Symposium on Credential Evaluation Issues

Melbourne, 25-26 April 2017

In April of this year, a group of stakeholders in credential evaluation and digital student data met prior to the Groningen Declaration Network (GDN) meeting in Melbourne. The [GDN](http://www.groningendeclaration.org/) has as its goal the expansion of digital student data to promote student mobility. A group of credential evaluators felt the importance of discussing and sharing the needs of credential evaluators as they relate to the work of the GDN. It was decided to bring the stakeholders together in conjunction with the meeting in Melbourne, with the support of TAICEP, the GDN, and Educational Credential Evaluators, Inc.

Planning began with the following framework:

* **Goal**: Develop a plan to lead and direct the evolution and progression of the transfer and use of student data, building on the work of the GDN as it pertains to credential evaluation.
* **Justification**: Credential evaluation is an integral part of the student mobility ecosystem.
* **Objective**: Bring together professionals with expertise in the areas of data mobility and credential evaluation who will a) discuss, debate, and develop best practices, b) create a plan to lead and direct the evolution and progression of the transfer and use of student data, and c) suggest a data governance strategy to guide the future of student data mobility.

The planning committee chaired by Margaret Wenger of ECE, and including Elizabeth Campbell-Dorning (Australian Government Department of Education and Training), Herman de Leeuw (GDN), Jessica Stannard (EP-NUFFIC), and Linda Tobash (World Education Services) sent out a call for white papers. The topics of the papers ranged from verification practices and privacy issues, to language and terminology, standards, data format, an exploration of online databases, emerging verification systems in the Asia Pacific region, the Article 26 Backpack, and a proposed international education network. (**Here is a link to some of the papers**.)

The planning committee organized four working groups who would have breakout discussions on the first day. They were Group 1, focusing on authenticity/verification/recognition, facilitated by Emily Tse of IERF; Group 2, data elements, including language and shared terminology, and facilitated by Beka Tavartkiladze of WES Canada; Group 3, communication protocols/data standards, security and privacy, facilitated by Ken Warren of Educational Perspectives; and Group 4, integration/communication of different models and creating global networks by Jim Kelly of ECE. We asked each facilitator to pose questions to his or her group about what they see as benefits or opportunities to credential evaluation by the digitalization of student data, and what they see as challenges or concerns, and also think about questions that are specific to their group.

There were nearly 30 participants from five continents, representing credential evaluation agencies, governmental organizations, student data providers, and universities. Each group facilitator reported on the group’s discussion and recommendations, and, based on their presentations the following overlapping themes emerged:

* Authentication/Verification
* Recognition
* Trusted sources
* Data elements, including shared terminology, the diploma supplement model, information needed by credential evaluators, language, and purpose
* Recognition in reporting from issuing institution
* Communication protocols—permissions and accessibility
* Records management, archival, and retention policies, repository (much discussion of the variations in retention based on governmental mandates and individual agency practice)
* CE as a stakeholder group—more conversation on how we want to be represented and included
  + What we do with information (we manipulate it; we assess it; we create a product that has a specific purpose; we define it); this is different from just being a repository.
  + Recommend that GDN’s role is to champion and to promote benefits of CE. Identify where they can have the influential conversations. Connect dots—help gain commitment.
  + There was some debate regarding CE stakeholder’s role: varying opinions on whether we retrieve info and create info or whether we are a service organization that retains info over time as a convenience for client and for self (for research).
  + Debate about our place in driving mobility: we have a technical competency that helps mobility but we are not the ultimate stakeholders—it is students, it is the economies, it is the employer.
  + Timeliness of landscape at moment; need for action; awareness of CE as stakeholders
  + Recognition of diversity—and that CE need to be supported to what exists in their context; build awareness of differences
  + Huge benefits—international cooperation and great value; one of which is to help CE advance the mobility of individuals. There is money in multilateral consortiums/networks that promote international education. Connect dots. Bring awareness.
  + First need awareness of the benefits and value CE brings to international cooperation and mobility. Need to connect dots. Then need to seek funding or develop a business plan to support our work.
* Privacy—student’s right to keep their information for themselves versus CE confidentiality—we have information that we do not share; what would change if we began to share information across groups of stakeholders.
  + Access in terms of communication protocols—permissions and accessibility
  + Spirit of GDN—is that the student drives what is shared and with whom.
* Networks—the need for capacity building, outreach and expansion, tying to the GND theme of expanding engagement
* What is involvement of quality assurance
* Affordability—is there a fee for access, and who pays it? (Where does privacy fit into this?)
* Funding—much discussion regarding our role and differences between US and other countries in terms of where funding might come from

Based on the discussion and themes, the following recommendations were presented to the GDN, and whose implementation will be worked on going forward:

1. **Common lexicon:** not necessarily a shared lexicon but at a minimum a commitment to having a lexicon that is accessible and comprehensible.
2. **Language:** a need for documents in the original language (when not issued in English) with an accompanying English translation, and including some specific information having to do with the credential, the student, and the educational system.
3. **GDN:** recommendation that the GDN champion and promote the benefits of CE work and help to identify with what other groups credential evaluators can have influential conversations. Connect the dots and help gain commitment.
4. **Digitized record:** include institutional and programmatic recognition information; the content takes into account purpose.
5. **Trusted sources are fundamental**. We affirm the importance of determining trusted resources.
   1. Suggest that perhaps TAICEP can play a role in the articulation of best practices as to what needs to be in place to determine if an entity is a trusted source; provide tools but not vetting.
6. **Request to engage in outreach:** extending engagement particularly to underserved and underrepresented regions
7. **Create a global directory of institutions and organizations**

Finally, we identified the following next steps, which we need to further define, including creating deadlines:

* Explore best practice and CE needs for trusted sources (particularly third parties)
* Explore issues surrounding documentation retention and data ownership
* Explore desirability and feasibility of inclusion/addition of evaluation report to digital student data
* Develop shared terminology as a prelude to further discussions about CE needs in digital student data
* Expand representation and engagement— Expand conversation with other CE stakeholders through existing forums and networks to ensure recommendations to the GDN are representative

The working groups were:

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| **Group1: Authenticity/verification/recognition**  *Facilitator: Emily Tse*  Mariam Assefa  Lucie de Bruin  Erik Johansson  Baiba Ramina  Ranvir Singh  Cheng Weixing  Bas Wegewijs  Chen Wenjun |  | **Group 2: Data elements, including shared language and shared terminology**  *Facilitator: Beka Tavartkiladze*  Annetta Stroud  Michael Sessa  Janina Mincer-Daszkiewicz  Xiong Xing |
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| **Group 3: Communication protocols/data standards (around security and privacy)**  *Facilitator: Ken Warren*  Navin Vasudev  Geir Vangen  Rick Torres  Rolf Lofstad |  | **Group 4: Integration/communication of different models and creating a global network**  *Facilitator: Jim Kelly*  Andrea Bateman  Che Weimin  Adrienne Fricke  Simone Ravaioli |

Meg Wenger 5/13/17