

Procedure Title

Agent (Educational Advisor) Management Procedure

Preamble

This procedure accompanies the Deakin College Agent (Educational Advisor) Policy and is compliant with the ESOS National Code 2018 and relevant Commonwealth legislation as detailed in this Policy.

Purpose

Educational Advisors (agents) play an important role in recruiting overseas students for Deakin College. Deakin College works collaboratively as part of the wider Navitas Group of Higher Education Colleges and within a joint management system of educational advisor management and quality assurance. This procedure is linked to the Deakin College/Navitas Policy and Procedures and required agent management documentation. It has been developed to ensure that agents or Educational Advisors act ethically in the best interest of overseas students.

Scope

This Procedure applies to Deakin College Marketing and Admissions Staff, as part of the wider Navitas joint management system of educational advisor management, and to Educational Advisors with the authority to promote Deakin College’s programs and services to prospective overseas students.

Policy

Navitas Agent Management Policy
Deakin College Agent (Educational Advisor) Policy

Related Documentation

- Navitas Educational Advisor Application Form;
- Navitas Educational Advisor Management Strategy;
- Agreement to Act as an Authorised Educational Advisor; and
- Terms and Conditions accompanying the above mentioned Agreement.

Procedure

1. General Appointment of Educational Advisors

- 1.1. Navitas Educational Advisors are appointed to represent the group or an individual college based on requests from the Deakin College or Source Country Office staff. All appointed Educational Advisors are issued a Navitas Agreement and Certificate of Representation to confirm their status as authorised representatives for Navitas and to ensure compliance with any regulatory bodies in Australia, Canada, New Zealand, Singapore, the United Kingdom and the United States of America.

Step 1: Request made by Educational Advisor for appointment as a Navitas Partner

Responsible	Action
Educational Advisor	Educational Advisor contacts Navitas Source Country Office, Deakin College, and/or Corporate Office requesting to represent Navitas.

Step 2: Contact Educational Advisor to initiate agreement process

Responsible	Action
Navitas Corporate / Deakin College	Forward Educational Advisor’s request to the nearest Regional Sales Director and/or Source Country Office to the Educational Advisor’s location, or to Deakin College where the Educational Advisor is located (e.g. If an Educational Advisor is located in Melbourne, request should go to a college in Melbourne).
Source Country Office / Deakin College	Send “ Navitas Educational Advisor Application ” PDF to the Educational Advisor via email.
Educational Advisor	Complete the “ Navitas Educational Advisor Application ” and return to Deakin College/Source Country Office. Form will only be accepted as a typed PDF file.

Step 3: Application assessment initial due-diligence

Responsible	Action
Source Country Office / Deakin College	Review Educational Advisor application to ensure all sections of the form have been completed. If a section has not been completed, request the Educational Advisor complete application in its entirety. If the form has been returned as a JPG, or any other file type other than a PDF, request the Educational Advisor resubmit the form as a PDF.
	Perform assessment of the application against internal Deakin College/Source Country Office metrics and/or liaise with Partner University on Educational Advisor suitability. This may also one or more of the following: <ul style="list-style-type: none"> • Educational Advisor office visit (if possible); • Educational Advisor location intel (market growth); • Market development (against internal market strategies); • Eligibility specific to market location (market risk rating); • Level of professionalism of the Educational Advisor (industry intel); • Knowledge and skill level of the Educational Advisor; and/or • Reputation of the company.

If Educational Advisor passes Step 3, go to Step 4

If Educational Advisor does not pass Step 3, go to Step 5b

Step 4: Conduct Reference Check

Responsible	Action
Source Country Office / Deakin College	Email the “ Navitas Educational Advisor Referee Report ” to the three (3) referees noted on the Educational Advisor’s application.
Educational Advisor’s Reference	Complete and return “ Navitas Educational Advisor Referee Report ” to Source Country Office / Deakin College
Source Country Office / Deakin College	Once “ Navitas Educational Advisor Referee Report ” has been returned, assess quality of responses to determine if suitable to appoint.
	Proceed with application when: <ul style="list-style-type: none"> • The first two (2) references have been received; AND • Both references are positive. <p>If an Educational Advisor who has not received two positive external references is to be offered a contract, written approval will need to be sought from the Channel Partner Services Manager.</p>
	In cases where referees are unable to complete the Navitas Educational Advisor Referee Report in writing or referees are unable to complete (i.e. travelling, policy of institute) there are two options: <ul style="list-style-type: none"> • Source Country Office/Deakin College to telephone referee and complete the form on their behalf with verification signature Navitas staff member conducting the check. Navitas Deakin College and/or Source Country Office to provide supporting statement documenting reasons why the Educational Advisor was appointed (i.e. office visit, recommendation from third party provider).
	References have one week to return the report. After, which the Source Country Office/Deakin College will send an email to Educational Advisor requesting they follow up with references and have them complete the referral report.

If Educational Advisor passes Step 4, go to Step 5a

If Educational Advisor does not pass Step 4, go to Step 5b

Step 5a: Submit Educational Advisor application to Channel Partner Services Team – **Positive**
Application

Responsible	Action
Source Country Office / Deakin College	<p>Email agentmanagement@navitas.com with the following:</p> <ul style="list-style-type: none"> • Educational Advisor application form • X2 positive references (See Appendix C – Educational Advisor Reference Check Policy) • Justification of why the Educational Advisor should be appointed • Who the Navitas Account Owner should be for the Educational Advisor on the CRM • Recommendation on appointment level (Basic Service or Full Service contract). • Specify which Deakin Colleges or destination countries are to be included in the agreement • (Optional) email trail between Source Country Office / Deakin College and the Educational Advisor
Channel Partner Services Team	Enter Educational Advisor onto Salesforce as 'Contract Pending' status
	Upload all documentation received from the Source Country Office / Deakin College onto the Educational Advisor's file
	Assign the nominated 'Account Owner' to the Educational Advisor's record

5b: Submit Educational Advisor application to Channel Partner Services Team – **Negative**
Application

Responsible	Action
Source Country Office / Deakin College	<p>Email agentmanagement@navitas.com the following:</p> <ul style="list-style-type: none"> • Educational Advisor application form • Justification as to why the Educational Advisor should not be appointed • Who the Navitas Account Owner should be for the Educational Advisor on the CRM • Any failed references (if this step was conducted) (optional) email trail between Source Country Office / Deakin College and the Educational Advisor
	Enter Educational Advisor onto Salesforce as 'Rejected' status

Channel Partner Services Team	Upload all documentation received from the Source Country Office / Deakin College onto the Educational Advisor's file
	Assign the nominated 'Account Owner' onto the Educational Advisor's record
	Enter a note into the 'Notes & Attachments' as to why the Educational Advisor's application was rejected.

Step 6: Channel Partner Services Team Application Assessment

Responsible	Action
Channel Partner Services Team	Assess completed application for suitability against the Navitas Educational Advisor Selection Criteria (Appendix A).
	If application does not pass the Channel Partner Services Team assessment – change Educational Advisor status to 'Rejected' on CRM.

If Educational Advisor is to be Contracted, go to Step 7

Step 7 – Channel Partner Services Team forward Educational Advisor Profile to Deakin College

Responsible	Action
Channel Partner Services Team	For Contracted Educational Advisors, send monthly Navitas Educational Advisor contract opt-out spreadsheet to Marketing Directors (cc'd nominated account owner and GMs) in Week 3 of the Educational Advisor management appointment process. Provide Deakin College with one week to respond and raise any concerns and/or objections to being included in contracts.
Marketing Director / Senior Marketing Manager	Evaluate Educational Advisor's suitability as per their CRM Educational Advisor Record against the following criteria: <ul style="list-style-type: none"> • Source Country Office feedback (if applicable) • Reference checks • Level of professionalism of the Educational Advisor • Knowledge and skill level of the Educational Advisor • Reputation and ability of the company • Commitment of the Educational Advisor • University Partner requirements • (where appropriate) Educational Advisor office visit
	Nominate if the Deakin College should not be included on a new contract

Step 7: Update Salesforce with Details for New Agreement

Responsible	Action
Channel Partner Services Team	Ensure all fields on Salesforce are complete for the Contract Pending Educational Advisor. Ensure the Educational Advisor has a: <ul style="list-style-type: none"> • Principal Contact Name • Office Address • Main Email Address • Navitas Account Owner • All documentation and communication attached to their record.
	Enter the Deakin College that should be included on the new agreement into the “Deakin College in Agreement” field on Salesforce.
	Enter the Recruitment Territory/ies that should be included on the new agreement into the “Recruitment Territories in Agreement” field on Salesforce.
	Create a new agreement number in the agreement’s field. Enter agreement start date and end date (1 July, 1 September for Full Service agreements, or 1 April, 1 December for Basic Service agreements). Change agreement status to “Sent to Agent”. Ensure “Active” is checked within the agreement number.
	Change Educational Advisor’s status from Contract Pending to Basic Service or Full Service.

Step 8.1: Channel Partner Services Team to Generate Agreement and notify Account Owner when Agreement is Ready

Responsible	Action
Channel Partner Services Team	Generate the new agreement in SF and attached Educational Advisor’s account. Advise Account Owner that agreement is ready.
Account Owner	Account Owner to download agreement from SF and forward to the Educational Advisor.

Step 8.2: OR if Educational Advisor is NOT in Source Country Office remit (e.g. Australia)

Responsible	Action
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Channel Partner Services Team	Email via Drawloop the relevant Educational Advisor agreement with the “ Navitas Educational Advisor Agreement Terms & Conditions YEAR ” to the Educational Advisor, cc’d the Account Owner.
	Request the Educational Advisor to read and sign the agreement and return a copy.

Step 9: Agreement Accepted

Responsible	Action
Educational Advisor	The terms of the agreement is accepted and signed by the Educational Advisor and a copy is returned to the Account Owner.
Account Owner	Send signed contract through to Channel Partner Services Team
Channel Partner Services Team	Save a copy of the signed agreement onto SF.
	On the CRM, change the Educational Advisor agreement status to “ Signed ”.

Step 10: Educational Advisor Induction

Responsible	Action
Source Country Office / Deakin College / Account Owner	Organise with Educational Advisor to provide training and induction.
	Update CRM with outcome of Educational Advisor meeting and subsequent training.

2. Monitoring of Educational Advisor Conduct & Practice

- 2.1.** Navitas Deakin College review an Educational Advisor’s conduct and practice at the end of each semester according to the obligations under the Educational Advisor agreement. If, during the review process, areas of non-compliance are identified, Navitas will inform the Educational Advisor in writing of these concerns. The Educational Advisor will then be required to address areas of concern to the satisfaction of Navitas.

- 2.2.** Navitas can terminate this agreement in accordance with paragraph ‘E’ of the agreement where an Educational Advisor fails to adequately address issues of non-compliance either by remedial action or within what is considered a reasonable period of time.

Step 1: Educational Advisor Visits and Contact

Responsible	Action
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Source Country Office / Deakin College	<p>Conduct on-going visits to Educational Advisor offices and maintain contact with Educational Advisor on a regular basis to ensure monitoring of Educational Advisor activities. Provide Educational Advisor with marketing collateral include:</p> <ul style="list-style-type: none"> • Navitas Program Matrix; • Navitas Program and Fee; • Navitas Regional Guides; • Navitas College/Division Specific Brochures;
	<p>Ensure Educational Advisors have the latest Navitas marketing information (e.g. college brochures, updates of colleges and courses and changes to relevant regulations) on display. Findings to be included within the Trip Report.</p>
	<p>CRM updated with 'Trip Reports' requesting information on all Educational Advisor visits and outcomes. Appendix B – Navitas Trip Report outlines the questions required in the Trip Report.</p>

Step 2: Review Performance of Educational Advisor

Responsible	Action
Source Country Office / Deakin College	Review performance and conduct of Educational Advisor and forward any issues to Channel Partners Services team (agentmanagement@navitas.com) to determine the next appropriate course of action.
Channel Partner Services Team	Follow up with Account Owner (via email) on any performance issues to request Educational Advisor to respond with explanation within 14 days.
	If consensus is reached (with support of the General Manager - Global Recruitment) on cancelling an agreement the Educational Advisor will be notified of the intent to cancel in the letter.
Educational Advisor	Respond to Navitas Channel Partner Services Team or Account Owner within fourteen 14 days providing explanation for performance. <i>Nil response from the Educational Advisor, after 14 days, will result in the cancellation of the agreement and an official letter of termination will be issued.</i>

Step 3: Provide Educational Advisor’s feedback to Source Country Office (where applicable) and Marketing Team

Responsible	Action
Channel Partner Services Team	Forward Educational Advisor response to the Source Country Office (where applicable) Country Marketing Teams and General Manager - Global recruitment for discussion.

Step 4: Determine follow-on action and notify Educational Advisor

Responsible	Action
Deakin College, Source Country Office & General Manager - Global Recruitment	Review feedback from Educational Advisor and determine what action will be taken (i.e. to continue or terminate agreement) and advise the Channel Partner Services Team.
Channel Partner Services Team	Notify Educational Advisor via email of action to be taken by Navitas as advised by the Country Marketing Team and/or General Manager - Global Recruitment.
	On the CRM, create a note recording the action taken and upload a copy of the letter.

3. Renewing of Expired Educational Advisor Agreements

- 3.1. Educational Advisor Basic Service Level agreements are generally issued for one (1) year period with two set expiration points throughout the year – 1 July and 1 December.
- 3.2. Educational Advisor Full Service Level agreements are generally issued for one (2) year periods with two set expiration points throughout the year – 1 April and 1 September.
- 3.3. Staggering Educational Advisor contract expirations will mitigate the Educational Advisor contract expirations previously occurring sporadically throughout the year.
- 3.4. In the expiry year, the Channel Partner Services Team will collate data and review the Educational Advisor’s performance.
- 3.5. Once a review of the Educational Advisor’s performance has been conducted, feedback obtained from the Source Country Offices and/or Deakin College (in consultation with the University Partners), will determine if an expired Educational Advisor agreement should be renewed.

Step 1: Determine agreements to be renewed

Responsible	Action
Channel Partner Services Team	Ascertain Educational Advisor contracts up for expiration. Indicate Educational Advisor performance (enrolments vs actuals) for the term of the contract.
	Send data to Source Country Offices (where applicable) for their input on Educational Advisor performance.
Source Country Office	<p>Review Educational Advisor performance against the following criteria to determine if agreement should be continued or not renewed.</p> <ul style="list-style-type: none"> • the Educational Advisor’s compliance with the Navitas Educational Advisor Agreement and commercial terms outlined in the Navitas Terms and Conditions; • the number of students the Educational Advisor has recruited and the conversion rate of: <ul style="list-style-type: none"> – Student applications to offers; and – Offers to actual enrolment of students; • Feedback from Navitas Source Country Offices and/or Deakin College as to why applications from potential students did not proceed to student enrolment status; • the number of student visa refusals for students recruited by the Educational Advisor; • any feedback or information from students or third parties regarding the Educational Advisor; and • The quality, accuracy and currency of information and advice provided by the Educational Advisor to students. <p>Advise the Channel Partner Services Team of action to be taken.</p>

Step 2: Liaise with Deakin College

Responsible	Action
Channel Partner Services Team	Send Educational Advisor data (including Source Country Office feedback) to the Deakin College.
	Request Deakin College review Educational Advisor list and confirm which Educational Advisor agreements they intend to be a party to.

Deakin College	Review Educational Advisor performance and determine if agreement should be continued or not renewed.
	Communicate decision with Partner University (if necessary).
	Advise the Channel Partner Services Team of action to be taken.

Step 3: Collate Source Country Office & Deakin College feedback

Responsible	Action
Channel Partner Services Team	College Source Country Office and Deakin College feedback.

Step 4.1: Issue renewed Agreement

Responsible	Action
Channel Partner Services Team	Generate the new agreement in SF and attached Educational Advisor's account. Advise Account Owner that agreement is ready.
Account Owner	Account Owner to download agreement from SF and forward to the Educational Advisor.

Step 4.1.1: OR if Educational Advisors is NOT in Source Country Office remit

Responsible	Action
Channel Partner Services Team	Email via Drawloop the relevant Educational Advisor agreement with the " Navitas Educational Advisor Agreement Terms & Conditions YEAR " to the Educational Advisor, cc'd the Account Owner.
	Request the Educational Advisor to read and sign the agreement and return a copy.

Step 4.1.2: Agreement Accepted

Responsible	Action
Educational Advisor	The terms of the agreement is accepted and signed by the Educational Advisor and a copy is returned to the Account Owner.
Account Owner	Send signed contract through to the Channel Partner Services Team.
Channel Partner Services Team	Save a copy of the signed agreement onto SF.
	On the CRM, change the Educational Advisor agreement status to " Signed ".

Step 4.2: OR Issue Letter of Expiry

Responsible	Action
Channel Partner Services Team	<i>If the Marketing teams have advised not to renew the agreement:</i> Send the “ Navitas Educational Advisor Agreement Expired_Not Renewed Letter ” to the Educational Advisor. Place a copy of the letter on the Educational Advisor’s file and archive the file.
	On the CRM update the Educational Advisor status as “ Archived ”. Note on the record, the reason for the agreement not being renewed and archive the record. Change the agreement status to “ Expired ”. Upload all review documentation as well as a copy of the letter.

4. Termination of an Educational Advisor Agreement

- 4.1.** If during the process of monitoring an Educational Advisor’s performance, or at any time, it is determined that an Educational Advisor has acted unsatisfactorily, unethically and/or breached the Terms and Conditions of the Navitas contract, the Navitas group can terminate the agreement.

Step 1: Escalate Educational Advisor Performance

Responsible	Action
Deakin College/Source Country Office	Escalate any issues where an Educational Advisor has acted unsatisfactorily, unethically and/or breached the Terms and Conditions of the Navitas contract to Channel Partner Services Team.

Step 2: Suspend Educational Advisor Pending Investigation Outcome

Responsible	Action
Channel Partner Services Team	Advise all Deakin College that Educational Advisor is under investigation.

Step 3: Investigation into Issue

Responsible	Action
Account Owner (under the guidance of the	Perform comprehensive investigation. Components of the investigation may include, but is not limited to:

Channel Partner Services Team)	<ul style="list-style-type: none"> • Requesting the Educational Advisor provide an explanation; • Seeking feedback on the Educational Advisor from all Deakin College and Source Country Office staff (where applicable); • Meeting with the Educational Advisor to discuss the issue (this may be done by Source Country Office staff or by Marketing Directors; • Seeking feedback on the Educational Advisor from the in-country Department of Home Affairs (Immigration) office, Austrade, Embassy or reciprocal organisations; <p>Collate documentation regarding the investigation and forward to the General Manager - Global Recruitment. Specify the chosen course of remediation for approval.</p>
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Step 4: General Manager - Global Recruitment Approval

Responsible	Action
General Manager – Global Recruitment	Review and approve remediation measure.

Step 5: Communication

Responsible	Action
Channel Partner Services Team	Communicate approved course of action to Deakin College/Source Country Offices.

Step 6.1: Remediation Action – Warning Letter

Responsible	Action
Channel Partner Services Team	Issue the Educational Advisor with a warning letter. This letter must stipulate the issues and the supporting evidence surrounding the case. The warning letter must also address why the Educational Advisor has been permitted to continue working with Navitas as well as what measures will be required (from both the Educational Advisor and Navitas) to ensure such circumstances do not reoccur.

Step 6.2: Remediation Action – Cancellation Letter

Responsible	Action
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Channel Partner Services Team	Issue the Educational Advisor with a cancellation letter. This letter must stipulate the issues and the supporting evidence surrounding the case.
Source Country Office / Account Owner	If the Educational Advisor has any concerns relating to the cancellation, it is the Source Country Office / Account Owner who should manage these queries on behalf of Navitas.

Step 7: Communication with DIBP, Austrade, Embassies and/or Reciprocal Organisations (if necessary)

Responsible	Action
Channel Partner Services Team /Deakin College/Source Country Offices	Communicate findings to governing bodies (where applicable).

Step 8: Account Management

Responsible	Action
Channel Partner Services Team	Upload all relevant documentation and warning/cancellation letter to the Educational Advisor’s record on the CRM.

Step 9: Account Management – Educational Advisor Status

Responsible	Action
Channel Partner Services Team	On the CRM update the Educational Advisor status as “ Cancelled ”. Note on the record, the reason for the the agreement being cancelled and archive the record. Change the agreement status to “ Cancelled ”.
	On the shared Marketing drive, archive the agreements that have been cancelled.

5. Review

- 5.1.** This Policy is reviewed annually by the Channel Partner Services Manager to ensure alignment to appropriate strategic direction and its continued relevance to Navitas’ current and planned operations.

Status and Details

Status	Current
Effective date	1/09/2018
Review date	1/09/2020
Approval Authority	Senior Management Group
Implementation Officer	Director of Marketing and Admissions
Enquiries Contact	Justine Morris