onto their programme;

### The **withdrawal rate**, looking at the rate of students who have been withdrawn from their studies at Cardiff Met due to non-attendance/engagement, academic failure at exam board or financial debt;

### The **visa refusal rate**, looking at the rate of those students who had their student visa application refused by the UKVI.

### Subject to the RAG outcome, the performance review will indicate whether to continue or to discontinue the collaboration with the Education Agent.

### The discontinuation of collaboration with an Education Agent will be in line with the termination clauses as noted within the Agent Agreement.

# Financials: Paying Education Agents

## The financial arrangements between Cardiff Met and the Education Agent are documented within the Agent Agreement:

### The level of commission payable to the Education Agent is determined at appointment stage by the Regional Manager and Head of International Student Recruitment and is set out in Schedule 3 of the Agent Agreement.

### The process of commission payment is made in accordance with clause 8 of the Agent Agreement.

## In line with AQF recommendations, Cardiff Met is proactive in sending out the list of eligible students for commission to the appropriate Education Agents, based on enrolment data in advance of invoice submissions.

## Cardiff Met has a robust commission payment process in place in which the information is checked against several criteria appearing on a checklist and reviewed by two staff members before being sent for signing.

# Related Policies and Procedures

## This policy should be read in conjunction with the [UK Agent quality Framework guidance](https://www.britishcouncil.org/sites/default/files/good-practice-guide-for-uk-providers-using-education-agents.pdf).

# Review and Approval

## The policy will be reviewed and updated annually unless legislative or statutory changes necessitate earlier review.

## The approval authority is the University’s Academic Board.