

EDUCATION PATHWAYS

**Report on Findings of Research
Commissioned by Members of CCIEM**

- **The presentation was delivered by ICG at the 2011 CBIE conference in Ottawa on 22 November 2011**
- **The presentation shall be considered incomplete without oral clarification**
- **The opinions expressed in this presentation are those of the authors alone**
- **ICG makes no warranty regarding any claim or data displayed in this presentation, and does not take any responsibility for any third party acting upon information contained in this presentation**

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

CCIEM Member Comments

Discussion

- **Competitive benchmarking of Canadian, US, Australian and British information (and visa) systems**
- **Gathering of available data from national, provincial, association and other sources, leading to an inventory of pathways-relevant data and information present in Canada**
- **Mapping of the organizational design and functioning of pathways systems in Canada and select competitor countries**
- **Gathering of perspectives, opinions, and needs of stakeholders (from education providers to governments to associations) in a structured survey**
- **Identification of formal and informal pathways models in Canada and select competitor countries**
- **Compilation of a catalogue of education pathways business models**

- **Canada-wide consultation on international student pathways practices, definitions, models and data collection**
- **Online survey across higher education institutions (colleges and universities), schools and K-12 sectors with 130+ responses**
- **Stakeholder engagement across all education sectors (K-12, language and post-secondary), federal and provincial government, and intergovernmental bodies yielding 100+ interviews**
- **Twelve case studies on international student pathways practices in Canada (8) and abroad (4)**

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

CCIEM Member Comments

Discussion

WHAT ARE PATHWAYS?

- **“Pathways” is a multi-faceted concept**
- **Conceptual. Pathways are a construct of institutions, systems, (regulatory) regimes, processes, definitions, etc.**
- **Functional. Pathways denote a transition from one education sector or level to another. This is typically a “upward” motion, but can also be sideways or even downwards**
- **Statistical. One “unit” transitioning from one category to another category. A key issue is the consistency of unit identification, systems integrity**
- **Economic. Each pathways action carries an economic value. This value action involves three (+) parties: Sender, Receiver, and the Individual (+)**
- **Political. The intent, volume, direction, and outcome of pathways almost always carries a political relevance**

Pathways are more complex (and technical) than generally believed

- **Upward**
 - The standard model (e.g., upper secondary to college, or language training into university, etc.)
 - Progression / life cycle-based
 - Most regulatory regimes focus on this model
- **Sideways**
 - A transfer model (on the same level / within same sector)
 - Many different models (from sandwich to fully articulated to free movers to doubling up)
- **Downwards**
 - Rare
 - Takes place in specific value-add situations (Master's to Certificate)

For Canada, upward pathways are the dominant paradigm

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

CCIEM Member Comments

Discussion

WHY PATHWAYS?

- **Because no country / education system(s) can really do perform well without clearly and well defined pathways**
- **Because high quality pathways can / should generate competitive recruiting / experiential / retention advantage**
- **Because pathways can / should / must serve as a critical quality assurance enabler**
- **Because students (customers / enablers) have a right to transparency across all dimensions (quality, experience, cost, outcome)**
- **Because the time of inefficient, misaligned, and ill understood pathways is over**

Canada: QA-centric pathways will be a crucial competitive enabler

- **Standard Pathway - A student can transition from the secondary to the higher education sector and thus utilize a “standard” pathway**
- **Multi-stage Pathway – From ESL to foundation year to post-secondary enrollment (colleges and universities)**
- **Each pathway is subject to rules and regulations set by both sectors, with the receiving sector holding the balance of procedural power**
- **Transition processes can rely on open pathways (i.e. they are essentially unrestricted), can be subject to tightly controlled pathways (via, for example, articulation agreements), or face closed pathways (in the case of structural inhibitors)**

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

CCIEM Member Comments

Discussion

- **In the past, educational pathways in Canada have not been systematically researched, analyzed, categorized, or optimized**
- **Initiatives to date are either based on narrow regional initiatives (British Columbia), or on select (pilot) projects (e.g., colleges and language schools)**
- **At a national level, the inherent complexity of pathways is reflected in the need to strive for an unprecedented stakeholder alignment including the national Government, Provinces and Territories, associations, private and public education providers at all levels, and so on**
- **In the absence of clearly articulated, structured pathways Canada as a whole has not been able to fully benefit from the quality of its educational sectors**
- **As a result, the recruiting and/or retention of students across all sectors suffers from inefficiencies, sub-optimal economics, and a lack of clarity and cohesion (especially with regards to data and analysis)**

PATHWAYS MODELS IN CANADA

A Short List of Examples

Nova Scotia International Student Program	➔	NS, Canadian and foreign post-secondary institutions
University of Toronto Scarborough Green Path Program	➔	University of Toronto Scarborough
Fraser International College	➔	Simon Fraser University
Canadian College of English Language	➔	Thompson Rivers University, University of Alberta, etc. (35+ institutions)
Bow Valley College	➔	AB post-secondary institutions
International Language Academy of Canada	➔	35+ Canadian colleges and universities
BC high schools	➔	North Island College
CultureWorks	➔	University of Western Ontario
Fanshawe College ESL	➔	Fanshawe College degree programs
AB high schools	➔	SAIT Polytechnic
StudyGroup International Study Centre	➔	Royal Roads University
BC colleges & foreign universities	➔	Thompson Rivers University

Canada is already home to many dozens of pathways models

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

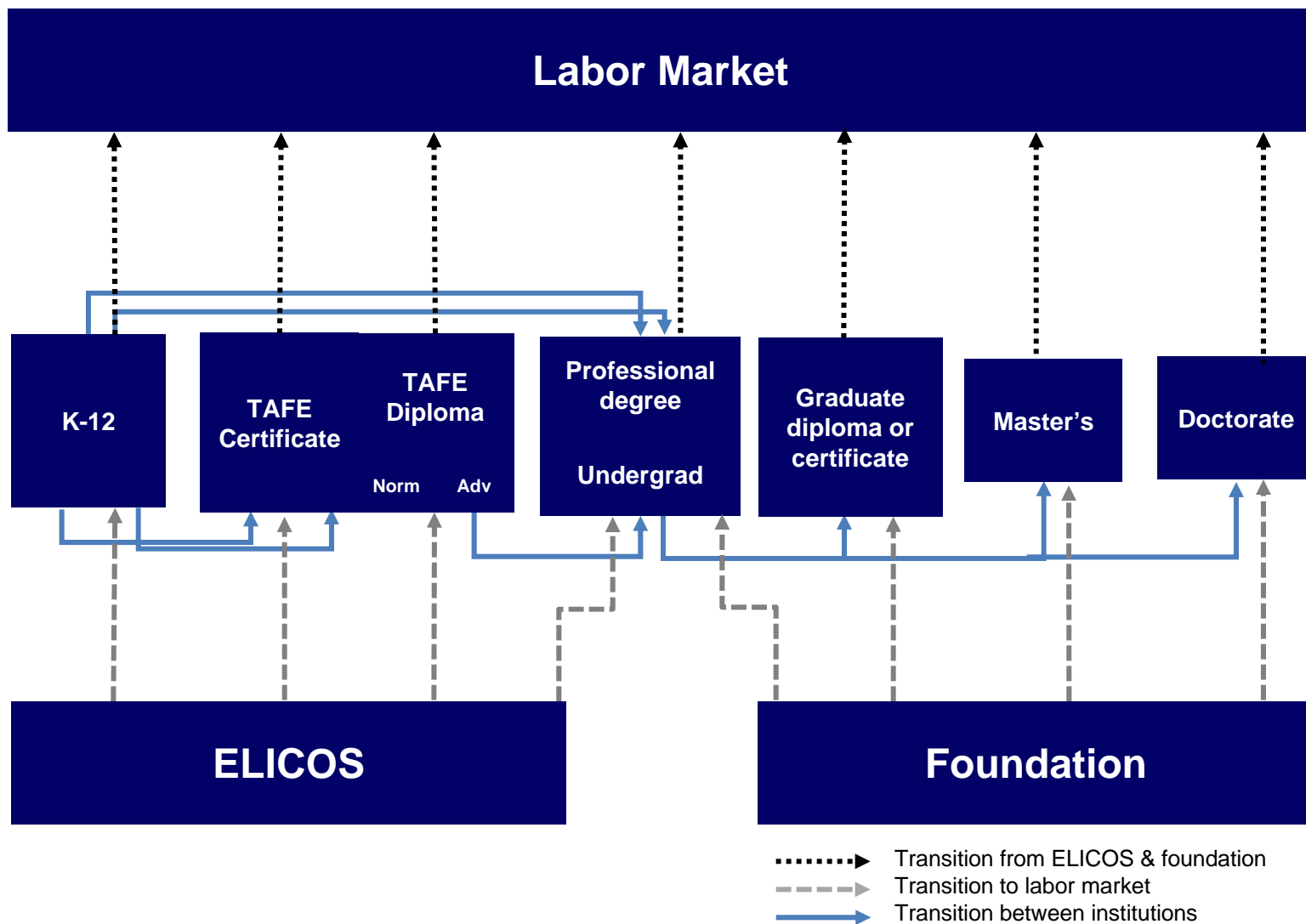
Summary of Perspectives

CCIEM Member Comments

Discussion

PATHWAYS IN AUSTRALIA

The Australian Educational Pathways System



PATHWAYS IN AUSTRALIA

Introduction

- **Pathways represent the backbone of the Australia international student recruitment model**
- **Competitor Benchmarking: Pathways in Australia include foundation programs, diplomas with intensive language preparation, bridging programs, secondary school academic pathways, entry through transnational partners and programs, etc.**
- **The Australia Qualification Framework (AQF) oversees the accreditation of the programs across education sectors (pathways model included)**
- **The following analysis focuses on international student flows between five education sectors – English as a second language (ESL), secondary schools, vocational education and training (VET), higher education, and other short-term enrolments (foundation year, exchange, etc.)**
- **AEI data utilized tracks education pathways of all first-time international students in on-shore Australian education throughout the 2000's**

PATHWAYS IN AUSTRALIA

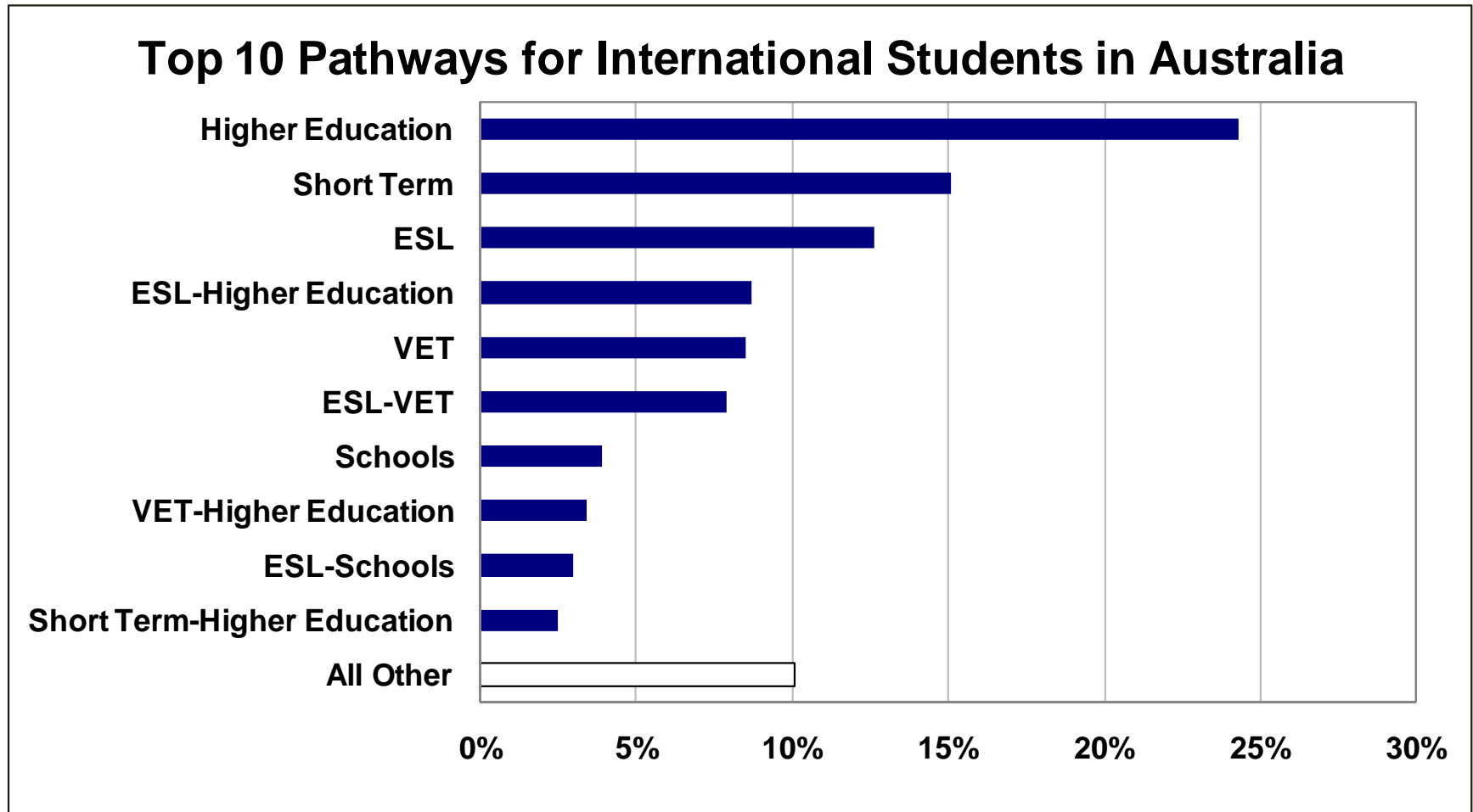
Single Vs. Multiple Sectors

Sectors	Number of students	Share
1 sector	66,808	64%
2 sectors	30,692	30%
3 sectors	5,891	6%
4 or more sectors	231	0.2%
Total international students	103,622	100%

36.2% of international students access Australian education in pathways

PATHWAYS IN AUSTRALIA

Top 10 Pathways for International Students

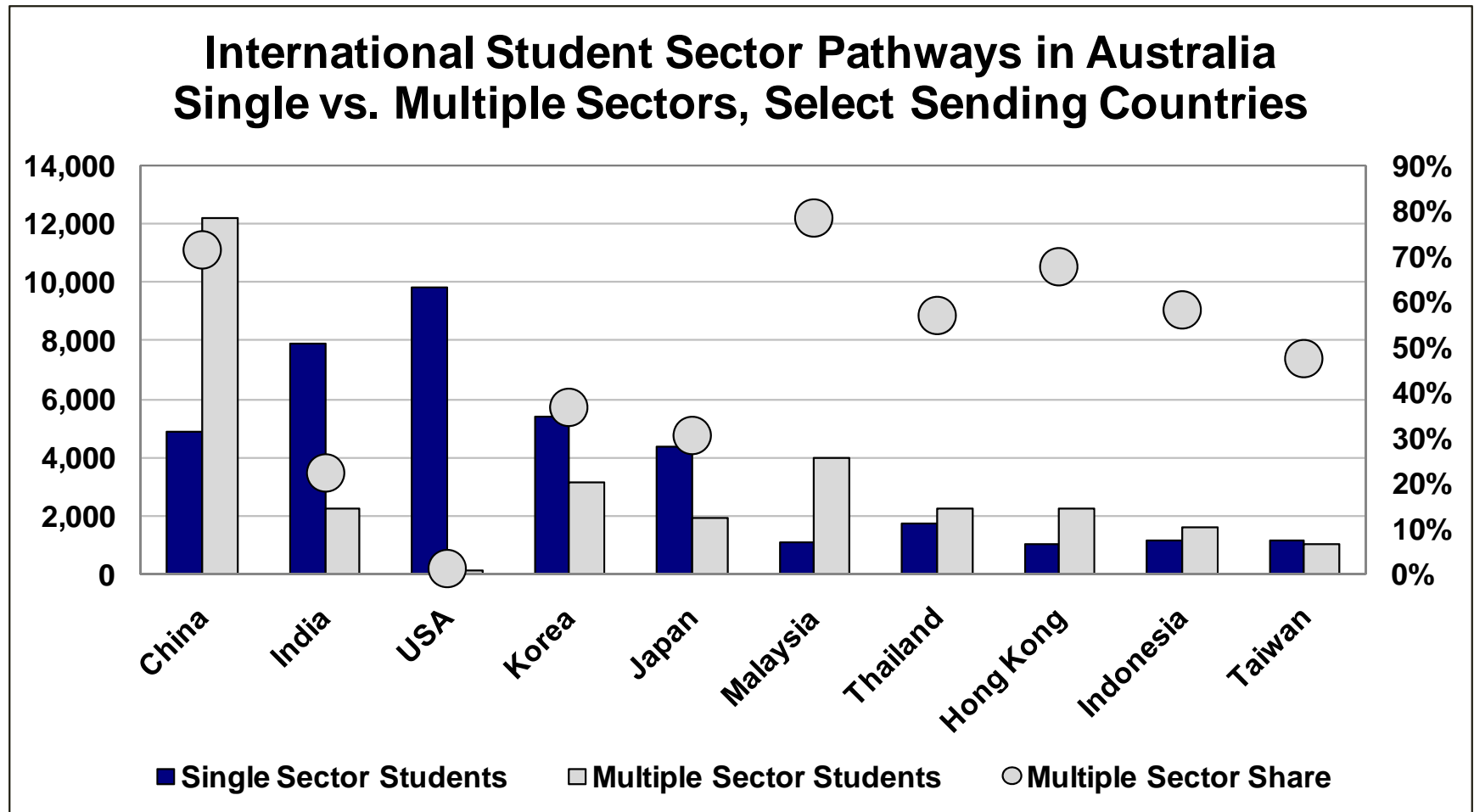


Notes: Data comprise both single sector and multiple sector pathways. ESL denotes English language training institutions; VET stands for vocational education and training institutions; Schools denote secondary education institutions; the Short Term sector comprises foundation courses, study abroad and other non-award courses. Percentages represent shares of all international students who commenced their studies in 2005.

Source: AEI.

PATHWAYS IN AUSTRALIA

Student Pathways by Select Source Country



Notes: Data represent all international students who commenced their studies in 2005. South Korea was shortened to Korea.
Source: AEI.

PATHWAYS IN AUSTRALIA

Most Common Multiple-sectors Pathways in Select Countries (I)

China	Number of students	Share
ESL-Higher Education	4,781	28%
ESL-Schools	1,686	10%
ESL-VET-Higher Education	1,008	6%
Other multiple sector pathways	4,703	27%
Total - Multiple sector pathway	12,178	71%
Total - Single sector pathway	4,903	29%
India	Number of students	Share
Higher Education-VET	754	7%
ESL-Higher Education	492	5%
VET-Higher Education	310	3%
Other multiple sector pathways	683	7%
Total - Multiple sector pathway	2,239	22%
Total - Single sector pathway	7,870	78%
South Korea	Number of students	Share
ESL-VET	1,235	14%
ESL-Schools	494	6%
ESL-Higher Education	357	4%
Other multiple sector pathways	1,068	13%
Total - Multiple sector pathway	3,154	37%
Total - Single sector pathway	5,410	63%
Malaysia	Number of students	Share
Short Term-Higher Education	431	9%
VET-Higher Education	225	4%
Schools-Higher Education	102	2%
Other multiple sector pathways	334	7%
Total - Multiple sector pathway	1,092	22%
Total - Single sector pathway	3,978	78%

Notes: ESL denotes English language training institutions; VET stands for vocational education and training institutions; Schools denote secondary education institutions; the Short Term sector comprises foundation courses, study abroad and other non-award courses. Data represent all international students who commenced their studies in 2005.

Source: AEI.

PATHWAYS IN AUSTRALIA

Most Common Higher Education Pathways by Degree

Single study level pathways	Number of Students	Share
Master's course	10,483	42%
Bachelor course	10,397	41%
Doctoral course	978	4%
Other single study level pathways	1,020	4%
Total - Single study level pathways	22,878	91%
Multiple study level pathways		
Graduate Diploma-Master's course	664	3%
Bachelor Degree-Master's course	578	2%
Other multiple study level pathways	1,104	4%
Total – Multiple study level pathways	2,346	9%
All higher education students	25,224	100%

Notes: Data comprise higher education-only pathways. Master's courses represent coursework degrees. Data include all international students who commenced their studies in 2005.

Source: AEI.

PATHWAYS IN AUSTRALIA

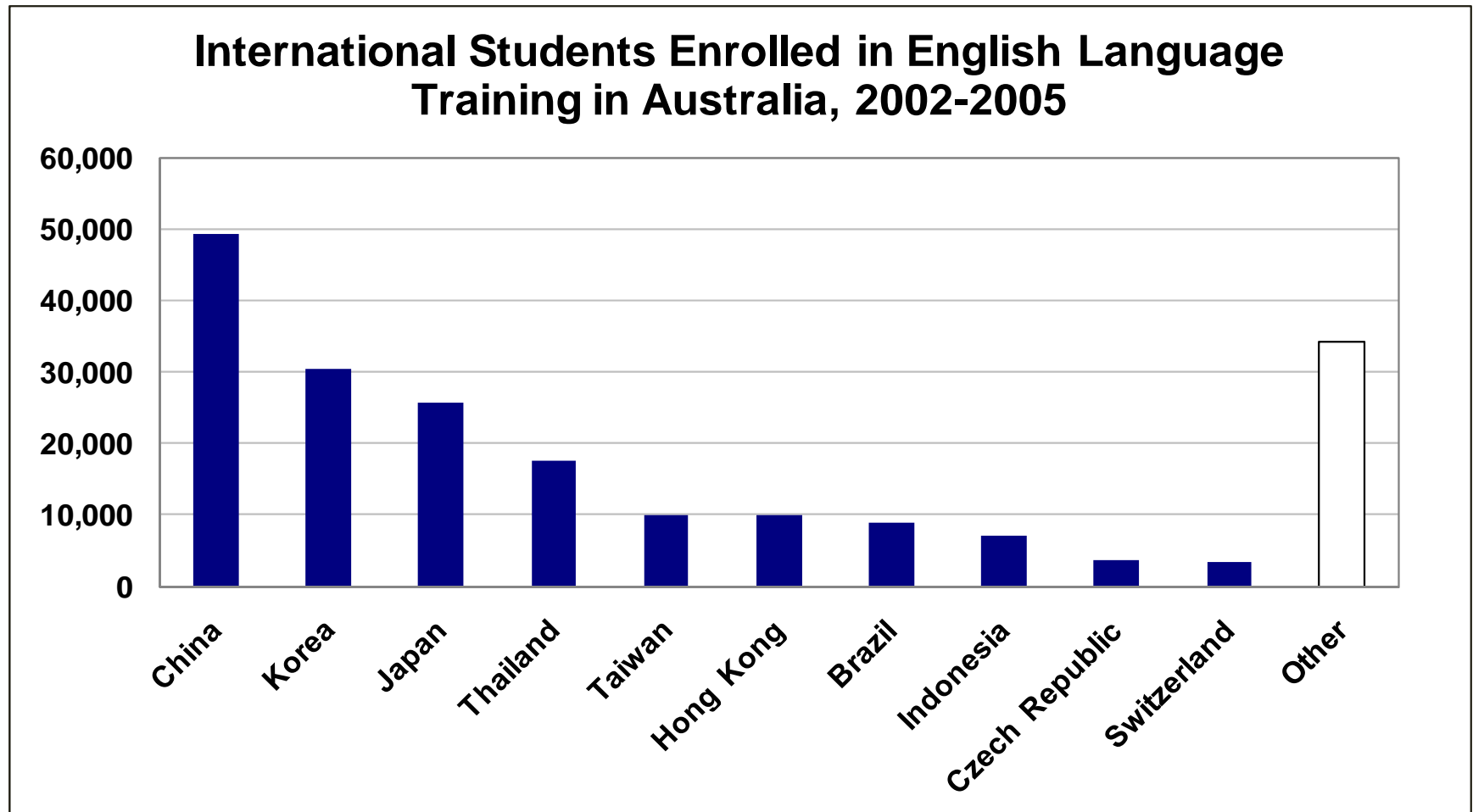
Most Common VET Pathways by Degree

Single study level pathways	Number of Students	Share
Diploma	3,139	36%
Advanced Diploma	1,632	18%
Certificate III	1,037	12%
Other single study level pathways	886	10%
Total - Single study level pathways	6,694	76%
Multiple study level pathways		
Diploma-Advanced Diploma	325	4%
Certificate IV-Diploma	292	3%
Other multiple study level pathways	1,525	17%
Total – Multiple study level pathways	2,142	24%
All VET students	8,836	100%

Notes: Data comprise VET-only pathways. Data represent all international students who commenced their studies in 2005.
Source: AEI.

PATHWAYS IN AUSTRALIA

ESL Enrollment by Top Source Countries, 2002-2005

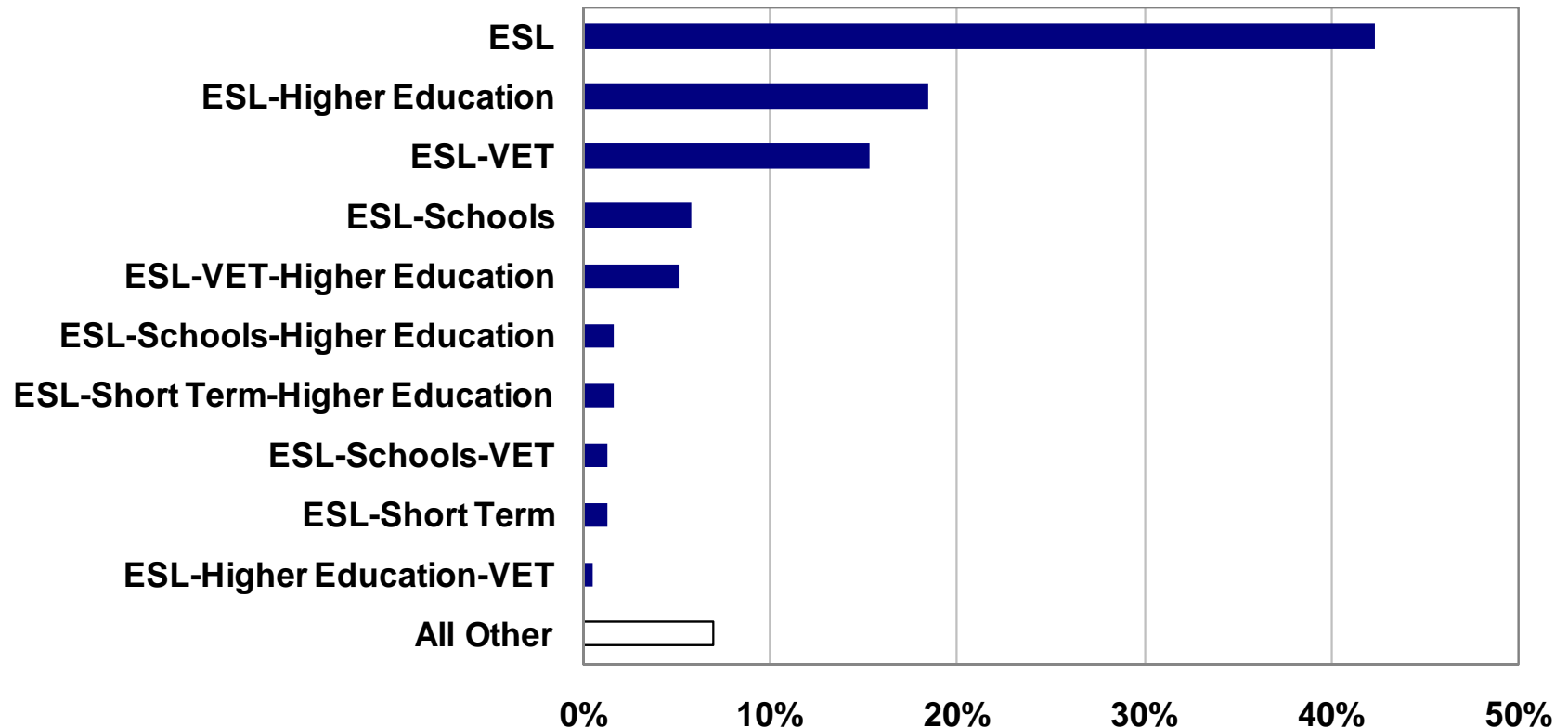


Notes: Data represent all international students enrolled in ESL training between 1 January 2002 and 31 December 2005.
Source: AEI.

PATHWAYS IN AUSTRALIA

Top 10 ESL Destination Pathways

Top 10 Sector Pathways through ESL in Australia



Notes: Data comprise both single sector and multiple sector pathways. ESL denotes English language training institutions; VET stands for vocational education and training institutions; Schools denote secondary education institutions; the Short Term sector comprises foundation courses, study abroad and other non-award courses. Percentages represent shares of all international students who were enrolled in ESL training between 1 January 2002 and 31 December 2005.

Source: AEI.

PATHWAYS IN AUSTRALIA

Six Key Insights

- **Students' pathway needs differ markedly between source countries**
- **English as a second language can have a critically important enabling function**
- **Competitive and compelling pathway design can induce enrolment into three or more educational sectors**
- **Higher education is not always the ultimate sector attained; a “downward” coupled pathway into VET can be sensible for some students**
- **The competitive nature of Australia's pathway design was a key driver for its success in attracting and retaining international students**
- **Data availability allows enables informed decision-making, market analysis and program design**

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

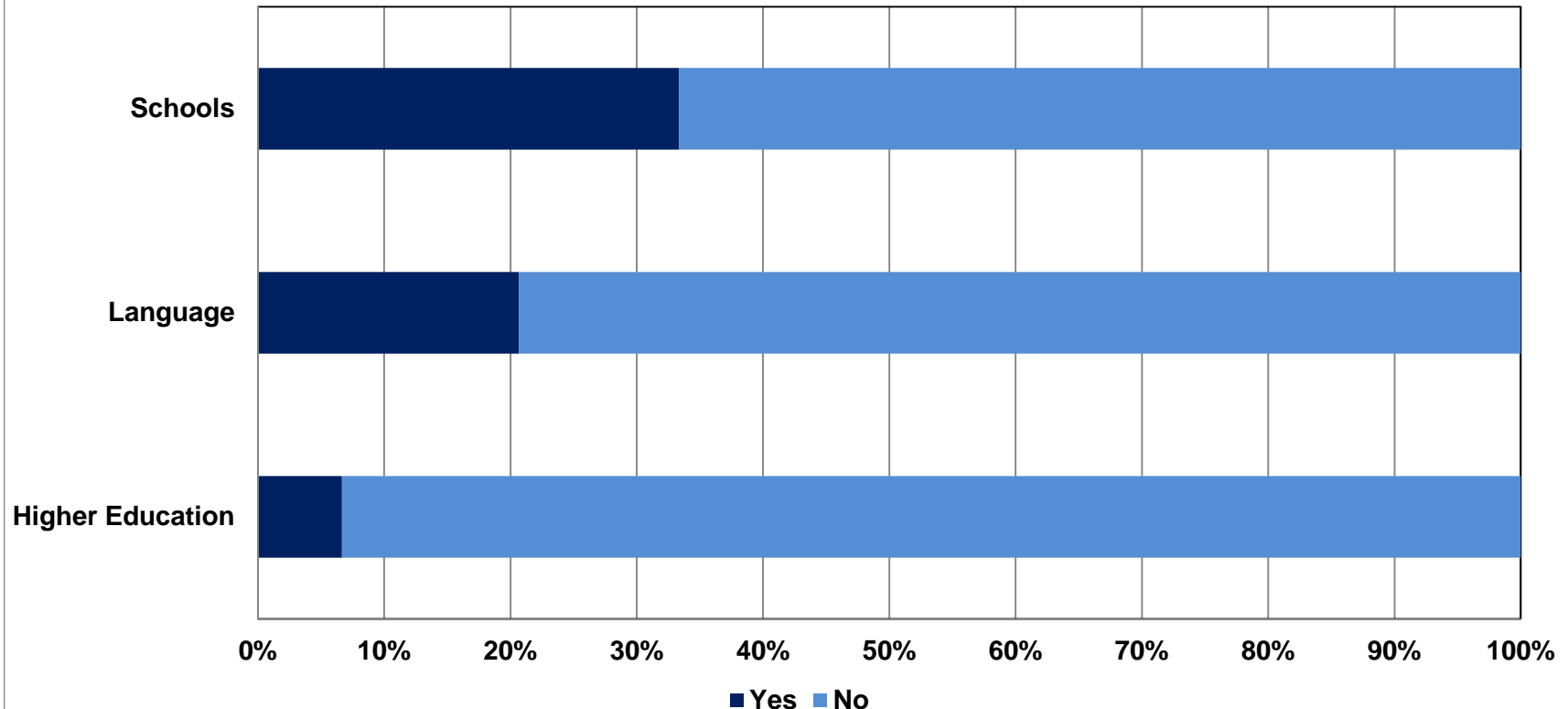
CCIEM Member Comments

Discussion

SUMMARY OF ONLINE SURVEY FINDINGS

All Sectors Overview – Select Themes (I)

Does Your Institution Have a Standard Definition of International Student Pathways?

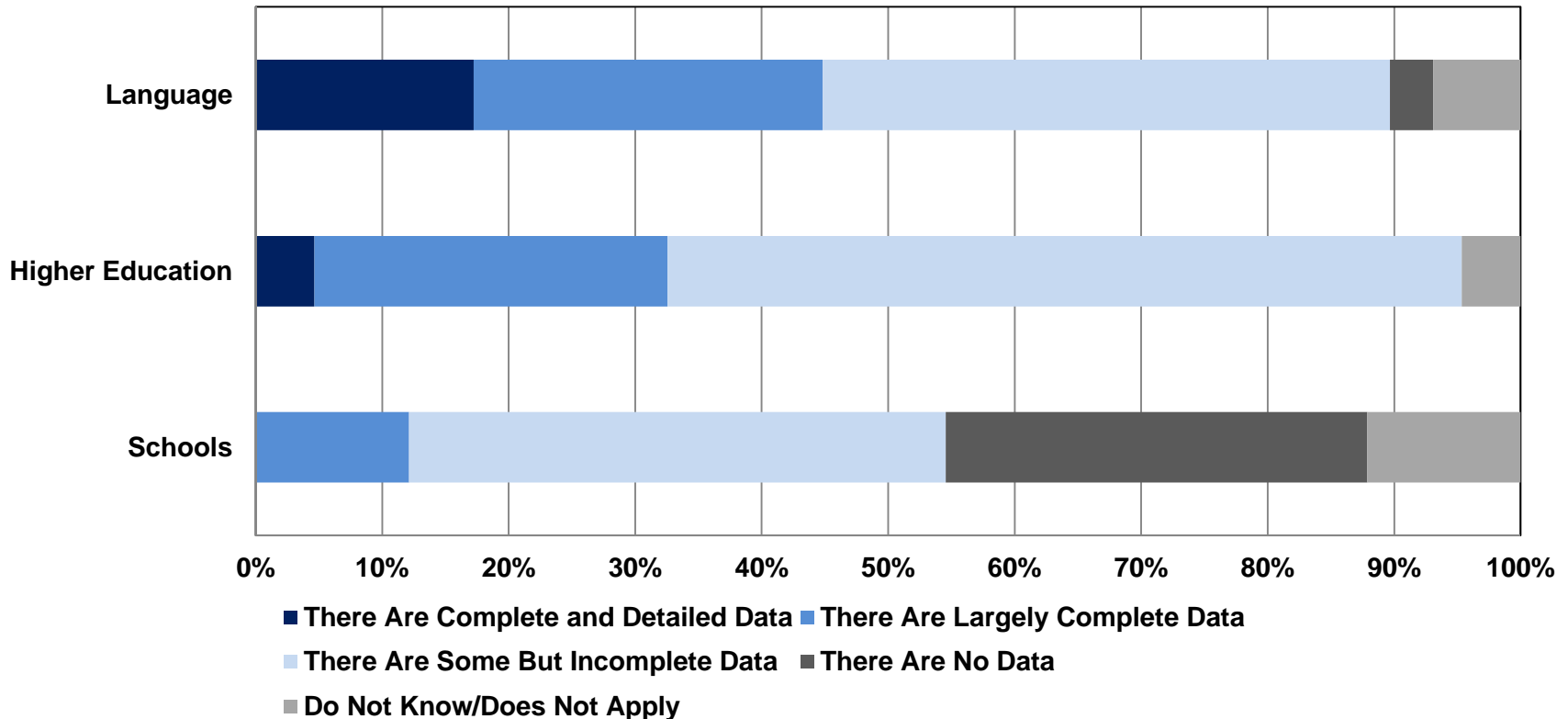


The vast majority of institution does not have a definition

SUMMARY OF ONLINE SURVEY FINDINGS

All Sectors Overview – Select Themes (II)

How Would You Assess the Quality of Data Your Institution Holds on International Student Pathways?

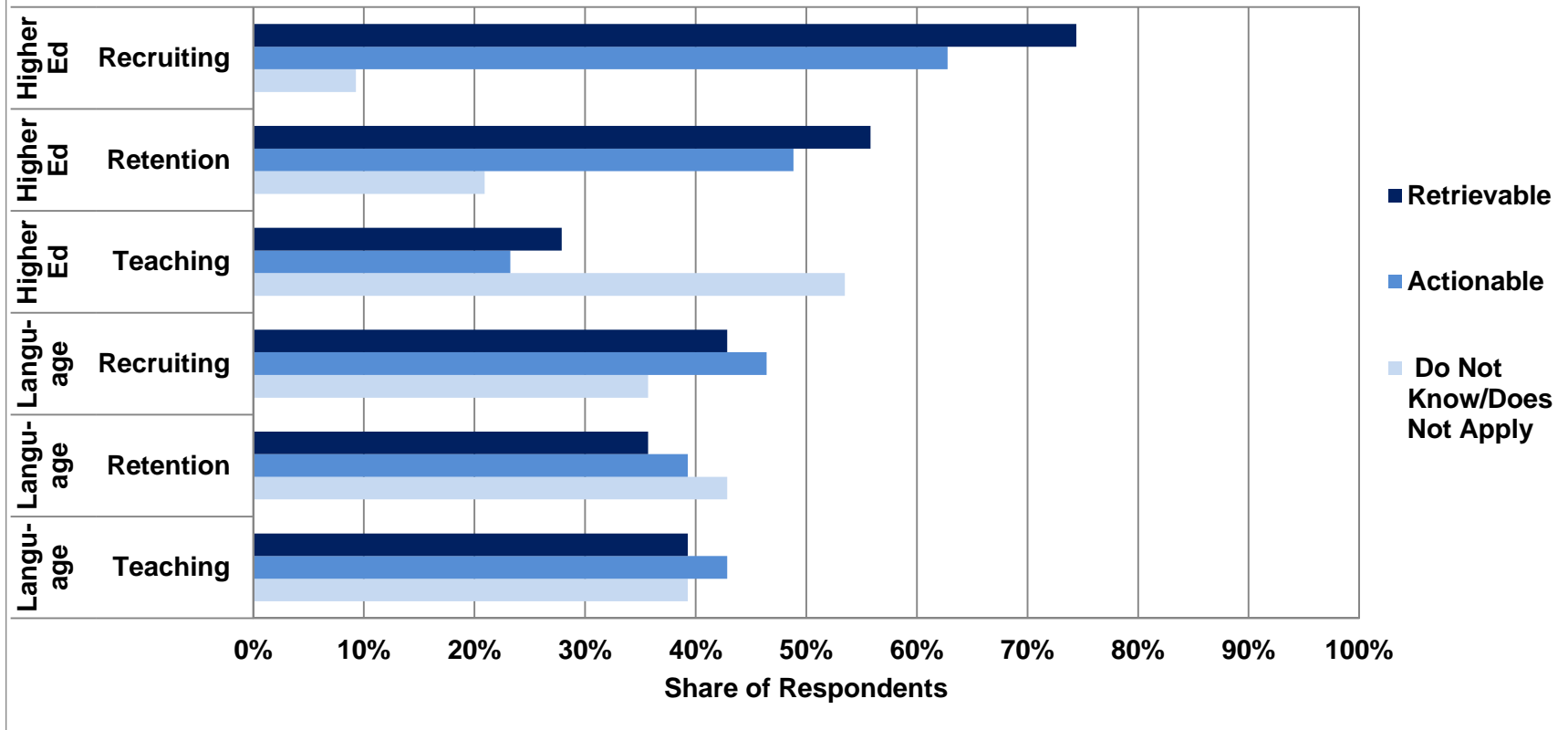


Data availability is limited – at best

SUMMARY OF ONLINE SURVEY FINDINGS

All Sectors Overview – Select Themes (III)

Are the Data on International Pathways You Currently Hold
Retrievable and Actionable in the Following Areas?

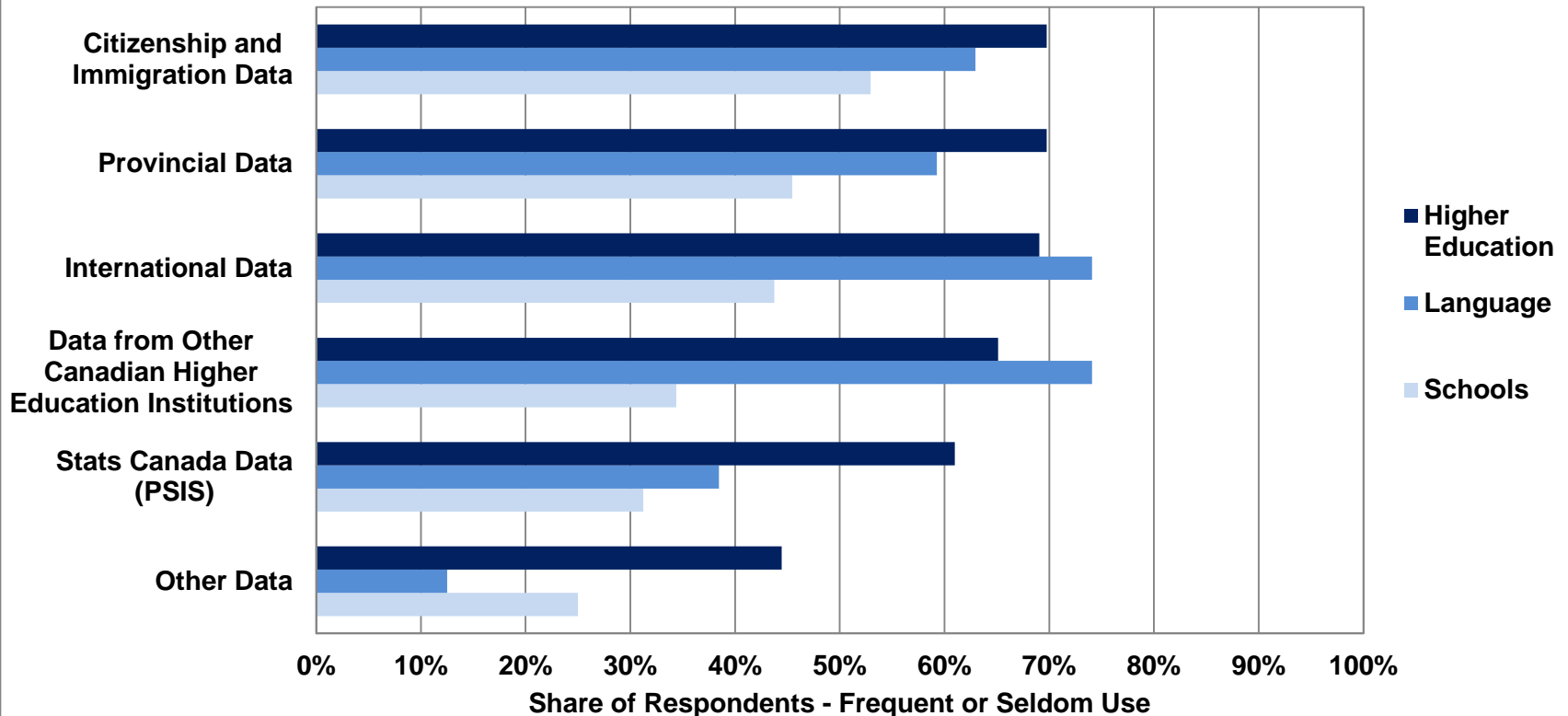


Recruiting activities are a key purpose for pathways data

SUMMARY OF ONLINE SURVEY FINDINGS

All Sectors Overview – Select Themes (IV)

How Frequently Does Your Institution Consider Data on Pathways from the Following Sources?

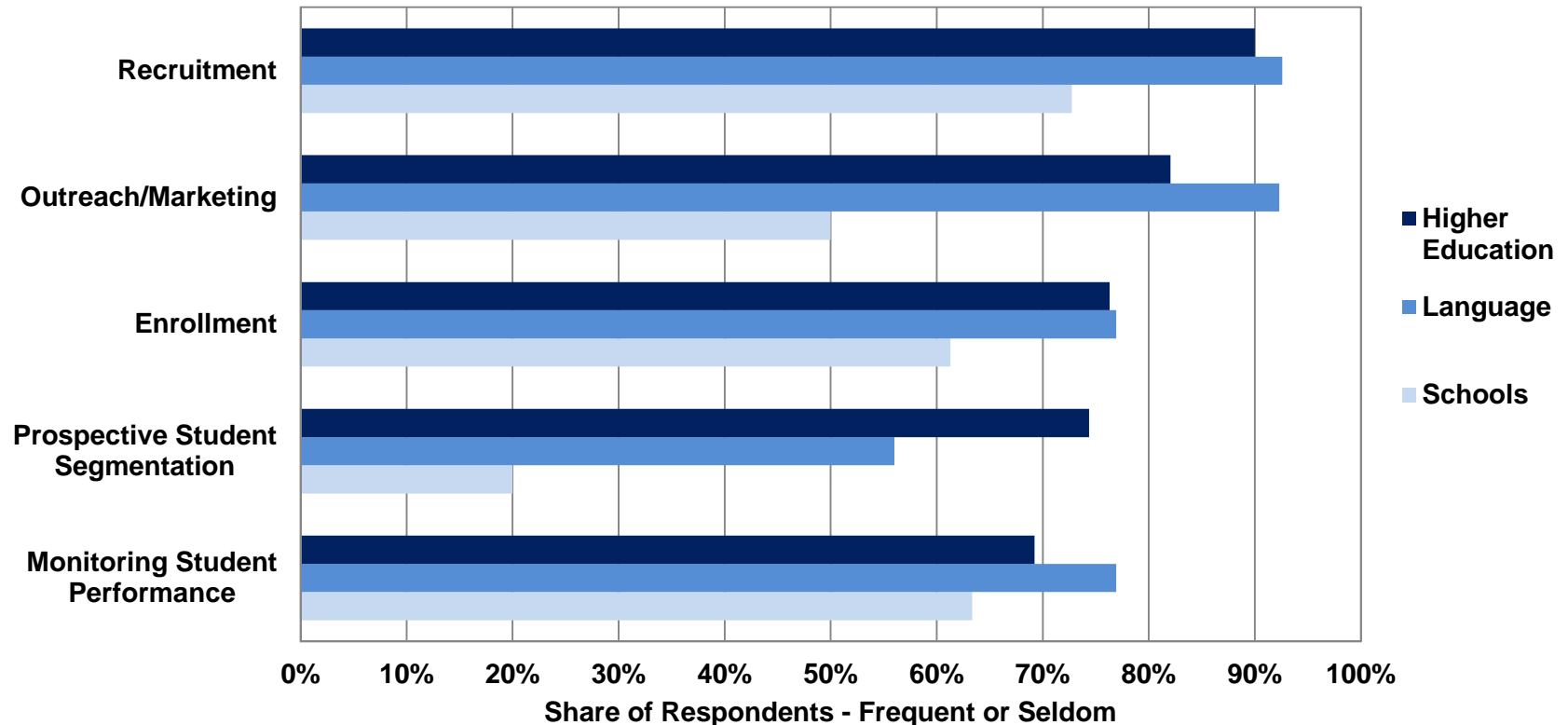


CIC and Provincial data are used most often

SUMMARY OF ONLINE SURVEY FINDINGS

All Sectors Overview – Select Themes (V)

To What Extent Does Your Institution Use International Student Pathways Data for the Following Purposes? (I)

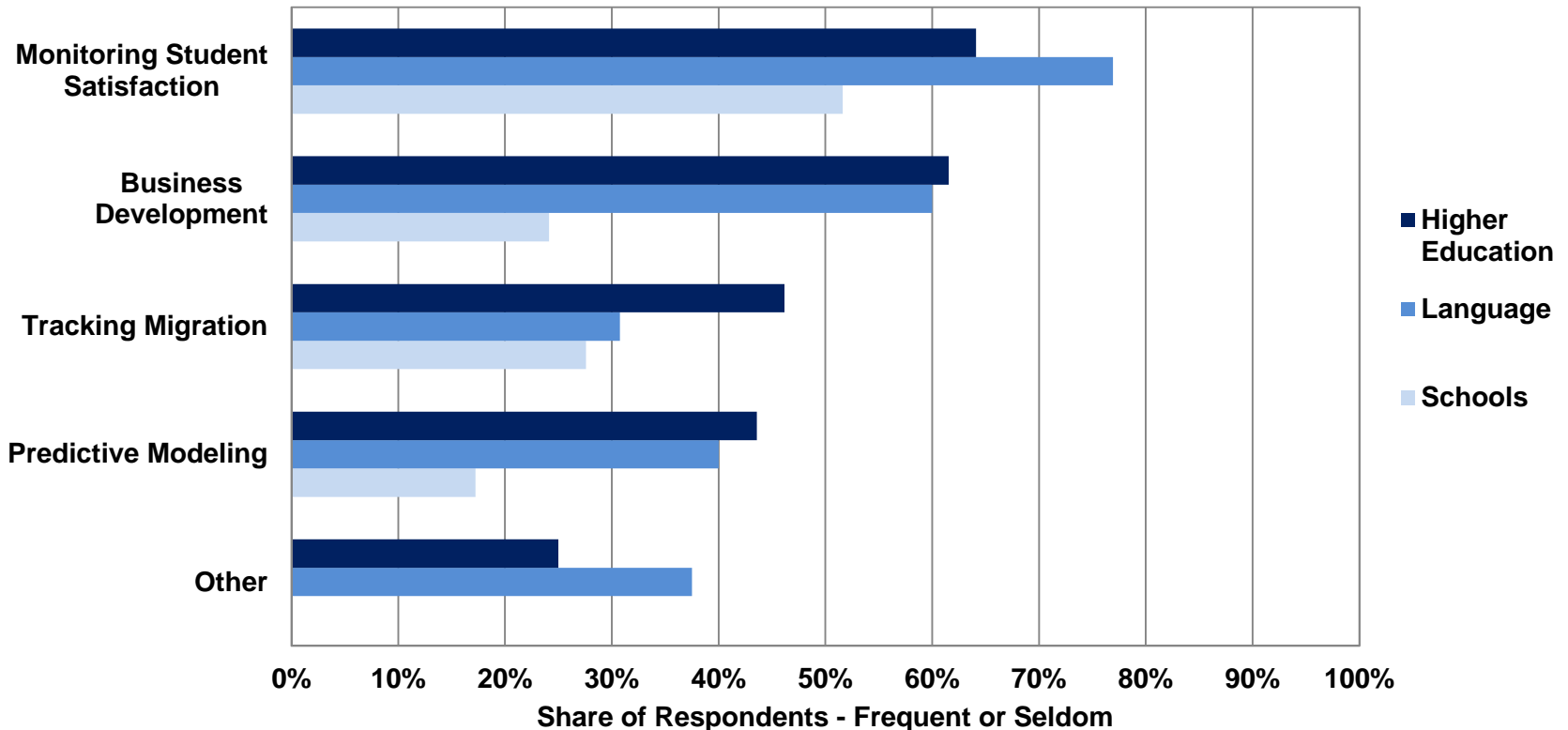


Marketing and recruiting are two lead usages

SUMMARY OF ONLINE SURVEY FINDINGS

All Sectors Overview – Select Themes (VI)

To What Extent Does Your Institution Use International Student Pathways Data for the Following Purposes? (II)

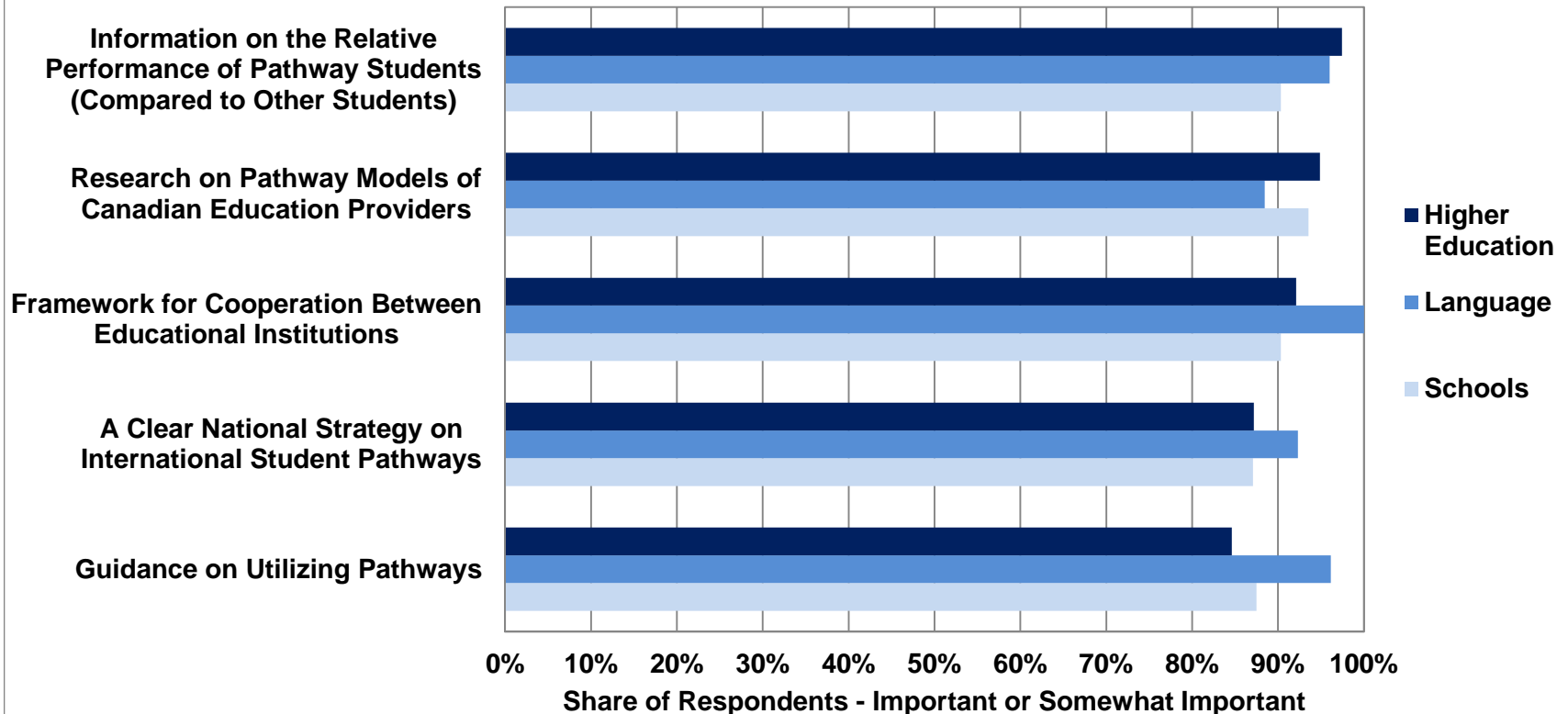


Business development and analytics are minor usage factors

SUMMARY OF ONLINE SURVEY FINDINGS

All Sectors Overview – Select Themes (VII)

What Areas Does Your Institution Believe Should be Addressed by CCIEM to Help Your Institution Build and Utilize Pathways?

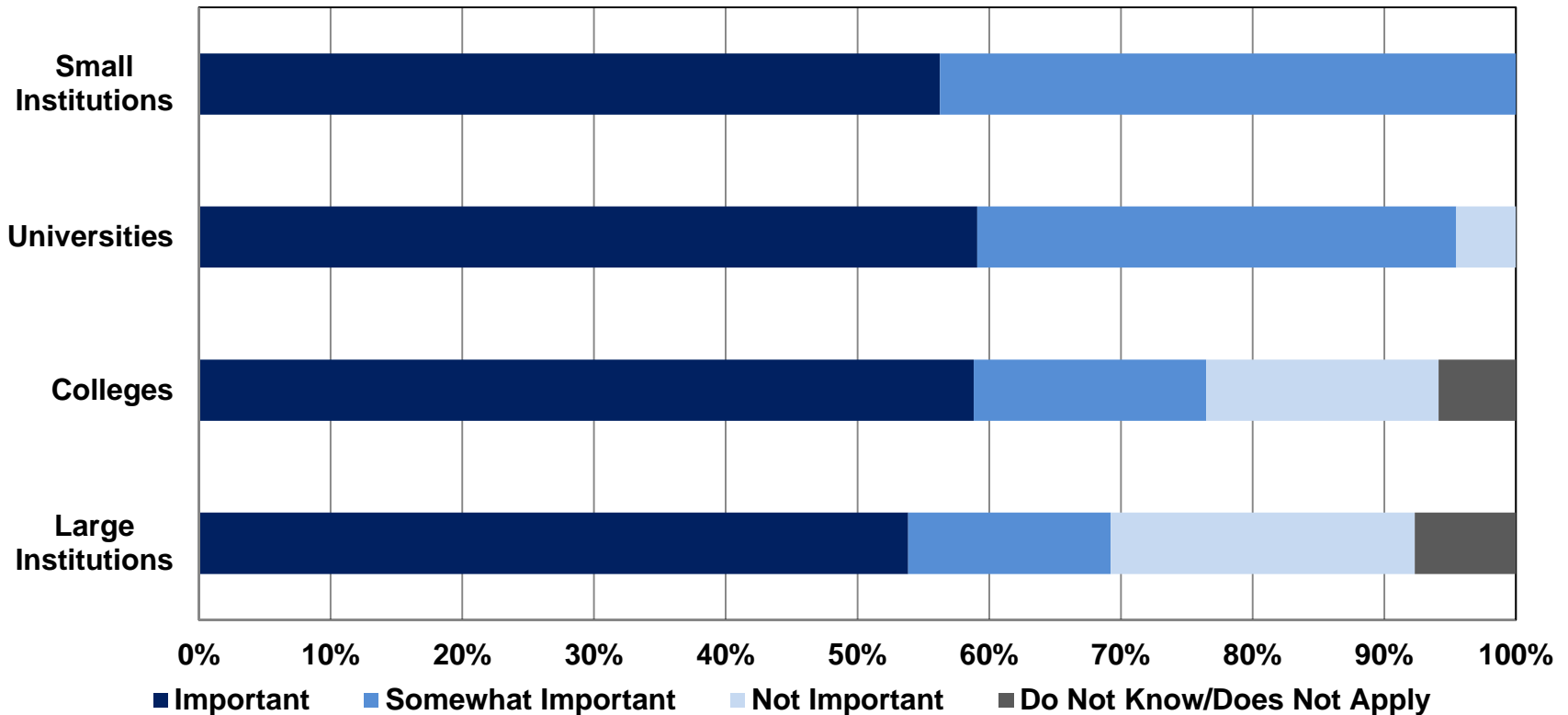


Uniformly high requests scores

SUMMARY OF ONLINE SURVEY FINDINGS

All Sectors Overview – Select Themes (VIII)

What Areas Does Your Institution Believe CCIEM Should Address? (Higher Education - A Clear National Strategy on Pathways)

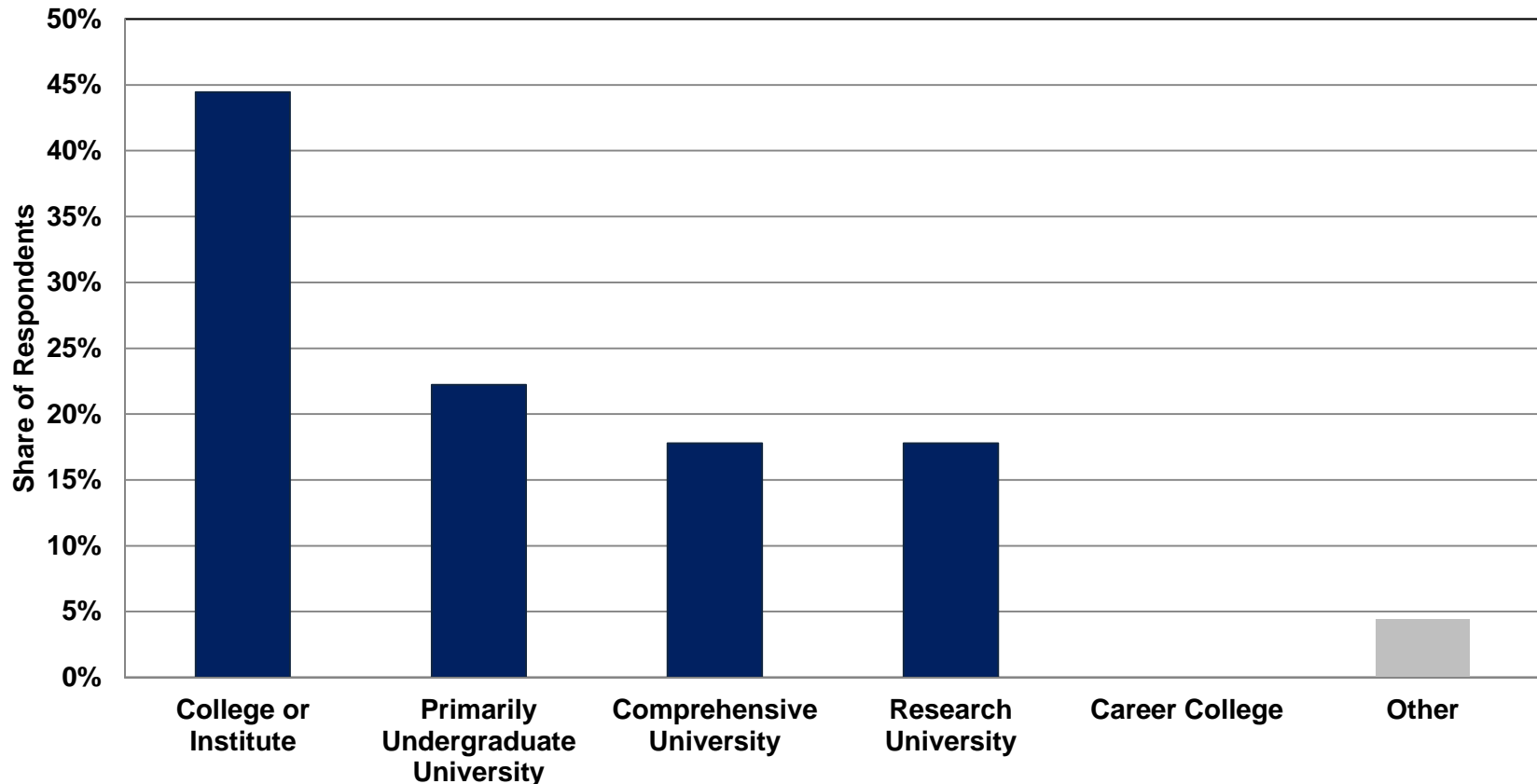


Institutional size emerges as a differentiator

SUMMARY OF ONLINE SURVEY FINDINGS

Higher Education Sector – Respondents' Demographics

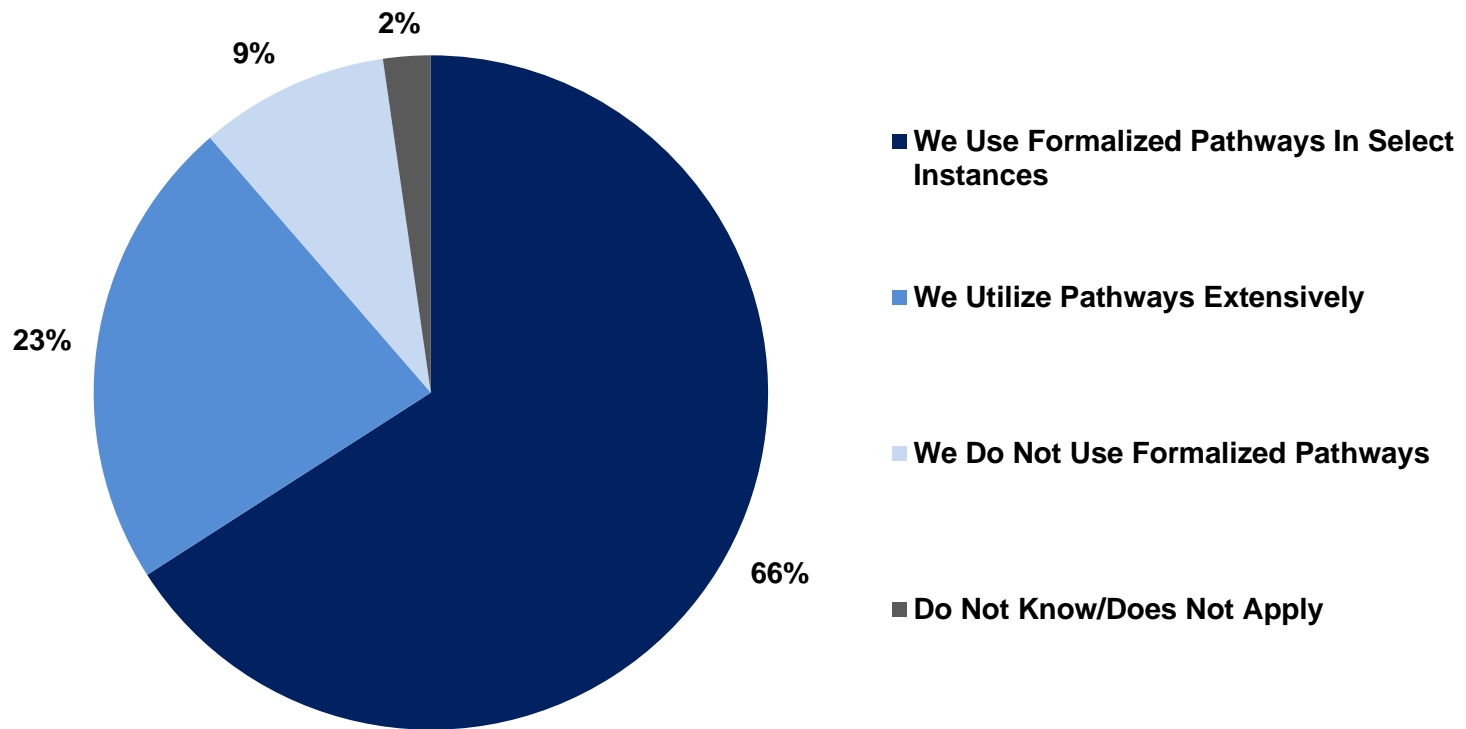
What is the Nature of Your Institution?



SUMMARY OF ONLINE SURVEY FINDINGS

Higher Education Sector – Select Themes (I)

Does Your Institution use Formalized Pathways in Recruiting, Quality Assurance, and Retention?

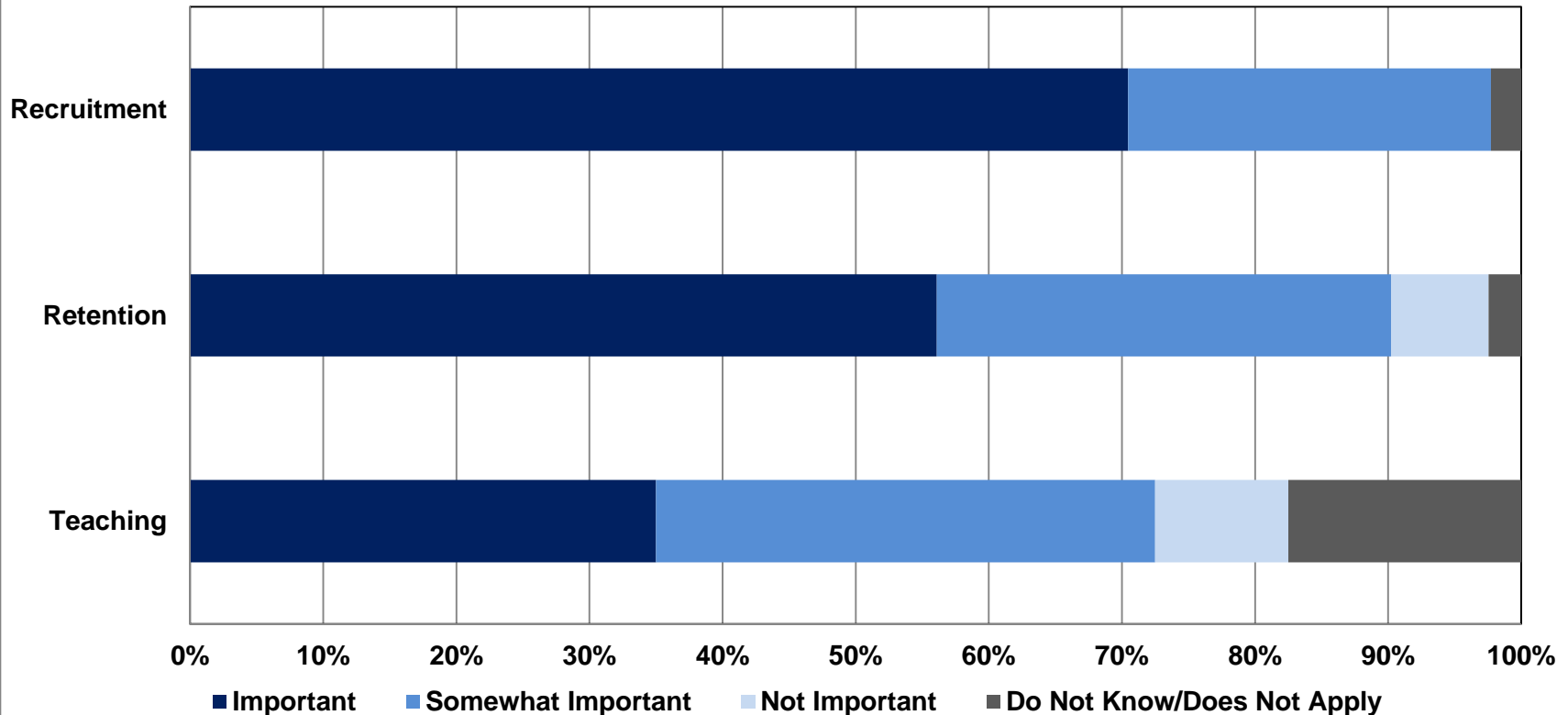


Pathways usage is near universal – but usage depth differs

SUMMARY OF ONLINE SURVEY FINDINGS

Higher Education Sector – Select Themes (II)

How Important are International Student Pathways to Your Institution's Objectives in the Following Areas?

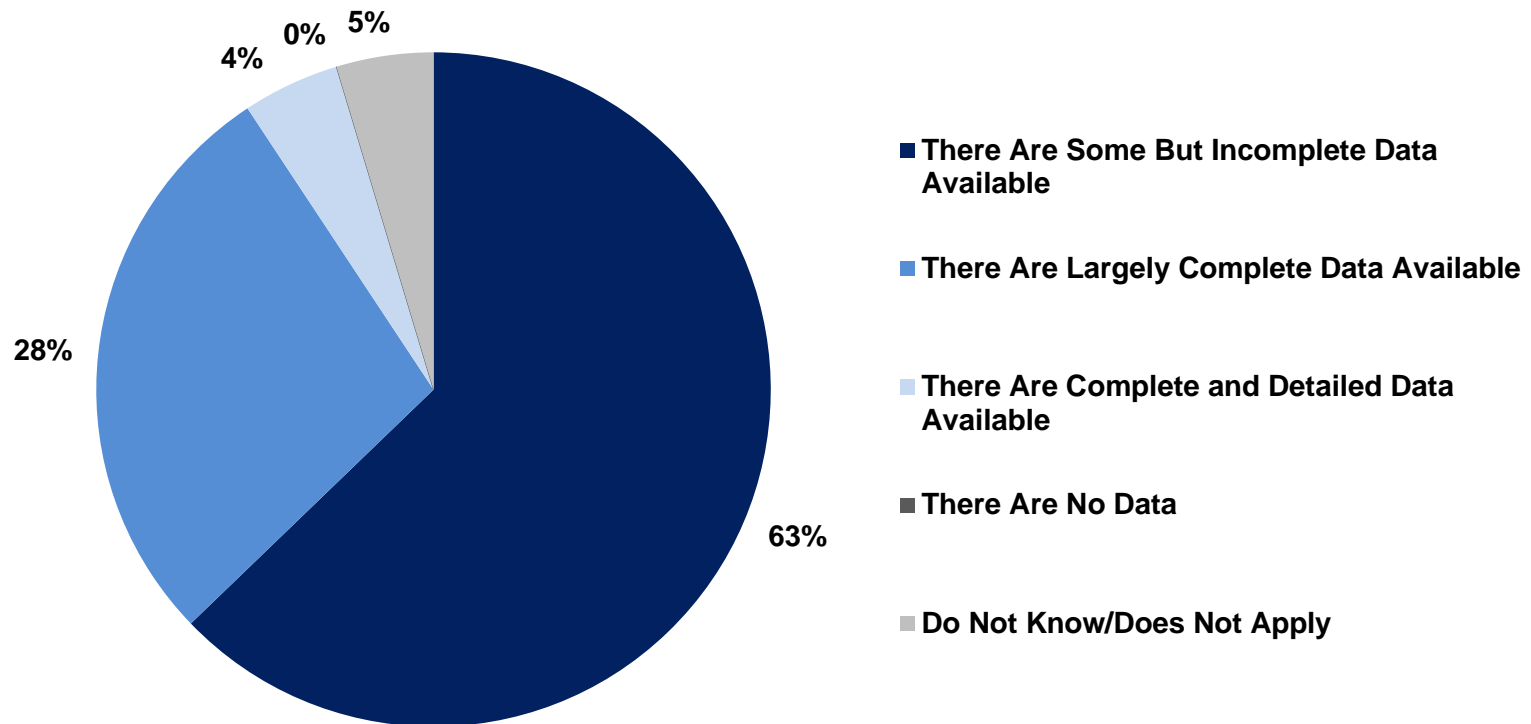


Recruitment and retention are lead usage factors

SUMMARY OF ONLINE SURVEY FINDINGS

Higher Education Sector – Select Themes (III)

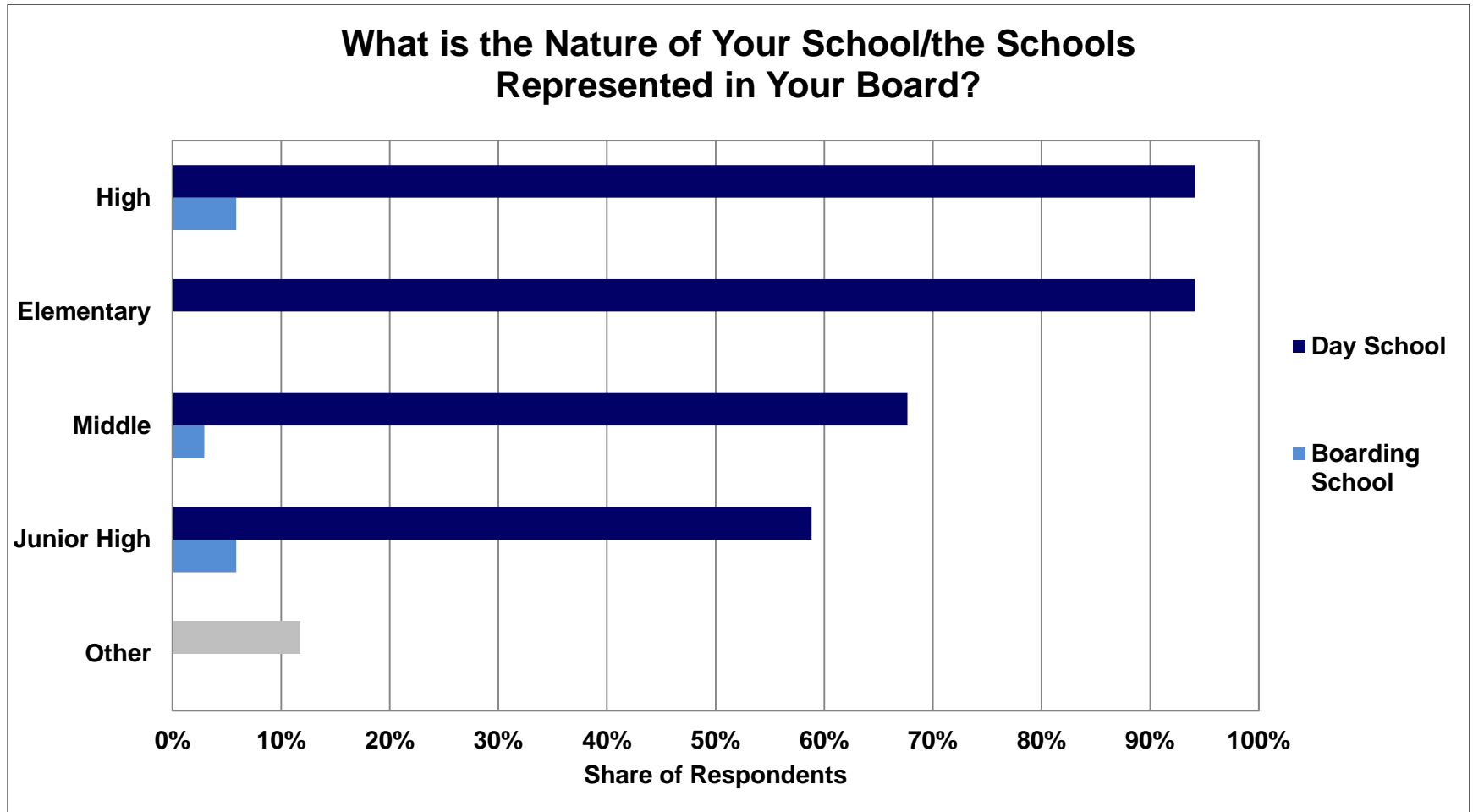
How Would You Assess the Quality of Data Your Institution Holds on International Student Pathways?



Only one-third of respondents is satisfied with data quality

SUMMARY OF ONLINE SURVEY FINDINGS

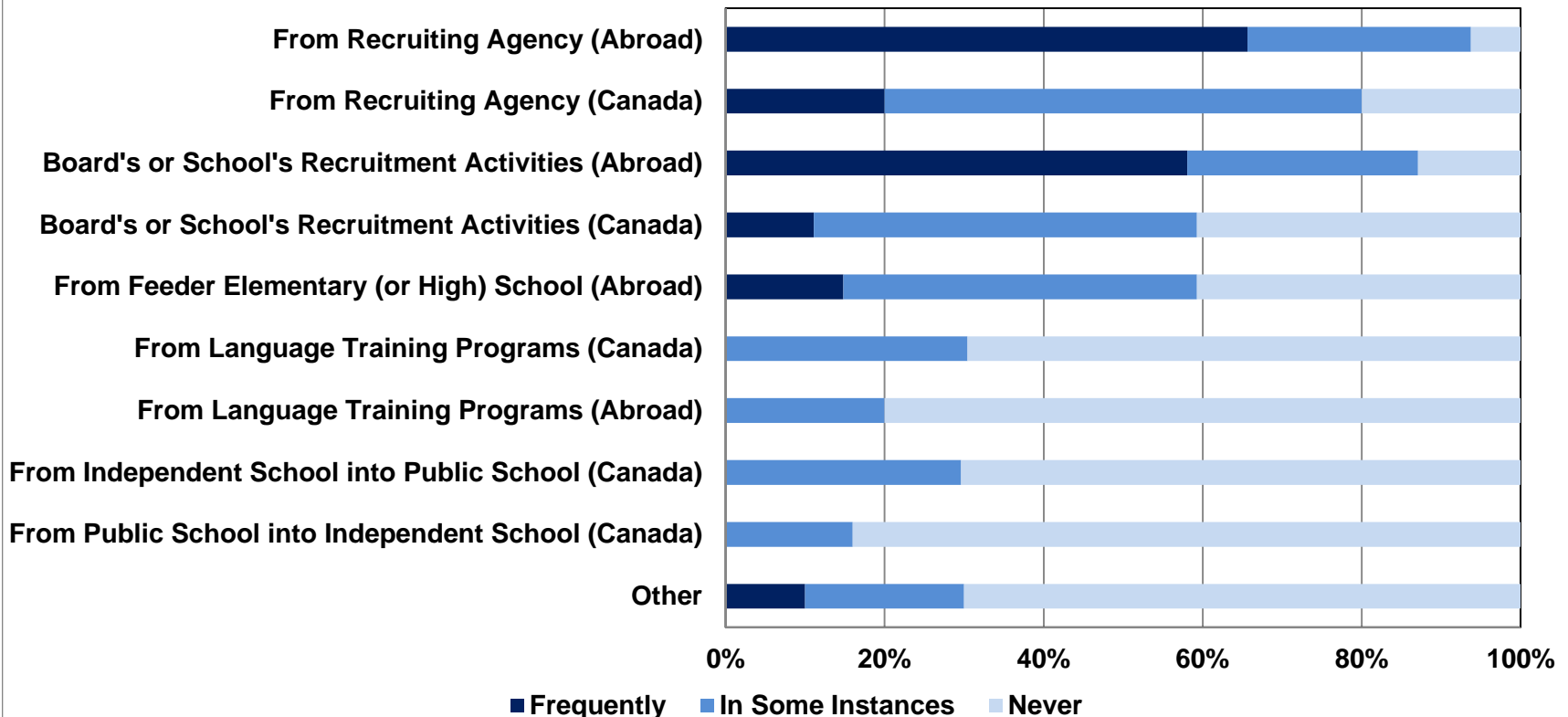
Schools Sector – Respondents' Demographics



SUMMARY OF ONLINE SURVEY FINDINGS

Schools Sector – Select Themes (I)

Does Your Board/School Use Formalized Pathways in its International Student Recruitment?

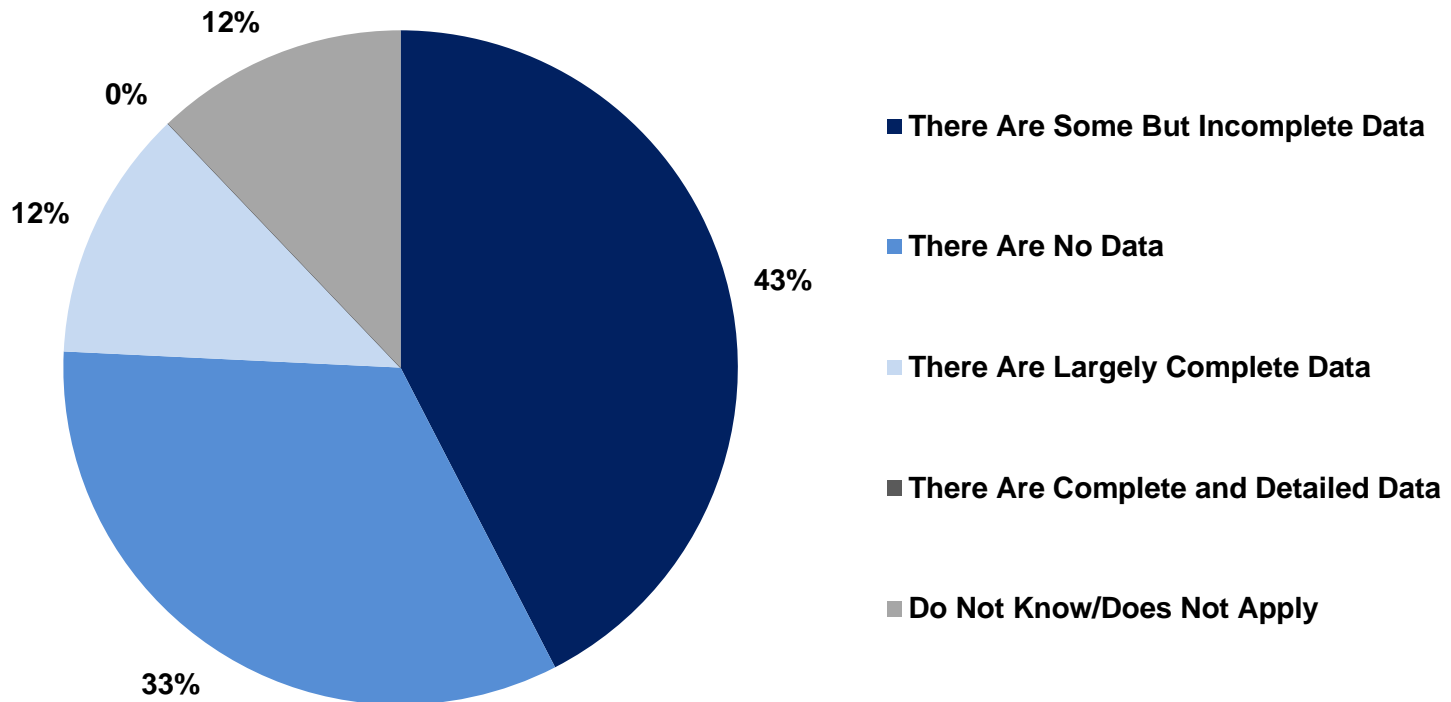


Pathways are dominantly used with partners outside Canada

SUMMARY OF ONLINE SURVEY FINDINGS

Schools Sector – Select Themes (II)

How Do You Assess the Quality of Data Your Board/School Holds on International Student Pathways?

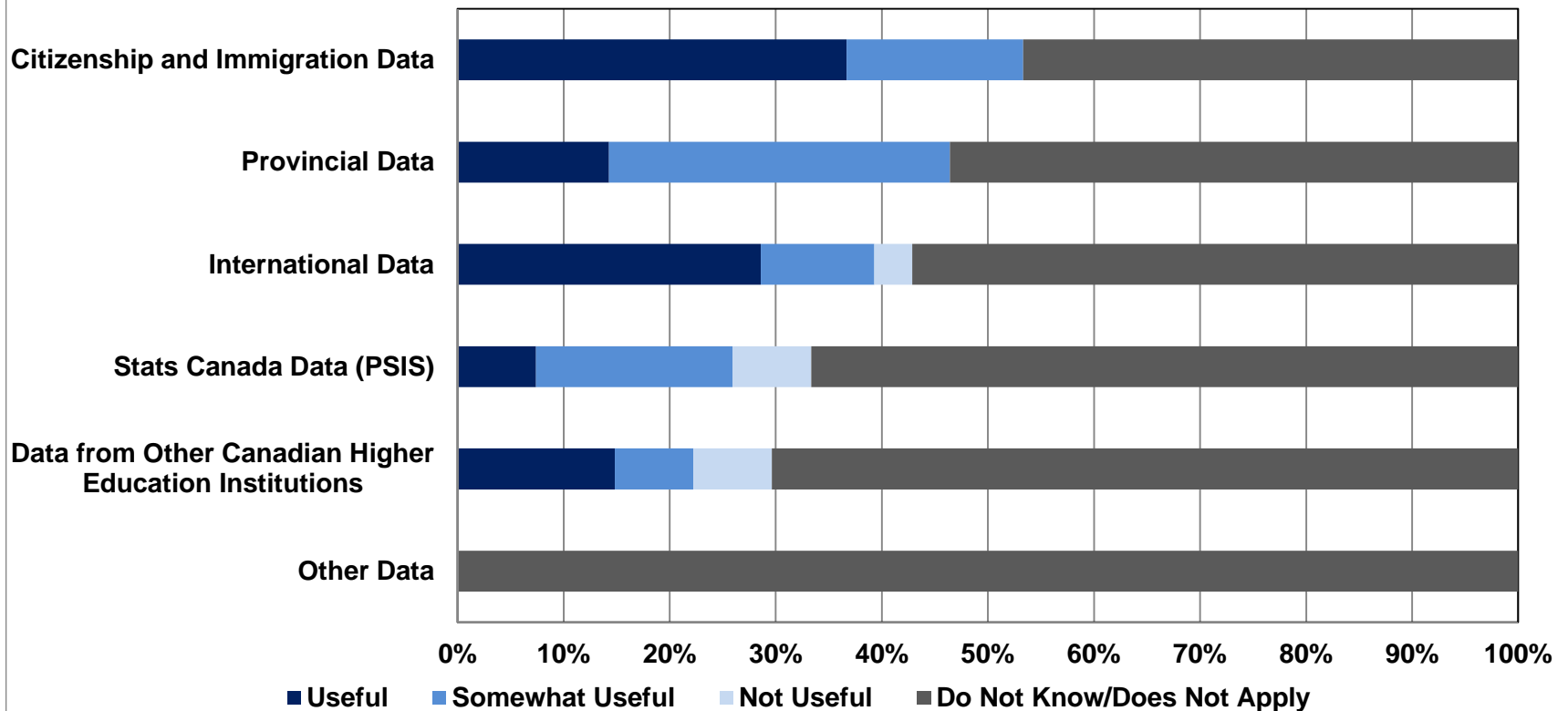


Data availability/quality is a major challenge for schools

SUMMARY OF ONLINE SURVEY FINDINGS

Schools Sector – Select Themes (III)

How Would You Assess the Quality of Data From These Sources?

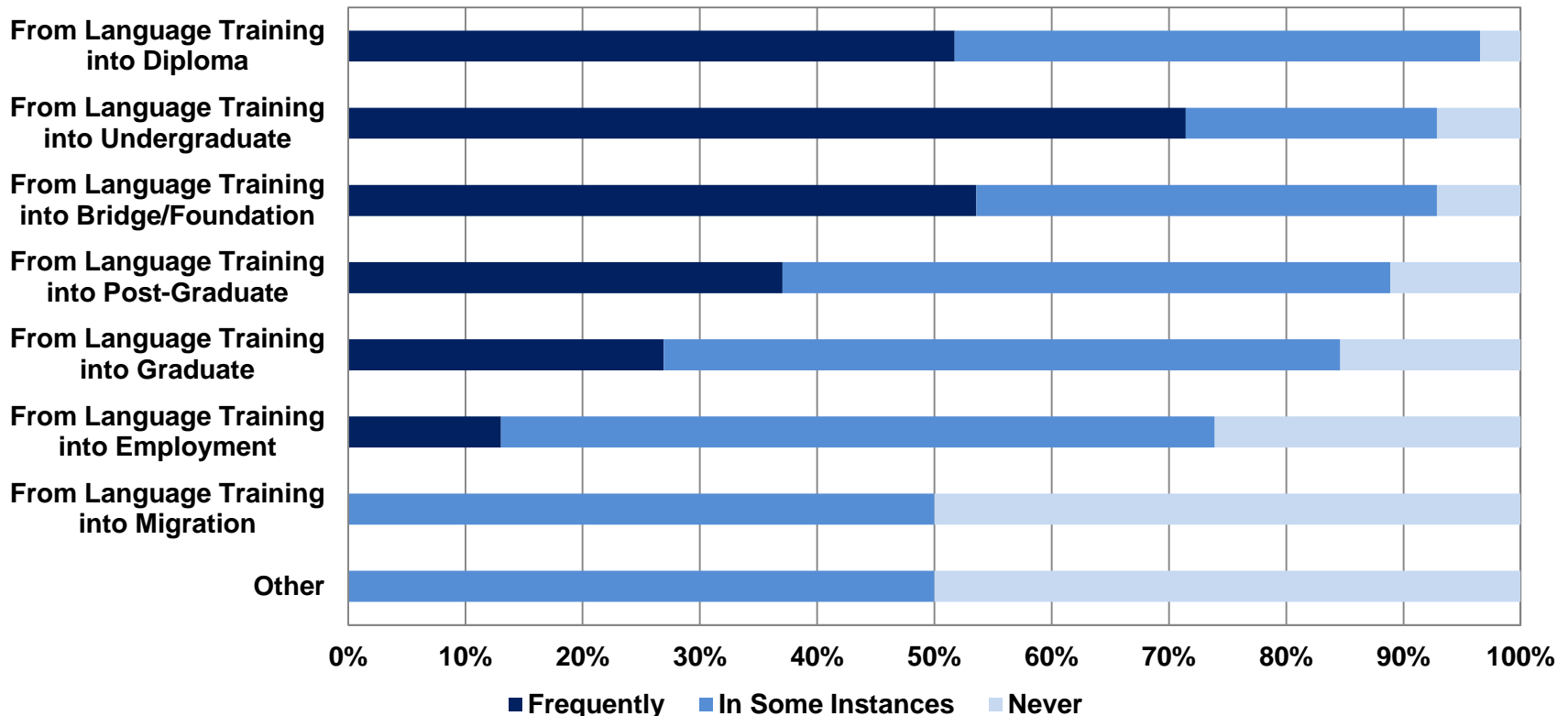


CIC and international data are most useful for schools

SUMMARY OF ONLINE SURVEY FINDINGS

Language Sector – Select Themes (I)

Which Kinds of Formalized Pathways Does Your Institution Offer?

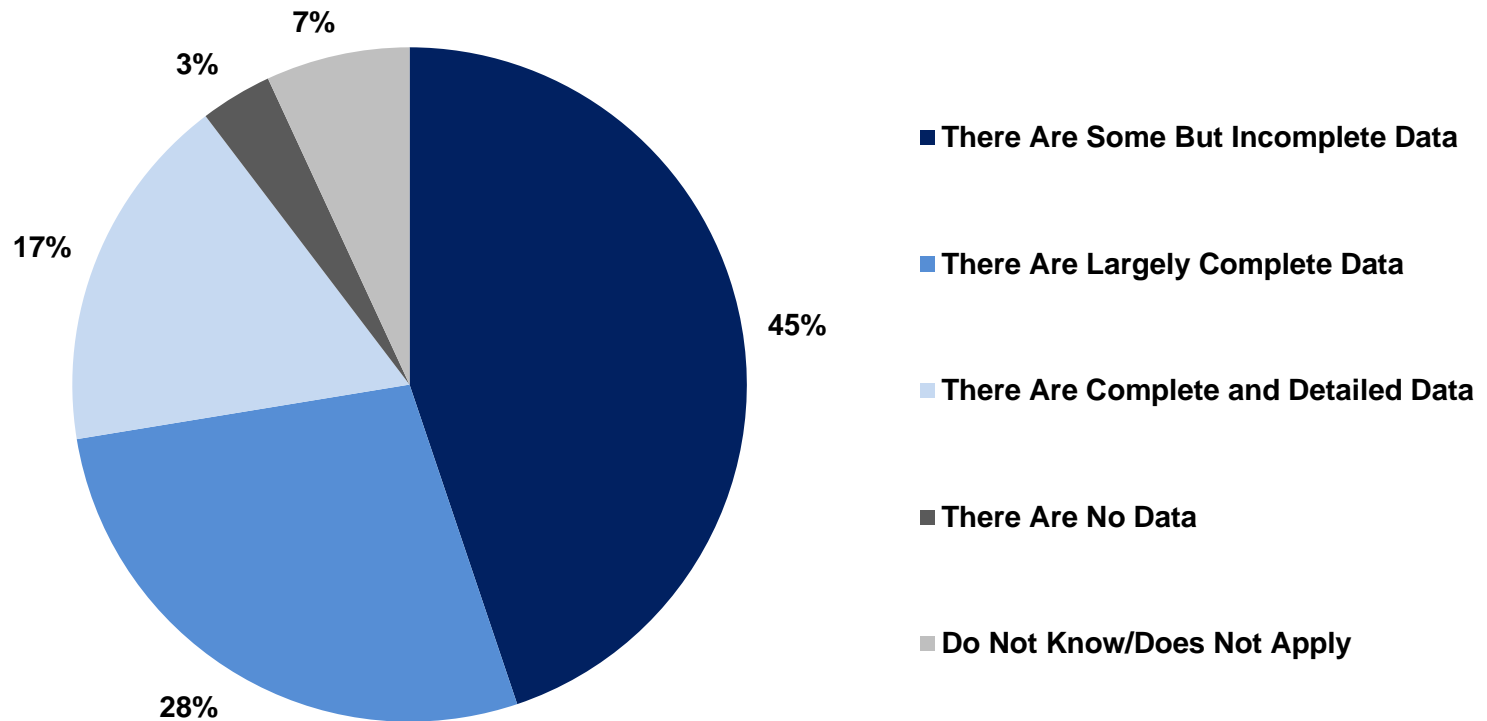


Language schools offer a wide range of pathways

SUMMARY OF ONLINE SURVEY FINDINGS

Language Sector – Select Themes (II)

How Would You Assess the Quality of Data Your Institution Holds on International Student Pathways?



Nearly half of language schools are satisfied with data availability/quality...

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

CCIEM Member Comments

Discussion

Suggested policy and development measures:

- **A set of structural and commercial frameworks to govern pathways (in lieu of a national pathways model)**
- **A national fraud prevention clearing house**
- **A national quality assurance panel**
- **A credential evaluation entity (paid-for-service)**
- **A national credit transfer model, possibly by devolving credit transfer to an institutional level**
- **A focus on improving data and intelligence through whole-of-stakeholder cooperation models**

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

CCIEM Member Comments

Discussion

- **Pathways are a fact of life**
- **Pathways involve every sector, whether in a feeder, funnel, or recipient role**
- **There is not a single institution which is in one way or another parts of pathway scenarios/behavior**
- **Pathways cut across jurisdictional lines. This makes the creation of national framework models challenging, but there is no alternative to providing national-level solutions**
- **Pathways are a key competitive lever. Canada will benefit from further developing pathways and framing these properly**

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

CCIEM Member Comments

Discussion

Introduction

What are pathways and how do they function?

Why pathways?

Pathways in Canada

Competitor Benchmarking: Pathways in Australia

Online Survey Results

Key Action Items

Summary of Perspectives

CCIEM Member Comments

Discussion

Dr. Daniel J. Guhr
Managing Director

Illuminate Consulting Group
P.O. Box 262
San Carlos, CA 94070
USA

Phone +1 619 295 9600
Fax +1 650 620 0080

E-mail guhr@illuminategroup.com
Web www.illuminategroup.com