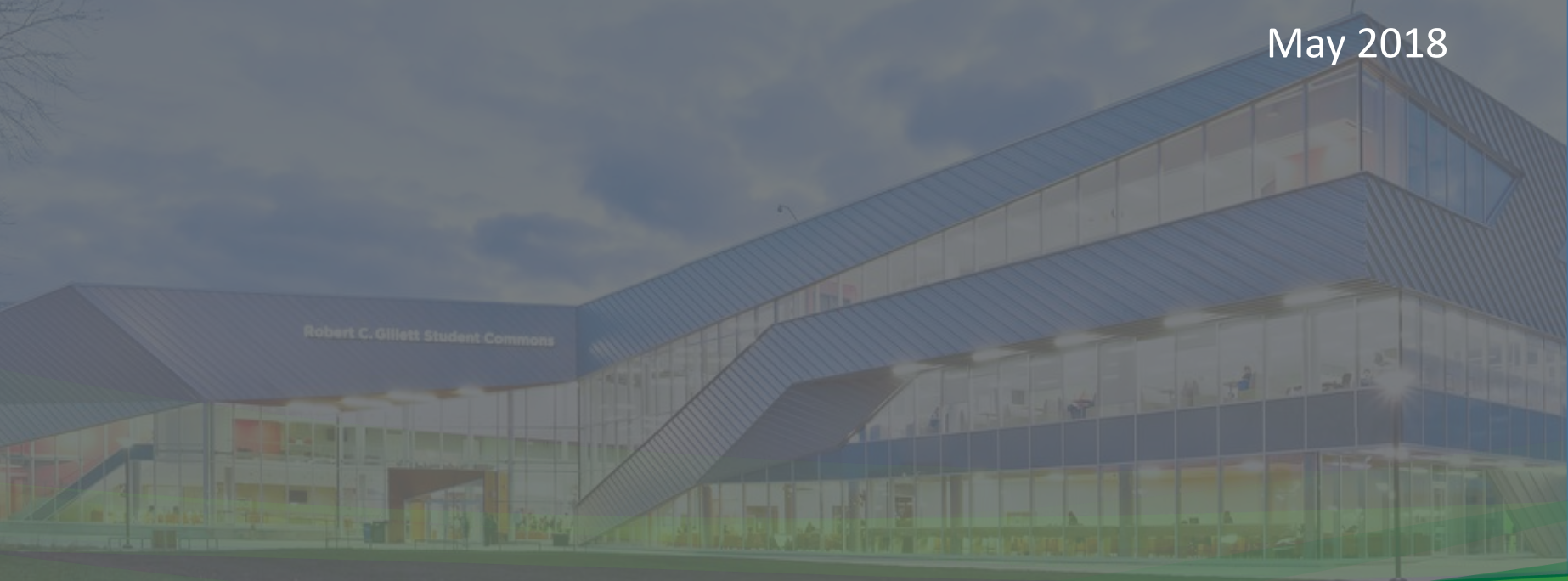


# RENEWING OUR INTERNATIONAL STRATEGY

May 2018



**ALGONQUIN**  
COLLEGE

# WHY THIS STRATEGY?

International education engages every part of Algonquin College and touches on nearly every goal in its *2017–2022 Strategic Plan*: to be **learner-driven**, lead in **quality** and **innovation**, be **sustainable** and provide an **exceptional** place to work.

The College rolled out its first-ever international strategy in 2014. This update reflects new **opportunities**, new **realities** and new **expectations** of international postsecondary education in a truly **global context**.

# BIG-PICTURE TRENDS

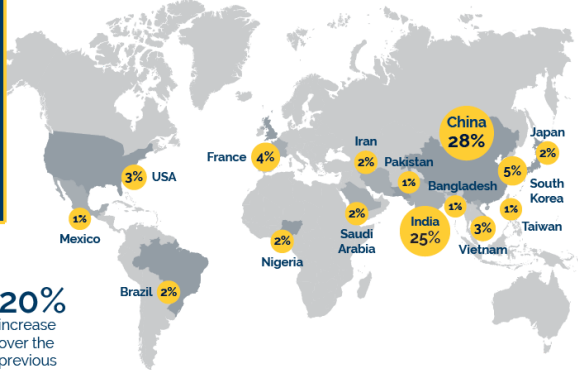
# CANADA IS A TOP DESTINATION FOR INTERNATIONAL LEARNERS

Canada's Performance and Potential in International Education

## International Students in Canada 2018

**494,525**  
international  
students in  
Canada  
at all levels  
of study in  
2017

Where do inbound students come from?

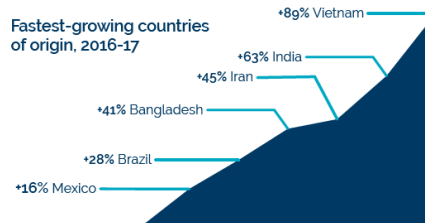


**119%**  
increase in  
international  
students in  
Canada between  
2010-2017

**20%**  
increase  
over the  
previous  
year

"The most positive part of my study experience in Canada has been the guidance I received from my professors. The quality of education is outstanding."  
- Natural Sciences student from Egypt

Fastest-growing countries  
of origin, 2016-17



Top **3** reasons international  
students choose Canada<sup>2</sup>

- 1 The **quality** of the Canadian education system
- 2 Canada's reputation as a **tolerant** and **non-discriminatory** society
- 3 Canada's reputation as a **safe** country



of international students  
recommend  
Canada  
as a study destination<sup>3</sup>



of international students  
plan to apply for  
permanent residence in  
Canada<sup>4</sup>

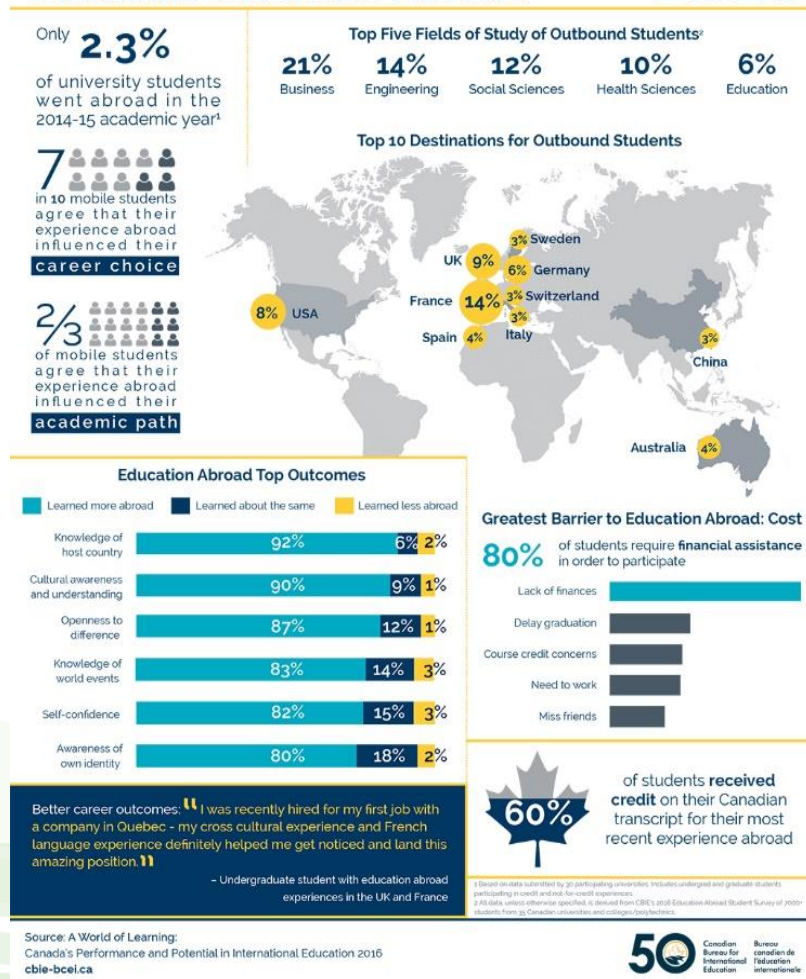
Source: A World of Learning:  
Canada's Performance and Potential in International Education 2016  
bcie-bcei.ca



Canadian Bureau for  
International Education  
Bureau canadien de  
l'éducation internationale

- **4<sup>th</sup> most popular choice** for international students in the world — up from 7<sup>th</sup> in 2015
- **11%** of postsecondary students in Canada were international in 2015-2016  
(Source: Statistics Canada)

# FEW CANADIAN STUDENTS ARE GETTING INTERNATIONAL EXPERIENCE



- Just 2.3% of Canadian university students study abroad — compared to 30% of German and 50% of Australian students
- The biggest barrier cited is financial

# TRANSNATIONAL EDUCATION GROWING

Figure 26: Trends in UK HETNE student numbers, 2008-09 to 2015-16

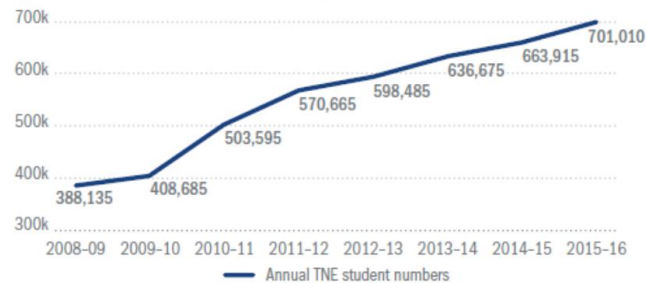
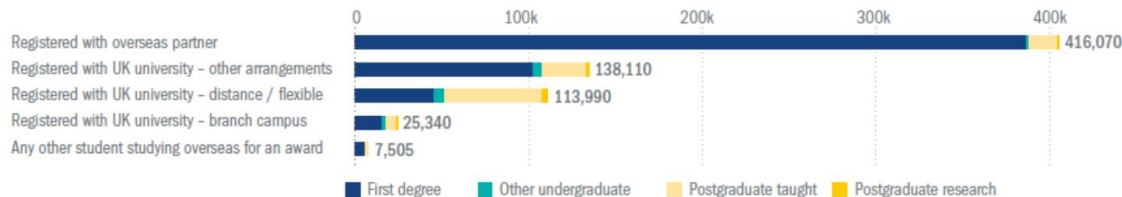


Figure 28: Type of UK HETNE provision, 2015-16



Source: HESA Aggregate Offshore Record (2015-16)

Note: In 2015-16 45% of all TNE students were registered through Oxford Brookes University with an overseas partner on Association of Chartered Certified Accountants (ACCA) programmes.

Figure 27: Changes in location of UK HETNE students rankings

Rank	2010-11	2012-13	2015-16
Malaysia	1	1 ▶ 0	1 ▶ 0
China	3	3 ▶ 0	2 ▲ 1
Singapore	2	2 ▶ 0	3 ▼ -1
Pakistan	4	4 ▶ 0	4 ▶ 0
Nigeria	6	6 ▶ 0	5 ▲ 1
Hong Kong, China	5	5 ▶ 0	6 ▼ -1
Sri Lanka	21	13 ▲ 8	7 ▲ 6
Egypt	15	17 ▲ 2	8 ▲ 9
Oman	16	11 ▼ -5	9 ▲ 2
Ghana	7	7 ▶ 0	10 ▼ -3

- The mobility of higher education programs and institutions/providers across international borders
- Doubled in size since 2000 and continues to grow

<https://www.eaie.org/blog/key-elements-transnational-education-tne.html>

# ONTARIO'S INTERNATIONAL POSTSECONDARY STRATEGY 2018

1. Create global citizens
2. Contribute to Ontario's communities and economy
3. Strive for sustainability

“By making it easier for global talent to come to Ontario, we can be more innovative, forge international partnerships, and drive economic development and positive social change. By putting students first — exposing them to diverse perspectives and providing them with opportunities to study-abroad — we can graduate global citizens who will thrive in today's borderless market.”





# OUR COLLEGE REFLECTS THESE PATTERNS

- **192% growth** in international enrolment between 2010 and 2017
- **Just 207 students** (0.55%) took part in College-sanctioned international activities in 2016–2017, along with 19 faculty

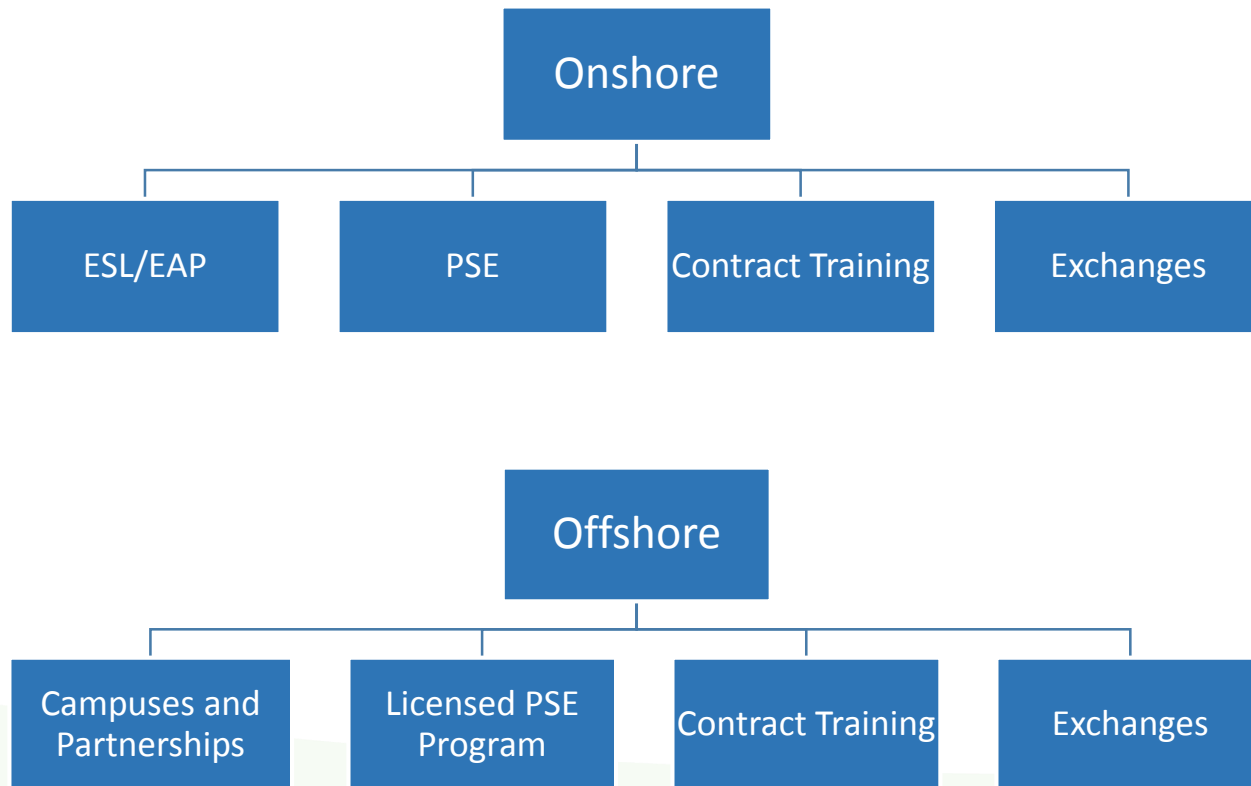
*The College's International Education Centre provided \$70,000 to 86 students and 10 employees to support international experiences.*

- **\$487, 927 net contribution** from transnational education in 2017-2018

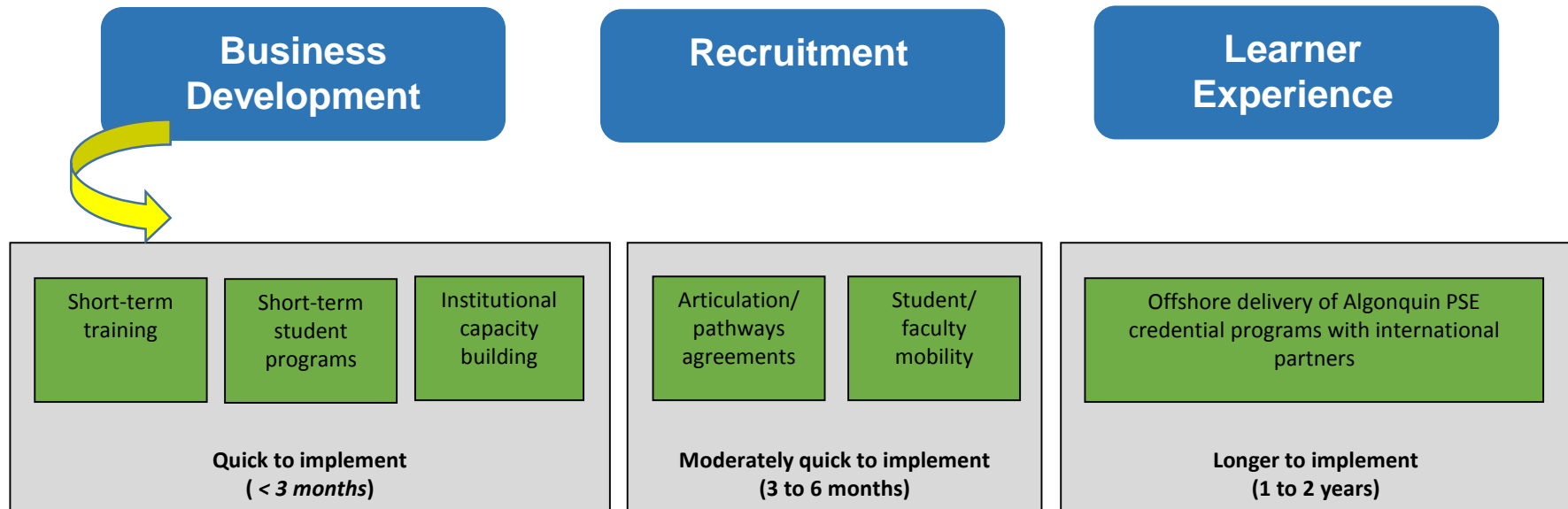


# INTERNATIONAL AT ALGONQUIN

# WE DELIVER INTERNATIONAL EDUCATION TWO WAYS

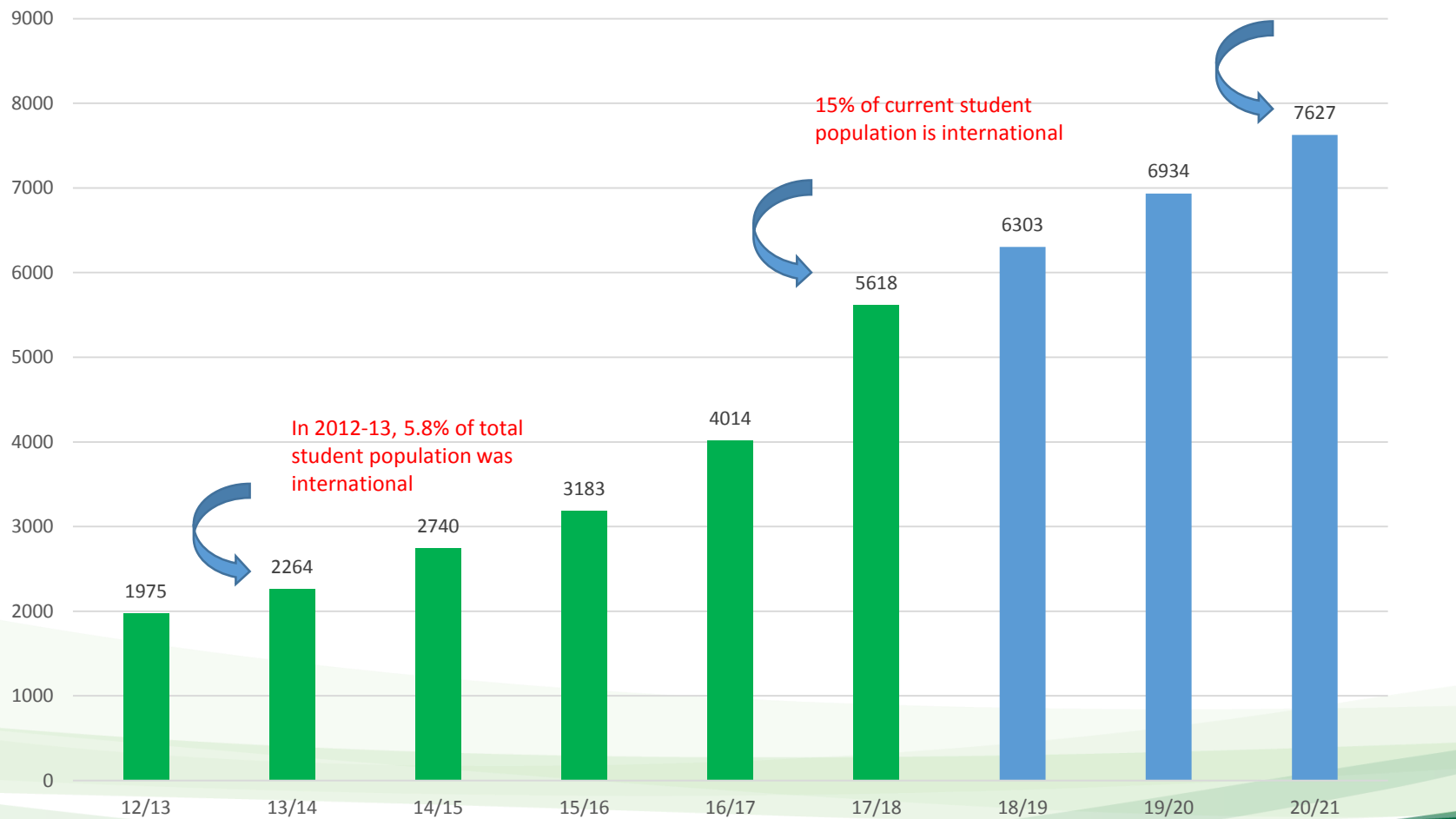


# THE INTERNATIONAL EDUCATION CENTRE (IEC) THREE PILLARS



Business Development generates revenue directly, contributes to the College's brand visibility in international markets, and provides targeted support to international student recruitment

# ONSHORE ENROLMENT CONTINUES TO CLIMB

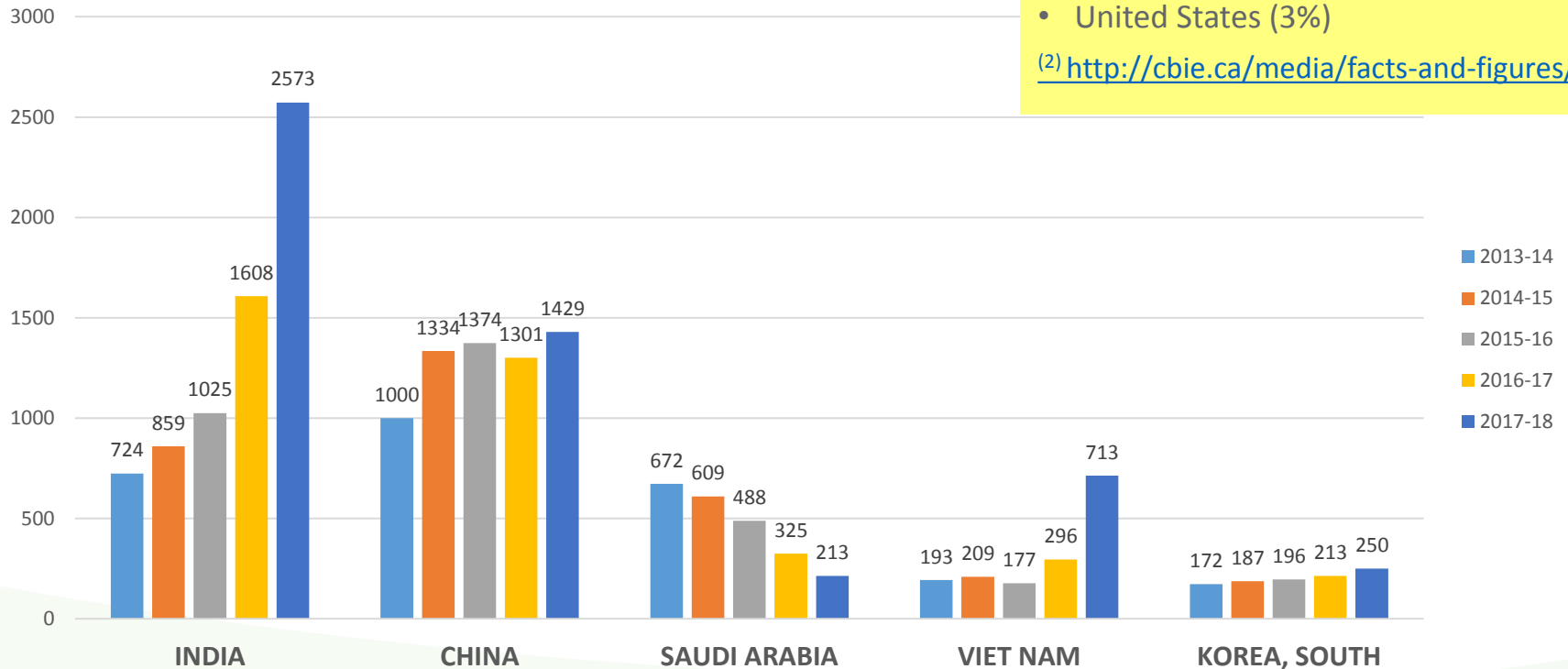


# INDIA HAS OUTSTRIPPED CHINA AS OUR TOP SOURCE COUNTRY

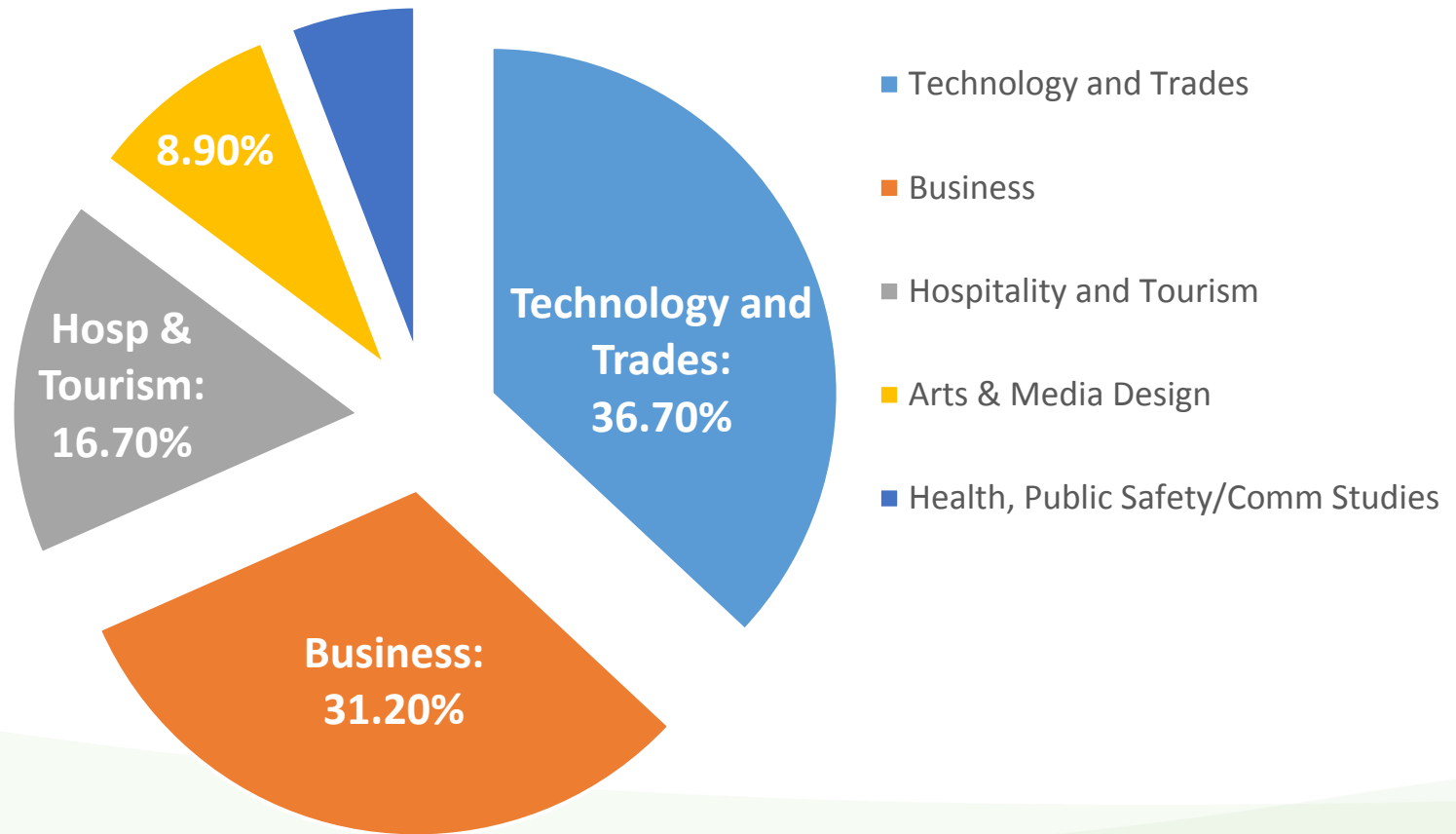
## Top 5 sources of international students across Canada<sup>(2)</sup>

- China (28%)
- India (25%)
- South Korea (5%)
- France (4%)
- United States (3%)

<sup>(2)</sup> <http://cbie.ca/media/facts-and-figures/>



# 70% OF OUR INTERNATIONAL ENROLMENTS ARE IN TWO SCHOOLS



Winter 2018 (as % of total international student enrolment)

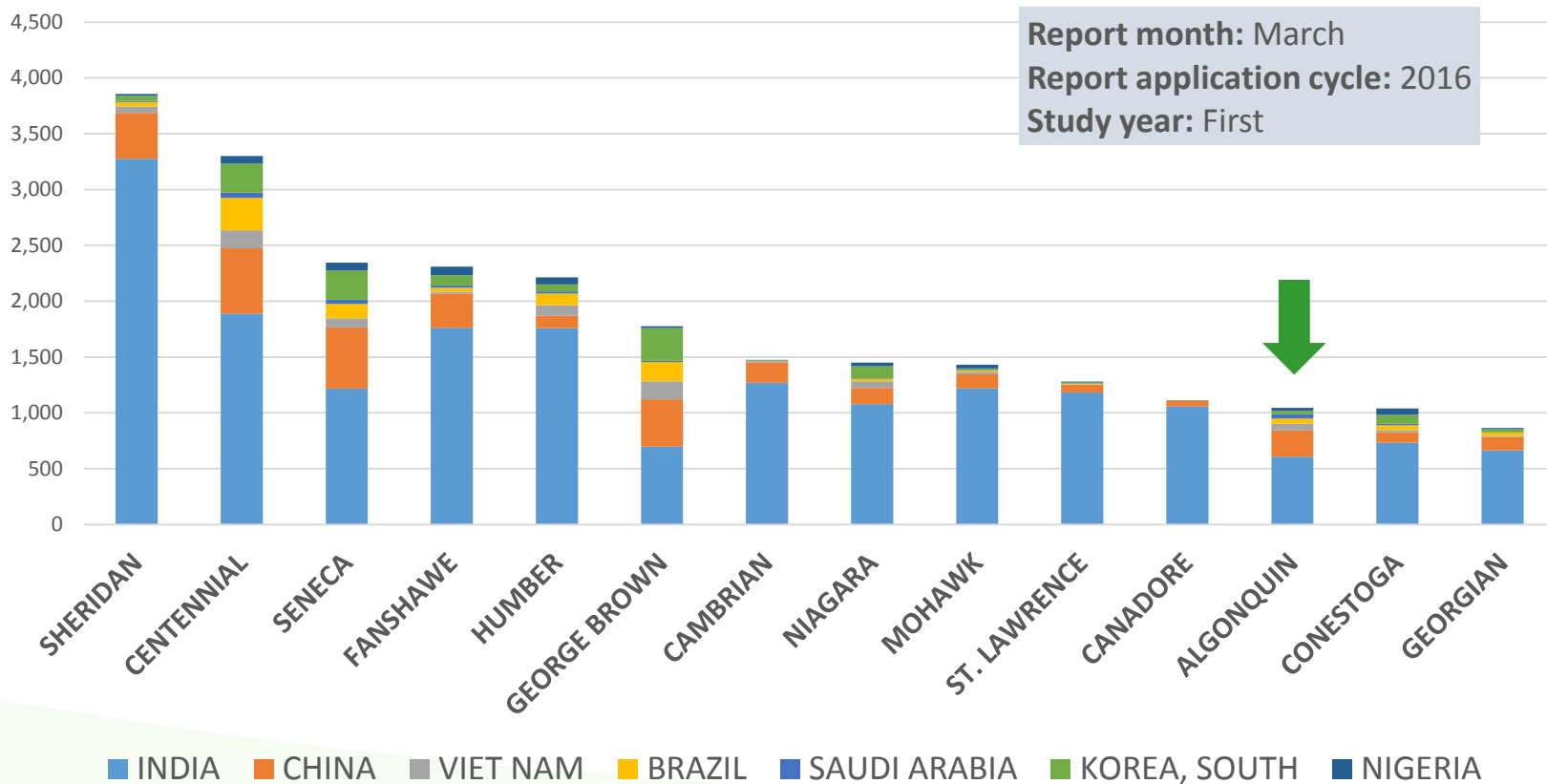
# OUR INTERNATIONAL STUDENTS ARE SATISFIED

	2014	2015	2016	2017
Arrival satisfaction	91	93	93	90
Learning overall	91	89	90	78
Living overall	90	92	91	89
International Education Centre	93	91	91	89
International student activities	95	96	96	95
Support overall	92	91	91	91

International Student Barometer (% satisfied and very satisfied)



# OTHER COLLEGES DEPEND MORE HEAVILY ON INTERNATIONAL



OCAS DATA: International Enrolment by Country of Citizenship

**ANY QUESTIONS  
ABOUT OUR  
CONTEXT?**

# STRATEGIC CONSIDERATIONS

# QUESTIONS WE STARTED WITH

1. What does it mean to be a global leader in personalized, digitally connected, experiential learning onshore and off?
2. What are the key elements of success in that context?
3. What principles should govern our approach to the onshore and offshore markets?

# DIRECTION FROM THE BOARD OF GOVERNORS

- Consider *why* the College should pursue an international strategy.
- Engage stakeholders beyond the Board and senior team.
- Gather more data on internal experience, best practices and competitors.
- Align with the capabilities of the College as a whole, not just the International Education Centre.
- Consider Indigenous learners, refugees and other non-traditional groups

# STRATEGIC ALIGNMENT IS MANDATORY

Any new International strategy must work in concert with our:

- 2017–2022 Strategic Plan
- People Plan
- Learner-driven Plan
- Indigenous Plan
- Entrepreneurship Plan

# HIGHLIGHTS OF OUR CURRENT STATE

- Success of CIGan and Government Initiatives streamlining Study Permit for College students resulting in an unprecedented interest and growth for the Ontario College sector
- Significant year over year growth in short term onshore programming, for international faculty and students, and government funded international capacity development activities.
- Ongoing success of Algonquin College Kuwait, with the first cohort graduating in May 2018.
- High retention rates for international students (92.9% Intl. vs.81.9% Domestic, 17/18W)

*More detail on our current state as created by the International Strategic Refresh Committee can be found in the Appendix slides of this presentation.*



# RISK WE COULD FACE

## EXTERNAL

- Political
- Economic / Market demand
- Social
- Environmental
- Technological
- Legal / Policy
- Safety and security
- Competition / Substitutes

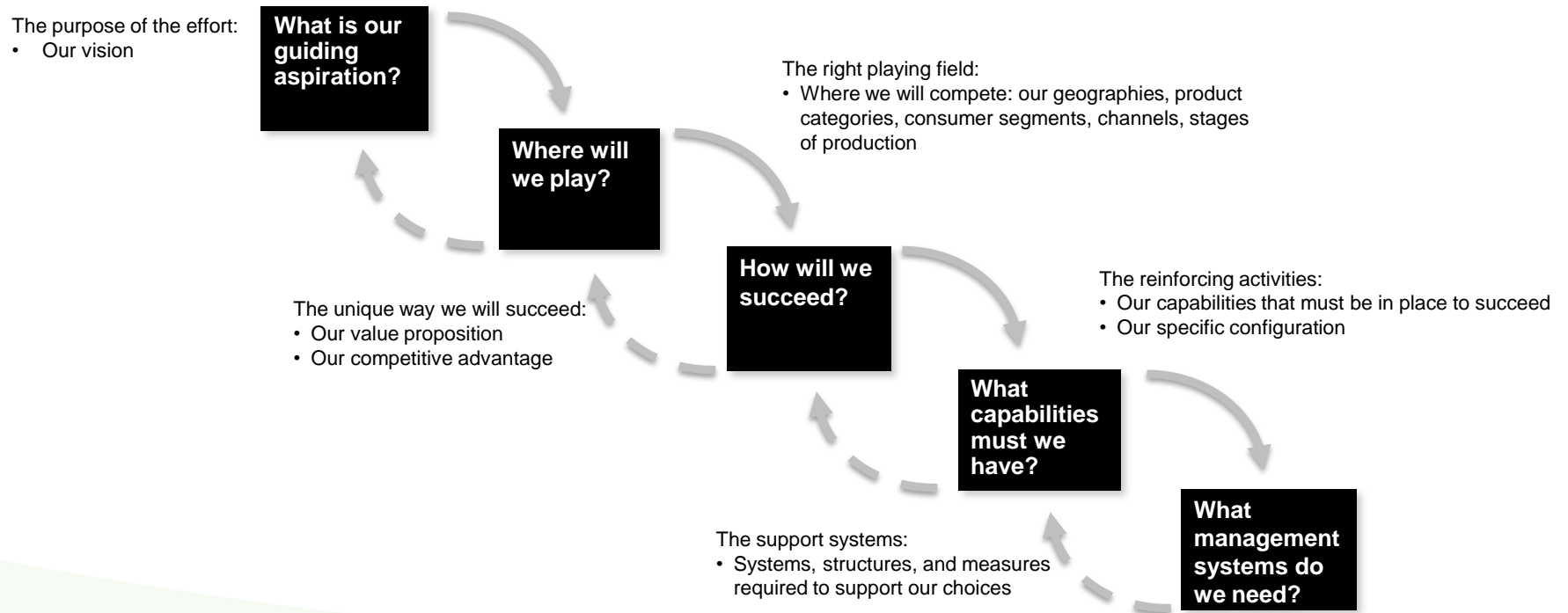
## INTERNAL

- Management preferences
- Strategy
- Organization
- Resources
- Demographic changes

**ANY QUESTIONS  
ABOUT OUR  
STRATEGIC  
CONSIDERATIONS?**

# DEFINING OUR STRATEGY

# OUR STRATEGIC FRAMEWORK



# HOW WE APPLIED IT

- Brainstormed **winning aspirations** for international education across the **College**
- Brainstormed follow-on aspirations **for each business unit** within the International Education Centre (Business Development, Recruitment and Marketing, Student Experience)
- Considered **what we would need** to realize those aspirations
- Considered the **barriers we might face**
- **Proposed tests** to see if the barriers can be overcome

# AN INTERNATIONAL ASPIRATION FOR THE COLLEGE

## THREE VARIATIONS: WHY WE ARE IN INTERNATIONAL EDUCATION

1. To transform hopes and dreams into lifelong success by creating a culture that promotes global citizenship.
2. To provide a learner-centered experience that fosters globally-minded learners empowering them with the skills to build and support sustainable, diverse communities.
3. To transform hopes and dreams with an exemplary (global) (Canadian) education experience that builds a connected and sustainable global community.

# ASPIRATIONS FOR THE IEC

## BY BUSINESS UNIT WHAT SHOULD WE DO WELL?

### **Business Development**

Actively position Algonquin College in the global market as an exemplary provider of skills development and training to contribute to its growth as a sustainable, accessible, globally minded institution.

### **Learner Experience**

Provide a personalized experience that results in high levels of international student satisfaction and graduation.

### **Recruitment**

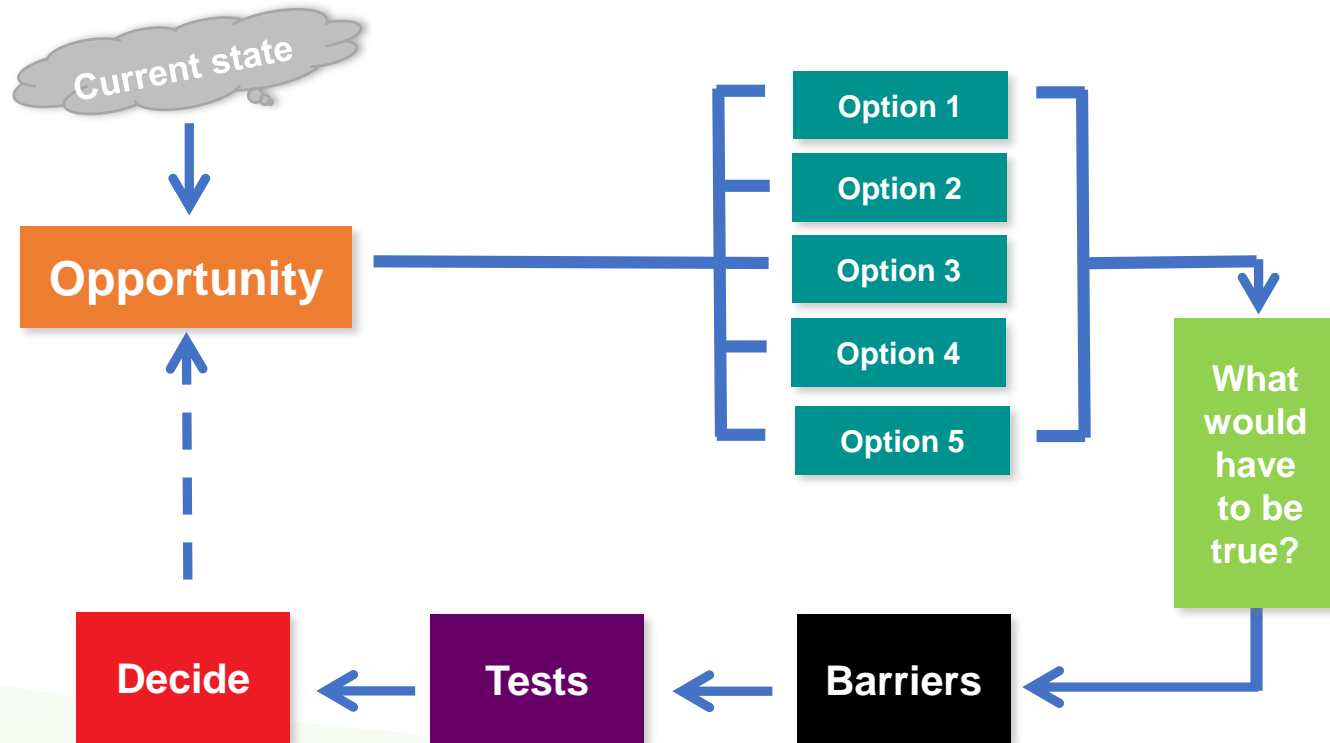
Sustainably attract and support a diverse international population distributed across college programs.



# DO THE ASPIRATIONS RESONATE?

- Which expression of the College-level aspiration is best?
- Do the Business Unit aspirations clearly support the overarching aspiration?

# THE STRATEGY DEVELOPMENT PROCESS



# OPTIONS WE COULD CONSIDER

## 1. Focus primarily onshore

- Grow international student population (to 15%, 20%, 30%, 40%?)

## 2. Focus on both onshore and offshore

- In all markets or select markets or markets aligned with program excellence?
- Endorsing an offshore franchising model (requires brand risk assessment)

## 3. Focus on transnational education opportunities

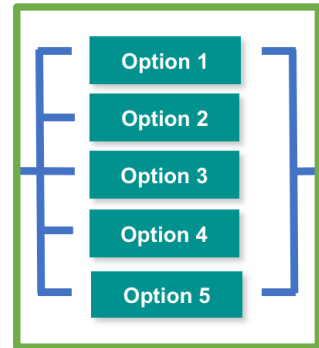
- Grow offshore partnerships, branch campuses, franchises (e.g., increasing international development projects)

## 4. Focus on mobility (sending students and faculty abroad)

- Grow study and work abroad (to 2.5%, 5%, 10%, 20%?)

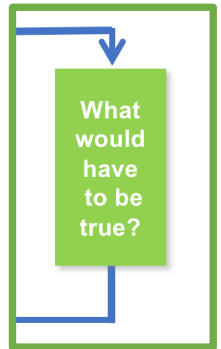
## 5. Focus on profitable lines of business only

- Onshore, offshore or both (e.g., short-term programming, training of faculty and staff from other institutions)



# WHAT WOULD HAVE TO BE TRUE?

To create the conditions for sustainable future success in international education, the College needs to ensure it has the right:



- **Business model**
- **Culture**
- **Risk appetite**
- **Resources and capacity**
- **Processes and procedures**
- **Approach to mobility and internationalization**

# BUSINESS MODEL CONSIDERATIONS

To achieve its aspiration, the College may need to evolve its business model by:

- Diversifying revenue contributions to **establish international enrolment caps** (by country or program)
- Shifting to **year-round program delivery**
- Developing a model for **micro credentialing**
- Developing better **internal pathways** between programs and between credentials (more of a **laddered** system)
- Streamlining financial and approval **processes** within the College
- Encouraging the use of both **qualitative and quantitative measures** to track success and effectiveness of international activity

# CULTURE CONSIDERATIONS

Across the College, supporting international education requires organizational commitment to:

- Making the necessary **system changes** (upgrade technology)
- Improving the **agility of the College** (around policies and procedures change, technology, staffing) to respond to increased enrolment
- Delivering an **individualized international learner experience**
- Embedding consideration of **international learner experience** in all areas of the College such as ensuring every student-facing role has a **minimum level of cultural awareness**
- Developing **characteristics** of Global Citizenship in all learners and across the college

# RISK APPETITE CONSIDERATIONS

Across the College, supporting international education requires organizational commitment to:

- Determining our **risk threshold** in each line of business
- Following robust mechanisms for **risk mitigation**
- Weighing **reputational risk** needs with financial risk
- Creating a robust mechanism to **monitor and respond to safety and security situations abroad** in real-time and a system of communication with students and staff abroad



# RESOURCE CONSIDERATIONS

To support international students and potentially broaden international offerings, the College must:

- Have sufficient **space**
- Be able to adequately **provide services** to support a diverse student population (including residence and meals) & have the capacity (staff and faculty) to support international student needs
- **Align resources** between recruitment and admissions/services
- Be **mindful of financial realities** and corridor funding model
- Ensure systems are in place that allow IEC to effectively **mobilize technical and academic expertise** within the College community for transnational education activities

# PROCESS AND PROCEDURE CONSIDERATIONS

Internally, supporting international education requires:

- A more **efficient process for curriculum review** and adherence to official curricular templates College-wide
- **Expedited reviews of articulation agreements and pathways** by pathways department
- Develop a more **streamlined process** for assessment of advanced standing
- Support from **all department and schools** — and greater integration of IEC with other areas

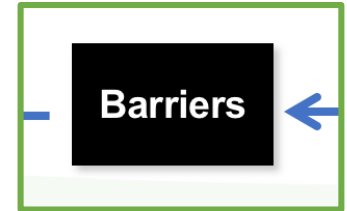
# MOBILITY AND INTERNATIONALIZATION CONSIDERATIONS

With respect to mobility, international education requires:

- Senior management support for **funding**
- **Flexible electives** and **credit transfer policies** that facilitate study abroad
- **Mentoring and orientation for faculty** to impart best practices for teaching abroad
- Creating a robust mechanism to **monitor and respond to safety and security situations abroad** in real-time and a system of communication with students and staff abroad and policies to guide associated program/activity postponement or cancellation
- Focusing on **learner experience**, including 'international at home' initiatives for local students

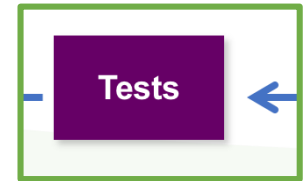
# WHAT ARE SOME POTENTIAL BARRIERS?

- Ability to respond to **fluctuations** in international interest and applications
- Lack of **strategic** international enrolment customized by program and source country
- Current **program review process** is domestically focused
- Current **net contribution model** is siloed, which means some divisions may post a loss when supporting international activities that are actually an overall gain for the College
- Other areas of college **not fully embracing** their importance and role in developing all learners as global citizens



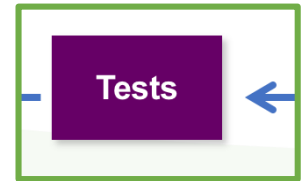
# WHAT CAN WE TEST TO CONFIRM OUR ASPIRATION IS ACHIEVABLE?

- **Financial sustainability:** Confirm the College is not dependent on unlimited/unending international enrolment growth
- **Forecasting:** Confirm commitment to continuous improvement/agility across college to respond to increased enrolment, and sudden, unforeseen fluctuations
- **Forecasting:** Embed international applicant demand in initial scoping for new programs
- **Capacity:** Trigger program review if international enrolment in a given program exceeds a set threshold to make mindful decisions about % of international student in any particular program and appropriate level of resourcing for support



# WHAT CAN WE TEST TO CONFIRM OUR ASPIRATION IS ACHIEVABLE?

- **Risk Appetite:** Endorse further franchising (AC Kuwait model) and offshore program licensing, conditional upon appropriate risk assessment
- **Institutional Support:** Embrace college wide net contribution; space availability, support from academic areas and academic development.
- **Support for Mobility:** Support as a goal by senior management, including additional resource support and policy support through more flexible electives, more flexible credit transfer policy



# QUESTIONS ABOUT THE CONSIDERATIONS, BARRIERS OR TESTS?

# APPENDICES



# CURRENT STATE: RAW CAPTURE

from International Strategic Refresh Advisory Committee

## 1. Winning Aspiration

What are we proud to accomplish? What is an obvious win for us? Against whom?

- Revenue contribution positive student experience and enrolment growth
- International is leveraging College's capability to attract international students
- Obvious win revenue, increase in revenue, maintaining a quality of educational standards
- **Business development is not an obvious win**
- Other colleges and post-secondary institutions
- **Contribution revenue support financial back to the college**
- **Strong enrolment growth – not a lot of awareness**

## PLAYING TO WIN STRATEGY PLACEMAT

Use this to collect and record the findings/thoughts of your group

## 2. Where to Play

Who are our customers? What products or services do we offer? In what geographies? What are our key markets? Through what channels? How does it sell its products to its customers? In what stages of production do we participate?

- Play around the world – mainly India and China; internal clients as well
- Generally playing in emerging economies
- Emerging economies certain demographics not postsecondary first generation students – customer is there a better alternative i.e. lack of seats in country
- Canadian credential, experience and opportunity
- Agents, attending educational fairs
- IEC does initial process afterwards attempting – international students are confused; at a certain point international students need to get services elsewhere. Then students are redirected back to the IEC
- CIBCan, CIBE other postsecondary institutions, pathways into credentials, short term training, development,
- Stage of production – Stephen wood
- *Other business development non-recruitment activities*
- *Confusing in the student lifecycle if there is a hand off sometimes the handoff does not happen*

## 3. How to Win

Why do customers choose us over the competition? Do we compete on low cost or differentiation? What is our competitive advantage? How is our competitive advantage linked to our where-to-play choices?

- Location to an extent, safety, diversity of programming, existing connections, responsiveness, infrastructure, reputation and brand recognition, Infrastructure (like a little city)
- Competitive advantage: close to Toronto, diversity
- Currently competitive advantage is our location – a lot of people are looking at affordability, smaller safer place: In Canada then Ottawa
- We do go to locations that don't have such high standards, integrity and quality they are looking for these things

## 4. Capabilities Needed

What are the four or five capabilities that we need to be really good at in order to win in this way?

- International barometer that collects satisfaction data but not sure follow up on the suggestions
- Satisfied: Arrival services, faculty,
- Dissatisfied: Library, LMS, ITS
- Demonstrate our core values –
- Human resources and knowledge, direct and indirect marketing capabilities
- Framework of Franchise model
- Lean Management systems

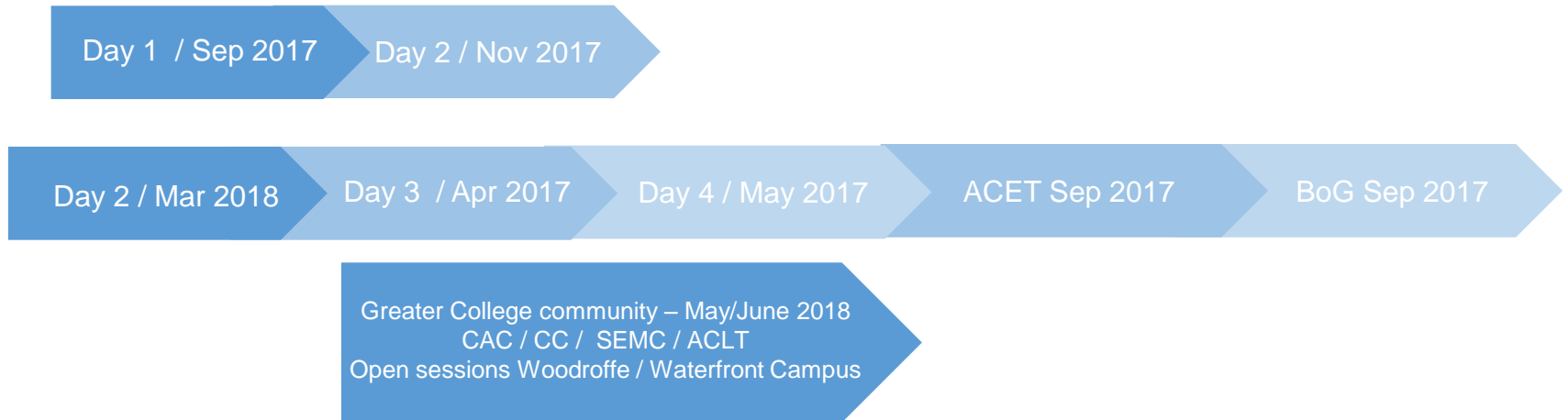
## 5. Management Systems Required

What systems build our capabilities and support our strategic choices? How do we measure our strategy's success?

- Not a seamless experience for onshore students
- Standard practice for admission, quality assurance, salesforce, licenses, **registration and enrolment maximums – not enablers of success**
- How we measure our success enrolment and revenue
- Giving people time on their SWFs to attend – financially supported – embedded in the overall training of faculty and staff

Other thoughts:

# TIMELINE: AT A GLANCE



# TIMELINE: DETAILED

## Deadline

### Three All-day Meetings

- |   |                    |
|---|--------------------|
| • Day One <ul style="list-style-type: none"><li>• Introduce framework</li><li>• Construct current strategy cascade</li></ul>  | By September 31    |
| • Day Two – <b>postponed</b> – <b>Review corridor funding model</b> <ul style="list-style-type: none"><li>• Frame strategic choices</li><li>• Draft cascades for each possibility</li></ul>   | November 6         |
| • Day Two – <b>actual</b> <ul style="list-style-type: none"><li>• Re-introduce framework</li><li>• Review current strategy cascade</li><li>• Frame strategic choices</li></ul>  | Thursday, March 1  |
| • Day Three <ul style="list-style-type: none"><li>• Review feedback from stakeholders on strategic choices</li><li>• Draft cascades for each possibility</li><li>• Specify conditions for each possibility</li><li>• Design tests</li></ul> | Thursday, April 12 |
| • Day Four (half-day) <ul style="list-style-type: none"><li>• Review feedback from stakeholders on cascades</li><li>• Revise strategic possibilities</li><li>• Make strategic choice</li></ul>  | Friday, May 25     |
| • Present to BoG  | TBD                |

# TIMELINE: DETAILED

**Deadline**

**Public Consultations**

**Waterfront Campus: May 17**

**Woodroffe Campus: TBD**

# BACKGROUND MATERIAL

- Committee Meeting PowerPoints
- Essential Readings including Findings Report

<http://www.algonquincollege.com/international/plan/>

# WORKING GROUP MEMBERS

- Ernest Mulvey
- Carolyn Lepage
- Sarah Aikin-Ayre
- Rebecca Volk
- Chris Lackner
- Elizabeth Tyrie



# ADVISORY COMMITTEE MEMBERS

- Director, International (Ernest Mulvey)
- Manager, Marketing and Recruitment (Nadia Ramseier)
- Manager, International Student Integration (Anna Choudhury)
- Manager, Projects and Partnerships (Christine Peachey)
- Faculty (Sherry Poirier)
- Faculty (Kerry Surman)
- Faculty (Sean Howe)
- Faculty (Chris Melmoth)
- Support (Brenda Brouwer)
- Support (Mark Moses)
- Representative from Language Institute (David Deveau)
- Representative from School of Business (Dave Donaldson)
- Representative from Media (Robyn Heaton)
- Representative from Hospitality (Altaf Sovani)
- Representative from Register (Krista Pearson)
- Representative from Student Services (Ben Bridgstock)
- Representative from Ancillary Services (Brent Brownlee)
- Representative from Student Association (Himalay Keekani)
- Representative from Student Association (Nikita Persaud)