



Best Practices in Dealing with Agents

A: TERMS & DEFINITIONS

For the purposes of this document, the following terms and definitions will be adopted.

Agents: An education agent, consultant or agency employee provides advice and placement assistance for international students who wish to study in Canada. Education agents can be individuals or organizations located in Canada or abroad offering marketing, promotion, recruitment, and other services in the education sector. Education agents may be known by various titles, including but not limited to student advisors, education consultants, counsellors, or representatives.

Agencies: Education agencies are commercial organizations that provide support to students in their education journey, helping them choose institutions and programs of study, submit applications, apply for study visas, and other services. Agencies can range from sole operators or small companies with a single office, to large multi-national companies with offices in dozens of cities. In addition, a company may have a technology platform representing broad agent and sub-agent networks under a single contact point. Agencies may earn revenue by charging service fees to students, and/or recruitment fees to education institutions.

Training: Agent training includes recognized certifications, such as the Canada Course for Education Agents (CCEA), as well as the provision by an institution of ongoing education and information related to their programs, facilities, services, and application processes, including how to effectively prepare students for living and studying in Canada.

B: SELECTION

Choose your agents judiciously.

1. Institutions are responsible for providing training to education agents and recruiters working on their behalf. Agents are seen as official institutional representatives and must have current and accurate information regarding admission policies, program details, academic policies, student services, facilities, and tuition refund and dispute resolution policies. Poor performance and services may affect the reputation of your program and institution adversely, as well as Canada's reputation as a provider of high-quality education services.
2. Institutions must have a documented, detailed process for the selection and vetting of potential education agents and recruitment partners. At minimum, this should include reference checks from existing partners and verification of agency training (such as the Canada Course for Education Agents), accreditations, and memberships with professional associations. Prior to finalizing any agreement, it is advisable to visit prospective agents in-person/in their office(s), as this may be the best indicator of the agency's professionalism and business ethics.

C: CONTRACTS

Establish clear contractual responsibilities.

1. Institutions must sign a contract or agency agreement that clearly specifies the following:

- Effective date
- Expiry date
- Renewal policy
- Cancellation policy (causes and process for termination of agreement)
- Dispute mechanism, including jurisdiction under Canadian law
- Policy on confidentiality and data protection
- Terms and conditions
- Range of services expected (and fees charged)
- Acknowledgment of applicable legislation
- Definition of responsibilities regarding third-party agreements (subcontractors)
- Payment terms and conditions, including:
 - Commission structure
 - Specification of commission applicable to any services other than tuition
 - Commission policy with respect to cancellations and refunds
 - Payment plans and consequences of non-payment or late payment

D: TRAINING

Provide ongoing training and communicate updates regularly.

1. Institutions must have a documented program and training materials to provide agents with a comprehensive overview of its programs, facilities, and services. This may include brochures, newsletters, and factsheets, as well as in-person meetings and events, such as familiarization tours (FAM trips).

2. Institutions must also have a mechanism in place to inform agents of any changes as they occur, as well as provide access to up-to-date information at all times. Communication is key to ensuring adequate service between your institution and the agency.

E: MARKETING AND PROMOTION

Ensure promotional material is current, accurate, and consistent.

1. Institutions are responsible for ensuring agencies use marketing and promotional materials that include clear, accurate, and complete information regarding the institution and its programs. Promotional materials must meet institutional standards and comply with applicable laws, regulations, and official policies.
2. Agencies are responsible for providing prospective students with information that supports informed decision-making regarding programs suited to their educational background, goals and aspirations. Agency representatives must inform students their rights and responsibilities in the destination country.

F: FOLLOW UP / TRACKING

Monitor the performance of agents and recruitment partners.

1. Institutions must establish a process to collect student feedback as to the quality of services and accuracy of information agencies provide, as well as develop a procedure for follow up with agencies in the event students are not adequately prepared.
2. Institutions should request that any materials produced by the agency (in addition to the institution's provided promotional materials) are sent to the institution for review. Institutions should verify that all fees charged to students are accurate and declared in the contract or agent agreement.
3. On recruiting missions, institutional representatives should schedule regular visits to agency office(s) in order to verify what promotional materials are displayed.
4. Institutions should monitor the performance of their recruitment partners and terminate contracts with any agencies whose ongoing conduct violates the terms of their contract, is misleading, deceptive, or in violation of applicable laws.

Checklist for the Selection & Vetting of Education Agents

The agency and its representatives practice responsible business ethics

- The agency is committed to complying with applicable laws, regulations, codes of conduct and other industry best practices
- The agency has appropriate business license(s), liability insurance, and risk management protocols
- Information about the agency's ownership, governance, and organizational structure is publicly available
- A transparent process is in place for declaring and resolving conflicts of interest
- Confidentiality is exercised regarding sensitive information obtained from stakeholders
- A clear process is in place for handling complaints and resolving disputes
- The agency is transparent regarding fees paid by students and commissions paid by education providers
- Agency representatives exhibit professionalism and integrity

Information provided to stakeholders is ethical, accurate, and consistent

- The agency has robust procedures for ensuring the recruitment of bona fide students
- Documentation sent to institutions on behalf of students is authentic and systematically verified
- Clients are informed of their rights and responsibilities regarding the conditions of their enrolment
- Written agreements between agencies and their clients are signed
- Documentation on fees and refund policies is readily available
- The agency discloses all partners, affiliates, and third-party agreements. Processes are in place to ensure third parties act ethically, honestly, and in the best interest of all stakeholders
- The agency has mechanisms in place to proactively ensure information provided to clients about institutions and their programs, services and facilities is accurate and up-to-date
- The agency has procedures in place to protect the welfare of minors
- The agency acts in the best interest of students, institutions, and partners at all times