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Overview

Forty-one individuals with a strong commitment to the field of international credential evaluation gathered in Boston to participate in the task of designing an organization to meet the specific needs of international credential evaluators. TAICEP’s Inaugural Symposium was held at Northeastern University: NU Global, which is the international arm of Northeastern University’s College of Professional Studies.

Symposium participants from several different countries, employed by organizations in the U.S., Canada, Sweden, and the Netherlands, addressed issues facing the creation of a new organization and developed plans for TAICEP’s governance, membership, functions and services. Meetings were structured around three main topics: Organizational Structure and Roles, Professional Development, and Planning for a General Meeting.

Symposium facilitator Patricia Gahl assisted Symposium organizers and participants in understanding the scope of the undertaking. She guided the group toward a realistic set of outcomes for the meeting. Rather than final decision making, the work of the Symposium was directed towards two possible outcomes: “recommendations” and “findings”. Recommendations represented strongly supported ideas and areas of general consensus. Findings were noteworthy alternate opinions and/or approaches.

Symposium deliberations led to the establishment of a Transition Committee to include several original Steering Committee members as well as new members from outside the U.S. and Canada. This is consistent with the goal that TAICEP become a world-wide organization, with the broadest possible international leadership and involvement. The Transition Committee has the responsibility to begin the consideration of Symposium recommendations and findings, with input and leadership from the broader TAICEP membership.

“It is no small endeavor to build an association, particularly one that needs to grow and differentiate itself from other associations.....To undertake that process and development with the contributions of professionals from a range of backgrounds, locations, and perspectives presents both a challenge and a possibility for collaboration and advancement of the profession, as well as the creation of an organization that meets the inherently varying needs of an international constituency.”1

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1 Julia Funaki, American Association of Collegiate Registrars and Admissions Officers, white paper written for TAICEP Inaugural Symposium, October 2013
The historic and groundbreaking Symposium was made possible by the strong commitment and hard work of many individuals and organizations in the field of international credential evaluation, including the Steering Committee members, the interim TAICEP officers, and the sponsors and friends who so generously donated to underwrite the cost of the Symposium. Perhaps most important are the TAICEP members who contributed their time, talents, and resources to travel to Boston to work together on issues facing TAICEP at this time. This summary seeks to illuminate the content and importance of their work for the future of TAICEP.

**Member Survey**

A TAICEP membership survey was conducted prior to the Symposium. Almost 50% of TAICEP members responded to the survey, and a summary of the results were made available to Symposium participants prior to the Symposium.

It is clear from the results of the survey that TAICEP members are eager to share their knowledge and expertise with other members. Results also reflect the importance to TAICEP members of professional development and research activities to support the profession. Of particular note, was the strong interest in information about pre-service and in-service training for international credential evaluation professionals and the documentation of training for professional certification.

In the words of one survey respondent, “There are a number of providers of training, such as ECE, EAIE, and NAFSA. There is a lack in comprehensive information on them and a uniform program for acknowledging training received from them. TAICEP should initially concentrate on identifying information on these sources, develop a program for members to track and document their training and then to demonstrate their expertise to their employers...”

**White Papers**

A white paper is an authoritative report or guide to help readers understand an issue, solve a problem, or make a decision. TAICEP Steering Committee members developed a series of questions to be addressed in the form of different white papers, each related to one of the three main Symposium topics: Organizational Structure and Roles, Professional Development, and Planning for a General Meeting.

The purpose of the white papers was to provide information key to the matter, identify possible solutions, discuss alternative scenarios and make recommendations for next steps. Many participants produced a white paper, all of which were made available to Symposium participants. The research reflected in these papers informed the deliberations and were often referenced in discussions. This significant body of research contains information, wisdom and advice on issues facing TAICEP. Although it
was not possible during the Symposium to discuss every topic addressed in the white papers, this body of knowledge will serve as an important resource for decisions to be made in the months ahead.

Opening Session

The Symposium began with a panel discussion, entitled “Building TAICEP: Perspectives on the need for an international professional organization for credential evaluators”. The panel set the tone for the Symposium deliberations by offering three different perspectives on the landscape of international credential evaluation, the need to build an international professional organization and some issues to consider as participants determine the desired structure and activities of the organization.

Natasha Sawh of the Canadian Information Centre for International Credentials moderated the panel. Panelists were Jenneke Lokhoff of Nuffic from the Netherlands, William “Doug” McBean of the University of Toronto, Canada, and Valerie Woolston from the University of Maryland College Park, USA.

In his remarks, Doug McBean expounded on the value of a catalog of resources for international credential evaluators and recommended that “TAICEP undertake to develop and maintain a really extensive database of up-to-date and historical information that we (and everybody else in the world who does ICE {International Credential Evaluation}) needs to do their work every day…”

Identifying the profession as “the basic building block for international mobility”, Valerie Woolston reflected on the history of the profession of international credential evaluation and the potential for TAICEP to raise awareness of its importance.

Jenneke Lokhoff offered perspectives on “research, initiatives, projects to improve credential evaluation and recognition practices” in Europe and the importance of TAICEP’s efforts to become an international association.

See Appendix B for each panelist’s complete presentation.

Working Groups

There were originally three working groups, as reflected in the Symposium program:

- Work Group OR/OS: Organizational structure and roles
- Work Group GM: Planning the first general meeting
- Work Group PD: Planning professional development activity.

Given the breadth and complexity of the issues surrounding organizational structure and roles, Symposium organizers expected this group to divide into smaller groups as
participants defined the topic and framed the specific questions to be addressed. Ultimately, two subgroups were formed: one focused on issues related to governance and the other focused on issues related to membership.

As a result, there were effectively four working groups, each of which met separately and developed recommendations and findings for all the Symposium participants to consider together.

**Governance**

The governance group reviewed the beginnings of TAICEP, including the steps taken by the Steering Committee and other volunteers to establish the organization, select the name, register a legal presence, open a bank account, set up a website and plan an Inaugural Symposium to provide the opportunity for broader member involvement.

With awareness that the governance structure... “needs to be transparent, have clear and direct ties to organizational goals and be adaptable as the organization grows and changes”\(^2\), the work of the governance group reflects the importance of moving as quickly as possible towards the election of officers and the establishment of an effective governance and committee structure.

It was recommended that the Transition Committee begin, as soon as possible, to seek volunteers and nominations for a new slate of officers and committee chairs for at least two fundamental committees: a Governance and Finance Committee and a Program Committee. The plan also allows for the establishment of task forces or ad hoc committees on specific issues that may emerge from the Symposium.

Once in place, the new executive committee would be tasked with replacing themselves with member-elected positions within twelve months. It was further recommended that a “secretariat” be established, when feasible, to allow certain ongoing functions of the organization to be performed by staff.

**Planning a General meeting**

Addressing whether a general meeting was necessary, desirable or possible for a relatively small organization with fiscal constraints, the group enthusiastically endorsed a general membership meeting or conference. The work of this group resulted in a recommendation that a task force be established to consider specific plans for a meeting to be held within a year to eighteen months following the Symposium to build on the momentum created by the Inaugural Symposium.

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\(^2\) Meg Wenger, Educational Credential Evaluators Inc., white paper written for TAICEP Inaugural Symposium, October 2013
A general meeting would provide a place “...for the broader membership to meet, network, and have an opportunity for structured professional development”. Furthermore, “a successful annual conference not only pays for itself, but provides some revenue to sustain the organization throughout the year.”

Drawing on their experiences with other similar associations, members of the group offered several creative strategies for a manageable general meeting. It was agreed that “institutional support from member organizations will be a critical factor in securing a location for the general meeting, the majority of funds, supporting the volunteer committee and providing guidance to the committee members.” Consideration was also given to the potential for technology to reduce the need for face-to-face meetings and to expand the reach of meetings through video recording or streaming of program sessions.

Professional Development and Membership

“The goal of TAICEP first and foremost should be to successfully identify, address, and fulfill the needs of the credential evaluation community as a whole. If this goal is achieved, attracting members from a diverse range of countries, regardless of gender, race, religion or place of employment shouldn’t be a problem.”

Professional development was considered in the context of defining and meeting the needs of TAICEP members. In the context of member services, the concept of professional development went beyond education and training to include the professional relationships that foster networking, mentoring, and the exchange of expertise within the TAICEP community.

Understanding the value proposition for TAICEP - what benefits and services do current and prospective members expect to receive - reinforced the integral relationship between professional development, in the broadest sense, and membership. This led to a discussion of ideas for member services and professional development that differentiate TAICEP from other associations, that do not duplicate what others are already doing, and that are feasible from budgetary and workforce perspectives.

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3 Natasha Sawh, Canadian Information Centre for International Credentials, white paper written for TAICEP Inaugural Symposium, October 2013

4 Ken Warren, Educational Perspectives, white paper written for TAICEP Inaugural Symposium, October 2013

5 Brentni Henderson-King, National Association of State Boards of Accountancy, white paper written for TAICEP Inaugural Symposium, October 2013

6 Jessica Stannard, Nuffic, white paper written for TAICEP Inaugural Symposium, October 2013
“In meeting the needs of the membership, at its earliest stages, I view TAICEP as a portal to all things “applied comparative education.” By this, I see TAICEP’s website as having a compendium of resources that are already available. I envision a team of researchers who will gather and establish a directory of organizations that offer credential evaluation training: at conferences, via the internet, during summer institutes, in person, free and paid. … Financially, TAICEP is at its advent and cannot afford to create resources or collaborative works. It might not even need to do so in the future. What it can do and must do is discover what is already here for us and how we can codify these resources in one place so that all members can be aware of and take part in the offerings.”

The recommendation was that a task force be formed to create a “TAICEP portal”. In this way, TAICEP could leverage technology to build relationships among TAICEP members with features such as a member directory, particularly members who are willing to serve as a resource on particular countries and/or issues; a calendar of professional development opportunities (not necessarily offered by TAICEP); a database of resources, with links to free and fee-based online reference materials; and a job board. Strategic use of social media was also recommended as an important technological tool to provide services to members and promote membership.

Finally, it was recommended that long-term plans include the development of a program to certify the competence of professional credential evaluators. This kind of certification would fill a gap in current professional development offerings and differentiate TAICEP from other organizations.

Membership Categories

Another aspect of membership, the definition of categories, criteria and privileges, emerged as the one of the most complex and challenging issues addressed by Symposium participants. After much deliberation, Symposium participants recommended the following membership categories to replace the current individual membership category:

- Individual (voting privileges)
- Organizational (designated number of votes per organization)
- Affiliate (no voting privileges)

An additional membership category, “Sponsor”, was also proposed, but this category requires further consideration to ascertain whether it is more appropriate as a designation for donors.

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7 Marybeth Gruenewald, Educational Credential Evaluators Inc., white paper written for TAICEP Inaugural Symposium, October 2013
The recommendation was that a task force be established to further define the proposed membership categories and develop criteria for membership in TAICEP that include the characteristics that would preclude membership as well as a legal framework for management of membership restrictions.

**Beyond the Symposium**

“This organization is created because there is no other organization that is solely dedicated to the needs and interests of the profession.”

The Symposium mobilized an internationally diverse group of enthusiastic, engaged, and committed professionals who see the potential in TAICEP’s uniqueness and who are willing and eager to work for TAICEP’s success.

At the same time, Symposium participants recognized that there will be challenges ahead, beginning with prioritizing and implementing the recommendations that emerged from the Symposium. There were clearly issues related to services, administration and finances that were beyond the scope of the Inaugural Symposium. “The last and possibly largest threat we will face going forward is continuing the momentum after the “honeymoon” phase is over, and moving forward after the initial Board and members have moved on.”

It is no small endeavor to build an association such as TAICEP. ... but the Inaugural Symposium succeeded in creating a framework for continuity and progress.

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8 Manas Mambetsadykov, University of Saskatchewan, Canada, white paper written for TAICEP Inaugural Symposium, October 2013

9 Allison Tapak, Queen’s University, white paper written for TAICEP Inaugural Symposium, October 2013
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