

# **An Introduction to the Illuminate Consulting Group**

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## **ABOUT ICG**

The Illuminate Consulting Group (ICG) is an international science, research, and academic strategy consulting firm advising the leadership of teaching and research institutions, foundations, governments, and public agencies on policy, development, and competition issues.

# ICG CORPORATE PROFILE

## Legal Formation and Ownership

ICG was founded in 2003 and is based in California. It is incorporated as a Limited Liability Company (LLC). ICG operates two subsidiaries, ICG Placement Strategies (ICGPS), and ICG Research Services (ICGRS).

## Organization

ICG is organized as an international expert network of academics, administrators, and researchers and analysts. Since its creation, ICG has grown into an organization of over 60 members in 13 countries.

## Members

ICG is firmly embedded in the academic world. Our members, about half of whom hold doctoral degrees, are connected to eight of the world's Top 10 research universities. Twenty-two of our members have served or continue to serve as university faculty, while 34 have academic administration experience.

Half a dozen ICG members have been trained in leading consulting firms such as the Boston Consulting Group or PwC. With most of our members having lived and worked abroad, we are collectively fluent in more than thirteen languages. In total, our members have published more than 90 monographs and 1,100 journal articles.

## Advisory Board

ICG's Advisory Board encompasses 59 members in 13 countries. The majority of members are based at universities and colleges (42), with the remaining 17 being based in governments, language schools, and other private enterprises.

Board members are an invaluable resource for many client and research projects ICG undertakes given their vast range of experiences. Specifically, a dozen members have held leading positions in international education such as the Presidency of EAIE or executive roles at AIEA, CBIE, or the DAAD.

In the case of Board members participating in ICG projects, they are subject to the same rules, regulations, and confidentiality clauses as all ICG project team members.

## STAFF MEMBERS (I)

### Managing Director – Dr. Daniel J. Guhr

#### Professional Background

Dr. Guhr has been serving as ICG's Managing Director since 2003. Prior to founding ICG, he worked as a strategy consultant with the Boston Consulting Group in Munich and San Francisco, and as a Director of Business Development with SAP in Silicon Valley.

#### Educational and Research Background

Dr. Guhr holds a D.Phil. in Higher Education and a M.Sc. in Educational Research Methodology from the University of Oxford, as well as a M.A. in Political Science from Brandeis University.

He also studied political science at Bonn and Harvard Universities. In addition, he served as a research specialist at the Center for Studies of Higher Education at the University of California at Berkeley, and conducted research at the Max-Planck-Institute for Human Studies in Berlin.

#### Awards and Publications

During his studies, Dr. Guhr was awarded 17 scholarships, fellowships, and grants. His doctoral dissertation on *Access to Higher Education in Germany and California* was published in the series *Studies in Comparative Education*.

Dr. Guhr has authored more than 40 reports, research papers, and studies. He has contributed to more than 100 conference sessions, seminars, and workshops.

#### Service

Dr. Guhr currently serves on the Provost's Council of College Eight at the University of California at Santa Cruz, as well as Chair of the Alumni Advisory Board of the European Commission's Climate KIC. He is the past President of the Oxford University Society's San Diego branch. He also served as a Council Member of Bonn University's Universitätsgesellschaft.

## **STAFF MEMBERS (II)**

### **Analysts**

- Nelson D. Furtado
- Andreas Q. Hovland
- Elba Gomez Navas
- Jakub Langr (as of July 2015)

### **External Researchers**

- Katrina Green (Victoria, Canada)
- Jingqiu Guan (Los Angeles, USA)
- Veronika Kupriyanova (Brussels, Belgium)
- Robyn Sneath (Oxford, United Kingdom)

### **Information Technology and Data Analysis Specialists**

- Orhun Aydin (Stanford, USA)
- German Eichberger (San Diego, USA)

## ADVISORY BOARD (I)

- Bjorn Einar Aas, University of Bergen, Norway
- Louis E. Alexander, MIT, USA
- Dr. John E. Andersen, University of Copenhagen, Denmark
- Dr. Nello Angerilli, University of Waterloo, Canada
- Orhun Aydin, Stanford University, USA
- Britta Baron, University of Alberta, Canada
- Tina Bax, CultureWorks, Canada
- Paul Brennan, Colleges and Institutes Canada, Canada
- Nicole Brigg, Macquarie University, Australia
- Laurel Bright, Griffith University, Australia
- Dr. Stephanie Busch, Goodgame Studios, Germany
- Angela Chapman, VGH & UBC Hospital Foundation, Canada
- Prof. Bruce Chapman, Australian National University, Australia
- Arnold Chazal, Vumed, USA
- Seong Chen, Roche, Switzerland
- Prof. Russell Cummings, US Air Force Academy, USA
- Dr. Paul Davis, Boise State University, USA
- Dr. Lorna Jean Edmonds, Ohio University, USA
- Joachim Ekström, Uppsala University, Sweden
- Prof. Sheila Embleton, York University, Canada
- Prof. Peter Frappell, University of Tasmania, Australia
- Prof. Andy Gillespie, Auburn University, USA
- Dr. Francine Gordon, F Gordon Group, USA
- Prof. Nigel Healey, Nottingham Trent University, UK
- Lars Holberg, Linköping University, Sweden
- Sonja Knutson, Memorial University, Canada
- Bob Korzeniowski, University of Canterbury, New Zealand
- Markus Laitinen, University of Helsinki, Finland
- Prof. Erich Leitner, Universität Graz, Austria
- Sonny Lim, JD, Rice University, USA

## ADVISORY BOARD (II)

- Frances Little, Auckland University of Technology, New Zealand
- Frank Loennies, Zurich Insurance Group, Germany
- Chris Madden, Griffith University, Australia
- Dr. Randall Martin, British Columbia Council for International Education, Canada
- Dr. Phil McLauchlan, MirriAd, UK
- Tracey McNicol, Australian National University, Australia
- Ian Moore, Queen's University Belfast, UK
- Gudrun Paulsdottir, eGovLab, Sweden
- Gonzalo Peralta, Languages Canada, Canada
- Douglas Proctor, University of Melbourne, Australia
- Dirk Radzinski, Algenol, Switzerland
- Prof. Ravi Rajan, UC Santa Cruz, USA
- Prof. Chris Robinson, Victoria University, Australia
- Dino Roppo, Alberta Enterprise and Advanced Education, Canada
- Prof. Sheldon Rothblatt, UC Berkeley, USA
- Carolyn Russell, University of Victoria, Canada
- Trine Sand, University of Copenhagen, Denmark
- Daniela Seskar-Hencic, University of Waterloo, Canada
- Andrew Shaindlin, Alumni Futures, USA
- Richard Stenelo, Lund University, Sweden
- Dr. Kirk Simmons, UC San Diego, USA
- Sonja Steinbrech, UC San Diego, USA
- Jean-Philippe Tachdjian, DFATD, Canada
- Prof. Michael Wilkes, UC Davis, USA
- Ted Vaughan, Nova Scotia Labour and Advanced Education, Canada
- Dr. Wedigo de Vivanco, de vivanco consulting, Germany
- Prof. Wilhelm Vossenkuhl, LMU Munich, Germany
- Delia de Vreeze, Wageningen University, The Netherlands
- Patrick Zielinski, e.q.z Sozietät, Germany



## **ICG ANALYTICAL MODELS AND SERVICES**

### **GAPI – Global Academic Placement Index**

GAPI is an analytical tool focused on the academic transitions of secondary school graduates to higher education institutions. GAPI uses extensive secondary school data on the university application success and actual matriculation of secondary school graduates to assess the competitiveness of secondary schools at placing their students at internationally ranked universities worldwide.

Based on these data, GAPI can also provide a “gap analysis” for universities to identify schools with performance profiles that offer compelling recruitment opportunities based on peer acceptance/matriculation patterns. GAPI currently includes data on students matriculating to more than 1,000 universities.

### **ISAFM – International Student Analytics and Forecasting Model**

ISAFM was conceived as a tool for introducing evidence-based, expert-derived analytical rigor into the comprehensive analysis and forecasting of international (higher education) student flows. ISAFM uses System Dynamics to predict international student flows three years into the future based on 2.1 million data points and more than 120 variables.

These flows are broken out by nationality, gender, subject, and degree level. ISAFM facilitates an empirical understanding of population, market, competition, and performance metrics at an in-depth, unbiased level.

### **PRISM – A Cross-national Student Success and Performance Benchmark Model**

PRISM analyses student performance based on up to two dozen admissions and student record attributes on harmonized grade scales and unified outcome metrics. Driven by millions of data points loaded by institutions on international student profiles, performance, and success, PRISM enables institutional and comparative benchmark analysis of student performance in a variety of segments (e.g., by nationality, study field, English language proficiency at admission, etc.).

PRISM operates with dedicated privacy, security, and brand protection features. PRISM allows institutions to deliver data in a fully recoded manner, ensuring the ability of cross-jurisdictional data transfer and comparison.

## **SEPAT – Strategic Enrolment and Performance Assessment Toolkit**

SEPAT is based on a continuous process and data flow model, coupled with extensive benchmarking databases that allow tracing the marketing-recruiting-admissions-enrolment-student services performance of a higher education institution. Given SEPAT's sensitive competitive nature, only select details are being shared publicly.

## **SMFB – Social Media Footprint Benchmarking**

Social media footprint benchmarking assesses the relative presence of educational institutions seeking to connect with prospective international students online. Institutions are compared against a pool of international competitors on social media platforms including Facebook, LinkedIn, YouTube, and Twitter (collectively accounting for more than 2.5 billion users).

Thousands of discrete data points from institutional social media accounts are used to assess the brand popularity, ability to reach prospective students, and level of user engagement/responsiveness of benchmarked institutions.

GAPI, ISAFM, and PRISM have been presented extensively at a number of international education conferences, ranging from AIEC to EAIE to NAFSA. Select graphs are attached at the end of this proposal.

# ICG GLOBAL EXPERIENCE

## Overview

Since its inception, ICG has served clients around the world, including government ministries, public agencies, associations, universities, colleges, language schools, and secondary schools. Many of these projects involved global research tasks, teams with up to eleven members, and reports delivered to clients ranging from 80-520 pages.

ICG covers a broad set of issues in international education, ranging from competition assessments to recruiting and marketing strategies, to research relationship analysis. Much of ICG's work is driven by in-depth quantitative benchmarking exercises. Substantial parts of ICG's work can be accessed publicly on ICG's website, or are commented on in nearly 100 conference presentations, papers, and articles.

As a reflection of ICG's academic research heritage, ICG pursues its own research on internationalization, performance, competition, and teaching issues and publishes Strategy Perspectives and stand-alone reports, most of which are available free of charge.

## **SELECT GLOBAL CLIENT LIST**

### **Governmental/Public Agencies**

Ministries of education, ministries of foreign affairs, international education promotion agencies, etc. in Australia, Canada, Denmark, Germany, New Zealand, Norway, Sweden, and the United Kingdom.

### **Associations and Groups**

The British Columbia Council for International Education (BCCIE), the Canadian Consortium for International Education Marketing (CCIEM), the German Academic Exchange Service (DAAD), the IDEA League, and Universities UK, and others.

### **Universities**

Australian National University, Bonn University, Capilano University, FU Berlin, Griffith University, King's College London, KTH, Lund University, Macquarie University, Memorial University, Monash University, Northwestern University, Okanagan College, OCAD U, Oxford University, Simon Fraser University, UC Santa Cruz, the University of Arizona, the University of British Columbia, the University of Copenhagen, the University of Helsinki, the University of Tasmania, and others.

## SELECT ICG BENCHMARKING EXPERIENCE

### ITBCD – International Tuition-based Competition Database

ITBCD contains tuition fees, added fees, and cost of living data on over 9,000 degree programs from more than 90 higher education institutions. ITBCD groups universities by rank to identify direct competitor programs. Scenario building allows for modelling the impact of fee changes up to a decade into the future.

In order to understand the full cost portfolio that international students face, ITBCD uses the concept of Total Cost of Degree Acquisition (TCODA) to combine tuition fees, additional fees, and cost of living into one metric of cost. The 2014 release (Version 3) of ITBCD allows users to customize cost modelling and data visualizations using a number of parameters including currency conversion rates, inflation rates, and student expenditure levels.

In addition to data on tuition fees and living expenses at benchmarked institutions, ITBCD includes a compilation of institutional fees policies and fees setting models. The assessment of institutional tuition fees policies and practices includes: Reviews of historical trends in tuition fees levels; identification of governmental or institutional statements guiding changes in tuition fees; and evaluation of ease of access to cost information for prospective students.

This benchmark research provides insight into relevant regulatory environments for higher education institutions around the world, as well as perspectives on individual institutional pricing strategies. Based on ITBCD research, strategic advice has been provided to institutions and public agencies with respect to the signaling effect of tuition fees increases and the role of administering cost offsets such as grants and scholarships.

Research for ITBCD also seeks to expound the means by which institutions can provide value to international students relative to the investment in education these students make. This “added-value” analysis assesses how an institution’s tuition fees cost level relates to other factors contributing to its attractiveness or value proposition for students. ITBCD added-value analysis is generated based on the collection of 44 hard-data indicators per institution across six measures of value: Alumni Networks; Entry Scholarships; Career Support; Brand Presence; Recruiting Ability; Location Attractiveness.

ITBCD clients include the German Academic Exchange Service (DAAD), Education New Zealand, a consortium of eight internationally-ranked Australian universities, a group of fifteen leading European universities, and usage by various individual universities in international recruiting and admissions strategy projects.

## **Comparison of English Language Master's Degrees delivered by 15 Leading European Universities**

This project was sponsored by the University of Copenhagen and includes 15 leading European universities (non-native English language institutions) which altogether deliver more than 900 English-language Master's programs. Institutions included in the comparison include, amongst others, ETH Zurich, the University of Helsinki, LMU Munich, and Utrecht University.

Research included a comprehensive assessment of admissions and enrolment data, a curricular and program design analysis, the role of the programs within the internationalization framework of a given university, and potential opportunities for new program developments and collaboration scenarios.

Research and findings were made available to the University of Copenhagen and institutions actively participating in this project. Sanitized results are expected to be shared at the 2015 EAIE Annual Conference in Glasgow.

## **Recruiting-Admissions-Services Benchmarking of 13 Ranked Research Universities**

This project was sponsored by the University of Calgary and covered 13 internationally-ranked universities (ranking from 20 (University of Toronto) to 399 (Northeastern University) in the 2014-15 QS ranking) in five countries.

Research included a comparison of international marketing and recruiting activities, international admissions policies and performance parameters, and an overview of the organizational design and program portfolios of student services. Research focused largely on quantitative metrics, but also contained the qualitative evaluation of services.

Research and findings were made available to the University of Calgary.

## **Global Enrolment Trend Analysis**

This project was sponsored by Education New Zealand and included the analysis of long-term international student enrolment trends at a global scale with a view on comparing sending and receiving country trends. The analysis included more than 20 countries, ranging from Australia to Germany to Malaysia to the UK (94 pages report).

## **Joint Doctoral Degrees (JDs) for Four Leading International Law Schools**

This past project was sponsored by the University of Melbourne's Law School. The Law School tasked ICG with researching and benchmarking more than two dozen well regarded law schools around the world with a view on their international partnerships and program delivery.

ICG created Briefing Books of up to 45 pages length for a dozen potential partner law schools which collated all salient information for an eventual presentation to a given law school. The Briefing Books specifically stressed potential partnering opportunities based on benefits for both the University of Melbourne and a potential partner.

As a result of this project, the University of Melbourne's Law School created joint doctoral law degrees with the University of Oxford, New York University, and the Chinese University of Hong Kong. This project was presented at a number of international education conferences.

## **Inventory of International Groups, Alliances, and Partnerships**

In 2012, ICG undertook an inventory of international groups, alliances, and partnerships of universities worldwide (excluding bilateral, non-formal, and faculty-based models). Research evidenced 155 such models, ranging from the Go8 (Australia) to IARU (international) to the Russell Group (UK) to Tu9 (Germany). Models were fitted into a matrix which characterized a given model based on key attributes such as membership criteria, mission, exclusivity, and size.

This research has been presented in parts at international education conferences and used extensively for client projects.

## **International Engagement Models of German, UK, and US Universities**

This German Academic Exchange Service (DAAD) sponsored project investigated the international in-market engagement models of German, UK, and US universities across alumni relations; fundraising; and liaison, recruiting, and research presences in North America and Europe, respectively. Research included quantitative (head counts, monies raised, staff members) and qualitative (mission and strategy) components.

This research was made available by the DAAD to German universities.

## **SELECT ICG RESEARCH REPORTS**

### **A Comparative Market Assessment of International K-12 Students in Canada**

ICG on behalf of the Canadian Association of Public Schools – International (CAPS-I): 2015, 151 pages.

This report provides a broadly scoped perspective on international primary and secondary students in nine countries: Australia, Canada, Germany, Hong Kong, New Zealand, Singapore, Switzerland, the United Kingdom, and the United States. Student enrollment trends are analyzed before the backdrop of regulatory schemes and policies, funding models, as well as fees and other costs.

This report is available to CAPS-I members and public agencies in Canada.

### **Secondary to Post-Secondary Education Pathways for International Students in British Columbia**

ICG on behalf of the British Columbia Ministry of Education: 2014, 300 pages.

This report summarizes the pathway approaches used by BC secondary schools and post-secondary institutions to retain international talent in the Province's education system. Based on extensive engagement with education providers, the report identifies systematic obstacles to facilitating international student transitions and provides recommendations for optimizing pathways within the Province.

This report is available to British Columbia education providers.

### **2014 British Columbia International Education Intelligence Report**

ICG: 2014, 25 pages.

This report shares research and strategic perspectives on: International student enrolment trends in BC; competition in key international student recruitment markets for BC; the cost for international higher education students to study in the Province; and the brand position of BC institutions relative to other popular student destination jurisdictions.

The report can be accessed on the British Columbia Council for International Education (BCCIE) website.



## **A Comparison of International Tuition Fees and Their Impact on International Students**

ICG on behalf of the German Academic Exchange Service (DAAD): 2014, 97 pages.

A report on the regulatory, structural, and historical aspects of domestic and international student tuition fees in relation to student intake and enrolment in six countries: Australia, Denmark, the Netherlands, Sweden, the United Kingdom, and the United States. This report also evaluates the role of scholarship programs in modulating the impact of tuition fees on international student recruitment.

This report is client confidential.

## **DFATD Edu-Canada Development Roadmap**

ICG on behalf of DFATD Canada: 2013, 170 pages.

This report enumerates a business development strategy for the Edu-Canada unit of DFATD to allocate increased funding for international education promotion activities. Recommendations are offered on Edu-Canada's organizational design, staffing, service portfolio, stakeholder relations, and opportunities for innovation. The report also reviews other national promotion agencies to place Edu-Canada in its relevant competitive landscape.

This report is client confidential.

## **Policy Responses to Fraud and Deception in International Education**

ICG on behalf of the Council of Ministers of Education, Canada and DFATD: 2013, 64 pages (public version).

This report analyses a difficult yet growing and at times disruptive occurrence in international education – the proliferation of large scale and at times systematic fraud being committed on education institutions, immigration authorities, and entities charged with quality assurance. This report constitutes the public version of documentation ICG produced.

This report can be accessed on the DFATD website.

## **US Market Entry Strategy**

ICG on behalf of a CultureWorks (a Canadian language school): 2012, 246 pages.

This report assesses potential opportunities for the client who sought to expand operations into the US market. The report uses a multistage filtering process to identify metro areas that offer attractive points of market entry for the client. Major criteria for analysis of each area included population size, domestic and international student enrolment, possible partner institutions (primarily universities), and notable competitors.

This report is client confidential.

## **International Baccalaureate MYP Success Factor Analysis**

ICG on behalf of the German American International School: 2012, 73 pages.

An analysis of factors needed for an International Baccalaureate (IB) World School to successfully introduce the Middle Years Programme (MYP) curriculum. The report surveys the MYP at IB world schools in Brazil, India, New Zealand, Poland, Singapore, and the United States. Based on these case studies, this report offers recommendations for individual schools and for the IB Organization to effectively facilitate the implementation of the MYP.

This report can be accessed on the ICG website.

## **Web 3.0 in Higher Education**

ICG: 2012, 303 pages.

This report encompasses 18 in-depth case studies on Web 3.0 (i.e. interactive and interconnected information and services on the web) including marketing, recruiting, admissions, alumni, and fundraising. In addition, web statistics and analytics as well as issues such as brand protection and identity fraud are covered.

This report is commercially available from ICG.

## **An Expanded International Market Positioning Strategy for Sweden**

ICG on behalf of Study Destination Sweden (a joint venture of Swedish universities and the Swedish Institute): 2011, 311 pages.

This report is available to Swedish stakeholders and includes a detailed analysis of the introduction of tuition fees for non-EU/EEA students, implications for the recruiting position of Swedish universities, and a perspective on the impact on existing admissions processes and procedures.

The full report was made available to Swedish stakeholders. Select chapters are publicly available on the Study Destination Sweden website.

## **Canada's Capacity for International Student Enrolment**

ICG on behalf of DFATD: 2011, 157 pages.

The report provides a quantitative overview of the current trends in international student enrolments by Province, education sector, and major Canadian metropolitan areas, and compares the Canadian landscape with select US and Australian student destinations. The report also estimates Canada's capacity to further absorb international students based on historical performance and projected demographic trends.

This report can be accessed on the DFATD website.

## **New Zealand Alumni Survey: Experiences, Attitudes, and Engagement**

ICG on behalf of the New Zealand Ministry of Education: 2009, 136 pages.

This report published the first ever global alumni survey conducted. Alumni of all universities in New Zealand were contacted to share information on their level of connectedness to and willingness to support New Zealand. The respondent pool of more than 3,200 alumni was segmented by former domestic and international students, and probed for differences in attitudes based on gender, age, institution attended, subject studied, etc.

This report can be accessed on the New Zealand Education Counts website.

## **Best Practices on Managing the Delivery of Canadian Education Marketing**

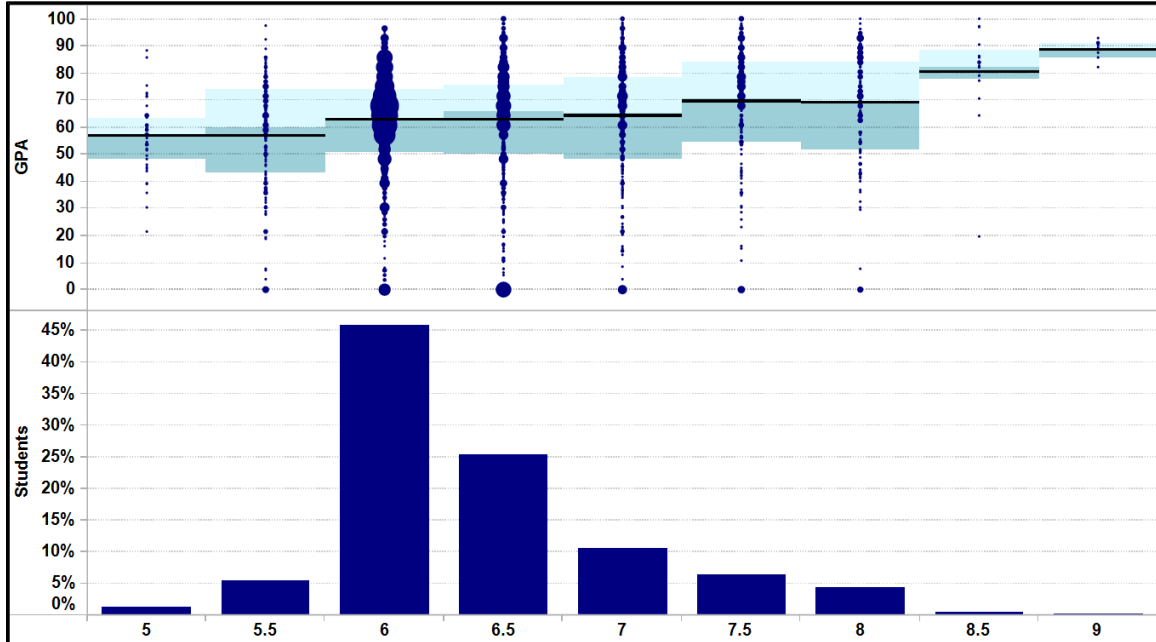
ICG on behalf of DFATD: 2009, 232 pages.

The report benchmarks country-wide international education marketing efforts by select major international education markets, such as Australia, France, Germany, New Zealand the United Kingdom, and the United States. The report also comments on Canada's international education marketing performance and landscape.

This report can be accessed on the DFATD website.

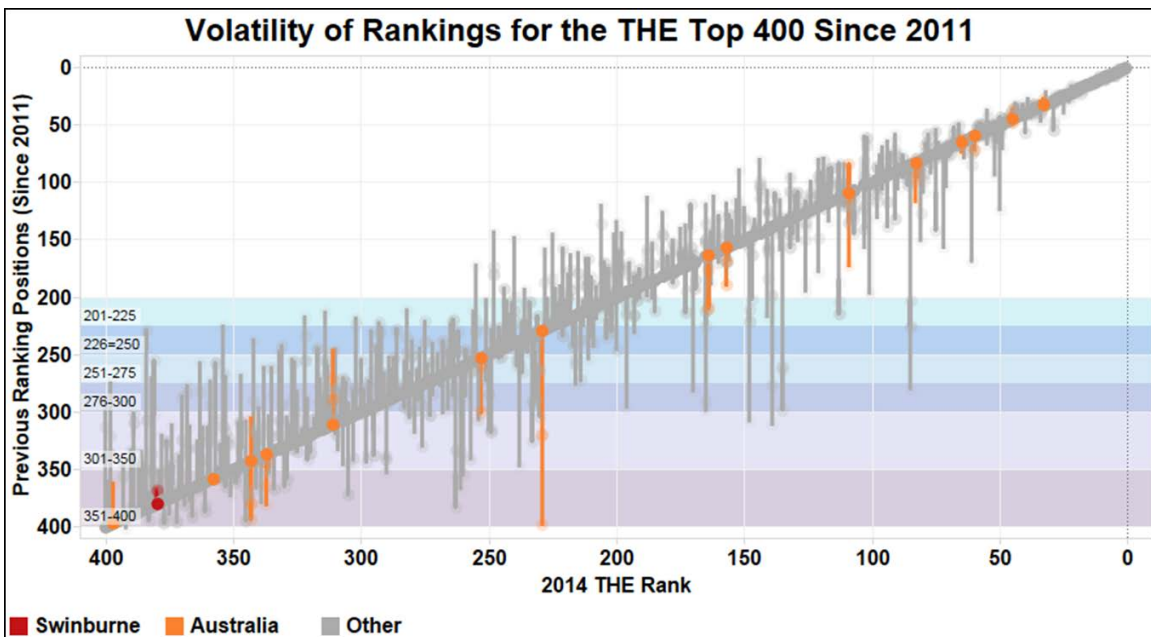
# ICG DATA VISUALIZATIONS

Example 1: Grade Performance as a Function of IELTS scores



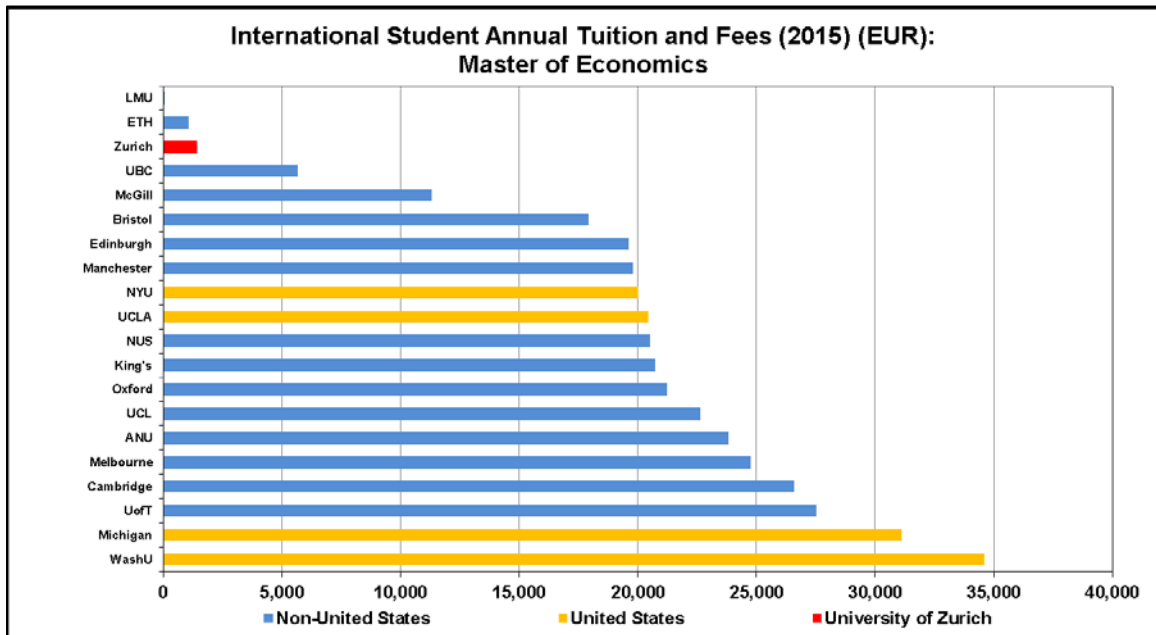
Source: ICG's PRISM student success and performance database.

Example 2: Volatility of Institutional Ranks in the THE Ranking since 2011



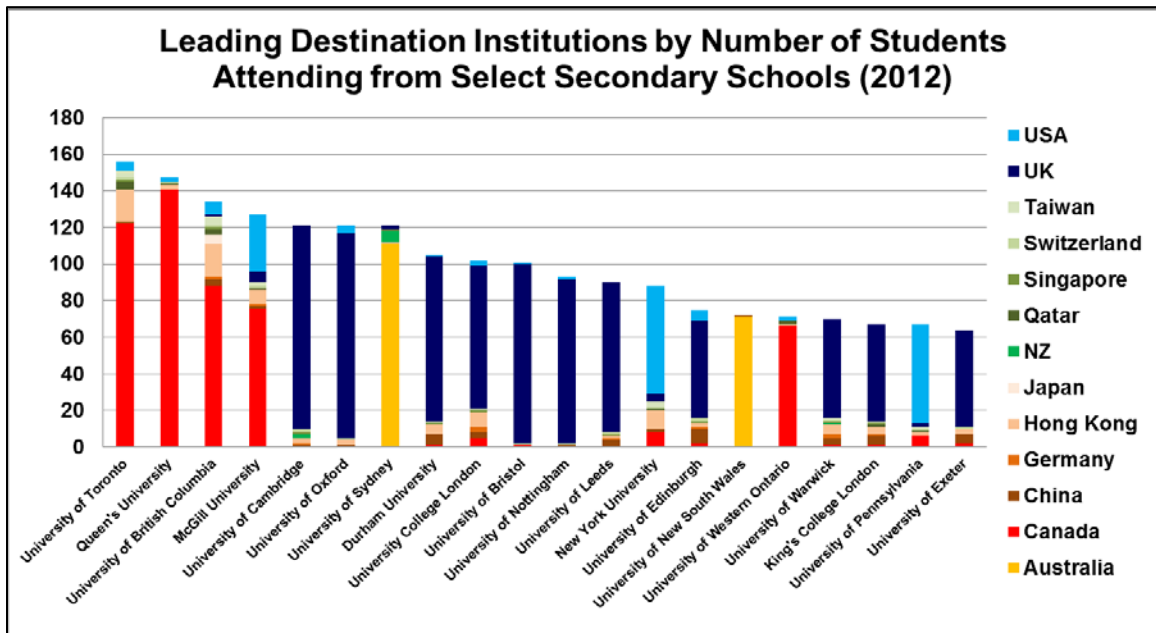
Source: ICG.

**Example 3: Annual Tuition and Fees for a Master of Economics Degree at Universities ranked in the Global Top 50**



Source: ICG's International Tuition Fees Based Competition Database.

**Example 4: Leading Destination Institutions by Number of Students Attending from Select Secondary Schools (2012)**



Source: ICG's Global Academic Placement Index.

## ICG CONTACT INFORMATION

The Illuminate Consulting Group, LLC  
990 Industrial Road, Suite 208  
San Carlos, CA 94070  
USA

Phone +1 (619) 295 9600

Fax +1 (650) 860 6109

E-mail [info@illuminategroup.com](mailto:info@illuminategroup.com)

Web [www.illuminategroup.com](http://www.illuminategroup.com)