

# International Transfer Credit Practices

*Prepared for BCCAT by Joanne Duklas, Duklas Cornerstone Consulting  
January 2019*



BCCAT

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BC COUNCIL ON ADMISSIONS & TRANSFER  
709 – 555 Seymour Street, Vancouver BC Canada V6B 3H6  
[bccat.ca](http://bccat.ca) | [bctransferguide.ca](http://bctransferguide.ca) | 604 412 7700 | [info@bccat.ca](mailto:info@bccat.ca)

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# International Transfer Credit Practices

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## *Executive Summary*

International assessment of academic documents by post-secondary institutions and other bodies represents a complex field guided by quality assurance frameworks, formal conventions and best practice. This research study sought to illuminate this complexity by examining current practices, constraints, perspectives, and possibilities for transfer and exchange assessment informed by a cross-Canada and international environmental scan. With funding provided by the British Columbia Council on Admissions and Transfer (BCCAT), research objectives included providing a literature review; exploring and showcasing exemplars across Canada and around the world that represent innovative, efficient, and scalable examples of promising practices; identifying a typology of assessment activities informed by a survey of institutions and qualitative interviews, with a particular focus on members of the BC Transfer System; providing member-informed issues and recommendations; and identifying potential next steps and areas for future research.

The report is structured into five sections, the first of which provides an overview of the project and the qualitative and quantitative research approaches. The second section presents the findings from the literature review informed by interviews with select experts in the field and website research of allied organizations. The third section showcases exemplars of helpful system-level collaborations, technology solutions, and partnerships, followed by the fourth section, which outlines thematic findings from the institutional web research, survey and qualitative interviews. Topics covered in this section include resources, policy approaches, fees practices, and assessment timing. A typology of practices emerged from the analysis, demonstrating the broad strokes of the process that institutions follow when assessing international documents for transfer and exchange equivalency. The final section contains a summary of issues and evidence-informed recommendations from the community for enhancing efficiencies, collaborations, and quality-assured best practice.

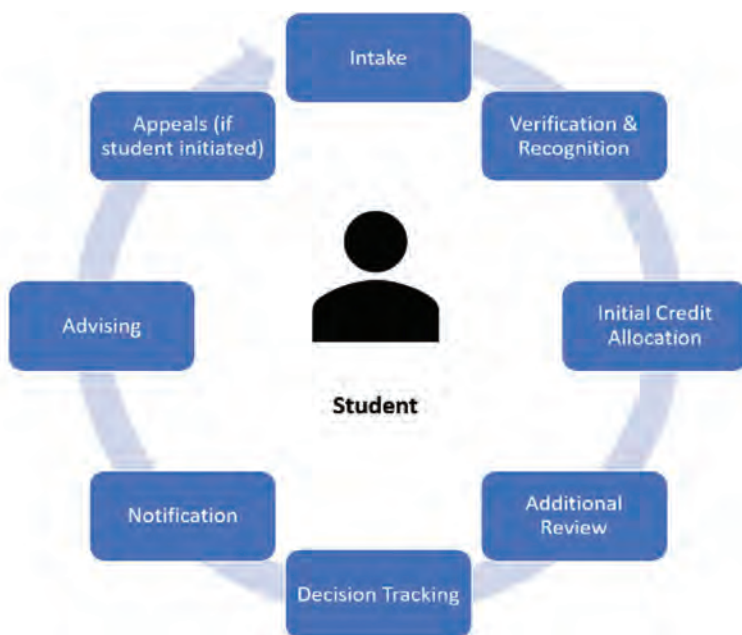
The research approach utilized several methods including literature and website reviews; a national, bilingual survey; interviews with staff at eight post-secondary institutions, six of which were from BC<sup>1</sup>; analyses of several publicly available international course equivalency systems for transfer and exchange; and interviews and participation in conferences and meetings with international associations active in the field. Ninety-five institutional participants responded to the survey on behalf of 81 primarily public institutions, resulting in a 43% public institutional response rate and an 82% completion rate (two private institutions within the BC Transfer System participated).

Select challenges emerged which affected the research. For example, institutional representatives interviewed for the project found it difficult to provide data on the volume of international documents processed for transfer and exchange assessment; the research therefore relied on proxy indicators that drew from Statistics Canada data for international student enrolments and from organizations such as the Canadian Bureau of International Education (CBIE) and the Organization for Economic Co-operation and Development (OECD) for student exchange volumes. BC provides an illustrative example of the volume and complexity. In BC, international enrolment grew over the period from 2004–2005 to 2015–2016 by 8% for universities and 6% for colleges (Statistics Canada, 2018). Most striking for BC colleges is the fact that five moved to university status in 2008 (Samson, 2018). Likely, assessment complexities also grew as most of these international students previously studied in China, India, South Korea, France, and the US, a list that matches the top source countries for international students enrolling in Canadian and BC colleges and universities as reported by Statistics Canada.<sup>2</sup>

It remained equally difficult for participants to identify the resources and costs expended to support international document assessment for transfer or exchange as institutions often integrate these tasks into existing support frameworks within broader portfolios. For example, the same faculty and staff supporting and evaluating domestic documents for transfer and exchange equivalency might also process and assess international documents. Ultimately, the findings from the survey provided the most concrete information regarding resources involved in the support of international document assessment for transfer and exchange.

The findings for transfer suggest that the Registrar's Office (RO) remains pivotal in policy and partnership development. The Admissions Office, often situated within the

**FIGURE 1: Typology of International Document Assessment Practices to Support Transfer and Exchange Credit**



<sup>1</sup> Institutions interviewed included Capilano University, the College of the Rockies, Thompson Rivers University, the University of British Columbia, the University of Victoria, Langara College, Humber College, and Ryerson University. Eighteen people, primarily from registrarial areas, participated in these interviews.

<sup>2</sup> This is based on an overall population pool of 171 publicly funded institutions.



RO, tends to support individual document evaluations, while faculty members within program areas conduct most of the equivalency assessments. At times, transfer credit units within the RO or separate international offices deliver some of the registrarial and admissions-related functions.

For exchange, often a separate, central international office provides advising and partnership support; however, faculty members still fulfill a pivotal role in course equivalency assessment, and the RO provides oversight of the student record and data collection in many instances.

The literature and website reviews, interviews and survey revealed a complex context within which international document assessment occurs. It represents a formal field of practice<sup>3</sup> and requires system-level supports and expertise that are not easily replicated within individual institutions, either in central registrarial areas or in specific academic disciplines. Nonetheless, the study revealed that larger institutions and those with long histories and large volumes of international student enrolments seem to have built this expertise within central units over time.

The research suggests most of the review processes of international documents rely on hand review of *individual* credentials and/or supporting information submitted by *individual* students and/or sent directly from other institutions in paper or PDF formats. Documents reviewed to support the transfer and exchange equivalency assessment processes tend to include academic transcripts, other academic credentials (e.g., European Diploma Supplements, diplomas), detailed course information (if available), and translations (where needed).

Institutional staff and faculty follow an eight-phased process to support the assessment of international documents, although advising tends to occur throughout (**Figure 1**). For exchanges, institutions typically resolve institutional recognition and possibly even initial course equivalency decisions when establishing partnerships; however, interview participants reported that students often return from exchanges having taken other courses. This results in their documents following the review process as outlined in **Figure 1**. Several of these different tasks also happen during the admissions process (e.g., intake, document verification, institutional recognition review, additional review for purposes of determining admission, decision notification to the student, advising, and, if necessary, appeals adjudication). The overlap exists as transfer and exchange credit assessment of international documents require institutions to follow similar steps; therefore, institutions reported coordinating processes across such activities. The report provides more detail on this overall typology, supported by **Appendix J**.

Institutions require students to submit detailed course syllabi to enable review and assessment of equivalencies, based on elements such as course content; learning outcomes or objectives; number of weeks of study and of contact hours per week; and type of course (e.g., lecture, laboratory, tutorial, seminar, studio work). Institutional representatives reported that students experience difficulties fulfilling these document requests; therefore, this represents a potential area for future study to identify alternative options.

*The research suggests most of the review processes of international documents rely on hand review of individual credentials and/or supporting information submitted by individual students and/or sent directly from other institutions in paper or PDF formats.*

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<sup>3</sup> The Cambridge Dictionary defines a "field" as "a particular branch of study" (Oxford University Press, 2018).

Examples of other reported issues include challenges with timeliness; limited or no access to necessary external resources (and challenges with related subscription fees); different equivalency review protocols followed even within the same institution; challenges with obtaining the necessary documents from students and establishing recognition *bona fides* of international institutions; and a lack of resources and expertise. Research participants urged the creation of provincial or national equivalency databases and training and supports for faculty and staff that recognize the complex needs and nature of the field.

Digitization and data exchange with trusted parties in other countries represent new and emerging areas of exploration that hold the promise of enhancing international document assessment practices for transfer and exchange. Related initiatives represent important focus areas for application centres and allied organizations such as BCCAT, EducationPlannerBC, the Association of Registrars of the Universities and Colleges of Canada (ARUCC), the Pan-Canadian Consortium on Admissions and Transfer (PCCAT), the Canadian Post-Secondary Electronic Standards Council User Group (CanPESC), and other bodies such as the international Groningen Declaration Network and the ENIC-NARIC Network, of which the Canadian Information Centre for International Credentials (CICIC) of the Councils of Ministers of Education, Canada (CMEC) is a member. As an illustrative example, survey respondents and those interviewed echoed support for BCCAT's efforts to extend the existing provincial equivalency database to include international equivalencies. Also, participants in the study expressed support for the ARUCC Groningen and Student Mobility Project which seeks to create a national student data exchange solution for Canada.

The report concludes by suggesting six potential next steps for consideration by the BC Transfer and Articulation Committee and BCCAT, some of which entail conducting additional research to refine further an understanding of relevant issues and opportunities for change.

1. Continue efforts to expand existing system-level equivalency and agreement database(s) to include international courses and agreements. To support these projects, consider additional exemplar research of system architecture designs and search capacities embedded in other database models that accommodate international courses.
2. Create new system-level resources, tools, and training for faculty and staff to expand their knowledge of the field of international document assessment. Consider assessing the value of existing resources and training to avoid unnecessary duplication.
3. Establish strategic partnerships to enhance international credential evaluation capacity within post-secondary institutions, across the province and nationally. Conduct research on existing credential evaluator service providers and consider partnership opportunities to enhance efficiencies and provide greater coherence and supports for internationally educated students.
4. Endorse and support national and international data exchange projects that hold the promise of establishing trusted connections to international institutions and organizations to facilitate connectivity and seamless and efficient student data exchange. Examples include the ARUCC Groningen and Student Mobility Project and the CanPESC GeoCodes Project, which seeks to corral information on international institutions from around the world.
5. Conduct further research of document expectations for course syllabi to address the challenges faced by internationally educated students, faculty and staff.

6. Explore alternative assessment approaches where possible (beyond relying on course syllabi) and where appropriate for establishing equivalencies that acknowledge *substantial difference* versus *substantial equivalence*. Consider embedding explicit references to the newly ratified Lisbon Recognition Convention and the supporting Canadian Quality Assurance Framework into local policy documents and public messaging.

Establishing course equivalency by looking for substantial equivalence requires highly detailed assessments of inputs, such as credits, weighting, and text used, with the intent of establishing maximum comparability in program content. Emphasizing substantial difference instead directs course assessors to focus on outcomes of learning, to look for “differences between the foreign qualification and the national qualification” that are sufficiently significant as to impede a student’s subsequent success in further study (ENIC-NARIC Networks, n.d.-a), and encourages the granting of credit recognition when such significant gaps are not found. The LRC and best practice guides encourage the adoption of quality assurance and access practices informed by concepts such as substantial difference and a focus on learning outcomes. These approaches test the reasonableness and efficacy of relying so heavily on inputs, as identified in course syllabi and other documents, in the equivalency assessment process across all programs. They also represent a potential area for further exploration: requiring substantial equivalence may be a practical reality for regulated professions; however, institutions have the opportunity to explore and consider adopting a substantial difference approach to principles-based credit transfer assessment in other fields.

This study contributes to the research on international document assessment practices for transfer and exchange credit in BC and across Canada. It achieves this by articulating the practices and perspectives of Canadian post-secondary institutions, including members of the BC Transfer System, and by identifying exemplars and available resources and tools. Significant previous research and efforts in BC to enhance transfer and the systems and supports available to institutions—research such as the provincial course equivalency system and best practice guides, led by groups such as BCCAT and its committees—set the stage for moving forward with recommendations identified through this research.

# Section One – The Research Project

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## Introduction

Assessing international documents for potential credit, whether as part of the admissions process or because of students participating in exchange opportunities outside of Canada, represents a complex field of practice. The research project sought to understand this context and the implications for post-secondary institutions, with a focus on members of the BC Transfer System and others across Canada.

Project objectives included identifying current practices, perspectives and issues, and promising exemplar approaches for transfer and exchange credit recognition, processing, and assessment of international documents. The research further sought to identify and showcase innovative practices worth replicating, ones that enhanced efficiencies and collaboration. The final project objectives included suggesting recommendations for next steps and future research at the institutional and system levels, with a focus on those that would result in scalable efficiencies, and system-wide sharing and collaboration.

The report is structured into five sections. Section One details the research approach, followed by Section Two which establishes the context for international transfer assessment evident from the literature reviews and website analyses of allied organizations. Section Three showcases exemplars that represent interesting and helpful collaborations, technology solutions, and partnerships. The fourth section contains the broader findings from the survey and qualitative interviews: topics examined in this section include resources, policy approaches, fees practices, assessment timing, and processes from which a typology is discernable. The latter outlines the discrete phases involved when assessing international documents for transfer and exchange equivalency. **Appendices B – K** contain additional findings to support the various thematic analyses. The final section contains a summary of issues and evidence-informed recommendations from the community for enhancing efficiencies.

## Background Rationale for Study

A previous research study led by the British Columbia Council on Admissions and Transfer (BCCAT) identified a need for further analysis of transfer credit assessment of international documents to identify current practice, scalable approaches, efficient collaboration opportunities, and areas for future research. Called *Transfer Credit Assessment: A Survey of Institutional Practices* (I.S. Educational Consulting Inc., 2015), the study examined overall transfer credit practices at BC member institutions and concluded that colleges tend to conduct the transfer credit assessment once applicants commit, and that larger BC institutions provide assessments during admissions and prior to registration; many participants in that study noted the value of early decisions for supporting higher applicant conversion (p. 7). Challenges noted include the high volume and the lower availability of staff and faculty during key decision periods. The author stressed the value of creating a province-wide database of “assessed non-BC courses” to improve information access and scalable and efficient processes (p. 7). The report concluded by suggesting “assessment of international transfer courses could serve as a focus for future research” (p. 7).

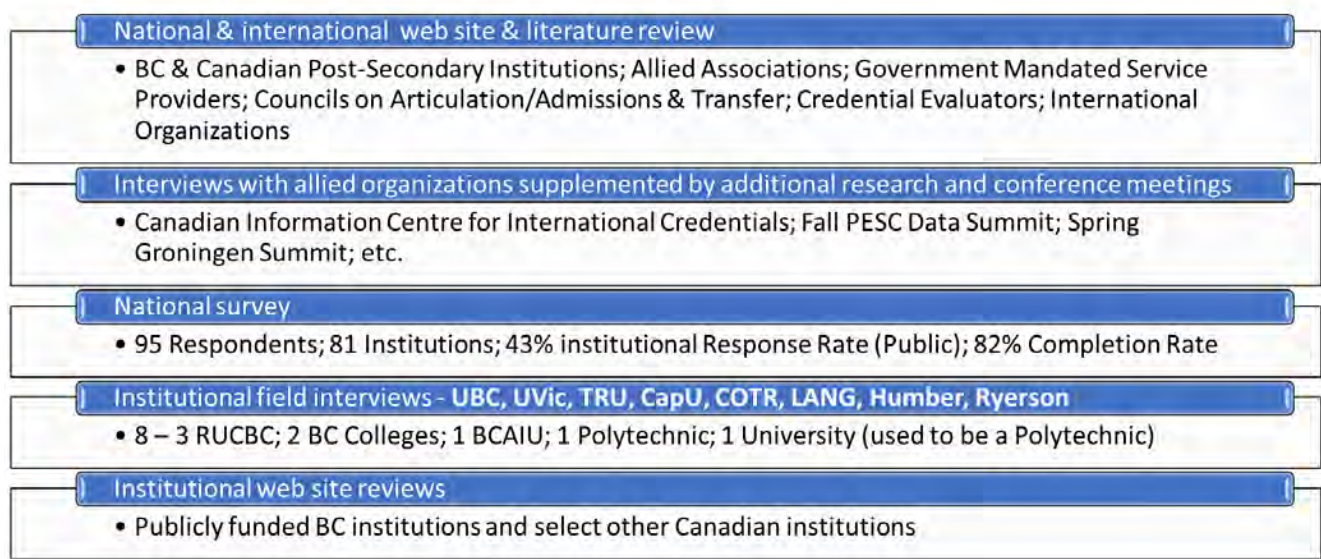
These findings and recommendations remain relevant for this research, given the increasing volume of international students studying in Canada and BC, the interest in enhancing the participation of Canadian educated students in out-bound study abroad,<sup>4</sup> and the focus on internationalization at institutions and within government, each of which is described further in Section Two of this report.

# Methodology

## Overview

A multi-faceted research approach supported the study: this included a literature review and environmental scan informed by qualitative interviews, and a review of websites and white papers of institutions and organizations involved in the field to establish the context for transfer and exchange credit assessment of international documents (Figure 2). The research also included distribution of a national, bilingual (French, English) survey, interviews with expert staff and faculty at six BC post-secondary institutions, two interviews with representatives at non-BC Canadian institutions with significant international enrolments, and two interviews with experts in allied organizations.

FIGURE 2: Overview of Research Approach



<sup>4</sup> In this report, ‘study abroad’ refers to those students who study at other institutions through formal or informal arrangements across all forms of international study experiences. ‘Exchange’ refers to formally articulated partnerships that facilitate students studying outside of Canada while studying within a Canadian post-secondary program. This research study focused on international transfer assessment resulting from participation in formal exchange opportunities.

## National, Bilingual Survey

The survey included both closed and open-ended questions to facilitate identification of current practices and perspectives. A five-point Likert scale supported opinion type questions. The survey remained in the field from November 2017 to early February 2018 (approximately two months).

Registrarial staff represented the primary target audience for the survey, since processing of international transfer credit, whether for transfer credit assessed in concert with the admissions process or for exchange credit assessment, often resides within or is supported by these individuals. Having noted this, a range of institutional participants develop policies and/or execute practices in the areas examined for this study; therefore, the messaging encouraged registrarial personnel both to complete and to distribute the survey to other faculty and staff. This approach was intended to ensure that different individuals involved in international transfer and exchange credit processes had an opportunity to provide information and perspective for the research.

The survey logic restricted role questions for both transfer and exchange assessment of international documents to registrarial personnel, to control responses for this line of questioning. Logic embedded throughout the survey enhanced the experience and reduced the time involved by triaging respondents to relevant questions depending on their responses.

**Exhibits A, B and C** provide an example of a bilingual covering email distributed with the survey, the supporting messaging that accompanied the survey, and the survey questions. In the last, sections highlighted in red illustrate the embedded logic. For this reason, the survey findings include 'n' counts for each area of analysis.

The survey contained eight sections:

1. Demographic details regarding institutional type and roles;
2. Transfer credit policies and practices at the respondent's institution that affect international document assessment;
3. Innovations at the respondent's institution or elsewhere regarding transfer credit policies and processes for international documents;
4. Exchange policies and practices at the respondent's institution that affect international document assessment;
5. Innovations at the respondent's institution or elsewhere regarding exchange policies and processes as these relate to assessing international documents and evaluating exchange credit;
6. Challenges affecting transfer credit and exchange credit policies and practices when evaluating international documents;
7. Ways to improve international document assessment policies and practices as these relate to transfer credit and exchange credit; and
8. Future areas of research suggested to improve international document assessment policies and practices as these relate to transfer and exchange credit.

Registrarial leadership received the survey via the listservs of the Association of Registrars of the Universities and Colleges of Canada (ARUCC), the BC Registrars' Association (BCRA), the Western Association of Registrars of the Universities and Colleges of Canada (WARUCC), the Ontario University Registrars' Associations (OURA), the Ontario College Committee of Registrars, Admissions, and Liaison Officers (CRALO), the Québec Bureau de coopération inter-universitaire (BCI), and the Atlantic Association of Registrars and Admissions Officers (AARAO). As all publicly funded institutions (except CEGEPs) and select private institutions maintain membership in these groups, using these listservs ensured a defined target audience for the survey. A reminder was distributed to the registrarial community through these listservs.

## Institutional Survey Respondent Profiles

Respondents from 81 institutions participated in the survey (**Table 6, Appendix A**);<sup>5</sup> of these, eight institutions were private and 73 were publicly funded. The survey experienced a 43% public institutional response rate based on an overall population pool of 171 publicly funded institutions.<sup>6</sup> Individual participation rates at each institution remain unavailable for two reasons: the registrarial contact may have distributed the survey to other people at their institution, and some participants reported collaborating on the responses and submitting one response online. The survey remained in the field from late November 2017 to early February 2018.

The distribution method for the national survey unintentionally contributed to a limiting of faculty and staff participation beyond registrarial areas. This is due to the use of national and regional registrarial listservs such as the Association of Registrars of the Universities and Colleges of Canada (ARUCC). While the messaging that accompanied the survey encouraged more than one response per institution and the inclusion of faculty and staff, most participants represented central registrarial areas.

PEI represented the region with the highest participation from publicly funded institutions, at a rate of 67% (i.e., 2 out of 3 institutions), followed by BC (65%, 17/26 institutions), Manitoba (63%, 5/8 institutions), and Ontario (50%, 23/46 institutions) (**Table 6, Appendix A**). Universities represented 73% of the institutional respondents followed by colleges (20%), institutes (1%), and four institutions classified as 'Other' (4%) (**Figure 13, Appendix A**).<sup>7</sup>

From a regional lens, the institutional participation included 22% from BC, 29% from institutions in other western provinces, 35% from Ontario and Québec institutions, and 11% from institutions in the eastern provinces (**Figure 14, Appendix A**).

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<sup>5</sup> Affiliate institutions (e.g., King's at Western University) were counted separately, given that individual responses were provided. 'N' counts were adjusted accordingly. Throughout this report, percentages are rounded; therefore, at times totals may not amount to 100%.

<sup>6</sup> The BC Transfer System includes 11 private institutions; two of these (Trinity Western University and Quest University) participated in the survey, representing an 18% response rate. Analysis of private schools participating from other jurisdictions proved challenging given the small counts and the different approaches to recognition across the country. Therefore, subsequent analyses combine the private and public results.

<sup>7</sup> Québec CEGEPs were not included in the outreach for this research given the different nature of CEGEP curriculum, which provides a one-year equivalent for each of high school and university level studies. Québec universities were included. Institutions were counted once unless an affiliate participated separately, in which instances, the affiliate was added to the overall population size. Duplicates were excluded for institutional level analyses unless otherwise stated.



## Individual Respondent Profiles

Ninety-five individual respondents participated in the survey, of which 14 represented additional responses within the same institution **(Table 6, Appendix A)**.<sup>8</sup> Seventy-eight respondents out of the original 95 fully finished the survey for a completion rate of 82%.

Staff from the Registrar's or Admissions Offices represented the largest percentage of respondents to the survey (85%) **(Table 7, Appendix A)**. The low response rate from other areas and people, particularly from international offices, exchange offices and faculty members, might be addressed in any future research by the use of alternative efforts aimed at reaching beyond registrarial staff.

Most of the respondents represented universities (75%) **(Figure 12, Appendix A)**. Twenty-five percent were from colleges, 12% from other types of institutions (e.g., faith-based institutions), and 1% from 'Institutes'. Twenty-three percent were in BC, 31% from prairie provinces, 38% from Ontario and Québec, and 11% from the eastern provinces **(Figure 13, Appendix A)**. Ontario (33%), British Columbia (22%), Alberta (16%), and Manitoba (11%) represented the largest number of individual respondents participating in the survey **(Table 6, Appendix A)**.

Further detail on number and type of respondents is found in **Appendix A**.

## Institutional Interviews

The research included eight institutional interviews: six in BC and two outside of BC. The six BC institutions included the University of British Columbia (UBC), the College of the Rockies (COTR), Langara College (LANG), the University of Victoria (UVic), Capilano University (CapU), and Thompson Rivers University (TRU). BCCAT and the researcher determined which institutions to interview with a goal to ensure the participants reflected the diversity within the province. This was achieved across several dimensions including sector association membership, regional locations, enrolment size (international), credentials awarded, and institutional type **(Figure 3; Appendix B)**. As examples, three institutions maintain membership in the Research University Council of BC (RUCBC), one in the BC Association of Institutes and Universities (BCAIU), and two in BC Colleges. One is located on Vancouver Island, three in Mainland/Southwest, and two in the Thompson-Okanagan-Kootenay regions.

The research included two institutions outside of BC with significant international student enrolments: Humber College, a polytechnic, and Ryerson University **(Appendix C)**. Humber College enrolls approximately 4,700 international applicants per year from 138 countries and currently partners with 75 international institutions (Humber College, 2017a). Ryerson enrolls approximately 1,235 international students from 146 countries per year and partners with 133 institutions in 133 countries (Ryerson University, 2018b). Ryerson also enrolls 264 international graduate students (Ryerson University, 2018a). In-bound exchange data were unavailable for either institution.

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<sup>8</sup> Capturing the population size for the individual responses proved impossible because information was not available regarding to whom the registrarial participants internally distributed the survey at each institution. For this reason, the analyses provide 'n' counts.

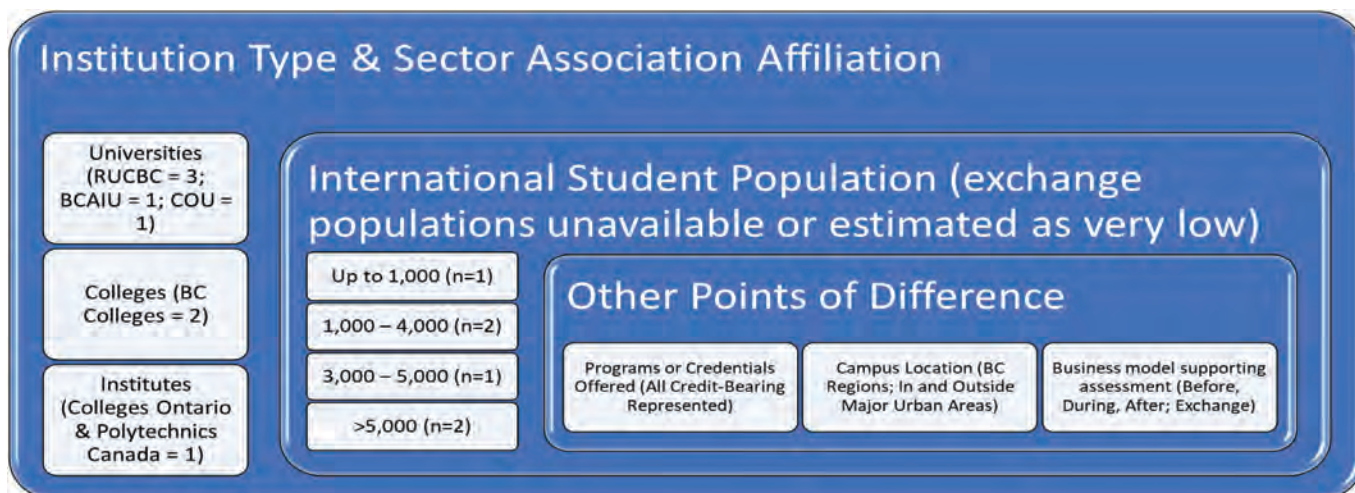


*Ninety-five individual respondents participated in the survey, of which 14 represented additional responses within the same institution.*

Eighteen people participated in the interviews, which were scheduled between late December 2017 and March 2018. Each one ran for approximately 1.5 hours. Most participants represented registrarial, transfer pathway, and admissions personnel. In addition to these staff, other participants included faculty and staff from deans' offices and from international and exchange offices. The institutional registrarial lead determined the interview participants, and was encouraged to include faculty and staff with expertise in transfer and exchange credit assessment of international documents.

An Interview Guide (**Exhibit D**) supported the process: it outlined the project scope, context, interview questions, and biography of the researcher. The Guide and the institution-specific responses to the survey were distributed to the institutional registrarial lead approximately one week in advance of the interview. The interview questions sought to elicit information about institutional context, practices and perspectives relevant to the project scope. The Guide included a request for additional statistics. This same request was made verbally and in writing.

**FIGURE 3:** Typology of Institutions Interviewed for the Study (n=8)



## Limitations and Considerations

The survey distribution approach relied on members of national and regional registrarial association listservs both to respond to the survey and to forward it to other relevant participants within each institution. This approach considered the central position of the registrarial areas and staff knowledge of the various policies, practices, and resources involved in transfer and exchange credit assessment of international documents. Given the anticipated variety of people involved at any one institution, the researcher deliberately did not prescribe the people to whom the survey should be sent but suggested that members of the following groups be invited to participate:

1. Registrar's Office and/or Admissions Office staff with expertise in transfer credit assessment of international documents for admissions and/or exchange; and
2. Staff or faculty in international admissions areas, exchange offices, or program areas involved in assessment of international documents, whether for transfer or exchange.

Despite this explicit messaging, most of the respondents ultimately represented registrarial areas. Other departments represented included select members from international offices, information systems, exchange offices, dean's offices, and provost areas.

The interviews followed a similar approach: the invitation went to registrars directly, with a request to include others who met the above criteria. Although at least one decanal representative participated in the interviews, very few faculty were involved. Future research would benefit from speaking directly to faculty members who assess course-specific equivalencies for international documents.

Institutional representatives experienced challenges providing specific data or estimates for international document assessment volume for exchange and transfer, although such data were requested as part of the interview process. Ultimately, local practices for data storage and tracking impeded this level of systematic data collection. To mitigate this, international enrolment and exchange participation data from Statistics Canada, the Canadian Bureau for International Education (CBIE) and other bodies were relied upon as proxy indicators.

Accessing information on resources allocated for assessment of international documents in the areas of transfer and exchange also proved challenging as institutions do not systematically track student documents, workflow, resources, or cost data to this level of specificity. Interview participants reported that transfer credit assessment of international documents during admissions was intimately and intricately interwoven with existing domestic transfer credit and admissions assessment practices. This situation further impeded focused resource analysis.

*The survey distribution approach relied on members of national and regional registrarial association listservs both to respond to the survey and to forward it to other relevant participants within each institution.*

## Definitions

**Exchange:** a formal agreement between two institutions where students study for defined periods of time (e.g., 4 months, 8 months) and typically involves students moving in both directions in relatively equal numbers. It is a highly formalized form of study abroad.

**Exchange credit:** credit granted by a home institution for studies completed at a partner institution where a formally articulated agreement exists (ARUCC PCCAT, 2015). Some institutions consider this under the category of typical transfer credit where the studies are acknowledged; however, the results do not count towards institutional residency requirements. Others consider this as a form of transfer credit called 'equivalent credit' as the awarded credit counts towards fulfilling residency requirements. Credit may be transcribed the same or differently depending on institutional practices.

**Non-substantial difference:** "an applicant ... seeking recognition for a purpose which is in line with the outcomes of his[/her] qualification (such as admission to a master's programme in history on the basis of a bachelor's degree in history) ... [If this alignment exists] no substantial differences exist between the qualification of the applicant and the required one. ... [T]here are bound to be differences in the contents of ...programmes (e.g., history) offered in two different countries with respect to the subjects covering the [topic]. However, these differences should not be considered as substantial, since the applicant has developed the competencies to easily extend his knowledge of [the topic] to any particular period or country" (ENIC-NARIC Networks, n.d.-a).

**Recognition:** "formal acknowledgement by a competent authority of the value of a foreign educational qualification with a view to [enabling] access to educational and/or employment activities" (Lisbon Recognition Convention 1997, p. 4).

**Recognition/assessment of Institutions or programs:** the "process for establishing the educational quality of a higher education institution or programme" (Council of Europe, 1997, p. 3).

**Recognition of foreign qualifications:** "the formal assessment of foreign qualifications or periods of study for the purpose of further studies, the right to carry an academic title or the right to enter the labour market" (enic-naric.net 2014–2016).

**Study Abroad credit:** credit granted for "any for-credit learning activity abroad including full-degree, exchange and Letter of Permission programs as well as experiential or service learning abroad for credit" (CBIE, 2018a). For-credit examples include community engaged learning, dual degrees, field school, independent study abroad, internships, Letters of Permission, service learning, student exchanges, study tour abroad, etc.

**Substantial difference:** "differences between the foreign qualification and the national qualification that are so significant, that they would most likely prevent the applicant from succeeding in the desired activity[,] such as further study, research activities or employment. The burden of proof of a substantial difference lies with the competent recognition authority of the host country and the accompanying guidelines are as follows:

*Transfer credit: 'the granting of credit for previously completed postsecondary level credit studies achieved in formal learning settings. The Transfer Credit awarded may apply to core courses or to elective courses. It can take the form of assigned credit, which is credit for a specific course, or unassigned credit, which is elective credit in a specific subject and year level. Transfer Credit may result in achieving a higher level of studies at a subsequent institution.'*

- not every difference should be considered to be “substantial”;
- the existence of a substantial difference entails no obligation to deny recognition to the foreign qualification;
- the difference should be substantial in relation to the function of the qualification and the purpose for which recognition is sought....

The ENIC and NARIC Networks promote flexible attitudes and [a] move away from rigid and legalistic interpretations. The interpretation of substantial differences is very much linked to the overall outcome of a qualification, programme and/or programme components, since this determines whether the applicant has been prepared sufficiently for the desired activity. A difference that is only related to input criteria (such as workload and structure of the programme) is not likely to have a direct effect on the abilities of the applicant, and should therefore not be considered automatically as a substantial difference” (ENIC-NARIC Networks, n.d.-a).

**Substantial equivalence:** “comparable in program content and educational experience[,] and it implies reasonable confidence that the graduates possess the academic competencies needed to begin professional practice at the entry level. The Accreditation Board recommends that Engineers Canada’s member engineering regulators treat graduates of programs evaluated as substantially equivalent like graduates of Canadian Engineering Accreditation Board-accredited programs for the period that substantial equivalence is in effect” (Canadian Engineering Accreditation Board, 2017, p. 42).

**Transfer credit:** “the granting of credit for previously completed postsecondary level credit studies achieved in formal learning settings. The Transfer Credit awarded may apply to core courses or to elective courses. It can take the form of assigned credit, which is credit for a specific course, or unassigned credit, which is elective credit in a specific subject and year level. Transfer Credit may result in achieving a higher level of studies at a subsequent institution. Assigning Transfer Credit helps students achieve educational goals by satisfying specific requirements for a credential, course prerequisites, and progression through a program; and/or by affecting a student’s enrolment priority (through the advanced access to upper level courses or levels in a program)” (ARUCC PCCAT, 2015).

# Section Two – Literature Review Findings

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## Overview

Internationalization efforts, growing student volumes, an emphasis on quality-assured practices, and technological advances inform the Canadian context for post-secondary level transfer and exchange assessment of international documents. Federal government international outreach priorities include education (Global Affairs Canada, 2018), with a focus on both international students transferring in through admissions and the need to enhance exchange partnerships to support study abroad. In a national survey of Canadian universities, Universities Canada (2014) found that 95% of the respondents were “deeply committed to internationalization” with 82% viewing it among the top five of overall institutional priorities (p. 4). International recruitment received considerable support, with 45% giving it top priority status and 70% placing it within their top five goals (pp. 4-5).

BC institutions, allied organizations, and governments continue to pursue internationalization research and coordination across several areas. These many efforts strategically position BC post-secondary institutions, allied organizations, and government bodies. From 2012 to 2016, the BC government implemented an internationalization strategy focused on creating a globally-oriented education system, ensuring “quality learning and life-long experiences” for students, and maximizing benefits for BC communities, families, and business (BC Ministry of Advanced Education, Skills and Training, 2012, p. 15). One goal included a desire to enhance international support services at post-secondary institutions through sharing best practices and improving infrastructure to extend capacities to support students (p. 26). The plan also included a commitment to expand the *BC Study Abroad Consortium*<sup>9</sup>, an initiative administered by the British Columbia Council for International Education (BC Study Abroad Consortium, 2018).<sup>10</sup> In addition to supporting this research and the 2015 study—and as a support to policy development efforts—BCCAT conducted a survey in 2014 targeting international students to better understand their experiences (Adamoski, 2015). BCCAT is also in discussions with several BC post-secondary institutions to import their international course equivalency decisions to the provincial Transfer Credit System; the results will be significant and include enhanced access to information for institutions (M. Winsemann, personal communications, April 2018).

As an example of system-level supports directly related to international document assessment, the British Columbia Institute of Technology (BCIT) offers the International Credential Evaluation Service (ICES), a government-mandated service supporting institutions, students, and other organizations. ICES “authenticates documents, conducts research based on well established methodologies, and then issues an evaluation report that provides a general recommendation of the comparability of education earned outside of Canada to the Canadian education system.”<sup>11</sup> It provides more comprehensive reports and other services as well.

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<sup>9</sup> For more information on the Consortium, visit <http://www.bcstudyabroad.ca/>

<sup>10</sup> Membership in this Consortium includes 25 BC public and private institutions (BC Study Abroad Consortium, 2018).

<sup>11</sup> <https://www.bcit.ca/ices/>

The broader research reveals that international document assessment represents a formal field of practice, shaped and informed by a focus on quality assurance and trust, and supported by formal conventions and best practices. This field requires institutions to develop expertise and supports that extend beyond program disciplinary knowledge when assessing equivalencies. Technological advances impacting the field present opportunities to create trusted and seamless connections across Canada and around the world. BC's work to date and these broader developments are the context for considering this report's findings from the literature and website reviews.

## Increasing Mobility

### International Enrolment Trends

Systematically collected and tabulated volume data for international documents assessed for transfer or exchange credit remain elusive; however, university and college international enrolment statistics serve as proxy indicators. Canadian post-secondary institutions experienced significant growth in international enrolments in the last dozen years: international students represented 6% of the total post-secondary enrolments in 2004–05, and 11% of the total post-secondary enrolments in 2015–16 (Statistics Canada, 2018). The volume of international students more than doubled during this same time, from 94,791 in 2004–2005 to 221,859 in 2015–16. Ontario, Québec, and British Columbia enrolled the highest number of international students across both universities and colleges as of 2015–16 (Figure 4). Universities experienced the largest growth of international students as a percentage of overall students: international students represented 5% of total students in 2004–05 and 8% of total students in 2015–16; at colleges, international students represented 1% of total enrolled students in 2004–05 and 3% of total enrolled students in 2015–16 (Statistics Canada, 2018). Ontario and British Columbia increased their share of enrolled international students in universities and colleges in each of 2004–05 to 2015–16 by 2% and 3% respectively; by comparison, other provinces either slightly increased, stayed the same or experienced declines over this same period (**Figure 5**).

British Columbia continues to enrol the highest proportion of international students in universities and colleges in comparison to any Canadian province (Statistics Canada, 2018). International enrolments at BC universities accounted for 11% (10,500) of the overall BC university student population in 2004–05, but accounted for 19% (34,206) of the overall BC university student population in 2015–16 (**Figure 6**). In 2004–05, BC colleges enrolled 5% international students (5,841) versus 11% (10,827) in 2015–16 as a proportion of the overall BC college enrolments (**Figure 7**).

Application and study permit volumes provide additional metrics to illustrate the increase. Immigration, Refugees and Citizenship Canada (IRCC) (2015) reported that the number of study permits grew from 239,899 in 2006 to 459,644 in 2015. BC's proportion of the national total study permits remained stable (30% in 2006 and 28% in 2015); however, actual volumes increased from 72,396 in 2006 to 129,720 in 2015. IRCC further reported that international student college applications increased by 20% in 2016, compared with a 6% jump reported for universities and other areas of education (ICEF Monitor, 2017).

Other studies demonstrate a similar picture for BC. Between 2008 and 2014, BC public post-secondary institutions reportedly experienced an 85% increase in the number of enrolled international students (Adamoski, 2015, p. 8).

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<sup>12</sup> Per Statistics Canada, the data included any student enrolled from September 30 to December 1; all others not enrolled during this period were excluded. The data also excluded apprenticeship programs..

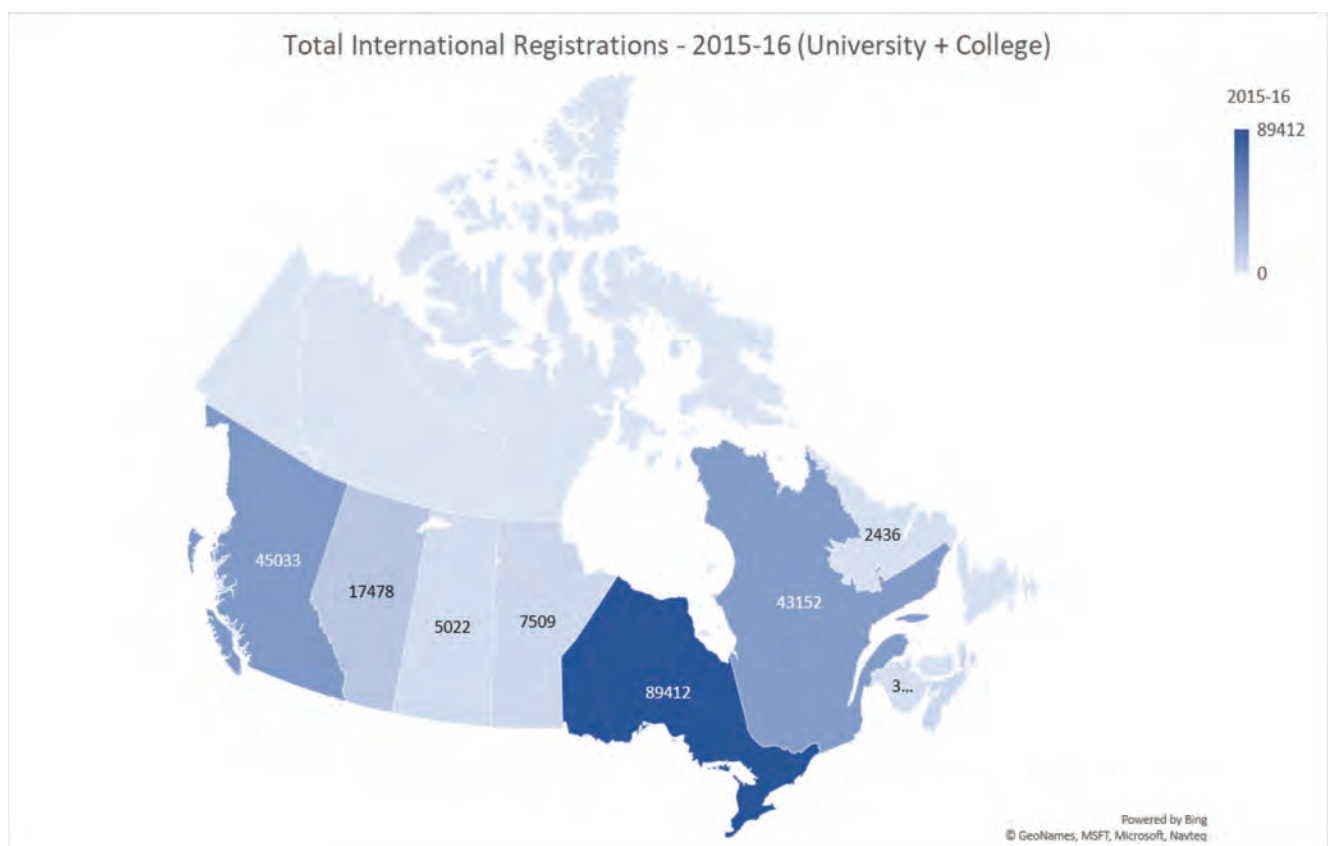
The BC Student Transitions Project (STP) found similar increases in the number of international students registered in BC public post-secondary institutions; according to this study, enrolments went from approximately 21,000 in 2008 to over 34,000 in 2013 (Heslop, 2014), making it one of the most popular destination provinces in Canada for international students.

While the numbers vary depending on the research body, the growth impacting post-secondary institutions represents an important consideration necessitating scalable approaches for international document assessment guided by best practice.

Canada primarily attracts international undergraduate students from China (28%), India (25%), South Korea (5%), France (4%), and the US (3%) (CBIE, 2018b). This aligns with Global Affairs Canada data (2018) which reported top source countries for international students as China (1<sup>st</sup>), India (2<sup>nd</sup>), and South Korea (3<sup>rd</sup>) respectively. The top five source countries in 2013 for BC international students matched the national picture to some extent as it included China, South Korea, India, Japan, and the US (Heslop, 2014). These statistics suggest significant diversity and subsequent complexity exist for Canadian post-secondary institutions when assessing international documents.

#### FIGURE 4: Total International Registrations

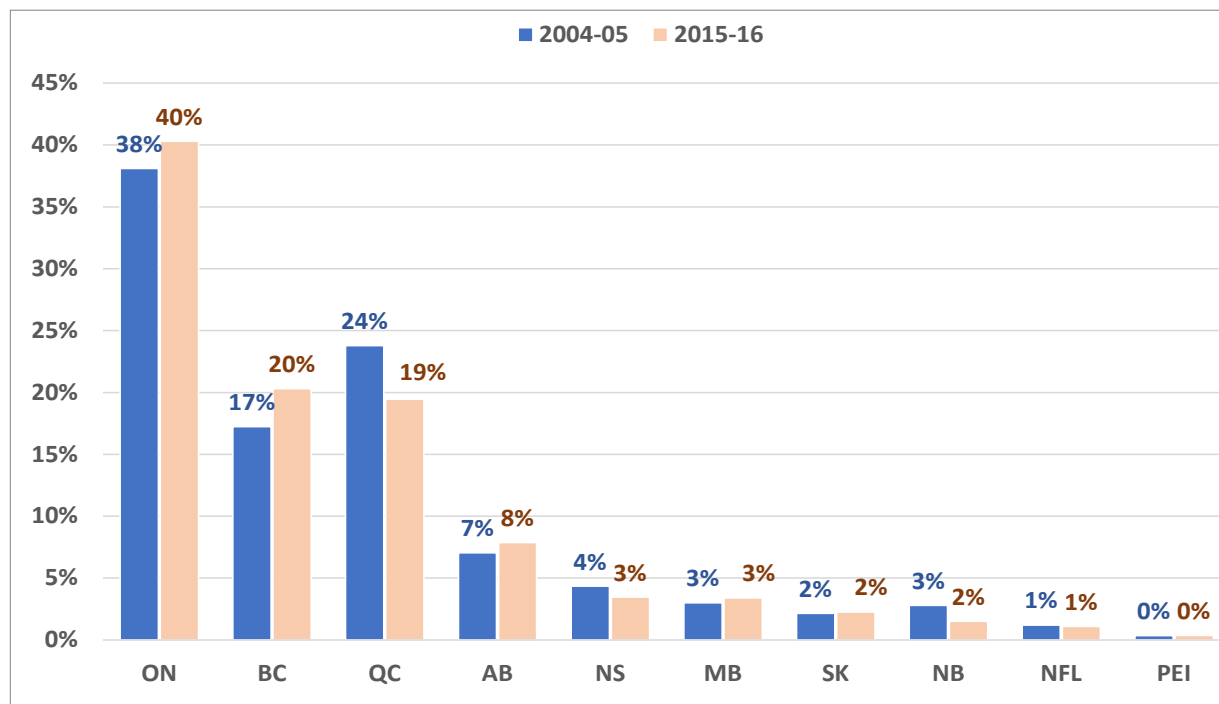
2015-16 (University + College; FT/PT; as of Fall Snapshot; n=221,859)



Source: Statistics Canada, March 21, 2018



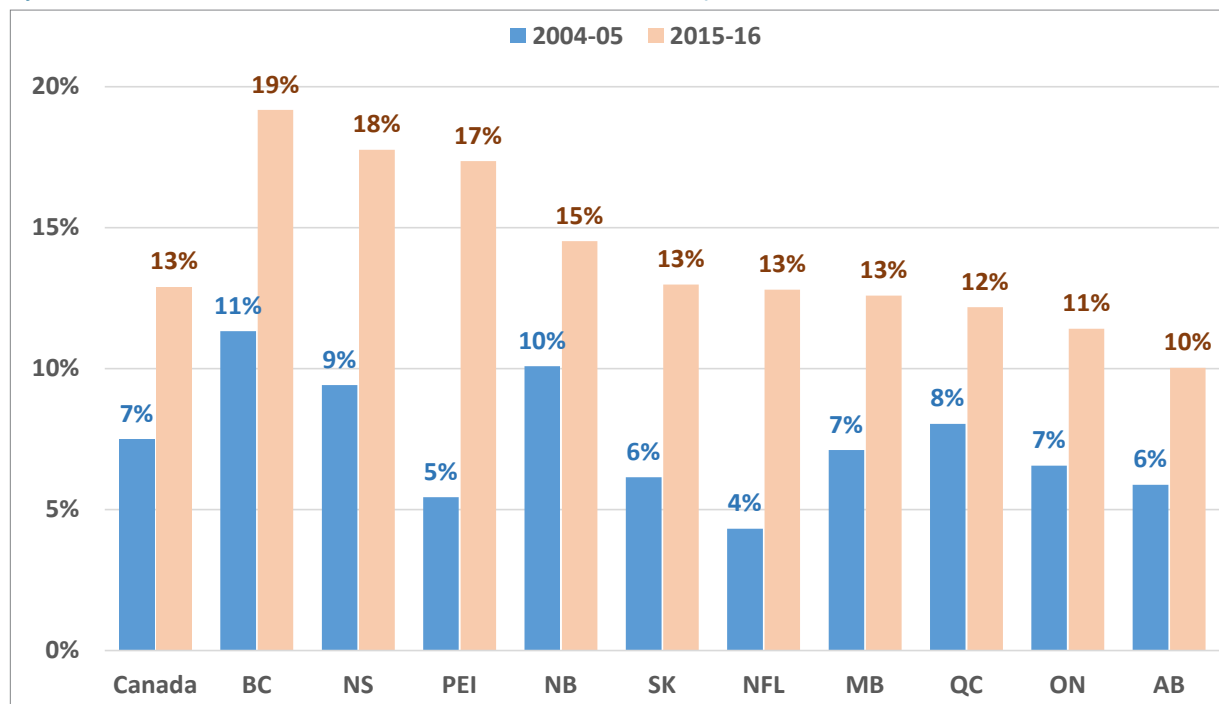
**FIGURE 5: Proportional Share of Overall International Enrolments in Canada by Province 2004-05 (n=94,791) versus 2015-16 (n=221,859) (FT/PT; University + College; as of Fall Snapshot)**



Source: Statistics Canada, 2018

\* Note: Canadian territories have marginal international enrolment and are not shown.

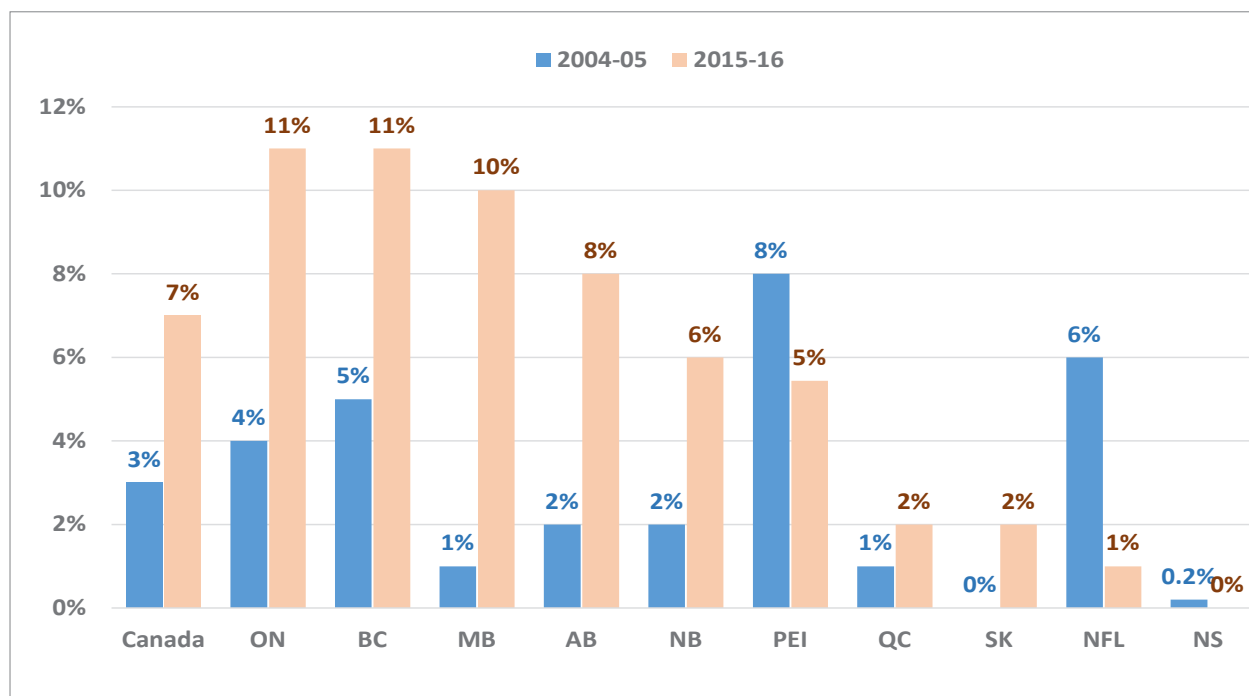
**FIGURE 6: International University Enrolments as a Percentage of Overall University Enrolments by Province 2004-05 versus 2015-16 (FT/PT; as of Fall Snapshot)**



Source: Statistics Canada, 2018



**FIGURE 7: International College Enrolments as a Percentage of Overall College Enrolments by Province 2004–05 versus 2015–16 (FT/PT; as of Fall Snapshot)**



Source: Statistics Canada, 2018

## Student Trends – Study Abroad

The lack of definitive study abroad data limits this study's ability to identify the volume of students pursuing international education and subsequently returning with international documents requiring assessment. Statistics Canada (2016b) reported close to 50,000 Canadian university students engaged in study abroad in 2012–13. The Canadian Bureau for International Education (CBIE) (2016) reported that only "2.3% of university students went abroad in the 2014–15 academic year," a finding based on a sampling of 30 institutions. The *Organization for Economic Cooperation and Development (OECD)* (2017) reported that 3.4% of Canadian students studied abroad in 2015. Top destination countries in 2015 included the United States (54.9%), the United Kingdom (12.9%), Australia (7.6%), and France (2.8%) (Statistics Canada, 2016). Nationally, Japan fell to 9<sup>th</sup>; however, it represents an important source country for exchange agreements (Global Affairs Canada, 2018).<sup>13</sup>

Universities Canada reported that 97% of universities offer their students an international academic experience (2014, p. 5); however, only "3.1% of full-time undergraduate students (or approximately 25,000 students) participated" in 2012–13 (p. 21). Of these, 2.6% pursued a for-credit experience (p. 21).<sup>14</sup> Colleges and Institutes Canada (2010) reported that 70% of its college members offered partnership agreements with international institutions; however, only

<sup>13</sup> Global Affairs reported 560 agreements were in place between Japanese and Canadian institutions (2018).

<sup>14</sup> Ninety-seven institutions responded to the Universities Canada survey, representing an 80% institutional response rate (Universities Canada, 2014).

1.1% of full-time Canadian college students participated (p. 4).<sup>15</sup> Obtaining credit for studies taken on exchange also appears to be an issue for students. Previous research by CBIE (2016) found that 60% of study abroad students received credit for their course work completed at partner institutions, and that receiving credit for such study remained one of their main concerns. The studies by Universities Canada and Colleges and Institutes Canada contained similar conclusions. Top barriers cited for university students studying abroad included cost and challenges accessing credit (Universities Canada, pp. 5, 21). For college students, Colleges and Institutes Canada (2016) reported that 80.6% cited financial barriers as the top issue, and 59.3% identified challenges obtaining credit for their international studies (p. 4).

In 2017, a consortium of leaders from institutions, corporations, and government launched a study group to examine global education and the opportunities for study abroad outside of Canada. This group tabled a report, *Global Education for Canadians: Equipping Young Canadians to Succeed at Home and Abroad*, which articulated several recommendations some of which remain relevant to this research (University of Ottawa & University of Toronto, 2017). The authors emphasized the importance of quality-assured practices supported by common standards and procedures to support students on their way, during, and upon returning from study abroad experiences; reducing barriers such as adopting “a more flexible approach to recognizing international learning experiences and granting credits for study [that] are related to students’ programs of study”[sic]; and further called upon post-secondary institutions to develop “academic pathways and credit and credential recognition mechanisms that enable students to engage in international learning opportunities.”<sup>16</sup>

The above report indicated that Canada lags behind other countries, with only 10% participating in study abroad programs compared with France (more than 30%), Germany (more than 25%), Australia (more than 15%), and the US (15%); the authors suggested Canada offers no coordinated strategy for study abroad (2017). The report supported other research suggesting participation impediments exist, including onerous credit transfer processes, incompatible grading systems, lack of official recognition, and inflexible programs at home institutions (University of Ottawa & University of Toronto, 2017).<sup>17</sup>

## Quality-Assured Best Practice: International Document Assessment as a Field of Practice

### Overview

International document assessment represents a highly complex field of practice that is deeply committed to quality assurance. This context impacts significantly on transfer and exchange credit assessment in Canada. Formal conventions such as the Lisbon Recognition Convention (LRC), quality assurance frameworks, foundational principles, expert registrarial staff, external service providers, and additional resources make up the tapestry of supports in place. The research indicates that Canadian registrarial offices rely on these broader external resources, tools, and quality-assured practices, in addition to their locally developed policies and guidelines, to assess international documents for admission, transfer, and exchange credit.

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<sup>15</sup> Of 146 colleges surveyed, 108 participated in this research (Colleges and Institutes Canada, 2010).

<sup>16</sup> <http://goglobalcanada.ca/#row--11>

<sup>17</sup> The authors further suggested specific opportunities to fix these challenges and shift the paradigm for internationalization by considering approaches such as using exchange opportunities to advance social mobility by providing support for low income, indigenous, and other students.

Several resources and research studies provide standards, recommendations, guidelines, and regionally specific memorandums of understanding to support quality-assured assessment practices and to encourage and promulgate trust building (CICIC, 2017; ENIC-NARIC Networks, n.d.-a; AACRAO, n.d.; Reilly, Mitchell & Eaton, n.d.; NAFSA, n.d.; Sumption, 2013; Cramer, 2017; Prospects, 2017; van Devender & Morawski, 2016).<sup>18</sup> Recently, the AACRAO conducted a survey which identified the variety of policy and procedural practices followed when determining recognition status of international institutions (AACRAO, 2018). The diversity demonstrates the degree to which local practices and policies influence assessment.

Often, the guidelines and training include providing best practice advice for handling documents, mitigating document fraud, assessing past educational studies, and identifying the recognition status of various international institutions; many also provide information about different education systems (CICIC, 2017; ICES, 2018; WES, 2017; ENIC-NARIC Networks, n.d.-a).<sup>19</sup> Various associations provide regionally specific, curated access to resources and accreditation bodies: examples include the ENIC-NARIC Network<sup>20</sup>, of which the CICIC<sup>21</sup> is a member, and The Association for International Credential Evaluation Professionals (TAICEP)<sup>22</sup>, which exists to support the profession of international credential evaluation. These supports inform credential evaluation efforts and provide the broader context of resources for faculty and staff who evaluate international documents.

## Lisbon Recognition Convention

The Lisbon Recognition Convention (LRC), of which Canada is a signatory, affects international document assessment across the full spectrum of activities from admissions through to transfer and exchange equivalency review. It represents an important defining policy document for Canadian post-secondary institutions. The LRC is an international agreement among 55 signatory states, developed by the Council of Europe, UNESCO, and member states of UNESCO from Europe and North America (CICIC, n.d.-a).<sup>23</sup> It requires that assessments of educational documents occur in accordance with quality-assured and auditable practices. Several countries around the world have adopted similar conventions to support student mobility and credential recognition (UNESCO, n.d.-a).<sup>24</sup>

In fall 2017, the Canadian government tabled the LRC in the House of Commons representing a final step towards final ratification (House of Commons of Canada, 2017). As it is now ratified, the LRC is legally binding (CICIC, n.d.-a).

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<sup>18</sup> For an example, see Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG). (2015). [http://www.enqa.eu/wp-content/uploads/2015/11/ESG\\_2015.pdf](http://www.enqa.eu/wp-content/uploads/2015/11/ESG_2015.pdf)

<sup>19</sup> For more information about ICES' services, see <https://www.icascanada.ca/home.aspx>

<sup>20</sup> See the following website, an initiative by UNESCO, the European Commission, and the Council of Europe, which is an international gateway to assist organizations and institutions with assessing international credentials: <http://www.enic-naric.net/index.aspx>

<sup>21</sup> <https://www.cicic.ca/>

<sup>22</sup> See the following TAICEP site for examples of resources and tools: <https://www.taicep.org/taiceporgwp/>

<sup>23</sup> <https://www.cicic.ca/1398/an-overview-of-the-lisbon-recognition-convention.canada>

<sup>24</sup> For a full list, see <https://en.unesco.org/themes/higher-education/recognition-qualifications/conventions-recommendations>. In 2013, UNESCO moved towards drafting a new Global Convention to bring all these regional conventions into a larger framework towards recognition and mobility across the six UNESCO regions; therefore, further enhancements are anticipated (UNESCO, n.d.b).

Of direct relevance to international credential assessment, the LRC requires that recognition requests meet the following standards:

- They must be assessed in a fair and timely fashion;
- They must be granted unless a substantial difference can be demonstrated, and as such, the burden of proof lies with the organization responsible for recognition of the credential and/or qualification, and not with the individual who wishes to access further studies, research, and/or employment; and
- Information about respective education systems must be distributed by competent authorities, through their national information centres, and distributed information should include quality-assurance practices; educational institutions; academic programs; and academic credentials.

CICIC fulfills the information dissemination role. Institutions and other organizations such as regulatory bodies and credential evaluation service providers support the other two components. The LRC embeds institutional autonomy into its Articles. As such, institutions are encouraged in good faith to adhere to the following principles:

- Adequate and clear information on assessment requirements must be provided;
- Transparent, coherent, and reliable procedures and assessment criteria must be used;
- Mutual recognition of academic credentials and qualifications must be extended unless substantial differences in requirements can be demonstrated; and
- Refusal of recognition must be justified (CICIC, n.d.-b).

The LRC does not demand that automatic admission and transfer credit awards occur; rather, assessment procedures must be ‘fair and non-discriminatory’ and consider substantial differences. Its potential ratification amplifies the timeliness of this BCCAT-funded research.

## Quality Assurance Framework

The *Pan-Canadian Quality Assurance Framework (QAF)*<sup>25</sup> represents a core component of Canada’s commitment to meeting its obligations towards the LRC (CICIC, n.d.-b). The QAF focuses on two levels of quality assurance while respecting and supporting institutional autonomy: a pan-Canadian focus on quality-assured international credential assessment “based on principles of collaboration, competency, integrity, feedback, and transparency” and an expectation of institutional quality assurance by those adhering to the QAF (p. 6). The QAF provides the *Pan-Canadian Code of Good Practice in the Assessment of International Academic Credentials*, which currently contains 41 principles and recommendations (pp. 11-16).<sup>26</sup>

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<sup>25</sup> [https://www.cicic.ca/1426/quality\\_assurance\\_framework.canada](https://www.cicic.ca/1426/quality_assurance_framework.canada)

<sup>26</sup> For details, see [https://www.cicic.ca/docs/2012/Quality\\_Assurance\\_Framework\\_EN.pdf](https://www.cicic.ca/docs/2012/Quality_Assurance_Framework_EN.pdf)

Under discussion currently is the addition of principles to support alternative pathways when documents cannot be verified (M. Ringuette, personal communications, March 2018). Once approved by the CICIC committees later in 2018–2019, the number of principles and recommendations will expand.

These principles represent best practice and emphasize non-discriminatory, conflict free assessment and appeals processes, consistent methodologies, decision consistency, and a regular review of practices. General procedures include ensuring assessment approaches situate the studies within the context of the originating education system; determining comparability to credentials offered at the destination institution; ensuring consistency of approach and outcomes from similar cases, supported by an inventory of prior decisions; and assessing documents based on information available at the time of assessment. The procedures encourage transparent messaging regarding decision timeframes and who or which areas/organizations will be accessing the student documents. Information requirements to support the applicant include communicating standardized procedural details consistently, clearly, and publicly—such as by providing instruction regarding the documents and document format required, and information on costs, timing, nature of appeals processes, scope of assessment, and what documentation will be returned to the student. The Code provides document fraud protocols and supports the power to rescind assessment decisions in cases of proven malfeasance. The assessment criteria for international credentials include the following:

- Evaluating entrance requirements, duration, structure, and contents of the original program;
- Identifying the original purpose of the credential in the home country;
- Explaining how it ladders to subsequent programs in the home country; and
- Confirming the recognition status of the home institution and/or program.

The principles do not discuss the finer details of the transfer processes; however, the above provides insights into overall good practice for admissions and transfer and exchange credit assessment of international documents. Given that many Canadian institutions already engage in quality assurances practices, institutions may wish to consider embedding explicit references to the newly ratified LRC and the supporting QAF into local policy documents and public messaging.

## System-Level Resources

### Best Practice Guides and Resources

CICIC provides an array of assessment tools to assist institutions and other organizations with adhering to the LRC. These include an assessor portal with training materials supported by an active listserv where institutional credential assessment practitioners routinely share information about international institutions, recognition of documents and programs, and practices. The portal offers step-by-step assessment guides, a competency profile for academic credential evaluators, a terminology guide offered in both French and English, and webinars and other resources to support continued professional development.

CICIC (2017) also provides best practice guides including the aforementioned QAF and the recently launched *Assessing Qualifications of Refugees Best Practices and Guidelines Final Report*. The latter document offers several recommendations to guide best practice for the reviews of previous international educational experiences of applicants unable to provide official documents for admissions and transfer. It further encourages use of the following:

- Competency-based assessments such as interviews, paper or practice-based examinations for licensure, challenge exams, and/or portfolio assessment;

- Flexible processes such as prior learning assessments in cases where documentation is unavailable (p. 26); and
- Transparent processes supported by coherent communications (p. 27).

Several other Canadian and international organizations offer similar best practice guidance to support international credential assessment for refugees, with much of it focusing primarily on admissions (World Education News & Reviews, 2016; Engineers Canada, n.d.; ICES, 2000; ENIC-NARIC Networks, n.d.-b).

As part of its role with the LRC, CICIC maintains membership in the collaborative ENIC-NARIC Networks (n.d.-b).<sup>27</sup> The ENIC-NARIC website<sup>28</sup> provides a comprehensive online gateway with links to resources and education systems around the world. Examples of resources available through the ENIC-NARIC gateway include links to various countries' education systems via reputable bodies such as CICIC, region-specific quality assurance information, lists of recognized post-secondary institutions, refugee qualifications recognition information, and links to national education bodies, education systems, qualifications frameworks, and policies for recognition of qualifications. These resources support transfer and exchange credit assessment of international documents.

The research, survey and interviews revealed that Canadian institutions and their counterparts in other countries use several national and international resources to support assessment of international documents for admissions and transfer and exchange credit evaluations (**Appendix D**). Some of these services are free; others provide both free and subscription-based services (ranging from \$5 for each download of country-specific summaries through to more than \$1,500 per year in annual subscription fees).

Several institutions provide online credential and document verification services (e.g., Tsinghua University in China, King Saud University in Saudi Arabia, Universidade Federal do Pará in Brazil) (**Appendix E**). Select institutions also provide details on country-specific requirements and grading equivalencies (e.g., University of Guelph in Canada and Wageningen University in the Netherlands). Several government-sanctioned organizations, such as the Chinese Higher Education Student Information and Career Centre (CHESICC) and the Norwegian Diploma Registry (**Appendix F**), support credential verification. Typically (but not always), these organizations are government supported and provide online verification of student credentials and accreditation information for institutions within their home jurisdiction. In addition, several national and international associations exist that support best practice for credential evaluators (**Appendix G**). These associations and organizations seek to ensure their members follow quality-assured credential evaluation practices when dealing with international documents.

Research indicates that innovative supports are emerging for students unable to provide detailed documentation. For example, the Council of Europe recently developed the *European Qualifications Passport for Refugees Project* (Council of Europe, 2018).<sup>29</sup> The Passport is:

a document providing an assessment of the higher education qualifications based on available documentation and a structured interview. It also presents information on the applicant's work experience and language proficiency. The document provides reliable information for integration and progression towards employment and admission to further studies (2018).

Credential evaluation experts from across Europe review evidence of individual student achievements as a support to

<sup>27</sup> The ENIC focuses on academic recognition and mobility for the nations that are part of the LRC and the NARIC focuses on improving the recognition of credentials; its membership includes the EU countries, the European economic countries, and Turkey.

<sup>28</sup> [enic-naric.net](http://enic-naric.net)

<sup>29</sup> <https://www.coe.int/en/web/education/recognition-of-refugees-qualifications>

*The research, survey and interviews revealed that Canadian institutions and their counterparts in other countries use several national and international resources to support assessment of international documents for admissions and transfer and exchange credit evaluations. Some of these services are free; others provide both free and subscription-based services.*

the Passport. The goal is to provide refugees with a document that validates their past studies in situations where no official credentials remain available. Plans include digitizing this Passport to support student mobility (de Leeuw & Skjerven, 2017). The Passport is a very new initiative: in future, Canadian institutions can expect to be presented with Passports by students requesting both admission and transfer credit for previous international studies.

## External Credential Evaluation Service Providers

Using external service providers with expertise in international credential evaluation represents another approach followed by institutions in BC and elsewhere to ensure scalable, quality-assured assessment of international documents. While usually the focus is on admissions, these organizations also serve components of the transfer credit assessment process (e.g., validating credentials and institutions, providing equivalency information for credentials, grading systems and conversions, and conducting course-by-course evaluations). **Figure 8** details survey respondents' feedback on the supports provided by these organizations to the respondents' post-secondary institutions. The percentages in brackets result from the survey findings. For example, 4% of the survey respondents reported relying on an external service provider to identify program level equivalencies.

In Canada, six external service providers maintain membership in the Alliance of Credential Evaluation Services of Canada (ACESC) (CICIC, n.d.-a).<sup>30</sup> These include the Comparative Education Service at the University of Toronto,<sup>31</sup> the International Credential Assessment Service of Canada,<sup>32</sup> the International Qualifications Assessment Service in Alberta (IQAS),<sup>33</sup> the International Credential Evaluation Service at BCIT (ICES),<sup>34</sup> the Ministère de l'Immigration, de la Diversité et de l'Inclusion du Québec,<sup>35</sup> and the WES-Canada.<sup>36</sup> The Alliance emphasizes quality assurance and excellence, establishes the standards for ongoing review, and requires that credential evaluation organizations adhere to standards to access and maintain membership. According to its membership principles, these include the following:

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<sup>30</sup> <http://canalliance.org/index.en.stm>

<sup>31</sup> <https://learn.utoronto.ca/international-professionals/comparative-education-service-ces>

<sup>32</sup> <https://www.icascanada.ca/>

<sup>33</sup> <https://www.alberta.ca/iqas-overview.aspx>

<sup>34</sup> <https://www.bcit.ca/ices/>

<sup>35</sup> <http://www.immigration-quebec.gouv.qc.ca/en/working-quebec/comparative-evaluation/index.html>

<sup>36</sup> <https://www.wes.org/ca/>

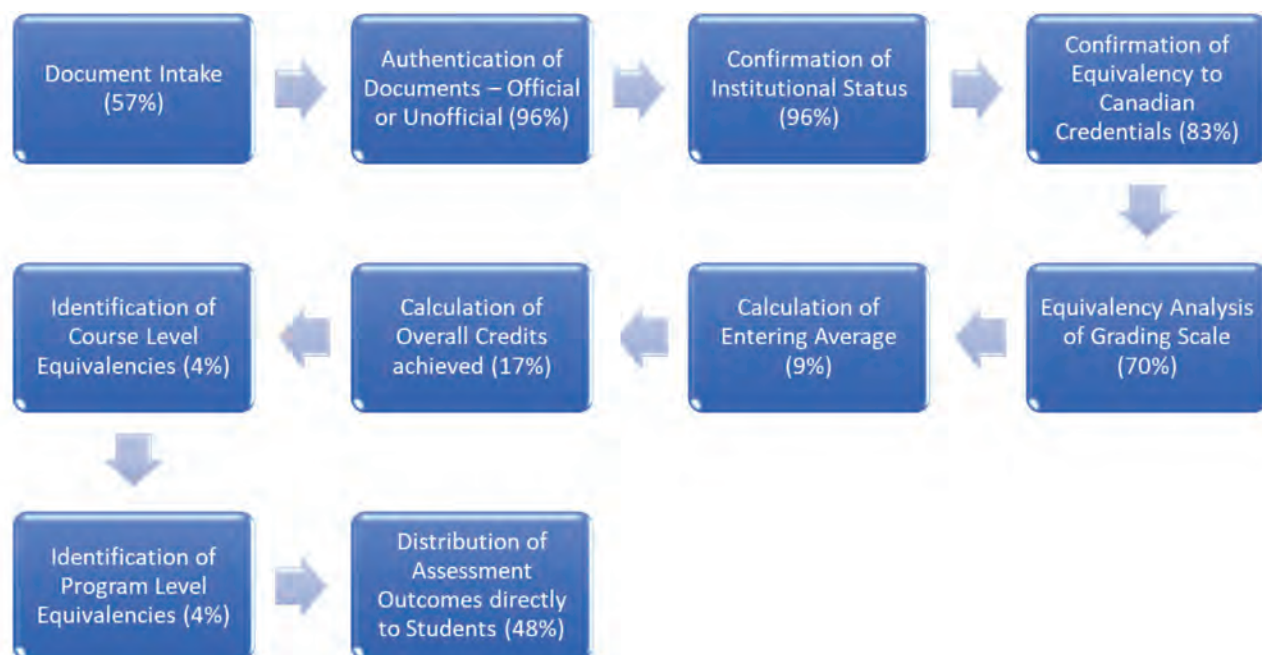


- demonstrating compliance with the *Pan-Canadian Quality Assurance Framework for the Assessment of International Academic Credentials* (QAF) and the *Pan-Canadian Code of Good Practice in the Assessment of International Academic Credentials*;<sup>37</sup>
- providing service to a broad range of clients including beyond one type of institution or organization (e.g., supporting only universities);
- supporting the range of assessments including for employment and all levels and types of education;
- complying with these expectations for at least a year; and, conducting 250 assessments during that time (2003–2012).

Membership also requires each service organization satisfy at least one of the following: be part of a provincial or territorial authority, be mandated by the same bodies to provide the services, or provide proof their services are used by at least two public institutions within the province or territory of operation.

As an illustration of the supports provided to the transfer and exchange credit assessment processes, ICES and WES offer different types of reports, which contain varying levels of information. For example, WES offers a “Document-by-Document Report” and a “Comprehensive Course-by-Course Report” (WES, 2018). The first one validates the Canadian equivalency of the international credentials provided. The second includes information on whether WES obtained the student documents directly from the home institution (important for mitigating document fraud); the country and institution of origin; the year the credential was awarded (if applicable); the recognition status of the institution; the admission credential required for entry to a program; the length of the previous program and the specialization;

**FIGURE 8: Functions Supported by Select External Service Providers**



<sup>37</sup> [https://www.cicic.ca/docs/2012/Quality\\_Assurance\\_Framework\\_EN.pdf](https://www.cicic.ca/docs/2012/Quality_Assurance_Framework_EN.pdf)



*These situations often require students to provide evidence of substantial equivalence as opposed to substantial difference to ensure specific competencies are met when seeking transfer equivalencies. The emphasis on substantial equivalence stands in contrast to a focus in conventions on substantial difference.*

the equivalent credential in the receiving region; a course-by-course equivalency analysis; and a grade conversion (WES, 2018).<sup>38</sup> These represent critical components to the transfer and exchange credit assessment process. ICES offers similar detailed reports.<sup>39</sup> While further research would be helpful to compare these various reports, the additional information they provide holds the potential of enhancing the transfer and exchange credit assessment processes of international documents.

## Assessing International Documents for Programs Tied to Regulated Professions

Select publicly available resources address equivalency assessments required to access heavily regulated fields or provide advice to facilitate transition into workplace settings (Engineers Canada, 2017; Conseil interprofessionnel du Québec, 2006; Monster.ca, n.d.). While access to employment opportunities sits outside the scope of this research, the capacity to evaluate international documents for equivalencies affects those post-secondary programs that are tightly tied to a regulated profession or to the workplace. These situations often require students to provide evidence of substantial equivalence as opposed to substantial difference to ensure specific competencies are met when seeking transfer equivalencies. The emphasis on substantial equivalence stands in contrast to a focus in conventions on substantial difference. As a result, assessment methods of regulatory bodies tend to be more involved and focused on both inputs (e.g., course syllabi and credit weighting) and outputs (e.g., grades and/or learning outcomes achieved). These might include requiring candidates to complete occupation-specific challenge exams, resubmit credentials for more involved additional review by an outside professional body, participate in interviews, and/or engage in further study at post-secondary institutions or with other providers (BC Industry Trade Authority, 2018; Engineers Canada, 2017; Conseil interprofessionnel du Québec, 2006).

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<sup>38</sup> For an example of a comprehensive course-by-course evaluation report provided by WES, see <https://www.wes.org/ca/partners/wes-evaluation-reports/>

<sup>39</sup> <https://www.bcit.ca/ices/general/reports.shtml>

*Engineers Canada's approach to developing agreements with accrediting bodies and institutions in other countries represents one model for coordinating efforts at a higher level to demystify the equivalency assessment process. This partnership model appears to be an interesting and effective practice to facilitate scalable equivalency assessment.*

Engineers Canada—like its counterparts in other countries—maintains a list of specific programs at international institutions that have been evaluated and subsequently determined to meet the criteria for substantial equivalency (pp. 43-44). In addition, it has established ‘international mutual recognition agreements’ with other organizations such as the US-based Engineering Accreditation Commission of ABET<sup>40</sup> and la Commission des Titres d’Ingénieur in France (p. 48) to facilitate credential recognition processes.<sup>41</sup> It is a signatory member of the Washington Accord, which recognizes engineering graduates from institutional programs accredited by the Canadian Engineering Accreditation Board, Engineers Australia, Engineers Ireland, The Institution of Professional Engineers New Zealand, the UK Engineering Council, and the aforementioned US organization (pp. 45-46). Since the Accord’s inception, additional associations have been added, several of which have been formally ratified by Engineers Canada (pp. 46-47)<sup>42</sup>. Engineers Canada (2017) embeds explicit direction and detailed examples in its accreditation criteria and procedures to guide equivalency evaluations.

Engineers Canada’s approach to developing agreements with accrediting bodies and institutions in other countries represents one model for coordinating efforts at a higher level to demystify the equivalency assessment process. This partnership model appears to be an interesting and effective practice to facilitate scalable equivalency assessment.

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<sup>40</sup> <http://www.abet.org/about-abet/governance/accreditation-commissions/engineering-accreditation-commission/>

<sup>41</sup> As of October 2017, the date of publication of the accrediting body’s procedures, the mutual recognition agreement with France was not implemented in all provinces in Canada.

<sup>42</sup> For details on specific countries added, refer to <https://engineerscanada.ca/sites/default/files/accreditation-criteria-procedures-2017.pdf>

# Section Three – Innovative Partnerships, Collaborations and Practices

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## Overview

Another objective of the research included identifying innovative, efficient and promising practices for transfer and exchange credit assessment of international documents. The partnership between the Ontario Universities' Application Centre (OUAC) and the World Education Services (WES) represents an interesting approach for supporting international document evaluation. The various national and international collaborations focused on enhancing transfer, such as those led by the Pan-Canadian Consortium on Admissions and Transfer (PCCAT) and the Association of Registrars of the Universities and Colleges of Canada (ARUCC), also deserve mention as they hold the promise of enhancing connectivity to support international document exchange. Finally, several technology and data exchange examples exist which improve the transfer and exchange credit assessment processes.

## Provincial, National, and International Collaborations

Existing collaborations at the provincial, national, and international levels represent best-in-class examples of initiatives that hold the promise of enhancing or creating scalable supports for transfer and exchange assessment of student documents. In 2014, PCCAT established a Canada-wide Memorandum of Understanding (MOU) between the existing Councils on Articulation/Admissions and Transfer, which was expanded in June 2017 to include all seven of the councils across the country (June 8, 2017). One of its stated goals relevant to this research includes establishing a Canada-wide, shared database to help students searching for course equivalencies at member institutions. BCCAT's plans to extend its long-standing equivalency database to support international course equivalency decisions represents one of the first Canadian forays into this area by a central allied organization (M. Winsemann, personal communications, April 2018). The systems enhancements to the transfer system of the Alberta Council on Admissions and Transfer (ACAT), which involves creating a database of domestic partnership agreements and course equivalency decision outcomes, represents another example where opportunities may emerge to support transfer and exchange assessment of international documents (Johns, Lyseng & Dohei, 2018).

International collaborative networks and trusted student data exchange models continue to evolve to support electronic data exchange of student data and subsequent transfer (**Table 1**). Internationally, the Groningen Declaration Network Foundation (GDN) leads many of these conversations.<sup>43</sup> Begun in the Netherlands in 2012, it focuses on bringing together the leaders in the field of electronic data exchange and strategically moving the digital mobility of student data into the broader student mobility conversations. Currently, 81 governments, corporations, not-for-profit organizations and associations, institutions, and credential evaluation service providers are signatories of the GDN principles (H. de Leeuw, personal communications, April 2018).<sup>44</sup>

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<sup>43</sup> <http://www.groningendeclaration.org/>

<sup>44</sup> For information on the GDN Ethical Principles: <https://www.groningendeclaration.org/statement-of-ethical-principles-2/>

Related to the GDN, other national collaborations exist which focus on improving the data exchange infrastructure within Canada and internationally. All of these initiatives will serve the transfer and exchange assessment of international documents. ARUCC is leading an initiative to create a national data exchange solution called the *ARUCC Groningen and Student Mobility Project*.<sup>45</sup> Its partners in this project include PCCAT, the Canadian University Council of Chief Information Officers (CUCCIO), and the Canadian Post-Secondary Electronic Standards Council User Group (CanPESC). The goal is to create a national data exchange solution for Canada that facilitates the exchange of student data across provincial and territorial boundaries and internationally through connections with trusted parties representing other countries. Twenty-three BC post-secondary institutions are members of ARUCC which unanimously endorsed this project at the June 2018 biennial conference (ARUCC, 2018b). BCCAT, BC Colleges, the BC Association of Institutes and Universities (BCAIU), and the BC Senior Academic Administrators' Forum, along with individual institutions such as Capilano University and the University of British Columbia, have formally endorsed this project.<sup>46</sup> Additionally, BCCAT supported a research study led by ARUCC and conducted in partnership with the University of Victoria, on examining the data exchange capacity of the BC Transfer System post-secondary institutions.

## Scalable Technology Solutions

Advances in technology are enabling changes within the field of international document assessment, and these changes will in turn support scalable practices. While the various national and international best practice guides include principles of decision consistency and substantial difference, the concepts of digitized student data and data exchange between trusted sources, and of the use of verifiable electronic peer-to-peer methods for validating previous studies, institutions, and equivalencies, represent new and growing areas of focus (de Leeuw & Skjerven, 2017). Examples of innovations exist that are improving document assessment, such as the digitization and electronic exchange of credentials or grades data;<sup>47</sup> the inclusion of links to course information in digitized transcripts; the digital exchange of or access to student e-portfolios or other artifacts of student work (Medium, 2017; University of Texas, 2018);<sup>48</sup> and the creation of online searchable databases of recognized institutions or previous course equivalency decisions (Duklas & Bridge, 2017). Companion research, standards, guidelines, and collaborations are emerging that bridge the divide between hand review of paper documents and data exchange (Chamula, 2017; Grech, 2017; European Commission, 2018; ARUCC 2018a). Organizations such as the Groningen Declaration Network Foundation,<sup>49</sup> ENIC-NARIC, DigiRec Project (2018), and the European Commission are creating international communities of practice to support these digitization conversations.

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<sup>45</sup> <http://arucc.ca/en/resources/task-force-groningen.html> ARUCC became a signatory to the international Groningen Declaration in 2015.

<sup>46</sup> <http://arucc.ca/en/partners-and-endorsements.html>

<sup>47</sup> Canada currently has ten data exchange hubs/application centres that exchange student transcripts between institutions and regions; internationally, My eEquals in Australia and New Zealand, the National Student Clearinghouse, and EMREX in Europe provide examples of organizations or networks that are currently exchanging or providing access to student credentials, grades, transcripts, and/or course information, including course equivalencies (ARUCC, 2018a).

<sup>48</sup> The University of Texas is leading an initiative called "ChainScript" which involves creating a lifelong, cross-institutional portfolio for students to showcase the verified artifacts of their learning experience within e-portfolios using blockchain technology. The University's goal includes creating a system that contains a learner's record of achievements across multiple institutions and experiences and "credits, competencies, micro-certificates, degrees and other records of achievement" (University of Texas, 2018). UT system partners with tech industry leader to develop next-generation learning platform. Austin, Texas: University of Texas. Retrieved from <https://www.utsystem.edu/news/2016/09/27/ut-system-partners-tech-industry-leader-develop-next-generation-learning-platform>.

<sup>49</sup> <https://www.groningendeclaration.org/>

**TABLE 1: Sample List of International Student Credential Data Repositories/Verification Services**

Region	Organization	URL
Australia and New Zealand	My eQuals	<a href="https://www.myequals.edu.au/">https://www.myequals.edu.au/</a>
Belgium	LED	<a href="http://leerenervaringsbewijzendatabank.be/">http://leerenervaringsbewijzendatabank.be/</a>
China	CHESICC	<p><a href="http://www.chsi.com.cn/en/aboutus/chsi.jsp">http://www.chsi.com.cn/en/aboutus/chsi.jsp</a></p> <p>Nationwide database that covers all MOE-recognized academic institutions and all post-secondary level students. By the early 2016, there were over 1 billion records registered in the database, which include qualification certificates, enrollment status, Gaokao results, student photos, etc. [Retrieved on January 18, 2018 from <a href="http://www.chsi.com.cn/en/aboutus/database.jsp">http://www.chsi.com.cn/en/aboutus/database.jsp</a>]</p> <ul style="list-style-type: none"> <li>• CHESICC provides verification service of higher education qualification certificates, student records, college transcripts, high school qualifications, Gaokao (National College Entrance Exam) scores, etc.</li> </ul>
Estonia	EESTi	<a href="https://www.eesti.ee/eng/services/citizen/haridus_ja_teadus/opilase_loputunnistused">https://www.eesti.ee/eng/services/citizen/haridus_ja_teadus/opilase_loputunnistused</a>
France	verifdiploma	<a href="http://www.verifdiploma.com/">http://www.verifdiploma.com/</a>
India	NSDL	<a href="https://nad.ndml.in/">https://nad.ndml.in/</a>
Mexico	CERTELEC-SEDUC	<a href="http://www.edomex.gob.mx/cert/validacion/#no-back-button">http://www.edomex.gob.mx/cert/validacion/#no-back-button</a>
Netherlands	Het diplomaregister	<a href="https://duo.nl/particulier/diplomas/over-mijn-diploma/diplomaregister.jsp">https://duo.nl/particulier/diplomas/over-mijn-diploma/diplomaregister.jsp</a>
Norway	Diploma Registry	<a href="https://www.vitnemalsportalen.no/english/">https://www.vitnemalsportalen.no/english/</a>
Romania	Registrul Matricol	<a href="http://www.rmu.ro/">http://www.rmu.ro/</a>
South Africa	SAQA	<a href="http://www.saqa.org.za/">http://www.saqa.org.za/</a>
United Kingdom	HEDD	<a href="https://hedd.ac.uk/">https://hedd.ac.uk/</a>
United Kingdom	Gradintelligence	<a href="https://gradintel.com/">https://gradintel.com/</a>
United States	National Student Clearinghouse	<a href="https://nscverifications.org/">https://nscverifications.org/</a>

Source: de Leeuw & Skjervan (2017).

## Course Equivalency and Transfer Databases

Creating provincial and national course equivalency systems remains the goal of provincial councils of admission/articulation and transfer, such as BCCAT (PCCAT, 2017). This goal is achievable, as evidenced by the publicly available international course equivalency databases created by select Canadian institutions (**Table 2**). Most of these databases provide an online search mechanism to assist transfer and/or exchange students to map international course work to courses offered at their home institutions. Several offer additional information about the destination institutions, and many include an expiry date to signal transparently to students the intention to re-review individual course equivalency decisions. As another example, Royal Roads University's transfer database, which includes international institutions, represents an approach well suited for block transfer agreements, as it provides a brief overview including helpful details such as admission requirements and listings of eligible programs within the text describing each partnership.

### McGill Data Exchange Model

McGill University's partnership with CHESICC, a government-mandated Chinese credentials verification organization, and a US-based non-profit, non-governmental organization called the National Student Clearinghouse (NSC) represents a Canadian exemplar of digitized international document exchange (Vadivel & Torres, 2017). CHESICC is the only organization authorized by the Chinese Ministry of Education to validate the higher education certificates of Chinese graduates (CHESICC, n.d.). In this model, students apply to graduate studies at McGill and order their Chinese educational documents from the NSC, which in turn brokers access to a PDF document from CHESICC to support the beginnings of the assessment process.<sup>50</sup> As CHESICC is a government-mandated organization in China that validates both the student's international documents and the former institution; this connection results in expediting the admissions process. While it is currently focused on supporting graduate admissions, the model holds the promise of supporting both undergraduate admissions and transfer credit assessment, at least with respect to expediting the front end of the process for receiving verified official documents from China, a major source country of international students in Canada.

### Erasmus Without Papers 2.0 – A Study Abroad Example

*Creating provincial and national course equivalency systems remains the goal of provincial councils of admission/articulation and transfer, such as BCCAT (PCCAT, 2017). This goal is achievable, as evidenced by the publicly available international course equivalency databases created by select Canadian institutions.*

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<sup>50</sup> For more information, visit <https://www.mcgill.ca/accepted/nextsteps/finalmarks/peoples-republic-china-graduate-students-only>

The *Erasmus Without Papers 2.0* project funded by the European Commission serves as a study abroad exemplar for data exchange.<sup>51</sup> One of its primary aims is to “create a network supporting the electronic exchange of student data and documents by interlinking higher education institutions and their student information systems” (Erasmus Without Papers, n.d.). It holds the promise of full scalability, efficiency, and student access for study abroad as it manages the full workflow requirements related to study abroad. It anticipates engagement over time from more than 1,000 higher education institutions (European University Foundation, n.d.). The system captures all aspects of the exchange workflow process, from the partnerships institutions establish through to the student learner agreements and individual student documents exchanged to support exchange credit approval (Valère Meus, personal communications, April 2018). EWP 2.0 represents a unique, full-scale European example of system-wide supports and coordination possible for exchange partnerships that benefit exchange credit assessment of international documents and more.<sup>52</sup>

## EMREX – An Integrated Student Directed Data Exchange Network Model

Another European project called EMREX provides an open-source model for data standardization and exchange between institutions: EMREX provides the foundation to support institutions that seek to automate data exchange in areas such as admissions, transcript exchange, credential verification to support transition to work, and course equivalencies. For example, by using the EMREX data standards, institutions that build appropriate functionality within the institutional student information system can establish trading relationships with other institutions to support students automatically embedding their courses from their prior institution directly into the transcript of their destination institution. In this example, the equivalency information on the receiving institution's transcript indicates the source of the transfer, the title and number of the course, and the decision outcome (i.e., 'Recognized'). While this functionality is not in place for all institutions, those with established course-to-course equivalency decisions are well positioned to leverage this approach. Once set up, no intervention is needed unless a course equivalency decision remains outstanding (Vangen, 2018).<sup>53</sup> This integrated model holds very interesting promise for fully scalable supports; however, it requires that international equivalency decisions be separately identified and available, to facilitate automation.

## Partnering with External Third Parties

*EMREX provides an open-source model for data standardization and exchange in areas such as admissions, transcript exchange, credential verification to support transition to work, and course equivalencies.*

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<sup>51</sup> For more information, visit <https://www.erasmuswithoutpaper.eu/>

<sup>52</sup> For a full list of the many projects in addition to Erasmus Without Papers 2.0 supported and led by the European University Foundation, see <http://uni-foundation.eu/european-university-foundation/projects>

<sup>53</sup> For more details on the EMREX model, see <http://www.emrex.eu/>

OUAC recently established a partnership with WES to send PDF versions of international document evaluations from the credential evaluator to the application centre for use in admissions processing at Ontario universities (OUAC, 2018b; Hack & Duklas, 2017). Students apply for an evaluation report, which is subsequently used by more than one institution. This initiative extends a long-standing arrangement for Ontario law school application processing.<sup>54</sup> In this model, the law application process through OUAC does not require students to provide separate official documents; instead, institutions rely on the WES to validate document accuracy (OUAC, 2018a). This partnership directly supports the initial document intake phase and provides expert support to institutions that involves researching the recognition status of a former institution.

**TABLE 2: Sample Course Equivalency Databases Supporting International Credential Assessment Identified by Survey Respondents or through the Website Research**

Institution	Description	Online Equivalency Database
Carleton University	<b>Exchange Equivalency Database</b> <ul style="list-style-type: none"> <li>Provides a search by institution that returns the name of the course, the credit value, and the course number of the host institution, and the equivalent course at Carleton.</li> <li>Codes Carleton-equivalent courses as '3xxx' unless specific courses are granted.</li> <li>Provides link with further information about the host institution along with its home website.</li> <li>Notes that exchange course year levels may not be credited at the same level as Carleton's courses.</li> <li>Encourages students to meet with their advisor.</li> <li>Notes in frequently answered questions that '6 ECTS (European Credit Transfer System) would count as 0.5 Carleton credits...'<sup>55</sup></li> </ul>	<b>Exchange Database</b> <a href="https://carleton.ca/registrar/exchanges/international-exchange/disclaimers-for-outgoing-international-exchanges/">https://carleton.ca/registrar/exchanges/international-exchange/disclaimers-for-outgoing-international-exchanges/</a>
McGill University	<b>Exchange Equivalency Database</b> <ul style="list-style-type: none"> <li>Provides an online equivalency database with a workflow management system to support the review and decision processes for exchange equivalencies.</li> <li>Provides results by country.</li> <li>Enables students to load course outlines and request reviews online.</li> <li>Enables faculty reviewers to input decisions directly into the system.</li> <li>Enables searches that compare external and internal McGill courses, with results that include the name of the McGill course, the name of the international institution, its country of location, the course name, equivalency status, decision expiry date, and additional reviewer comments (if applicable).</li> <li>Provides answers to frequently asked questions for students and resource guides for reviewers and faculties on the website.</li> </ul>	<a href="https://nimbus-ssl.mcgill.ca/exsa/search/searchEquivalency">https://nimbus-ssl.mcgill.ca/exsa/search/searchEquivalency</a>

<sup>54</sup> <https://www.ouac.on.ca/guide/olsas-transcript/>

<sup>55</sup> <https://carleton.ca/registrar/exchanges/international-exchange/international-exchange-faqs/>



Institution	Description	Online Equivalency Database
Royal Roads University	<b>Transfer Agreement Database</b> <ul style="list-style-type: none"> <li>Provides a list of agreements for both domestic and international institutions (demonstrating the range of possibilities for access to upper-year entry into degrees rather than direct entry, as per RRU's practice).</li> <li>Provides links with additional information on each pathway agreement (e.g., identifies if block transfer is available).</li> </ul>	<a href="http://www.royalroads.ca/prospective-students/transfer-agreements">http://www.royalroads.ca/prospective-students/transfer-agreements</a>
Trinity Western University	<b>Transfer Database</b> <ul style="list-style-type: none"> <li>Provides a search by institutions.</li> <li>Shares specific course equivalencies along with the number of credits available.</li> </ul>	<b>Transfer Database</b> <a href="https://www1.twu.ca/undergraduate/admissions/transfer-students/credit">https://www1.twu.ca/undergraduate/admissions/transfer-students/credit</a>
University of Alberta	<b>Exchange Database</b> <ul style="list-style-type: none"> <li>Provides access to study abroad opportunities and links to more information.</li> <li>Does not include exchange credit equivalency.</li> <li>Provides information for accessing transfer credit.</li> </ul>	
University of Lethbridge	<b>Transfer Equivalency Database</b> <ul style="list-style-type: none"> <li>Provides an online equivalency database that supports transfer credit assessment during the admissions process.</li> <li>Provides a search by country and by institution.</li> <li>Presents results that include the name of the institution within the country, the courses assessed, the effective dates of the assessment, the equivalent credit awarded at the University (or an indication if the course was deemed non-transferable), any additional relevant comments (e.g., restrictions), and the 'attribute' the course fulfills at the University of Lethbridge.</li> </ul>	<a href="https://bridge.uleth.ca/PROD/uofl_ro_tc_agrmnts.front_end">https://bridge.uleth.ca/PROD/uofl_ro_tc_agrmnts.front_end</a>
University of Manitoba	<b>Transfer Equivalency Database</b> <ul style="list-style-type: none"> <li>Provides course specific equivalencies by country, by institution, and by University of Manitoba courses for specific areas of study (e.g., economics).</li> <li>Provides date of most recent assessment (results valid for five years, although subject to change at any time).</li> <li>Provides number of credits at both the sending and receiving institutions.</li> </ul> <b>Exchange Database</b> <ul style="list-style-type: none"> <li>Provides a search by country, institution, and subject area, and links to the host institution (note: course equivalencies not visible).</li> <li>Provides an online application.</li> </ul>	<b>Transfer Database</b> <a href="https://aurora.umanitoba.ca/banprod/ksstransequiv.p_trans_eq_main">https://aurora.umanitoba.ca/banprod/ksstransequiv.p_trans_eq_main</a>  <b>Exchange Database</b> <a href="http://umanitoba.ca/research/international_centre/exchange.html">http://umanitoba.ca/research/international_centre/exchange.html</a>

Institution	Description	Online Equivalency Database
University of Saskatchewan	<b>Exchange Database</b> <ul style="list-style-type: none"> <li>Provides a search by country that presents links to information about credits awarded for each host institution.</li> <li>Provides course numbers and names associated with each host institution, and maps these to equivalent University of Saskatchewan courses.</li> <li>Provides specific information on details required to support any evaluations for credit.<sup>56</sup></li> </ul>	<b>Exchange Database</b> <a href="https://admissions.usask.ca/requirements/transfer-credit.php#Courseequivalents">https://admissions.usask.ca/requirements/transfer-credit.php#Courseequivalents</a>
University of Windsor	<b>Transfer Database</b> <ul style="list-style-type: none"> <li>Provides a search by institution, which includes Canadian and international institutions.</li> <li>Requires students to choose the University of Windsor course for which they are interested in receiving transfer credit as well as identifying the course they took at their previous institution.</li> </ul>	<b>Transfer Database</b> <a href="http://www.uwindsor.ca/registrar/uw_transfer_credits">http://www.uwindsor.ca/registrar/uw_transfer_credits</a>

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<sup>56</sup> <https://admissions.usask.ca/requirements/transfer-credit.php#Process>

# Section Four – Typology of Practices within Canada for Transfer and Exchange Credit Assessment of International Documents

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## Overview

A core objective of the project involved identifying the typology of current practices for transfer credit recognition, processing, and assessment of international documents (including resources involved, timing, costs, types of credit granted, coordination and communications, and fees paid if appropriate). To achieve this, the research involved the review of institutional websites, a national survey, and interviews at eight institutions (six in BC and two from another province in Canada). This section outlines the thematic findings from this research.

## Thematic Findings – A Typology of Practices

### Resources Involved

Survey findings validated the Registrar's Office's (RO) role as primary lead unit supporting policy and partnership development, and the Admissions Office's role as the unit designated to evaluate international documents (**Tables 3 and 4**). Reportedly, faculty/school and program areas lead on establishing course equivalencies.<sup>57</sup> The interviewees confirmed these findings, although some reported that a separate international team exists to handle the student advising and document intake process. Several indicated that the Admissions Office is situated within the RO. The offices most often mentioned that support international document assessment for transfer and exchange include the RO and faculty evaluators, a finding consistent regardless of type of institution or region.

Often, the interviewees indicated that the same people who deal with domestic transfers also handle international transfer credit processing and equivalency review, making it difficult to separately articulate resources. While those interviewed identified specific departmental positions that support these processes (e.g., transfer coordinator, program chair), providing specifics proved challenging (e.g., number of faculty or staff involved). Without exception, those interviewed indicated that their institution did not track resources and costs to this level of specificity, i.e., for interna-

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<sup>57</sup> Two distinct questions were asked: (i) What role(s) do each of the following departments/areas fulfill when assessing international documents for TRANSFER CREDIT? (ii) What role(s) do each of the following departments/areas fulfill when assessing international documents for EXCHANGE CREDIT? Respondents could check all that applied and were encouraged to provide additional details in a freeform box regarding 'Other roles' or 'Other areas' involved. The survey logic intentionally limited access to the role questions to registrarial respondents under the assumption that these central area staff were best positioned to comment on roles involved throughout the assessment process.

tional document assessments related to exchange and transfer. This finding remained true across all interviews and subsequently impeded the goal of identifying specific resources and costs involved beyond those detailed below.

### *Transfer Credit Assessment of International Documents in Detail*

While the primary offices involved in transfer credit assessment of international documents reportedly include the Registrar's Office (RO), and faculty and program areas (**Figure 9**), 27 survey respondents (33%, 27/81) provided additional qualitative commentary under 'Other Areas' and 'Other Roles'. 'Other Areas' mentioned include institutional governance bodies, advising, student unions, international offices, and teaching and learning areas. Examples of 'Other Roles' identified and not already noted include responsibility for receiving documents, communicating with students, and managing appeals.

Survey respondents indicated that academic areas sometimes establish assessment protocols and processes and, at times, international offices process the international documents to support both transfer and exchange credit assessment. A small portion of respondents indicated that advising office staff provide guidance to internationally educated students with respect to the transfer process, timelines, and mapping equivalencies against program requirements.

Some indicated that the RO maintains the student record and the system infrastructure supporting these processes (e.g., to centralize decision capture both at the student and course levels). Others reported centralizing processes within one area, usually within Admissions or the RO or in a focused unit within the latter.

Those interviewed validated this complexity. Other resource examples mentioned in the interviews include data entry staff in the central registrarial/admissions areas who update the student record; advisors who guide students throughout the transfer process from beginning to end; assessors who examine the credentials for both admissions and transfer; coordinators who manage the overall student experience and the faculty/staff connections and communications; and faculty members in program areas who assess individual course equivalencies.

Interviewees from larger institutions reported that several faculty members support the course equivalency process. For example, one indicated "approximately 60 faculty are involved in adjudicating individual course equivalency decisions." Interviewees, particularly those representing larger schools, reported that the individual designated to adjudicate a course equivalency decision within a program area is not always apparent; in contrast, some spoke about having a formal roster of faculty who perform this work. Another institutional interviewee spoke about the formal and primary role of the chairs who lead on evaluating equivalencies and draw in others only when subject matter expertise is needed.

### *Exchange Credit Assessment of International Documents in Detail*

As with transfer credit assessment, the Registrar's Office (RO) and the faculty and program areas reportedly provide the primary supports when processing and assessing international documents for exchange credit (**Figure 10**). Nineteen survey respondents (24%, 19/78) provided additional qualitative information about the functional areas and roles involved. Thirteen of the respondents (17%, 13/78) indicated that the international areas or a position with an international focus support the exchange credit assessment processes including handling the full range of student interaction. Reportedly, faculty members typically handle the equivalency assessment and the RO manages the student records process. Having noted this, most interviewees indicated that exchange offices tend to operate separately from the transfer credit assessment areas, even though both teams manage international documents. As with transfer credit, it remained difficult for interviewees to provide detailed information regarding the number of people involved, as institutions do not typically track resources and costs for exchange credit equivalency assessment to any degree of specificity.

**Figure 9: Analysis of Roles by Functional Area for Transfer Credit by Number of Responses (n=81)**

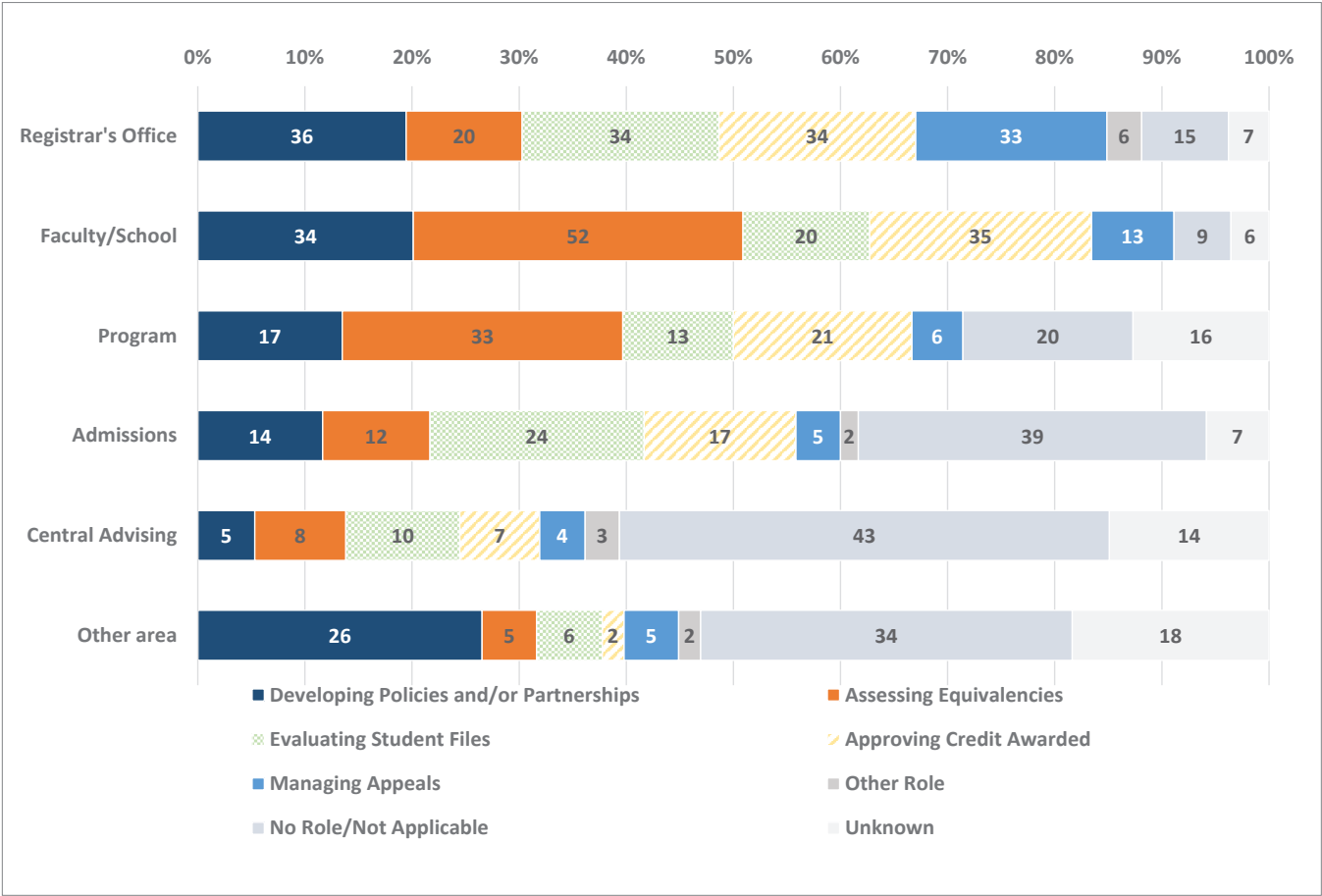
Functional Office	Developing Policies and/or Partnerships	Assessing Equivalencies	Evaluating Student Files	Approving Credit Awarded	Managing Appeals	Other Role
Registrar's Office (n=75)	63	37	41	40	58	9
Faculty/School (n=77)	44	62	26	45	22	1
Admissions (n=64)	34	35	53	38	25	8
Program (n=57)	19	44	19	32	10	2
Central Advising (n=30)	5	7	10	8	8	10
Other area (n=19)	18	4	2	2	5	3

## Policy Approaches

Institution-wide transfer policies at most of the institutions surveyed also apply to assessment of international documents, a finding validated by those interviewed (76%; **Table 3; Appendix G** provides the publicly available, institutional policy URLs shared in the survey). In contrast, only 37% (20) reported having a campus-wide exchange policy; 57% (31) responded in the negative, and 6% (3) indicated they did not know.

Survey respondents were asked if the campus-wide transfer credit policy applies to exchanges. Fifty percent (21 respondents) indicated 'yes', 45% (19) responded 'no', and 5% (2) did not know, for a total of 42 respondents. One survey respondent indicated that the partnership agreements serve as the policy tools for exchange. The interviewees validated these findings and suggested that maintaining one policy facilitates alignment of practices.

Figure 10: Analysis of Roles by Functional Area for Exchange Credit by Percent and Number of Responses (n=78)



Most institutions categorize transfer credit resulting from review of international documents as 'assigned' or 'unassigned'. Of the 79 institutional responses, 94% categorize international learning experiences as 'assigned credit'.<sup>58</sup> Seventy-seven percent categorize the learning as 'unassigned credit', 13% use the category of 'block credit', and 20% identified other forms of credit, including prior learning assessment credit, course waivers, elective placeholder credits, and exemptions. (No definitions were provided.)

**Table 3: Institution-wide Policies Applying to Transfer Credit Assessment of International Credentials (n=63)**

Region	Institution-wide Policy applies to International Documents	Yes; but Unique Policies are in Use	Does not apply to international credentials	Do not know	Row Totals
Alberta	10	2	1		13
British Columbia	13	2			15
Manitoba	5	1	1		7
New Brunswick	2				2
Nova Scotia	1	1			2
Ontario	17	5	2	1	25
Prince Edward Island	2				2
Québec	1				1
Saskatchewan	3				3
Newfoundland and Labrador		1			1
<b>Column Totals</b>	<b>54 (76%)</b>	<b>12 (17%)</b>	<b>4 (6%)</b>	<b>1 (1%)</b>	<b>71</b>

*Only those institutions that responded to this question were included in the above results.*

## Approaches to Charging Fees

Charging fees for transfer or exchange credit assessment varies by institution in BC. Based on a website review of publicly available information, select institutions charge no transfer credit assessment fee (22). However, this finding may be misleading as institutions could be including these costs in other fees (e.g., as part of an application fee) or may rely on assessments completed by external credential evaluation services which charge students (See **Appendix I** for details).

Nine BC institutions charge students a fee to assess international documents for transfer credit: fees range from \$6 per course to approximately \$158 per document.<sup>59</sup> Most charge by document; those that engage in this practice tend to charge more, which aligns with pricing models employed by external credential evaluators (although the latter tend to charge yet more). One institution does not charge at the point of admissions; rather, it charges only current students. This appears to be a unique and interesting approach as it may incentivize students to make these kinds of requests at the point of admission. Some institutions provide flexible reviews through prior learning assessment and/or challenge

<sup>58</sup> Each institution was assigned one count for each category; therefore, duplicates were resolved.

<sup>59</sup> One institution indicates costs vary by program; another indicates challenge exam costs are applied.



for credit, which tend to result in costs equal to a portion of the total cost of a course (the same protocol applies to domestic students). The various fee levels are not surprising as fee policy is locally determined in accordance with provincial/territorial government regulations.

Institutions do not always charge a separate fee for equivalency assessments resulting from exchange, although it is not unusual for students to be charged an overall fee for participating in study abroad.

External third-party organizations supporting international document assessment provide a proxy indicator of the true costs and complexities involved in conducting the preliminary evaluative work. Their rates vary and exceed those charged by Canadian institutions (**Table 4**).<sup>60</sup> At the time of this research study, costs fell between a minimum range of approximately \$100–\$210 per document/credential for a basic assessment through to well over \$200–\$280 per document/credential for a more comprehensive report. Supplemental fees also apply depending on other types of additional services a student requires (e.g., mailing costs, supplemental reports).

Most of these organizations do not conduct the full course equivalency assessment that occurs within institutions. Different types of assessment reports at various cost levels are available depending on the client's needs and the requirements of the receiving organization. For example, institutions with open access admission policies might require a basic report; for those with more involved requirements, a comprehensive report would be more appropriate. Typically, the latter would be needed for the purposes of supporting transfer and exchange assessment. It is also important to note that the assessments conducted by external third-party organizations would not necessarily be sufficient to satisfy all aspects of the transfer and exchange credit assessment processes for most levels within post-secondary institutions; however, they provide important value-added services.

The many trades programs offered by BC colleges present an opportunity to consider future research for international credential evaluation of a different nature. While interviewees and respondents did not articulate examples or raise concerns related to the trades, the researcher did briefly explore this area to identify any scalable collaboration examples and related costs. An Australian organization called "VETASSESS" serves as an interesting exemplar.<sup>61</sup> It is mandated by the Australian government to conduct credential equivalency assessments and to award vocational certificates to facilitate transition to employment. The types of occupations supported include electricians, metal fabricators, motor mechanics, welders, and others. There are several services provided beyond credential equivalency assessment such as language training. The fees to access equivalency services within this organization cover a range of activities that highlight the unique nature of assessing international experience and credentials for trades. These include conducting an 'evidence review', a 'technical interview', 'practical assessments' for licensed and non-licensed professions, and reassessments. The costs range from \$470 to \$1890 Australian, depending on the assessment needed. While exploring this type of model and its associated requirements falls outside the scope of this research, the Australian model represents an area for future exploration that demonstrates the potential supports and costs associated with alternative credential equivalency assessment.

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<sup>60</sup> As fees may change, the Table includes information from publicly available websites only.

<sup>61</sup> For more information on VETASSESS, visit <https://www.betassess.com.au/skills-assessment/trades-recognition-service>

**Table 4: Fee Resources for External Service Providers Involved in International Credential Evaluation**

External Service Provider	Fee Information
International Credential Evaluation Service (ICES)	<a href="https://www.bcit.ca/ices/apply/fees.shtml">https://www.bcit.ca/ices/apply/fees.shtml</a> <a href="https://www.bcit.ca/ices/apply/educationalinstitutes.shtml">https://www.bcit.ca/ices/apply/educationalinstitutes.shtml</a>
World Education Services (WES)	<a href="https://www.wes.org/ca/evaluations-and-fees/">https://www.wes.org/ca/evaluations-and-fees/</a>
Comparative Education Service (CES)	<a href="https://2learn.utoronto.ca/portal/applications/applicationProfile.do?applicationProfileId=37707890">https://2learn.utoronto.ca/portal/applications/applicationProfile.do?applicationProfileId=37707890</a>
International Credential Assessment Service of Canada (ICAS)	<a href="https://www.icascanada.ca/new/main-application.aspx/services.aspx">https://www.icascanada.ca/new/main-application.aspx/services.aspx</a>
International Qualifications Assessment Service (IQAS)	<a href="https://www.alberta.ca/iqas-employment-apply.aspx">https://www.alberta.ca/iqas-employment-apply.aspx</a>
Ministère de l'Immigration, de la Diversité et de l'Inclusion (MDD)	<a href="http://www.immigration-quebec.gouv.qc.ca/en/working-quebec/comparative-evaluation/submitting-request/fees.html">http://www.immigration-quebec.gouv.qc.ca/en/working-quebec/comparative-evaluation/submitting-request/fees.html</a>
VETASSESS (Australian example)	<a href="https://www.vetassess.com.au/skills-assessment/trades-recognition-service/application-fees">https://www.vetassess.com.au/skills-assessment/trades-recognition-service/application-fees</a>

## Assessment Timing and Related Considerations

Regardless of the size or type of their institution, interviewees routinely indicated that the amount of time and complexity involved increases significantly with international as compared against domestic document assessments. Several indicated it represents good practice to front-end credit assignment decisions to help students with their admissions decisions, subsequent course selections, and overall program completion.<sup>62</sup> However, they noted delays do occur at times up to and beyond the start of classes. Reported reasons include students not providing official documents in a timely manner; the breadth and depth of course documentation required to support equivalency evaluations; the time needed to conduct an assessment; the amount of information faculty need to conduct a review; and the time of year when the largest bulk of decisions are required, which reportedly coincides with periods of low faculty availability (typically late spring, early summer). Respondents identified these same challenges for exchange credit in situations where students take courses beyond those for which preapproval exists. Those interviewed for this project reported that they routinely ask students to arrange to submit official documents direct from former institutions to mitigate fraud prevention; however, 82% of the survey respondents indicated that obtaining this information remains challenging for students.

Only those institutions with databases of prior decisions or transfer agreements, long histories and expertise in the field within central registrarial offices, and large volumes of international or exchange students provided scalable examples of time efficiencies. These include relying on prior equivalency decisions and conducting course-level reviews of only new courses; assessing a student for admission separately from evaluating a course equivalency; providing detailed protocols to guide faculty in the equivalency review; and automating the processes and

<sup>62</sup> Two interviewees out of the 18 interviewed from two separate institutions expressed a concern about front-ending this information, given its potential for encouraging students to 'shop' for credit rather than focus on program and institutional fit.

communications by integrating and leveraging systems and databases. Often, those interviewed spoke of relying on external resources and/or service providers to expedite decision-making and to ensure quality. When utilizing these practices and supports, institutions reported that students often receive indications of assigned credit simultaneous with their admission offer, or soon after or, for exchanges, prior to leaving for study abroad.

Several interviewees indicated that the breadth and depth of course information required to conduct a review present challenges and cause delays for internationally educated students who are not always able to satisfy document expectations. Reportedly, institutions conduct course-by-course reviews and examine inputs such as texts used, contact hours, credit weight, and more to determine the degree of overlap. To support this process, institutions expect students to provide course syllabi that include detailed course descriptions complete with articulated objectives and/or learning outcomes; credits awarded; weekly meeting times and instruction contact hours; type of learning experience (e.g., tutorial, lecture, lab); evaluation approach; and assignments, grading information, and texts and resources used. To further complicate the international assessment process, some institutions reported expecting students to submit 'official' course outlines (i.e., those created by the home institution) and translations compiled by *certified* translators<sup>63</sup> —the latter stipulating the consequence of poor quality translations having introduced challenges, such as different course titles for the same courses.

The interviewees suggested various strategies to resolve the above challenges, such as using triangulation to improve decision timeliness, a practice that would necessitate access to the course equivalency decisions at other institutions.<sup>64</sup> Some institutional interviewees indicated that their practice includes allocating unassigned credit to students in lieu of pre-existing equivalency decisions. In addition, if the student provides sufficient course information, it is circulated to faculty in the discipline area for subsequent assessment, which can result in later changes.<sup>65</sup> Select survey respondents and interviewees indicated that once an assessment decision is finalized, they maintain decision outcomes in a central database. Some institutions reportedly use flexible assessment processes in these situations by leveraging prior learning and assessment policies and practices; others reported providing block credit, unassigned credit, or no credit.

Those interviewed and surveyed indicated a need for resources and training to support faculty and staff involved in international document assessment to enhance efficiencies, timeliness, and the quality of decision-making. Furthermore, they urged the adoption and/or creation of shared assessment principles, strategic partnerships, system-level resources, training, and tools for both faculty and staff.

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<sup>63</sup> The Canadian Translators, Terminologists and Interpreters Council provides a list of certified provincial associations and translators (<http://www.cttic.org/chercher.asp>). According to its website, the Council is a member of the Sectoral Commission on Culture, Communications and Information for the Canadian Commission for UNESCO and “maintains and promotes professional standards across Canada”. In Québec, the Ordre des traducteurs, terminologues et interprètes agréés du Québec provides translation services to Québec members (<https://ottiaq.org/en/about-ottiaq/mission-and-history/>). According to its website, the association is a member of the International Federation of Translators of UNESCO (2018). It is not a member of the Council (Canadian Translators, Terminologists and Interpreters Council 2012).

<sup>64</sup> Triangulation in the BC system refers to using the previously established transfer decisions from Institution A for Institution B's courses to guide equivalency decisions at one's own institution (i.e., Institution C) because of pre-existing articulations in place between Institution A and C. BCCAT provides more explanation and recommendations regarding triangulation in the following online resource: <http://www.bccat.ca/receiver/manage>

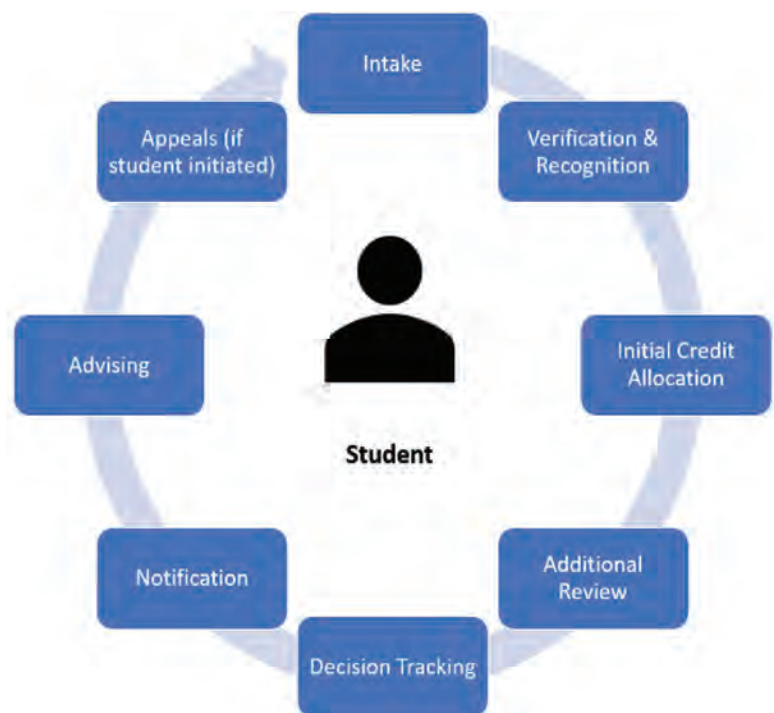
<sup>65</sup> This occurs only when a student meets admissibility requirements and attended a recognized/accredited program/institution.

## Detailed Assessment Practices and Coordination Activities

The interviewees' feedback and the survey results revealed that institutions engage in a phased and complex process to support transfer and exchange assessment of international documents. This results from the complexity of the students' educational backgrounds, the institutional decision-making processes, the embedded quality checks, the array of resources involved, and the focus on ensuring a quality-assured process. Without exception—and whether institutions used external service providers or handled everything in-house—the activities involved eight distinct phases (**Figure 11**). **Appendix K** provides detailed information about each phase and a list of external resources recommended by respondents and interviewees.

1. **Intake:** Application and submission of official academic results from prior studies (e.g., transcripts, diploma supplement, Australian Higher Education Certificate [AHEG]), detailed course outlines, and translations (if applicable)
2. **Verification and Recognition:** Review and validation of document authenticity and recognition status of institutions and programs
3. **Initial Credit Allocation:** Consideration and allocation of unspecified credit and, if precedents exist, of specified credit  
Institutional approaches vary in this area. Select institutions reported assessing credit after admissions (typically colleges or smaller institutions); others reported assessing initial credit at the point of admissions (e.g., typically larger universities). Sometimes, where precedents did not exist, institutional representatives reported assessing initial credit as unspecified and subsequently seeking decisions after admissions.
4. **Additional Credit Equivalency Review:** Where precedents did not exist, distribution of the course syllabi and supporting information to a faculty/school discipline expert within the program areas
5. **Decision Tracking:** Receipt and coding of decisions (usually into a central database)
6. **Notification phase:** Notification to the student of the decision outcomes
7. **Advising:** Advising support to plan a program  
Often, some form of student advising or coordinating support occurs at every stage in the process. A good practice cited by interviewees typically involves a primary staff person functioning as the main contact for the student throughout the entire process, thereby fulfilling a significant coordinating and boundary-spanning role.
8. **Appeals:** If applicable, an appeal process to resolve issues

**Figure 11: Overarching Process**



# Section Five – Issues, Opportunities, Suggested Next Steps and Future Research

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## Identified Issues

The research process raised several thematic issues with transfer and exchange credit assessment of international documents. Of the 54 survey respondents that identified challenges, 83% suggested that a lack of resources impedes efforts, and 85% identified challenges in clarifying differences among international educational systems. Other challenges include identifying fraudulent documents (80%, 43) and determining the accreditation and/or recognition of international institutions (78%, 42). Nineteen survey respondents provided additional issues—these included difficulties accessing sufficient, verifiable documentation; struggles with resolving different practices, perspectives and standards applied within the same institution for the same course work by different program areas; a lack of scalable, system-wide supports, such as a province-wide course equivalency database; and dealing with untimely decision processes. Respondents also identified challenges unique to exchange credit assessment processes of international documents such as the ineffectiveness of course preapprovals for equivalent credit, given the limited course availability at host institutions. Those interviewed validated all these challenges.

Seventy-nine survey respondents agreed or strongly agreed that students have difficulty with the following particularly problematic challenges:

1. Providing documents (82%, 41)
2. Receiving recognition for prior post-secondary studies (72%, 36)
3. Misunderstanding nomenclature (70%, 35)
4. Accessing information (56%, 28)
5. Navigating complex processes (60%, 30)
6. Paying for document assessments (26%, 13)

Fourteen respondents provided additional comments: approximately 30% of these individuals emphasized course outline challenges (e.g., insufficient detail, difficulty providing them) and a similar percentage emphasized challenges with timeliness (e.g., verifying results with former institutions or external service providers, overall timeliness, students placing pressure on staff to deliver faster service). These various challenges aligned with findings for exchange credit assessment of international documents, although additional issues were noted, including challenges related to opaque agreements and challenges specific to host institutions.

## Potential Opportunities

The community provided specific examples they believed would result in more efficient recognition, processing, and assessment. As a policy example, 57% of 78 survey respondents (44/78) agreed or strongly agreed that maintaining one policy regardless of source of transfer represented a good practice. A regional analysis indicated that institutional respondents in BC (59%), and the prairie (67%) and eastern provinces (76%) support this approach, whereas Ontario and Québec institutional respondents (34%) agreed or strongly agreed with having more than one policy. While differences of opinion exist, several respondents suggested a single overarching policy helps to guide principled and pragmatic assessments of international documents for both transfer and exchange. Essentially, they supported the adoption of guidelines and procedures that support flexibility, a student focus, and respect for international regional diversity.

Other examples provided include the following (see **Appendices B** and **K** for more detailed information):

- Maintaining a database of equivalency decisions and sharing them across the province and nationally;
  - Seventy-three percent of 78 survey respondents (57/78) supported providing course equivalency decisions in advance, as the BC Transfer Guide—a public database cataloguing transfer guarantees—does. Eight-five percent (66/78) agreed or strongly agreed that students should have access to course equivalency decisions in advance of applying; 83% supported providing institutions with this same access.
- Enhancing system-wide quality assurance by providing related training for both staff and faculty;
- Researching and potentially reconsidering expectations for course syllabi;
- Enhancing resource supports, including the creation of a system-level list of international institutions with recognition status noted;
- Exploring the use of external service providers and developing partnership models such as what ICES maintains with individual institutions and the WES has created with select region-wide application centres (e.g., OUAC); and
- Enhancing institutional and system-wide data collection capacity.

## Potential Recommended Principles and Practices

Interviewees suggested that institutions should consider adopting the following practices, some of which repeat earlier findings:

- Encourage students to speak with their advisors early and often;
- Develop system-wide document uploading and validation capacity and data exchange with trusted international parties (endorsed by eighty-seven percent of 78 survey respondents);
- Ensure that past precedents inform future transfer credit decisions, that faculty members review courses for assigned credit, and that criteria for assessing course equivalency are predetermined, particularly for introductory courses (e.g., math and economics);
- Employ conditional equivalency decisions based on unofficial documents;
- Adopt practices that expedite early stages of registration, such as initial awarding of unassigned credit for courses without established equivalencies, prior to sending them to faculty discipline experts for review;
- Encourage blind equivalency reviews (i.e., focus on evaluating a course, not a student);
- Integrate flexible approaches with assessments, including prior learning assessment; and
- Create or hire a team of expert evaluators or explore partnerships with third-party service providers to enhance scalable, quality-assured equivalency decisions.

Sixteen out of 76 survey respondents (21%) and all interviewees provided examples of other innovations at their institutions worth replicating. These mostly applied to transfer credit and included online equivalency databases; workflow and decision-management systems; communications improvements; enhanced use of student information systems for data capture; and alternative resource models to support students and faculty (e.g., by creating specialized advising roles). Once again, the partnership between OUAC and WES emerged as an exemplar model.

The idea of using third-party credential evaluators received mixed reviews. Some respondents indicated that volume pressures would necessitate relying on them while others suggested that the decisions of these evaluators tend to be too broad and high level to be useful to the transfer credit assessment process. One person noted these providers do not always provide timely decisions. Given the many challenges with quality assurance noted by the participants in this project, the opportunity exists to reconsider some of these positions.



## Suggested Next Steps and Future Research Areas

Along with the recommendations that emerged from the external literature review and the interviews, 76 survey respondents provided suggestions for next steps and additional research (**Appendix K**). These are categorized thematically into six topic areas.

1. *Create a system-wide equivalency and agreement database(s) of international courses and agreements.*

This idea emerged as a consistent thematic recommendation. While a complex project, BCCAT's early forays into expanding the existing course equivalency system to include international results represents an important and viable next step. Its existing system, the databases currently maintained in-house by various institutions, and the publicly available equivalency systems showcased in this report present potential models to assist with the design and content development process. Additional focused research of potential exemplars would be helpful to this process.
2. *Research document expectations for course syllabi to address the challenges faced by students.*

One investigative approach might include corraling examples from primary sending institutions to better appreciate what institutions can reasonably expect students to provide by way of documentation of prior learning. This research could be informed by focusing on primary source countries and sending institutions for international students (e.g., China, India).
3. *Consider alternative approaches to assessing course syllabi for equivalency, including ones that acknowledge 'substantial difference' versus 'substantial equivalence' where possible.*

These concepts require further investigation. As the LRC and best practice guides include quality assurance and access informed by concepts such as 'substantial difference' and a focus on learning outcomes, testing the reasonableness of weighing so heavily on detailed information in the course syllabi in the equivalency assessment process represents another interesting area of exploration. Given that many institutions already engage in quality assured practices, institutions may wish also to consider embedding explicit references to the newly ratified LRC and the supporting Pan-Canadian Quality Assurance Framework (QAF) into local policy documents and public messaging.
4. *Enhance the resources, tools, and training for faculty and staff.*

This seems to be an appropriate and important next step. An opportunity exists to continue enhancing quality-assured practices, beginning first with improving the community's awareness and understanding of the LRC, the QAF for international assessment, and the existing resources and tools available to help extend existing communities of practice. As part of this work, institutions may wish to consider embedding references to the LRC principles and to the QAF into local policy documents and public messaging. CICIC represents an exemplar and offers several assessor tools, including a practitioners' listserv which could be of great use to staff. Supports for faculty who lead the course equivalency assessments are equally necessary. Survey respondents also suggested several resources to assist in the review of international documents; most of these focus on the front-end of the process (i.e., intake and institutional recognition) rather than on equivalency assessment (**Table 5**).

5. *Establish strategic partnerships to enhance international credential evaluation capacity.*

The partnerships with third-party credential evaluation service providers represent interesting, system-level models for collaboration and scalable service delivery. Select institutions in BC already rely on these providers, one of which, ICES, is mandated by the provincial government. Although reviews were mixed, survey respondents that rely on these providers indicated that significant benefits result, particularly when relying on the more comprehensive reports. Given the commitment and adherence to international conventions, quality assurance, and best practice by these organizations, as well as the range of comprehensive supports available, additional research and collaboration would be useful to help enhance the higher education sector's understanding and trust in these third-party service providers. While doing so won't resolve all needs within the transfer and exchange credit assessment processes, several steps would benefit from this focused expertise.

6. *Endorse and support national and international data exchange projects that hold the promise of establishing trusted connections to international institutions and organizations.*

Institutions and allied organizations are well positioned to advocate for the expansion of the PESC initiative called the 'GeoCodes Project' to include capturing recognition attributes of Canadian and international institutions. Rather than expecting so many institutional staff members to research many of the same international institutions, the system as a system could coordinate the capture of this data. Such coordination would expedite processing, result in huge efficiencies for staff and faculty and ultimately enhance student service.

As another example, select BC institutions and allied organizations recently endorsed the ARUCC Groningen and Student Mobility Project, which is intent on developing a national data exchange network for Canada. Its focus on connecting with trusted credential repositories and with student data exchange networks in other countries directly aligns with enhancing efficiencies in international credential assessment.

In the same vein, continuing support of efforts by BCCAT, PCCAT and the other provincial councils to create a national course equivalency and agreement database remains essential. Such system-level resources and tools hold significant promise for enhancing institutional efficiency and student service and mobility.

**Table 5: Exemplar Resources Used by Respondents to Support Transfer Credit Assessment of International Credentials (n=35)**

Organization	Times Mentioned	Resources
World Education Services	12	<a href="https://www.wes.org/ca/partners/">https://www.wes.org/ca/partners/</a> <a href="https://applications.wes.org/country-resources/resources.asp">https://applications.wes.org/country-resources/resources.asp</a>
AACRAO Edge and AACRAO TCP – American Association of Registrars and Admissions Officers	8	<a href="http://edge.aacrao.org/aacrao-edge-login-page.php?uri=/">http://edge.aacrao.org/aacrao-edge-login-page.php?uri=/</a> <a href="http://tcp.aacrao.org/search/search_main.php">http://tcp.aacrao.org/search/search_main.php</a>
NAFSA – Association of International Educators	1	<a href="https://www.nafsa.org/">https://www.nafsa.org/</a>
Australia Government Department of Education and Training - NOOSR – National Office of Overseas Skills Recognition	3	<a href="https://internationaleducation.gov.au/Services-And-Resources/Services/Country-Education-Profiles/Access-CEP/Pages/default.aspx?ReturnUrl=%2fcep%2fPages%2fdefault.aspx">https://internationaleducation.gov.au/Services-And-Resources/Services/Country-Education-Profiles/Access-CEP/Pages/default.aspx?ReturnUrl=%2fcep%2fPages%2fdefault.aspx</a>
CICIC	1	<a href="https://www.cicic.ca/">https://www.cicic.ca/</a>
IQAS	5	<a href="https://www.alberta.ca/iqas-overview.aspx#toc-2">https://www.alberta.ca/iqas-overview.aspx#toc-2</a> <a href="https://www.alberta.ca/iqas-education-guides.aspx">https://www.alberta.ca/iqas-education-guides.aspx</a>
IERF – International Education Research Foundation	1	<a href="http://www.ierf.org/">http://www.ierf.org/</a>
NUFFIC – Dutch organization for internationalization of education	2	<a href="https://www.nuffic.nl/en">https://www.nuffic.nl/en</a>
ECE – Educational Credential Evaluators	3	<a href="https://theconnection.ece.org/Advantage">https://theconnection.ece.org/Advantage</a>
WHED – international Association of Universities' Worldwide Database	2	<a href="http://www.whed.net/results_institutions.php">http://www.whed.net/results_institutions.php</a> <a href="http://whed.net/home.php">http://whed.net/home.php</a>
UK NARIC – UK National Recognition Information Centre	5	<a href="https://www.naric.org.uk/naric/Default.aspx">https://www.naric.org.uk/naric/Default.aspx</a>
WENR – World Education News and Reviews	1	<a href="https://wenr.wes.org/">https://wenr.wes.org/</a>
ENIC-NARIC	4	<a href="http://www.enic-naric.net/">http://www.enic-naric.net/</a>
Other Resources	4	UNESCO Guide des niveaux de formation pour l'admission générale des candidats on québécois (2013), CRÉPUQ (maintenant BCI) Google PIER Reports Ministry of Education site in various countries ARUCC In-house faculty experts or the international areas

# Conclusion

The research study examined transfer and exchange credit assessment of international documents to understand current practices and perspectives at post-secondary institutions within Canada with a specific focus on members of the BC Transfer System. With funding provided by the BC Council of Admissions and Transfer (BCCAT), it sought to achieve five objectives:

- To provide a literature review of international credit transfer recognition, processing and assessment practices;
- To identify practices that are innovative, efficient or worthy of replication and suggest ones that would result in more efficient recognition, processing and assessment at the institutional and system levels;
- To create a typology of current practices (including resources required, timing, costs, types of credit granted, coordination and communication, and fees paid, if appropriate);
- To identify issues related to international credit transfer recognition, processing and assessment; and
- To suggest appropriate next steps and topics for future research.

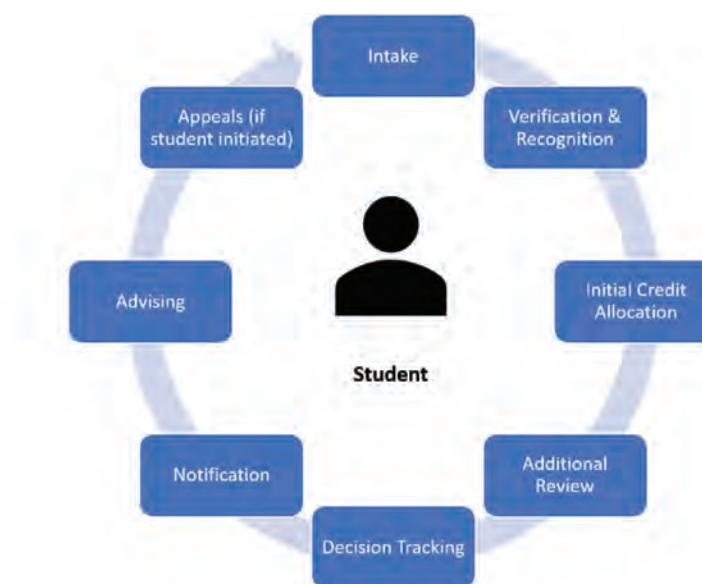
The literature review and environmental scan revealed a complex and nuanced international document assessment field supported by quality assurance frameworks, conventions, and best practices. The Lisbon Recognition Convention (LRC), with its focus on principles of best practice and supporting tools, such as the *Pan-Canadian Quality Assurance Framework*, serve to guide assessment of international documents for both admissions and transfer and exchange assessment. The findings suggest that international document assessment as a unique discipline, requires system-level supports and expertise not easily replicated within individual institutions either in central registrarial areas or in specific academic disciplines. This situation affects smaller institutions with fewer internationally educated students more than it does those with larger volumes and/or longer histories practicing in the field.

The examination of current practices, expert perspectives, and future possibilities for transfer and exchange credit assessment is aided by the showcasing of exemplars across Canada and around the world. This report provides several Canadian institutional examples of online, publicly available course equivalency databases, and documents other efforts at individual institutions and councils to provide critical supports for international document assessment. BCCAT's initiative to extend its provincial equivalency system to support international assessments represents one recent effort. Institutions and other bodies rely on the resources and supports provided by the Canadian Information Centre for International Credentials (CICIC), Canada's official representative within the international ENIC-NARIC (the European Network of National Information Centres and the National Academic Recognition Information Centres), and designated body responsible for disseminating information relevant to meeting our collective obligations to the LRC. The collaborative efforts to create a national data exchange network, undertaken jointly by the Association of Registrars of the Universities and Colleges of Canada (ARUCC), the Pan-Canadian Consortium on Admissions and Transfer (PCCAT), the Canadian University Council of Chief Information Officers (CUCCIO), and the Canadian Post-Secondary Electronic Standards Council User Group (CanPESC), represent innovative, efficient, and scalable collaboration and coordination examples. This consortium's initiative, called the ARUCC Groningen Project, holds the promise of establishing trusted connections to international bodies to facilitate the seamless sharing of student data to support assessment processes. The various international examples showcased in the report demonstrate the possibilities.

These various findings established the context for the study. Using a multi-pronged research approach of qualitative and quantitative methods, including interviews of eight post-secondary institutions—six within BC—website reviews and a national survey, resulted in the identification of an eight-phased typology of practices at Canadian post-secondary institutions. Pictured below, these phases involve ‘Intake’ of documents; ‘Verification and Recognition’ of international documents and institutions; ‘Initial Credit Allocations’ which include allocating known assigned credits and potential unassigned credits to facilitate future enrolment and credential completion; ‘Additional Review’ to refine decisions regarding unassigned credit allocations; ‘Decision Tracking’ to ensure systematic capture of review outcomes (approaches and systems vary by institution); ‘Notification’ to apprise students of the decisions; ‘Advising’ which institutions reported typically occurs throughout the entire process; and, if necessary, an ‘Appeals’ phase. The latter represents an essential obligation under the LRC to ensure students have the right to challenge decisions and provide additional documentation and information. Several staff roles emerged as critical to ensuring successful execution of the eight phases: these roles included staff in the Registrar’s Office (including Admissions)—supporting overall processes at both the strategic partnership and policy development level and at the tactical level, with individual document intake, evaluations and student record management—and faculty within program areas who assess equivalencies. This is not to suggest other areas within institutions, such as Exchange Offices, are not also involved; however, most institutions, including those in BC, rely most heavily on people in these crucial roles.

Study participants articulated several challenges affecting quality-assured international document assessment for transfer and exchange credit, not least of which is the increasing volume of internationally educated students requiring support and document assessments. Other examples include challenges with timeliness, having sufficient expertise and access to (or knowledge of) external resources and tools to support the assessment process through the eight phases, and limited resources and training for both faculty and staff. Study participants identified student challenges such as an inability to satisfy document requests, particularly as these relate to detailed course syllabi, and difficulties with demonstrating recognition of former institutions. Institutions without in-house equivalency databases or with limited access to expert faculty and staff appear to be struggling to stay ahead of the volume.

Finally, the community identified possible solutions, next steps, and areas for future research. Research participants urged the creation of provincial and national equivalency databases and training and supports for faculty and staff in keeping with the complex needs of the field of international document assessment. Digitization and data



exchange with trusted parties in other countries represent exciting new frontiers. Study participants indicated that allied organizations such as BCCAT, EducationPlannerBC, ARUCC, PCCAT, CanPESC, and other organizations are well positioned to establish potential new means of further enhancing collaboration and the development of scalable, innovative approaches.

Six thematic options provide a path for the way forward.

1. Continue efforts to expand existing system-level equivalency and agreement database(s) to include international courses and agreements.

To support these projects, consider researching the exemplars identified through this study to inform additional options for system architecture design and search capacity that accommodate international courses. Include in this analysis an exploration of those models that hold the promise of enhancing integration between course equivalency decision outcomes, agreements, and student records (see European EMREX and Erasmus Without Papers 2.0 solutions as illustrative examples).<sup>66</sup>

2. Create new and provide system-level access to existing resources, tools and training for faculty and staff, to expand their knowledge of the field of international document assessment.

This may include negotiating system-level purchasing agreements with trusted international organizations to reduce the per institution cost of subscription services. Consider consulting further with faculty and staff to identify what they would recommend for training. Assess the relevancy of existing training programs such as those run by the CICIC and consider developing additional training tiered to different competency levels.

3. Establish strategic partnerships to enhance international credential evaluation capacity within post-secondary institutions and across the province or nationally.

Consider researching credential evaluation providers and potentially developing a system-level partnership model similar to the OUAC/WES arrangement to enhance efficiencies and provide greater coherence and supports for students. Use these partnerships as an opportunity to improve scalable, quality-assured assessment of international documents. The research should consider the merits of using detailed comprehensive reports provided by these organizations versus basic reports given the complex needs of transfer and exchange credit assessment of international documents.

4. Endorse and support national and international data exchange projects that hold the promise of establishing trusted connections to international institutions and organizations to facilitate seamless and efficient student data exchange.

Examples include the CanPESC 'GeoCodes Project' and the ARUCC Groningen and Student Mobility Project.

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<sup>66</sup><http://www.emrex.eu/> and <https://www.erasmuswithoutpaper.eu/>

5. Conduct further research of document expectations for course syllabi to address the challenges faced by internationally educated students, faculty and staff.
6. Explore alternative assessment approaches where possible and appropriate for establishing equivalencies that acknowledge 'substantial difference' versus 'substantial equivalence'. Consider embedding explicit references to the newly ratified LRC and the supporting *Pan-Canadian Quality Assurance Framework* into local policy documents and public messaging.

Establishing course equivalency by looking for substantial equivalence requires highly detailed assessments of inputs, such as credits, weighting, and text used, with the intent of establishing maximum comparability in program content. Emphasizing substantial difference instead encourages a focus on outcomes of learning, to look for "differences between the foreign qualification and the national qualification" that are sufficiently significant as to impede a student's subsequent success in further study (ENIC-NARIC Networks (n.d.-a), and encourages the granting of credit recognition when such significant gaps are not found. The LRC and best practice guides encourage the adoption of quality assurance and access practices informed by concepts such as substantial difference and a focus on learning outcomes. Considering the promotion of these concepts, further research into the traditional heavy reliance on detailed course syllabi may be warranted. This research should address the question, "Is it reasonable and efficacious to continue such reliance?" While relying on substantial equivalence may be a practical reality for regulated professions, an opportunity exists to explore and adopt principles-based, best practice approaches that lean towards establishing substantial difference. The report references several resources accompanied by Appendices to support this exploration.

The interview participants from the eight institutions and other organizations graciously gave of their time to share thoughts and concerns to help support the creation of a better future for internationally educated students. With the ratification of the Lisbon Recognition Convention, the timing is opportune to showcase, explore, and extend efforts within institutions and at the systems level to align with the principles embedded in that defining document. The research on relevant practices in BC validates existing efforts and suggests new ways forward.



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# Appendix A: Institutional and Individual Respondent Profiles – Overview

**Table 6: Institutional and Respondent Overview**

Region	Total Responses	Total Responding Institutions <sup>67</sup>	Total Public Institutions in Data Set <sup>68</sup>	Total Private Institutions in Data Set <sup>69</sup>	Total Population Pool – Publicly Funded Institutions <sup>70</sup>	Survey Response Rate among Public Institutions by Region	Percentage of Total Responses (Public and Private, n=95)
Alberta	15	13	11	2	28 <sup>71</sup>	39%	16%
British Columbia	21	19	17 <sup>72</sup>	2	26 <sup>73</sup>	65%	22%
Manitoba	10	9	5	4	8 <sup>74</sup>	63%	11%
New Brunswick	3	3	3	0	8	38%	3%
Newfoundland and Labrador	1	1	1	0	2	50%	1%
Nova Scotia	4	3	3	0	11	11%	4%
Ontario	31	23	23 <sup>75</sup>	0	46 <sup>76</sup>	50%	33%
Prince Edward Island	2	2	2	0	3	67%	2%
Québec	5	5	5	0	25 <sup>77</sup>	20%	5%
Saskatchewan	3	3	3	0	11 <sup>78</sup>	27%	3%
Yukon	0	0	0	0	1	0%	0%
Northwest Territories	0	0	0	0	1	0%	0%
Nunavut	0	0	0	0	1	0%	0%
<b>Total</b>	<b>95</b>	<b>81</b>	<b>73</b>	<b>8</b>	<b>171</b>	<b>42%</b>	<b>100%</b>

<sup>67</sup> Each institution received one count despite the number of responses.

<sup>68</sup> As above.

<sup>69</sup> As above. The private institutions included in the study: AB = Ambrose University, The King's University; BC = Quest University Canada, Trinity Western University; MB = Booth University College, Canadian Mennonite University, Providence University College and Theological Seminary, Quest University Canada

<sup>70</sup> Source for NB, NS, NFLD, and PEI: Government of Canada. (January 27, 2017). Retrieved from <https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/atlantic-immigration-pilot/publicly-funded-institutions.html>

<sup>71</sup> Source: Canadian Information Centre for International Credentials (CICIC). (1990-2017). *Learn about the education system in the province of Alberta!* Retrieved from <https://www.cicic.ca/1152/Postsecondary-education-in-Alberta/index.canada>

<sup>72</sup> Thompson Rivers Open Learning (TR Open Learning) was counted separately from Thompson Rivers University (TRU). Separate submissions were made for TR Open Learning and TRU.

<sup>73</sup> TR Open Learning was counted as a separate institution from TRU given that it provides online learning for the entire province.

<sup>74</sup> Source: CICIC. (1990-2017). *Learn about the education system in the province of Manitoba!* Retrieved from <https://www.cicic.ca/1200/Postsecondary-education-in-Manitoba/index.canada>

<sup>75</sup> Royal Military College was counted as a publicly funded institution. Affiliated colleges of Western were counted as separate institutions (Brescia and King's).

<sup>76</sup> Brescia and King's, affiliates of Western University, were counted as separate institutions for the purposes of this study.

<sup>77</sup> The eight constituent schools of the University of Québec were counted as unique institutions. CEGEPs were not included in this study. Source: CICIC. (1997-2017). *Learn about the education system in the province of Québec!* Retrieved from <https://www.cicic.ca/1174/Postsecondary-education-in-Quebec/index.canada>

<sup>78</sup> This number includes the publicly funded universities, polytechnic, and colleges, and excludes the federated and affiliated colleges. Source: Government of Saskatchewan. (n.d.). Post-Secondary Institutions. Retrieved from <https://www.cicic.ca/1174/Postsecondary-education-in-Quebec/index.canada>



Figure 12: Individual and Institutional Respondents by Sector (Public and Private)

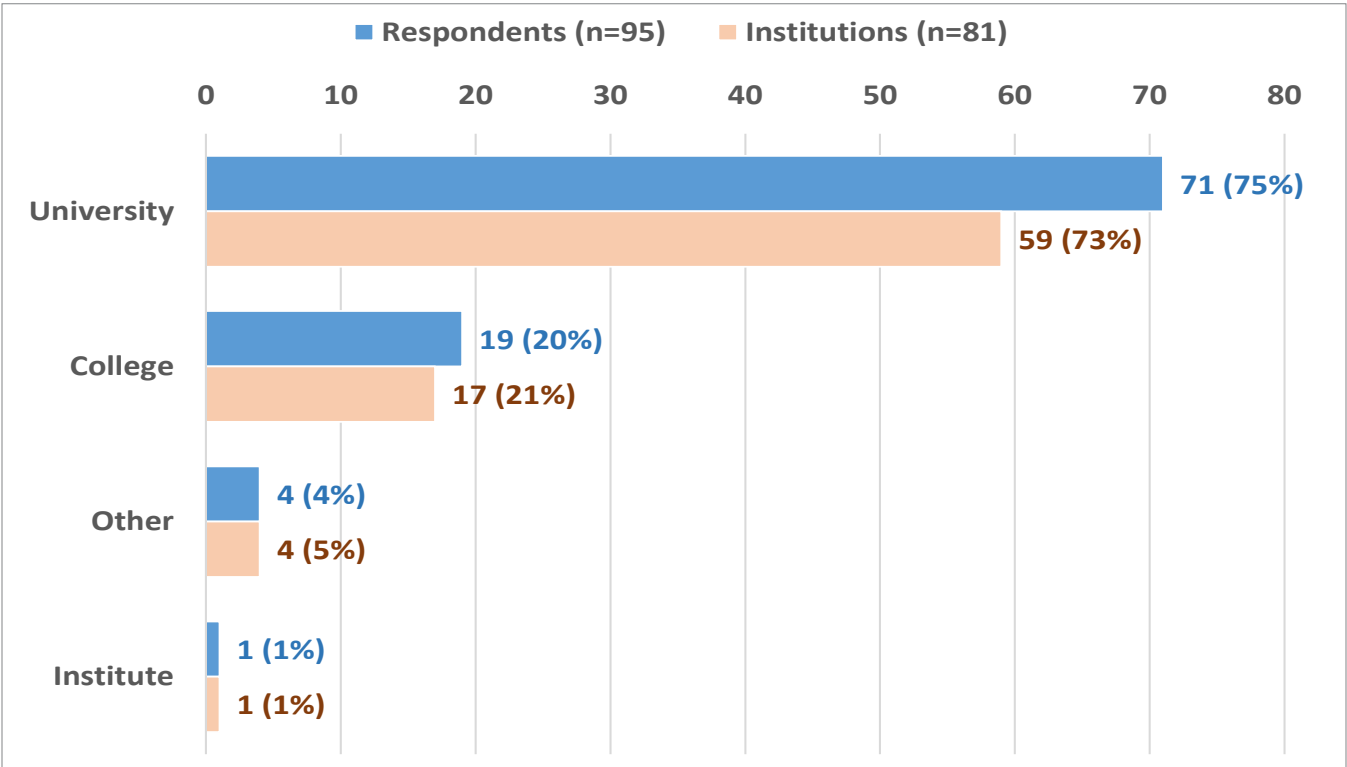
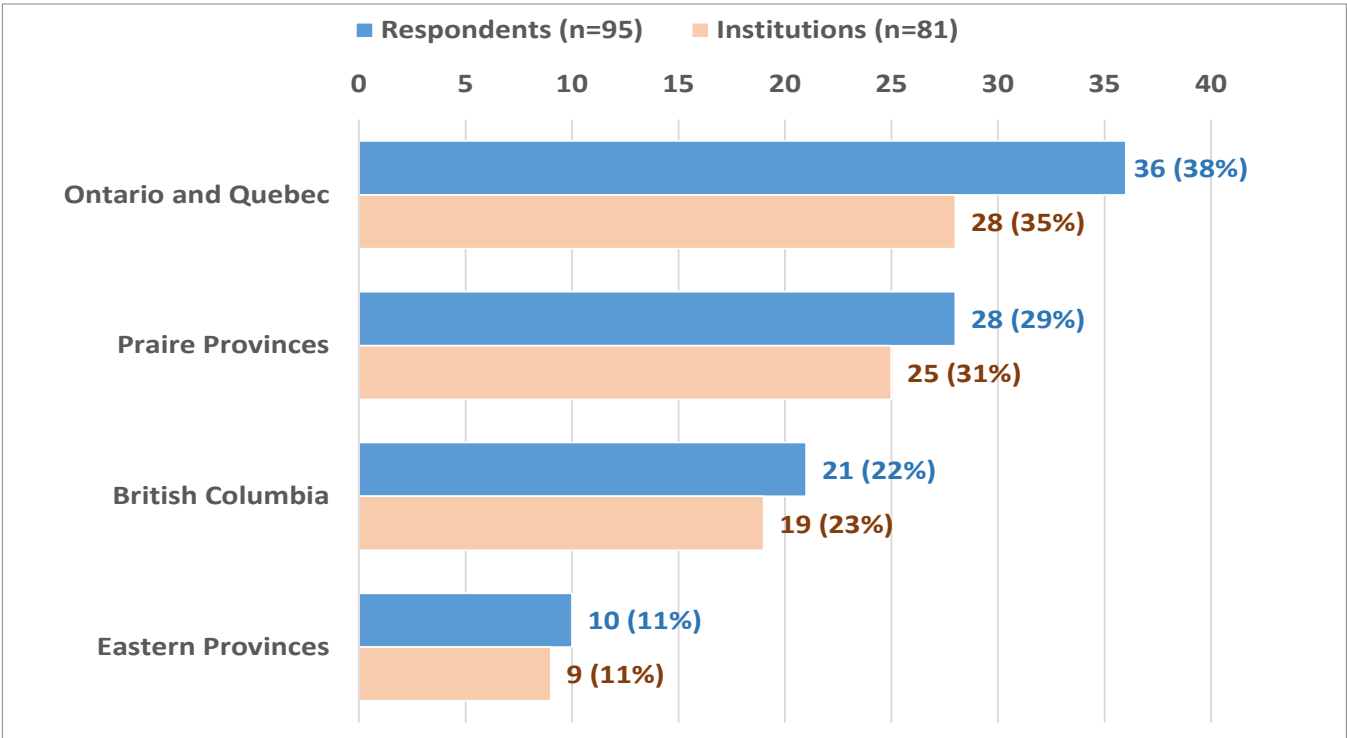


Figure 13: Individual and Institutional Respondents by Region (Public and Private)



**Table 7: Additional Respondent Profile Details**

Respondent Type	Respondent Count	Home Dept: Central Registrar's/ Admissions Office	Home Dept: Central Faculty/ School Office	Home Dept: International Admissions Office	Home Dept: International Exchange Office	Home Dept: Other <sup>79</sup>
Staff <sup>80</sup>	90 (95%)	79 (83%)		4 (4%)	2 (2%)	5 (5%)
Faculty	5 (5%)	2 (2%)	3 (3%)			
<b>Column Totals (% of Total Respondents)</b>	<b>N = 95 (100%)</b>	<b>81 (85%)</b>	<b>3 (3%)</b>	<b>4 (4%)</b>	<b>2 (2%)</b>	<b>5 (5%)</b>

Additional information on the survey responses is available on request.

<sup>79</sup> 'Other' allowed self-identification. Respondents indicated their home departments as PLAR and Transfer Credit, Enrolment Services, International Student Services, Senior Administration Offices.

<sup>80</sup> Individuals who identified as 'faculty' were left as such even if they held other roles such as 'Registrar'. Nine respondents chose 'Other' and provided their title and/or a descriptor of their role. In those instances where a registrar or other administrator indicated their title plus 'faculty', they were placed in the faculty category. Where they indicated positions such as 'AVP', 'Executive Director', 'Administration', or 'Associate Registrar', they were assigned to the 'staff' category.

## Appendix B: Institutional Profiles for Interviews – BC Institutions

Institution	Capilano University (CapU)	College of the Rockies (COTR)	Langara College (LANG) <sup>81</sup>	Thompson Rivers University (TRU)	University of British Columbia (UBC)	University of Victoria (UVic)
Campus Locations	2 campuses (Sunshine Coast, North Vancouver)	7 campuses – Cranbrook (2), Creston, Fernie, Golden, Invermere, Kimberley	Vancouver	Kamloops	2 Campuses (Vancouver, Okanagan)  Partners with other institutions through other centres (e.g., Great Northern Way, UBC Robson Square, medicine)	Victoria NB: UBC and UVic partner to deliver the Island Medical Program - educates doctors on Vancouver Island
Region in Province <sup>2</sup>	Mainland/ Southwest	Thompson-Okanagan-Kootenay	Mainland/ Southwest	Thompson-Okanagan-Kootenay	Mainland/ Southwest	Vancouver Island
Enrolments <sup>82</sup> International for UBC and UVic <sup>83</sup> FTE for UBC and UVic <sup>84</sup>	International enrolments (Head count) = 1,410 (2016)  Domestic enrolments (Head count) = 8,430 (2016)	International enrolments (Head count) = 425 (2016)  Domestic enrolments (Head count) = 9,475 (2016)	International enrolments (Head count) = 5,985 (2016)  Domestic enrolments (Head count) = 16,865 (2016)	International enrolments (Head count) = 4,095 (2016)  Domestic enrolments (Head count) = 25,650 (2016)	International enrolments (Head count) = 13,184 (2016)  Domestic enrolments (Head count) = 41,043 (2016)	International enrolments (Head count) = 3,437 (2016)  Domestic enrolments (Head count) = 21,696 (2016)
Institution Type	Special Purpose Teaching University	College	College	Special Purpose Teaching University	Research Intensive University	Research Intensive University

<sup>81</sup> Langara interviewees indicated the institution started dealing with in-bound transfer credit requests in 2012 after the launch of its degrees (personal communications, January 2018).

<sup>82</sup> BC Ministry of Advanced Education, Skills and Training. (October 2017). Post-Secondary Central Data Warehouse Standard Reports October 2017 Data Submission. Retrieved from [https://www2.gov.bc.ca/assets/gov/education/post-secondary-education/data-research/standard\\_reports/headcount\\_totals.pdf](https://www2.gov.bc.ca/assets/gov/education/post-secondary-education/data-research/standard_reports/headcount_totals.pdf). Page 3.

<sup>83</sup> International Head Counts, provincial region (2012/13): Heslop, J. (October 10, 2014). International Students in BC's Education Systems. Vancouver, BC: BCCAT. Retrieved from [https://www2.gov.bc.ca/assets/gov/education/post-secondary-education/data-research/stp/stp-international-research-results\\_2014-10-10.pdf](https://www2.gov.bc.ca/assets/gov/education/post-secondary-education/data-research/stp/stp-international-research-results_2014-10-10.pdf)

<sup>84</sup> BC Ministry of Advanced Education Skills and Training, Post-Secondary Finance Branch. Full-time Equivalent (FTE) Data (2007-08). Retrieved from <https://catalogue.data.gov.bc.ca/dataset/full-time-equivalent-enrolments-at-b-c-public-post-secondary-institutions/resource/5ccc8108-855c-4802-b60d-cb9da4b96fbf>

Institution	Capilano University (CapU)	College of the Rockies (COTR)	Langara College (LANG) <sup>81</sup>	Thompson Rivers University (TRU)	University of British Columbia (UBC)	University of Victoria (UVic)
Institution Type Self-Identified in the Survey	University	College	College	University	University	University
Sector Affiliation	BC Association of Institutes and Universities	BC Colleges	BC Colleges	Research Universities' Council of BC	Research Universities' Council of BC	Research Universities' Council of BC
Academic Details	Undergraduate studies  Continuing education, developmental, career and vocational, academic programs	Undergraduate studies  Continuing education, developmental, career and vocational, apprenticeship, trades and technologies, academic programs	Undergraduate studies  Continuing education, developmental, career and vocational, academic programs	Undergraduate and graduate studies  Continuing education, developmental, career and vocational, trades and technology, academic programs <sup>85</sup>	Undergraduate and graduate studies	Undergraduate and graduate studies
Credentials Awarded	Certificates, diplomas, associate degrees, bachelors, graduate diplomas, post baccalaureates	Certificates, diplomas, associate degrees, a business degree  Partners with UVic to offer four-year degrees	Certificates, diplomas, associate degrees, bachelors, post-degree programs	Certificates, diplomas, bachelors, master's	Bachelors, masters, doctoral, post-doctoral	Bachelors, masters, doctoral, post-doctoral

<sup>85</sup> TRU's Open Learning Division: distance education via online and correspondence courses and programs

Institution	Capilano University (CapU)	College of the Rockies (COTR)	Langara College (LANG) <sup>81</sup>	Thompson Rivers University (TRU)	University of British Columbia (UBC)	University of Victoria (UVic)
Faculties/ Schools	<p>5 Faculties</p> <p>Arts and Sciences, Business and Professional Studies, Education, Health and Human Development, Fine and Applied Arts, Global and Community Studies</p>	<p>Business and university studies, health and human services, trades and technology</p>	<p>Arts, business, science and technology, humanities and social sciences, health</p>	<p>11 Faculties and Schools</p> <p>Adventure, culinary arts and tourism, arts, business and economics, education and social work, law, nursing, open learning, science, student development, trades and technology, TRU World</p>	<p>Several faculties and schools</p> <p>Vancouver: Applied science, architecture and landscape architecture, arts, audiology and speech sciences, business, community and regional planning, dentistry, education, forestry, journalism, kinesiology, land and food systems, law, library, archival and information studies, medicine, music, nursing, pharmaceutical sciences, population and public health, science, social work, economics</p> <p>Okanagan: arts and sciences, creative and critical studies, education, engineering, health and social development, management, medicine, graduate studies</p>	<p>10 faculties</p> <p>Business, education, continuing studies, engineering, fine arts, graduate studies, human and social development, humanities, law, sciences, medical sciences, social sciences</p>

## Appendix C: Institutional Profiles for Non-BC Institutions

Institution	Humber College <sup>86</sup>	Ryerson University <sup>87</sup>
Campus Locations	Three campuses: North Campus, Lakeshore Campus, Orangeville Campus in and outside of Toronto	Downtown Toronto
Program Mix	A range of continuing education, apprenticeship, academic programming  Offers a collaborative nursing degree with the University of New Brunswick and joint programs through University of Guelph-Humber	Offers 62 undergraduate and 52 graduate programs
Faculties or Schools	Eight academic schools: School of Applied Technology, The Business School, School of Creative & Performing Arts, School of Health Sciences, School of Hospitality, Recreation & Tourism, School of Liberal Arts & Sciences, School of Media Studies & Information Technology, and School of Social & Community Services	Seven faculties or schools: arts, community services, communication and design, engineering and architectural science, science, Ted Rogers School of Management, Yeates School of Graduate Studies
Credentials	Certificates, Ontario graduate certificates, diplomas, advanced diplomas, bachelors	Bachelors, masters, doctoral
Undergraduate Enrolments	International enrolments: 4,700 from 138 countries Exchange participation: NA Overall enrolment: Head count = 29,800 (with 23,000 part-time and continuing education students)	International enrolments: 1,586 (Fall 2016) ~160 exchange students (personal communications)  Domestic enrolment: Head count = 36,187 (Fall 2016)
Sector Affiliation	Colleges Ontario	Council of Ontario Universities
Institution Type	Polytechnic	University
Institution Type in Study	College (as defined by Humber respondent)	University
Region in Province	Greater Toronto Area	Downtown Toronto

<sup>86</sup> Sources for Humber information:

[https://humber.ca/sites/default/files/uploads/documents/humber\\_media\\_fact\\_sheet\\_july\\_2016.pdf](https://humber.ca/sites/default/files/uploads/documents/humber_media_fact_sheet_july_2016.pdf)

<https://humber.ca/>

<http://international.humber.ca/>

<sup>87</sup> Sources for Ryerson information:

Ryerson University. (2018b). Undergraduate Students 2016-17. Retrieved from

<https://www.ryerson.ca/upo/statistics/students-2016-head/>

<https://www.ryerson.ca/>

<https://www.ryerson.ca/about/data/a-general/#degrees>

Ryerson information: Ryerson University. (2018a ). Graduate Students 2016-17. Retrieved from <https://www.ryerson.ca/upo/statistics/grads-2016>

## Appendix D: Sample List of Service Providers that Support Scalable Assessment Practices

Region	Organization	Website	Services Provided
<b>Australia</b>	Country Education Profiles, International Education, Australian Gov't	<a href="https://internationaleducation.gov.au/Services-And-Resources/services-for-organisations/Pages/Services-for-organisations.aspx">https://internationaleducation.gov.au/Services-And-Resources/services-for-organisations/Pages/Services-for-organisations.aspx</a>	<p>This service is an online qualifications recognition tool in Australia with information on higher education and post-secondary technical and vocational educational qualifications from around the world.</p> <p>Provides information on 127 countries including ...</p> <ul style="list-style-type: none"> <li>- assessment guidelines in comparison to the Australian Qualifications Framework qualifications</li> <li>- institutions recognised within various countries</li> <li>- education systems and national qualifications frameworks</li> <li>- grading systems, language of instruction, academic year, admission requirements, courses and qualification requirements, types of institutions, accreditation and quality assurance</li> <li>key quality indicators</li> <li>- guides to help with interpretation of qualification documents</li> </ul>
<b>Australia</b>	Tertiary Education Quality and Standards Committee (TEQSA)	<a href="http://www.teqsa.gov.au">www.teqsa.gov.au</a>	<p>TEQSA is Australia's independent national quality assurance agency.</p> <p>TEQSA also maintains a national registry of regulated/ accredited HEI providers in/from Australia.</p>
<b>China</b>	Ministry of Education (China)	<a href="http://old.moe.gov.cn//publicfiles/business/htmlfiles/moe/moe_2812/200906/48836.html">http://old.moe.gov.cn//publicfiles/business/htmlfiles/moe/moe_2812/200906/48836.html</a>	<p>This website provides a list of recognized Chinese institutions.</p> <p>The website offers four indexes: regular colleges and universities; junior colleges; independent colleges; branches and programs.</p>
<b>Europe</b>	Eurydice	<a href="https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Main_Page">https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Main_Page</a>	<p>Eurydice is a network of 42 organizations within 38 EU countries. Its website provides information resources on European Education Systems.</p>

NOTE: This list is not intended to be exhaustive and represents a sample of the resources available. The information provided has been gathered from a review of the external websites that are listed in the above table. Those using this list are encouraged to contact these organizations/ associations for current information.

Region	Organization	Website	Services Provided
Europe	European Association for Quality Assurance (ENQA) in Higher Education	<a href="http://www.enqa.eu/">http://www.enqa.eu/</a>	<p>The ENQA is “an umbrella organisation which represents quality assurance organisations from the European Higher Education Area (EHEA) member states. ENQA promotes European co-operation in the field of quality assurance in higher education and disseminates information and expertise among its members and towards stakeholders in order to develop and share good practice and to foster the European dimension of quality assurance.”</p> <p>The ENQA website provides information on higher education practices, guidelines, and agencies in Europe.</p>
Europe	European Quality Assurance Register (EQAR) for Higher Education	<a href="http://www.eqar.eu/register.html">http://www.eqar.eu/register.html</a>	<p>The EQAR is a register of quality assurance agencies in countries that have demonstrably complied with a common set of principles for quality assurance in Europe.</p> <p>Its website provides an index of registered quality assurance agencies operating in European countries.</p>
International	International Association of Universities - World Higher Education Database	<a href="http://www.whed.net/home.php">http://www.whed.net/home.php</a>	<p>International Association of Universities was founded as part of UNESCO. It is a stand-alone organization.</p> <p>The World Higher Education Database (WHED) provides detailed higher education information for 186 countries (more than 18,000 institutions are included).</p>
International	ENIC-NARIC	<a href="http://enic-naric.net/">http://enic-naric.net/</a> <a href="http://www.enic-naric.net/educational-systems-country-profiles-and-other-tools.aspx">http://www.enic-naric.net/educational-systems-country-profiles-and-other-tools.aspx</a>	<p>The ENIC-NARIC Network represents a collaboration between the European Network of National Information Centres on academic recognition and mobility for the nations that are part of the Lisbon Recognition Convention and the National Academic Recognition Information Centres (NARIC) which focuses on improving the recognition of credentials and includes the EU countries, the European economic countries, and Turkey.</p> <p>The enic-naric.net provides a gateway with links to resources and education systems around the world. For example, it provides access to a country's education system: national information centers, systems of education, quality assurance information, lists of recognized post-secondary institutions, refugee qualifications recognition information, diploma supplement information, and links to national education bodies, education systems, qualifications frameworks, and policies for recognition of qualifications.</p>



Region	Organization	Website	Services Provided
<b>International</b>	TAICEP	<a href="https://www.taicep.org/taiceporgwp/professional-development/resources/reference-materials/available-online-resources/">https://www.taicep.org/taiceporgwp/professional-development/resources/reference-materials/available-online-resources/</a>	TAICEP is a professional association for international credential evaluators intent on ensuring best practice. Its website provides extensive links to other countries and organizations that support international credential evaluation. Examples: - professional development resources/supports - online resources for international education organizations - databases on regional accreditation organizations, institutional organizations, information centers and country-specific resources
<b>International - UNESCO</b>	International Bureau of Education	<a href="http://www.ibe.unesco.org/en/document/world-data-education-seventh-edition-2010-11">http://www.ibe.unesco.org/en/document/world-data-education-seventh-edition-2010-11</a>	The IBE is a UNESCO organization operating as a stand-alone entity. The world data education system provides in-depth summaries of countries' education systems.
<b>International - UNESCO</b>	Country specific search	<a href="https://en.unesco.org/countries/c">https://en.unesco.org/countries/c</a> <a href="http://uis.unesco.org/">http://uis.unesco.org/</a>	This website provides detailed data on countries' demographics and education systems.
<b>International - World Education Service (WES)</b>	WENR WES (News)	<a href="https://wenr.wes.org/">https://wenr.wes.org/</a>	The World Education Services Canada (WES), produces this publication. WES is a non-profit credential evaluator service provider. WENR provides news on worldwide education and regularly shares information regarding diploma mills.
<b>International - World Education Services (WES)</b>	WES Country Index	<a href="https://applications.wes.org/country-resources/resources.asp">https://applications.wes.org/country-resources/resources.asp</a>	This index compares international grading systems and provides links to country profiles (typically UNESCO). These typically include the documents required for a WES assessment (including links to regionally specific verification bodies in students' home countries), document verification guidelines, and links to ministry of education/official government education departments.
<b>Netherlands</b>	NUFFIC Diploma Recognition System	<a href="https://www.nuffic.nl/en/diploma-recognition/foreign-education-systems">https://www.nuffic.nl/en/diploma-recognition/foreign-education-systems</a>	NUFFIC is the Dutch organization focused on international education. This service provides international education systems with sample documents. It also provides an online assessor training program.
<b>United Kingdom</b>	UK NARIC	<a href="https://www.naric.org.uk/naric/Organisations/Product%20Catalogue/Online%20Databases.aspx">https://www.naric.org.uk/naric/Organisations/Product%20Catalogue/Online%20Databases.aspx</a>	UK NARIC is a national agency for the UK government focused on "providing information, advice and opinion on academic, vocational and professional qualifications and skills from all over the world" (UK NARIC). It is the official source of information on international education and training systems beyond the UK and is part of the NARIC network.  The directory provides information on 200 countries (academic, vocational, professional qualifications); grade comparisons; education systems comparisons and more.

Region	Organization	Website	Services Provided
United Kingdom	Higher Education Degree Datacheck	<a href="https://hedd.ac.uk/">https://hedd.ac.uk/</a>	<p>HEDD is a centralized system for degree verification.</p> <p>Its services include a searchable database of recognized higher education providers in the UK and online credential verification.</p>
United Kingdom	CIFAS	<a href="https://www.cifas.org.uk/">https://www.cifas.org.uk/</a>	<p>CIFAS is a non-profit, member-driven UK organization focused on fraud mitigation.</p> <p>It hosts a database of all committed fraud cases in the UK.</p>
United States	AACRAO EDGE	<a href="https://www.aacrao.org/resources/AACRAO-International/about-edge">https://www.aacrao.org/resources/AACRAO-International/about-edge</a> <a href="http://edge.aacrao.org/aacrao-edge-login-page.php?uri=/">http://edge.aacrao.org/aacrao-edge-login-page.php?uri=/</a>	<p>AACRAO is the American national registrars' association.</p> <p>AACRAO's subscription platform hosts several information resources for international credential evaluators.</p> <p>AACRAO EDGE provides the following:</p> <ul style="list-style-type: none"> <li>- country education system overviews</li> <li>- explanations regarding each credential and how it fits into the different levels and what is required to move between the levels</li> <li>- grading scales used</li> <li>- placement recommendations (for the US)</li> <li>- lists of post-secondary institutions</li> <li>- background resources</li> </ul>
United States	NAFSA Guide to Education Systems Around the World	<a href="http://www.nafsa.org/ProfessionalResources/Publications/NAFSA_Guide_to_Educational_Systems_Around_the_World/">http://www.nafsa.org/ProfessionalResources/Publications/NAFSA_Guide_to_Educational_Systems_Around_the_World/</a>	<p>NAFSA is an association which provides supports to advisors and credential evaluators regarding assessment of international credentials.</p> <p>NAFSA provides several country-specific guides to support both admissions and transfer credit assessment.</p>
United States	Council for Higher Education Accreditation (CHEA) / CHEA International Quality Group (CIQG)	<a href="http://www.chea.org/">http://www.chea.org/</a>	<p>CHEA is a US-based national, member-led association with 3,000+ institutions. It serves as a resource arm and advocate for the sector.</p> <p>For international document evaluation, it provides numerous supports including...</p> <ul style="list-style-type: none"> <li>• a database of accredited institutions and programs along with accrediting bodies, and,</li> <li>• other information resources, research, and information.</li> </ul>

## Appendix E: Institutional Examples of Resources and Tools

Institution/ Region	Resource	Website
<b>University of Guelph, Canada</b>	International Credential Evaluators Tool	<a href="https://www.uoguelph.ca/graduatestudies/future/international/credential">https://www.uoguelph.ca/graduatestudies/future/international/credential</a>
<b>Wageningen University, Netherlands</b>	International credentials evaluation guideline	<a href="https://www.wur.nl/upload_mm/0/5/4/7604371a-dfa6-44d3-96b5-94979ebcf9c7/Wageningen_University_Research_%20International_Credentials_Evaluation_Guidelines.pdf">https://www.wur.nl/upload_mm/0/5/4/7604371a-dfa6-44d3-96b5-94979ebcf9c7/Wageningen_University_Research_%20International_Credentials_Evaluation_Guidelines.pdf</a>
<b>Tsinghua University, China</b>	Verification Services for Graduates' Documents	<a href="http://xlrz.cic.tsinghua.edu.cn/xlrz.xlrz_zsxxb.do?m=start">http://xlrz.cic.tsinghua.edu.cn/xlrz.xlrz_zsxxb.do?m=start</a>
<b>National University of Mongolia, Mongolia</b>	Verification Services for Graduates' Documents	<a href="http://www.num.edu.mn/checkdiploma.htm">http://www.num.edu.mn/checkdiploma.htm</a>
<b>University of Baghdad, Iraq</b>	Verification Services for Graduates' Documents	<a href="http://graduation.uobaghdad.edu.iq/">http://graduation.uobaghdad.edu.iq/</a>
<b>King Saud University, Saudi Arabia</b>	Verification Services for Graduates' Documents	<a href="https://edugate.ksu.edu.sa/ksu/ui/home.faces">https://edugate.ksu.edu.sa/ksu/ui/home.faces</a>
<b>Universidad Tecnológica de Chile INACAP, Chile</b>	Verification Services for Graduates' Documents	<a href="http://www.inacap.cl/portal">http://www.inacap.cl/portal</a>  Provides verification services for graduates of several institutions: La Universidad Tecnológica de Chile INACAP (The Technological University of Chile INACAP), El Instituto Profesional INACAP (The INACAP Professional Institute The INACAP), El Centro de Formación Técnica INACAP (Technical Training Center), La Dirección Nacional de Capacitación INACAP (The National Training Directorate INACAP).
<b>Pontificia Universidad Javeriana, Colombia</b>	Verification Services for Graduates' Documents	<a href="https://rhg.javeriana.edu.co/psp/HR9GUEST/EMPLOYEE/HRMS/c/MANAGE_ACADEMIC_RECORDS.UJ_VERIFICAR_CERT_GBL?FolderPath=PORTAL_ROOT_OBJECT.UJ_VERIFICAR_CERTIFICADOS&amp;IsFolder=false&amp;IgnoreParamTempl=FolderPath%252clsFolder">https://rhg.javeriana.edu.co/psp/HR9GUEST/EMPLOYEE/HRMS/c/MANAGE_ACADEMIC_RECORDS.UJ_VERIFICAR_CERT_GBL?FolderPath=PORTAL_ROOT_OBJECT.UJ_VERIFICAR_CERTIFICADOS&amp;IsFolder=false&amp;IgnoreParamTempl=FolderPath%252clsFolder</a>
<b>Universidad Industrial de Santander, Colombia</b>	Verification Services for Graduates' Documents	<a href="https://www.uis.edu.co/admisiones/indexCertificados.jsp">https://www.uis.edu.co/admisiones/indexCertificados.jsp</a>

NOTE: This list is not intended to be exhaustive and represents a sample of the resources available. The information provided has been gathered from a review of the external websites that are listed in the above table. Those using this list are encouraged to contact these organizations/associations for current information.

<b>Pontificia Universidad Catolica del Peru</b>	Verification Services for Graduates' Documents	<a href="http://www.pucp.edu.pe/certificaciones/certificaciones-grados-y-titulos/">http://www.pucp.edu.pe/certificaciones/certificaciones-grados-y-titulos/</a> [degree and transcript verification]  <a href="http://tesis.pucp.edu.pe/repositorio/">http://tesis.pucp.edu.pe/repositorio/</a> [thesis verification]
<b>Universidad Monteávila, Venezuala</b>	Verification Services for Graduates' Documents	<a href="https://uma.terna.net/ComprobarConstancia.php">https://uma.terna.net/ComprobarConstancia.php</a>
<b>Universidade Federal do Pará, Brazil</b>	Verification Services for Graduates' Documents	<a href="https://sigaa.ufpa.br/sigaa/public/autenticidade/tipo_documento.jsf">https://sigaa.ufpa.br/sigaa/public/autenticidade/tipo_documento.jsf</a>
<b>Universidade Federal de Santa Catarina, Brazil</b>	Verification Services for Graduates' Documents	<a href="http://cagr.sistemas.ufsc.br/autenticidade/">http://cagr.sistemas.ufsc.br/autenticidade/</a>  <a href="https://repositorio.ufsc.br/">https://repositorio.ufsc.br/</a>

## Appendix F: Examples of Service Providers Supporting Scalable Assessment through Online Services

Country Served	Organization/Service	website
<b>Africa</b>	West African Examination Council	<a href="http://www.waecnigeria.org/">http://www.waecnigeria.org/</a>  34 members (universities, governments, secondary schools, etc.) from 5 countries: The Gambia, Ghana, Nigeria, Sierra-Leone, Liberia; sanctioned by legislative ordinance in each participating country
<b>Bangladesh</b>	Bangladesh Boards of Intermediate and Secondary Education	<a href="http://www.educationboard.gov.bd/">http://www.educationboard.gov.bd/</a>
<b>Brazil</b>	Ministério da Educação e-MEC	<a href="http://emec.mec.gov.br/">http://emec.mec.gov.br/</a>
<b>Brazil</b>	Coordenação de Aperfeiçoamento de Pessoal de Nível Superior (CAPES)	<a href="https://sucupira.capes.gov.br/sucupira/public/consultas/coleta/programa/listaPrograma.jsf?acao=pesquisarRegiao">https://sucupira.capes.gov.br/sucupira/public/consultas/coleta/programa/listaPrograma.jsf?acao=pesquisarRegiao</a>
<b>Bulgaria</b>	Bulgaria Ministry of Education, Youth and Science	<a href="https://www2.mon.bg/AdminRD/mon/">https://www2.mon.bg/AdminRD/mon/</a> [Primary, Secondary, Vocational credentials] <a href="http://89.252.196.217/AdminRHE2/default.asp?action=changelang&amp;lang_id=1">http://89.252.196.217/AdminRHE2/default.asp?action=changelang&amp;lang_id=1</a> [Post-Sec credentials]
<b>Chile</b>	Ministerio de Educacion	<a href="http://certificados.mineduc.cl/certificados-web/mvc/validar/ingresarCodigo">http://certificados.mineduc.cl/certificados-web/mvc/validar/ingresarCodigo</a>
<b>China</b>	China Higher Education Student Information and Career Center [CHESICC]	<a href="http://www.chsi.com.cn/en/">http://www.chsi.com.cn/en/</a> <a href="http://www.chsi.com.cn/en/aboutus/database.jsp">http://www.chsi.com.cn/en/aboutus/database.jsp</a>  Official government-mandated credential repository for students
<b>Colombia</b>	Ministerio de Educación Nacional (Colombia)	<a href="https://sineb.mineduacion.gov.co/bcol/app">https://sineb.mineduacion.gov.co/bcol/app</a> <a href="https://www.mineduacion.gov.co/sistemasdeinformacion/1735/w3-propertyname-2672.html">https://www.mineduacion.gov.co/sistemasdeinformacion/1735/w3-propertyname-2672.html</a>
<b>Ecuador</b>	Ministerio de Educacion	<a href="https://servicios.educacion.gob.ec/titulacion25-web/faces/paginas/consulta-titulos-refrendados.xhtml">https://servicios.educacion.gob.ec/titulacion25-web/faces/paginas/consulta-titulos-refrendados.xhtml</a>
<b>Ecuador</b>	Secretaría de Educación Superior, Ciencia, Tecnología e Innovación, Ecuador (Ministry of Higher Education, Science, Technology and Innovation)	<a href="http://www.senescyt.gob.ec/consulta-titulos-web/faces/vista/consulta/inicio.xhtml?jsessionid=APunrzSenU7o7zZdCxjMIFM5.9d3554de-65a7-3bea-bdb0-5e7d4cccec2bb">http://www.senescyt.gob.ec/consulta-titulos-web/faces/vista/consulta/inicio.xhtml?jsessionid=APunrzSenU7o7zZdCxjMIFM5.9d3554de-65a7-3bea-bdb0-5e7d4cccec2bb</a>
<b>Guatemala</b>	Consulta de Titulos	<a href="http://cgc.contraloria.gob.gt/registro-titulos/frm_consulta_titulos_externa.jsp">http://cgc.contraloria.gob.gt/registro-titulos/frm_consulta_titulos_externa.jsp</a>
<b>Malaysia</b>	Malaysian University Database	<a href="https://dohe.mohe.gov.my/award/tables.php">https://dohe.mohe.gov.my/award/tables.php</a>  Sanctioned by the Malaysian government
<b>Mexico</b>	Secretaría de Educación Pública (SEP), Dirección General de Profesiones (DGP)	<a href="https://www.cedulaprofesional.sep.gob.mx/cedula/indexAvanzada.action">https://www.cedulaprofesional.sep.gob.mx/cedula/indexAvanzada.action</a>

NOTE: This list is not intended to be exhaustive and represents a sample of the resources available. The information provided has been gathered from a review of the external websites that are listed in the above table. Those using this list are encouraged to contact these organizations/associations for current information.

Country Served	Organization/Service	website
<b>Mexico</b>	Secretaría de Educación Pública (SEP), Dirección General de Profesiones (DGP)	<a href="https://www.cedulaprofesional.sep.gob.mx/cedula/indexAvanzada.action">https://www.cedulaprofesional.sep.gob.mx/cedula/indexAvanzada.action</a>
<b>Nigeria</b>	National Examination Council	<a href="http://www.mynecoexams.com/index.html">http://www.mynecoexams.com/index.html</a> <a href="http://www.mynecoexams.com/results/">http://www.mynecoexams.com/results/</a>  Sanctioned by the national government
<b>Norway</b>	Vitnemalsportalen (Norwegian Diploma Registry)	<a href="https://www.vitnemalsportalen.no/english/">https://www.vitnemalsportalen.no/english/</a>
<b>Peru</b>	Superintendencia Nacional de Educación Superior Universitaria (SUNEDU)	<a href="http://www.sunedu.gob.pe/grados-y-titulos/registro-de-grados-y-titulos/">http://www.sunedu.gob.pe/grados-y-titulos/registro-de-grados-y-titulos/</a>
<b>South Africa</b>	The South African Qualifications Authority (SAQA) maintains the National Learner's Records Database [NLRD]	<a href="http://www.saqa.org.za/show.php?id=5689">http://www.saqa.org.za/show.php?id=5689</a>
<b>Ukraine</b>	Inforesurs	<a href="https://www.inforesurs.gov.ua/">https://www.inforesurs.gov.ua/</a>  Sanctioned by the Ukraine Ministry of Education and Science
<b>Ukraine</b>	Ukraine ENIC	<a href="http://www.enic-naric.net/ukraine.aspx">http://www.enic-naric.net/ukraine.aspx</a>  Sponsored by Ministry of Education and Science, part of ENIC-NARIC network (est. 1994 by UNESCO and Council of Europe)
<b>International</b>	ENIC-NARIC	Examples of equivalency databases: <a href="https://norric.org/tools/assessment-databases">https://norric.org/tools/assessment-databases</a>

# Appendix G: Associations to Support Credential Evaluation Service Providers

Name	Description	Supports provided	Guidelines	Ethical expectations
Canada - Alliance of Credential Evaluation Services Canada [ACESC]  <a href="http://www.canalliance.org/index.en.stm">http://www.canalliance.org/index.en.stm</a>	<b>Members:</b> Comparative Education Service [CES] International Credential Assessment Service of Canada [ICAS] International Credential Evaluation Service [ICES] International Qualifications Assessment Service [IQAS] Ministère de l'Immigration, de la Diversité et de l'Inclusion [MIDI] World Education Services [WES]  CICIC provides secretariat support to ACESC.	Ensures quality assured practices are followed by its members (i.e., external credential service providers).	<p>Members must either operate as part of provincial/territorial authority; be mandated by provincial/territorial authority to provide services; or provide international credential evaluation services to two public institutions in the province/territory.</p> <p>Members are required to demonstrate compliance with the <i>Pan-Canadian Quality Assurance Framework for the Assessment of International Academic Credentials</i> (QAF); serve a broad-based clientele; provide multi-purposed assessments for many different countries of origin, disciplines, and levels of credentials; have complied with the above requirements for at least one year; and have performed at least 250 evaluations annually.</p>	<p>Operating principles are embedded in the QAF.</p> <p>"Alliance clients can expect the following:</p> <ul style="list-style-type: none"> <li>* Fair and credible services All applicants are treated in an equitable manner.</li> <li>* Quality assurance Alliance members must conform to established principles of good practice and maintain internationally recognized standards of quality.</li> <li>* Portability Assessments are accepted by other member services and are widely recognized by employers, educational institutions and regulatory bodies.</li> <li>* Consistency in approach While decisions may vary according to provincial or territorial systems of education, consistent application of standards ensures similar cases are treated in a similar manner.</li> <li>* Accountability Because members are mandated by or work with provincial or territorial authorities to provide international academic credential assessment services, they are accountable to the public." (ACESC, n.d.).</li> </ul>

NOTE: This list is not intended to be exhaustive and represents a sample of the resources available. The information provided has been gathered from a review of the external websites that are listed in the above table. Those using this list are encouraged to contact these organizations/associations for current information.

Name	Description	Supports provided	Guidelines	Ethical expectations
Canada – Canadian Information Centre for International Credentials (CICIC)  <a href="http://cicic.ca">http://cicic.ca</a>	Canada's official information centre for international students under the Lisbon Recognition Convention (LRC)  Canada's representative in the ENIC-NARIC Networks  What does CICIC do? 1. "provides information and referral services to individuals and organizations on the recognition of academic and occupational credentials for working and studying in Canada and abroad; 2. provides information on Canada's education systems and quality assurance to assist in the recognition of Canadian qualifications, in collaboration with provincial and territorial ministries of education 3. contributes to policy dialogue and analysis on academic credential assessment issue management in Canada, including building awareness of the impact of developments in related areas such as immigration and labour market policies, and of the need to facilitate mobility by reducing barriers to students and workers moving to, across, or outside Canada; 4. develops tools and resources to support the community of academic credential assessors to improve consistency of and capacity for academic credential assessment in Canada; 5. manages labour-mobility projects, focusing on academic credential assessment and the teaching profession." (CICIC)	<b>For Individuals, services provided include the following:</b> 1. Directory of Occupational Profiles (to find "information on occupation regulation, regulatory authorities, credential assessment and recognition, and whether a mutual recognition agreement (MRA) is available.") <sup>88</sup> 2. Directory of Educational Institutions in Canada (to find "currently recognized, authorized, registered, and/or licensed educational institutions in Canada") <sup>89</sup>  <b>For credential assessors:</b> 1. <i>Quality Assurance Framework</i> <sup>90</sup> 2. Directory of Comparability Assessment Outcomes <sup>4</sup> (Accessible to CICIC members) 3. EVALUATION Listserv <sup>92</sup> - for CICIC members to get feedback from other pan-Canadian assessors to assist in the assessment and recognition process 4. Competency Profile for an Academic Credential Assessor (to support HR within your organization) <sup>93</sup> 5. Terminology Guide - of terms commonly used in the academic credential assessment industry in Canada <sup>94</sup> 6. Assessment 101 - online, distance education course for credential assessors in Canada	CICIC is guided by the Lisbon Recognition Convention (LRC) and the <i>Pan-Canadian Quality Assurance Framework</i> (QAF).	These are embedded in the LRC and the QAF.

<sup>88</sup> <https://www.cicic.ca/935/perform-an-advanced-search-in-the-directory-of-occupational-profiles.canada?>

<sup>89</sup> <https://www.cicic.ca/869/Do-an-advanced-search-in-the-Directory-of-Educational-Institutions-in-Canada/index.canada>

<sup>90</sup> <https://www.cicic.ca/1498/Comply-with-the-Pan-Canadian-Quality-Assurance-Framework-within-your-organization/index.canada>

<sup>91</sup> <https://www.cicic.ca/extranet/1452/index.canada>

<sup>92</sup> <https://www.cicic.ca/1473/Read-more-about-the-EVALUATION-listserv/index.canada>

<sup>93</sup> <https://www.cicic.ca/1532/Identify-key-competencies-of-an-academic-credential-assessor/index.canada>

<sup>94</sup> <https://www.cicic.ca/1541/search-the-terminology-guides.canada?>



Name	Description	Supports provided	Guidelines	Ethical expectations
International - TAICEP  <a href="https://www.taicep.org/taiceporgwp/">https://www.taicep.org/taiceporgwp/</a>	Association Goals: <ul style="list-style-type: none"> <li>• "Define and promote the profession</li> <li>• Develop and promote common standards</li> <li>• Advocate for the profession</li> <li>• Conduct research and disseminate information that supports the profession</li> <li>• Identify and develop theories, methodologies and best practices used in international credential evaluation</li> <li>• Obtain appropriate official recognition for the association</li> <li>• Promote cooperation with other groups involved in international education</li> <li>• Identify and promote professional development, training, and other educational opportunities"<sup>95</sup></li> </ul>	TAICEP publishes a professional competency profile <sup>96</sup> which details the expectations of credential evaluators. The Profile may be used by institutions when developing job descriptions and guidelines.	Membership expectations: <sup>97</sup>  "Individuals and organisations involved in the professional development of international credential evaluators and the quality of international credential evaluation practices may qualify as members upon the payment of annual dues. Membership in TAICEP implies acceptance of and adherence to TAICEP's operational principles of Collaboration, Transparency, Inclusiveness, Volunteerism, and International Orientation."	TAICEP is guided by the following principles when developing best practice standards: <sup>98</sup>  <ul style="list-style-type: none"> <li>• Openness</li> <li>• Balance</li> <li>• Transparency</li> <li>• Consensus</li> <li>• Principled processes</li> </ul>
US - Association of Credential Evaluators  <a href="http://aice-eval.org/">http://aice-eval.org/</a>	Promotes best practices in international education.  AICE Endorsed Members provide international credentials evaluation services.	Publishes several evaluation guides for members <sup>99</sup> - Admissions Credentials Evaluation Guide - HR Credentials Evaluation Guide - Immigration Credentials Evaluation Guide - Military Credentials Evaluation Guide - Professional Licensing Credentials Evaluation Guide - Standards guide	<b>Membership application process:</b> - Each member must meet "the highest standards in research methodology and international credential evaluation services". - Members are required to meet and enforce AICE standards (e.g., as these relate to professional expertise of hired evaluators, evaluation methodology, and credential evaluation reports).	AICE publishes a code of ethics with 14 ethical principles, to which AICE members must adhere. <sup>100</sup>

<sup>95</sup> <https://www.taicep.org/taiceporgwp/about/>

<sup>96</sup> <https://www.taicep.org/taiceporgwp/wp-content/uploads/2017/08/Professional-Competency-Profile-PCP-for-Credential-Evaluators-4.pdf>

<sup>97</sup> <https://www.taicep.org/taiceporgwp/membership-criteria/>

<sup>98</sup> <https://www.taicep.org/taiceporgwp/about/>

<sup>99</sup> <http://aice-eval.org/evaluation-guides/>

<sup>100</sup> <http://aice-eval.org/code-of-ethics/>

Name	Description	Supports provided	Guidelines	Ethical expectations
US - National Association of Credential Evaluation Services  <a href="http://www.naces.org/">http://www.naces.org/</a>	<p>NACES' Vision Statement:<sup>101</sup> "To serve as the authority in the credential evaluation field and to guide the evolution of the profession in ever-broadening contexts for applied comparative education in the global community."</p> <p>NACES' Mission Statement: "NACES member organizations demonstrate the highest ethical and practice standards through a rigorous membership process. We serve education institutions, professional organizations, regulatory and legal entities, business communities, and individuals in the authentication, verification, analysis, and evaluation of education obtained outside the United States."</p>	Provides members access to reference and resource libraries and databases	<p>NACES members must meet membership requirements and complete an application procedure:</p> <ul style="list-style-type: none"> <li>- These include an onsite visit, meeting the standard of having a senior evaluation staff with no less than 5 years of fulltime experience, etc.</li> <li>- "[M]embers must make sustained contributions to the field of credential evaluation, maintain extensive reference, resource libraries, and databases, [as well as] share information with other NACES® members."</li> <li>- NACES members must "adhere to strict standards of professional ethics."</li> <li>- NACES members must "undergo an annual recertification process which includes periodic on-site visits."</li> </ul>	Website indicates NACES maintains "strict standards of professional ethics".

<sup>101</sup> <http://naces.org/about.html>

# Appendix H: Transfer and Exchange Credit Policies for International Credentials

Institution	Policies
Ambrose University	<a href="https://ambrose.edu/registrar/transfer-credit">https://ambrose.edu/registrar/transfer-credit</a>
Athabasca University	<a href="http://ous.athabascau.ca/policy/registry.php">http://ous.athabascau.ca/policy/registry.php</a>
Brandon University	<a href="https://www.brandonu.ca/future-students/apply/transfer/transfer-guide/">https://www.brandonu.ca/future-students/apply/transfer/transfer-guide/</a>
Brock University	<a href="https://brocku.ca/university-secretariat/facultyhandbook/section3">https://brocku.ca/university-secretariat/facultyhandbook/section3</a> see section 3.A.3 for undergraduate and section B.6 for graduate <a href="https://brocku.ca/webcal/2017/undergrad/admi.html">https://brocku.ca/webcal/2017/undergrad/admi.html</a> <a href="https://brocku.ca/webcal/2017/undergrad/admi.html#sec12">https://brocku.ca/webcal/2017/undergrad/admi.html#sec12</a> <a href="https://brocku.ca/admissions/international/international-university-transfer-student/">https://brocku.ca/admissions/international/international-university-transfer-student/</a>
Canadian Mennonite University	<a href="http://www.cmu.ca/become.php?s=transfer">http://www.cmu.ca/become.php?s=transfer</a> <a href="http://www.cmu.ca/students.php?s=registrar&amp;p=policies">http://www.cmu.ca/students.php?s=registrar&amp;p=policies</a>
Capilano University	<a href="http://www.capilanou.ca/WorkArea/linkit.aspx?LinkIdentifier=id&amp;ItemID=22784&amp;libID=22794">http://www.capilanou.ca/WorkArea/linkit.aspx?LinkIdentifier=id&amp;ItemID=22784&amp;libID=22794</a>
Carleton University	<b>Transfer policies:</b> <ul style="list-style-type: none"> <li><a href="https://admissions.carleton.ca/apply/transfer-credit/">https://admissions.carleton.ca/apply/transfer-credit/</a></li> <li><a href="https://admissions.carleton.ca/apply/transfer-credit/requesting-transfer-credit/">https://admissions.carleton.ca/apply/transfer-credit/requesting-transfer-credit/</a></li> </ul> <b>Exchange policy:</b> <ul style="list-style-type: none"> <li><a href="https://carleton.ca/registrar/exchanges/international-exchange/">https://carleton.ca/registrar/exchanges/international-exchange/</a></li> </ul>
College of the Rockies	<a href="https://sharepoint.cotr.bc.ca/Forms/Policies%20and%20Procedures/College%20Policies%20and%20Procedures%20Manual/2%20STUDENT%20AFFAIRS/2.5%20Records/2.5.6%20Transfer%20Credit%20(as%20a%20receiving%20institution).pdf">https://sharepoint.cotr.bc.ca/Forms/Policies%20and%20Procedures/College%20Policies%20and%20Procedures%20Manual/2%20STUDENT%20AFFAIRS/2.5%20Records/2.5.6%20Transfer%20Credit%20(as%20a%20receiving%20institution).pdf</a>
Conestoga College	<a href="https://www.conestogac.on.ca/policies/academics.jsp">https://www.conestogac.on.ca/policies/academics.jsp</a>
Fanshawe College	<a href="https://www.fanshawec.ca/sites/default/files/legacy/oldfanshawe/sites/default/files/assets/policies/pdf/2a11.pdf">https://www.fanshawec.ca/sites/default/files/legacy/oldfanshawe/sites/default/files/assets/policies/pdf/2a11.pdf</a>
Humber College	<a href="http://humber.ca/assets/files/pdfs/Academic_Regulations_2017_2018.pdf">http://humber.ca/assets/files/pdfs/Academic_Regulations_2017_2018.pdf</a> Section 6.0
Justice Institute of BC	<a href="http://www.jibc.ca/policy/3212">http://www.jibc.ca/policy/3212</a> <a href="http://www.jibc.ca/procedure/3212-001">http://www.jibc.ca/procedure/3212-001</a>
King's University College at Western University	<a href="https://www.kings.uwo.ca/future-students/admissions/transfer-advanced-credit/">https://www.kings.uwo.ca/future-students/admissions/transfer-advanced-credit/</a>

Institution	Policies
Kwantlen Polytechnic University	<a href="http://www.kpu.ca/sites/default/files/Policies/AR12%20Transfer%20Credit%20and%20Advanced%20Standing%20Policy.pdf">http://www.kpu.ca/sites/default/files/Policies/AR12%20Transfer%20Credit%20and%20Advanced%20Standing%20Policy.pdf</a> <a href="http://www.kpu.ca/sites/default/files/Policies/AR12%20Transfer%20Credit%20and%20Advanced%20Standing%20Procedure.pdf">http://www.kpu.ca/sites/default/files/Policies/AR12%20Transfer%20Credit%20and%20Advanced%20Standing%20Procedure.pdf</a> <a href="http://www.kpu.ca/policies#Admissions">http://www.kpu.ca/policies#Admissions</a> & Registration
Langara College	<a href="https://langara.ca/about-langara/policies/college-policies/category.html">https://langara.ca/about-langara/policies/college-policies/category.html</a> E2009 Transfer credit policy
MacEwan University	<a href="https://www.macewan.ca/contribute/groups/public/documents/policy/interinst_transferability.pdf">https://www.macewan.ca/contribute/groups/public/documents/policy/interinst_transferability.pdf</a>
Manitoba Institute of Trades and Technology	<a href="http://mitt.ca/Content/Images/uploaded/Transfer%20Credit%20Policy%20updated%20Jan%202015.pdf">http://mitt.ca/Content/Images/uploaded/Transfer%20Credit%20Policy%20updated%20Jan%202015.pdf</a>
McGill University	<a href="https://nimbus-ssl.mcgill.ca/exsa/search/searchEquivalency">https://nimbus-ssl.mcgill.ca/exsa/search/searchEquivalency</a>
Memorial University	In university calendar: <a href="http://www.mun.ca/regoff/calendar/sectionNo=REGS-0421">http://www.mun.ca/regoff/calendar/sectionNo=REGS-0421</a>
Mount Allison University	<b>Transfer Policies:</b> <ul style="list-style-type: none"> <li>3.9. Admission with Advanced Standing - <a href="http://www.mta.ca/academic_calendar/17-18a/_3.html#_3.93.10">http://www.mta.ca/academic_calendar/17-18a/_3.html#_3.93.10</a></li> <li>Transfer Students - <a href="http://www.mta.ca/academic_calendar/17-18a/_3.html#_3.10">http://www.mta.ca/academic_calendar/17-18a/_3.html#_3.10</a></li> </ul> <b>Exchange policy:</b> <ul style="list-style-type: none"> <li><a href="http://www.mta.ca/academic_calendar/17-18a/_3.html#_3.13">http://www.mta.ca/academic_calendar/17-18a/_3.html#_3.13</a></li> </ul>
Nipissing University	<a href="https://academiccalendar.nipissingu.ca/Catalog/ViewCatalog.aspx?pageid=viewcatalog&amp;catalogid=4&amp;chapterid=310&amp;loadusercredits=False#AppPostSecondaryEd">https://academiccalendar.nipissingu.ca/Catalog/ViewCatalog.aspx?pageid=viewcatalog&amp;catalogid=4&amp;chapterid=310&amp;loadusercredits=False#AppPostSecondaryEd</a>
Norquest College	<a href="https://www.norquest.ca/about-us/policies-procedure/academic/admissions-policy/transfer-credit-procedure.aspx">https://www.norquest.ca/about-us/policies-procedure/academic/admissions-policy/transfer-credit-procedure.aspx</a>
Okanagan College	<a href="http://www.okanagan.bc.ca/Assets/Departments+(Administration)/Legal+Affairs/ABE+Transfer+Credit+Policy.pdf">http://www.okanagan.bc.ca/Assets/Departments+(Administration)/Legal+Affairs/ABE+Transfer+Credit+Policy.pdf</a> <a href="http://www.okanagan.bc.ca/Assets/Departments+(Administration)/Legal+Affairs/Transfer+Credit+Policy.pdf">http://www.okanagan.bc.ca/Assets/Departments+(Administration)/Legal+Affairs/Transfer+Credit+Policy.pdf</a>
Providence University	<a href="http://www.prov.ca/admissions/recognition-of-prior-learning/">http://www.prov.ca/admissions/recognition-of-prior-learning/</a>
Quest University	<b>Transfer Policies:</b> <ul style="list-style-type: none"> <li><a href="https://questu.ca/downloads/documents/REGISTRAR/2018/2017-2018-Academic-Calendar.pdf">https://questu.ca/downloads/documents/REGISTRAR/2018/2017-2018-Academic-Calendar.pdf</a></li> <li><a href="https://questu.ca/admissions/apply/transfer-students/">https://questu.ca/admissions/apply/transfer-students/</a></li> </ul> <b>Exchange Policy:</b> <ul style="list-style-type: none"> <li><a href="https://questu.ca/wp-content/uploads/2017/12/2017-2018-Academic-Calendar-1.pdf">https://questu.ca/wp-content/uploads/2017/12/2017-2018-Academic-Calendar-1.pdf</a></li> </ul>
Red Deer College	Transfer Credit Policy - <a href="http://rdc.ab.ca/sites/default/files/uploads/documents/2078/transfer-credit-courses-and-programs.pdf">http://rdc.ab.ca/sites/default/files/uploads/documents/2078/transfer-credit-courses-and-programs.pdf</a> Recognition of Prior Learning Policy - <a href="http://rdc.ab.ca/sites/default/files/uploads/documents/2093/recognition-prior-learning-policy.pdf">http://rdc.ab.ca/sites/default/files/uploads/documents/2093/recognition-prior-learning-policy.pdf</a>
Red River College	<a href="http://www.rrc.ca/policies">http://www.rrc.ca/policies</a> - See A14, A15, A16, A17; Under Revision

Institution	Policies
Royal Military College of Canada	<a href="https://www.rmcc-cmrc.ca/en/plar/prior-learning-assessment-transfer-credits-undergraduate">https://www.rmcc-cmrc.ca/en/plar/prior-learning-assessment-transfer-credits-undergraduate</a>
Ryerson University	<a href="http://www.ryerson.ca/currentstudents/transfercredits/Eligibility/UGRD_Eligibility/">http://www.ryerson.ca/currentstudents/transfercredits/Eligibility/UGRD_Eligibility/</a>
Saint Mary's University	<a href="http://www.smu.ca/webfiles/UG%20calendar%202017-18%2024%20March%202017.pdf">http://www.smu.ca/webfiles/UG%20calendar%202017-18%2024%20March%202017.pdf</a>
Saskatchewan Polytechnic	<a href="http://saskpolytech.ca/about/about-us/documents/policies/recognitionofpriorlearning116.pdf">http://saskpolytech.ca/about/about-us/documents/policies/recognitionofpriorlearning116.pdf</a>
Seneca College	<a href="http://www.senecacollege.ca/degreetransfer/applying-for-transfer-credit/">http://www.senecacollege.ca/degreetransfer/applying-for-transfer-credit/</a>
Sheridan College	<a href="https://policy.sheridanc.on.ca/dotNet/documents/?docid=795">https://policy.sheridanc.on.ca/dotNet/documents/?docid=795</a> <a href="https://policy.sheridanc.on.ca/dotNet/documents/?docid=796">https://policy.sheridanc.on.ca/dotNet/documents/?docid=796</a>
Simon Fraser University	<p><b>Transfer policies:</b></p> <ul style="list-style-type: none"> <li><a href="https://www.sfu.ca/students/calendar/2017/fall/fees-and-regulations/admission/undergraduate-admission.html#transfer-credit">https://www.sfu.ca/students/calendar/2017/fall/fees-and-regulations/admission/undergraduate-admission.html#transfer-credit</a></li> <li><a href="http://www.sfu.ca/students/admission/admission-requirements/transfer-credit.html">http://www.sfu.ca/students/admission/admission-requirements/transfer-credit.html</a></li> </ul> <p><b>Exchange policy:</b></p> <ul style="list-style-type: none"> <li><a href="https://www.ufv.ca/media/assets/secretariat/policies/Transfer-Credit-(107).pdf">https://www.ufv.ca/media/assets/secretariat/policies/Transfer-Credit-(107).pdf</a></li> </ul>
Southern Alberta Institute of Technology	<a href="http://www.sait.ca/about-sait/administration/policies-and-procedures/academic-student">http://www.sait.ca/about-sait/administration/policies-and-procedures/academic-student</a>
The King's University	<a href="https://registry.kingsu.ca/Calendar/CalendarPDF/Application%20Admission%20Registration.pdf">https://registry.kingsu.ca/Calendar/CalendarPDF/Application%20Admission%20Registration.pdf</a>
Thompson Rivers University	<a href="https://www.tru.ca/_shared/assets/ED_2-435476.pdf">https://www.tru.ca/_shared/assets/ED_2-435476.pdf</a>
University of Alberta	<a href="https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Transfer-Credit-Articulation-Procedure.pdf">https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Transfer-Credit-Articulation-Procedure.pdf</a>
University of British Columbia	<a href="http://www.calendar.ubc.ca/vancouver/index.cfm?tree=2,25,0,0">http://www.calendar.ubc.ca/vancouver/index.cfm?tree=2,25,0,0</a> (General transfer students policies) <a href="http://www.calendar.ubc.ca/vancouver/index.cfm?tree=2,17,0,0">http://www.calendar.ubc.ca/vancouver/index.cfm?tree=2,17,0,0</a> (Advanced high school course work) <a href="http://www.calendar.ubc.ca/vancouver/index.cfm?tree=4,228,549,736">http://www.calendar.ubc.ca/vancouver/index.cfm?tree=4,228,549,736</a> (Exchange) <a href="http://www.calendar.ubc.ca/vancouver/index.cfm?tree=3,47,0,0">http://www.calendar.ubc.ca/vancouver/index.cfm?tree=3,47,0,0</a> (students who visit other post-sec institutions on Letters of Permission)
University of Calgary	<a href="http://www.ucalgary.ca/pubs/calendar/current/a-12.html">http://www.ucalgary.ca/pubs/calendar/current/a-12.html</a>
University of Lethbridge	<p><b>Transfer Policies:</b></p> <ul style="list-style-type: none"> <li><a href="https://www.uleth.ca/ross/sites/ross/files/imported/academic-calendar/2017-18/part01.pdf">https://www.uleth.ca/ross/sites/ross/files/imported/academic-calendar/2017-18/part01.pdf</a></li> <li><a href="https://www.uleth.ca/ross/admissions/undergrad/transfer-credit">https://www.uleth.ca/ross/admissions/undergrad/transfer-credit</a></li> <li><a href="https://www.uleth.ca/ross/transfer-resources">https://www.uleth.ca/ross/transfer-resources</a></li> <li><a href="https://www.uleth.ca/ross/admissions/undergrad/visiting-exchange">https://www.uleth.ca/ross/admissions/undergrad/visiting-exchange</a></li> </ul> <p><b>Exchange Policies:</b></p> <ul style="list-style-type: none"> <li><a href="https://www.uleth.ca/ross/sites/ross/files/imported/academic-calendar/2017-18/part01.pdf">https://www.uleth.ca/ross/sites/ross/files/imported/academic-calendar/2017-18/part01.pdf</a></li> <li><a href="https://www.uleth.ca/ross/admissions/undergrad/visiting-exchange">https://www.uleth.ca/ross/admissions/undergrad/visiting-exchange</a></li> </ul>

Institution	Policies
University of Ontario Institute of Technology	<a href="http://admissions.uoit.ca/transferecredit/policies/index.php">http://admissions.uoit.ca/transferecredit/policies/index.php</a> <a href="http://admissions.uoit.ca/transferecredit/transfer-students/engineering-applicant.php#tab_applicantType_notes">http://admissions.uoit.ca/transferecredit/transfer-students/engineering-applicant.php#tab_applicantType_notes</a>
University of Ottawa	<a href="http://www.uottawa.ca/undergraduate-admissions/admission-with-advanced-standing">http://www.uottawa.ca/undergraduate-admissions/admission-with-advanced-standing</a>
University of Prince Edward Island	<a href="http://www.upei.ca/programsandcourses/regulation-14-transfer-credits">http://www.upei.ca/programsandcourses/regulation-14-transfer-credits</a> <a href="http://www.upei.ca/programsandcourses/undergraduate-admissions/ib">http://www.upei.ca/programsandcourses/undergraduate-admissions/ib</a> <a href="http://www.upei.ca/programsandcourses/undergraduate-admissions/advanced-placement-program">http://www.upei.ca/programsandcourses/undergraduate-admissions/advanced-placement-program</a>
University of Saskatchewan	<a href="http://policies.usask.ca/policies/academic-affairs/articulation-and-transfer-credit-policy.php">http://policies.usask.ca/policies/academic-affairs/articulation-and-transfer-credit-policy.php</a>
University of the Fraser Valley	<a href="https://www.ufv.ca/media/assets/secretariat/policies/Transfer-Credit-(107).pdf">https://www.ufv.ca/media/assets/secretariat/policies/Transfer-Credit-(107).pdf</a>
University of Waterloo	<a href="https://uwaterloo.ca/future-students/transfer-students/policies">https://uwaterloo.ca/future-students/transfer-students/policies</a>
University of Windsor	<a href="http://www.uwindsor.ca/registrar/2848/transfer-students">http://www.uwindsor.ca/registrar/2848/transfer-students</a> <a href="http://www.uwindsor.ca/registrar/sites/uwindsor.ca/registrar/files/policy_on_advanced_standing_and_credit_transfer_may_2015.pdf">http://www.uwindsor.ca/registrar/sites/uwindsor.ca/registrar/files/policy_on_advanced_standing_and_credit_transfer_may_2015.pdf</a>
Western University	<a href="http://www.uwo.ca/univsec/pdf/academic_policies/admission/transfer.pdf">http://www.uwo.ca/univsec/pdf/academic_policies/admission/transfer.pdf</a>
Wilfrid Laurier University	<a href="https://www.wlu.ca/future-students/undergraduate-students/transfer/transfer-credit-policy.html">https://www.wlu.ca/future-students/undergraduate-students/transfer/transfer-credit-policy.html</a> <a href="https://www.wlu.ca/future-students/undergraduate-students/transfer/college-pathways.html">https://www.wlu.ca/future-students/undergraduate-students/transfer/college-pathways.html</a>
York University	<a href="http://secretariat-policies.info.yorku.ca/">http://secretariat-policies.info.yorku.ca/</a>

*The policies in this table were provided by the survey respondents and interviewees and/or resulted from web research to support the project.*

# Appendix I: Fee Changes

Name of Institution	Fees related to transfer credit	Main Website	Transfer Information
Alexander College	NA	<a href="https://alexandercollege.ca/">https://alexandercollege.ca/</a>	<a href="https://alexandercollege.ca/admissions-and-registration/credit-transfer/">https://alexandercollege.ca/admissions-and-registration/credit-transfer/</a>
Ascenda School of Management	NA	<a href="http://www.acsenda.com/">http://www.acsenda.com/</a>	<a href="http://www.acsenda.com/admissions-for-international-business-programs/transfer-of-credits/">http://www.acsenda.com/admissions-for-international-business-programs/transfer-of-credits/</a> <a href="http://camosun.ca/services/student-records/transfer-credit.html">http://camosun.ca/services/student-records/transfer-credit.html</a>
BC Institute of Technology	NA	<a href="https://www.bcit.ca/">https://www.bcit.ca/</a>	<a href="https://www.bcit.ca/admission/transfer/">https://www.bcit.ca/admission/transfer/</a>
Camosun College	\$50/International Baccalaureate (IB) and Advanced Placement (AP) transcript; \$100 per transcript outside of Canada	<a href="http://camosun.ca/">http://camosun.ca/</a>	<a href="http://camosun.ca/services/student-records/transfer-credit.html">http://camosun.ca/services/student-records/transfer-credit.html</a> <a href="https://www.bcit.ca/ices/apply/educationalinstitutes.shtml">https://www.bcit.ca/ices/apply/educationalinstitutes.shtml</a>
Capilano University	NA	<a href="http://www.capilanou.ca/">http://www.capilanou.ca/</a>	<a href="http://www.capilanou.ca/admissions/Transfer-Credit/">http://www.capilanou.ca/admissions/Transfer-Credit/</a> <a href="http://www.capilanou.ca/current/calendar/">http://www.capilanou.ca/current/calendar/</a>
Coast Mountain College (formerly Northwest Community College)	NA	<a href="http://www.nwcc.bc.ca/">http://www.nwcc.bc.ca/</a>	<a href="http://www.nwcc.bc.ca/admissions/applying-nwcc/transfer-credit">http://www.nwcc.bc.ca/admissions/applying-nwcc/transfer-credit</a>
College of New Caledonia	International Transcript: \$157.50	<a href="http://www.cnc.bc.ca/">http://www.cnc.bc.ca/</a>	<a href="http://www.cnc.bc.ca/Exploring/Services/student_services/advising/transferring.htm">http://www.cnc.bc.ca/Exploring/Services/student_services/advising/transferring.htm</a>
College of the Rockies	NA	<a href="http://www.cotr.bc.ca/">http://www.cotr.bc.ca/</a>	<a href="http://www.cotr.bc.ca/Transfer/">http://www.cotr.bc.ca/Transfer/</a>  <a href="https://sharepoint.cotr.bc.ca/Forms/Policies%20and%20Procedures/College%20Policies%20and%20Procedures%20Manual/2%20STUDENT%20AFFAIRS/2.5%20Records/2.5.6%20Transfer%20Credit%20(as%20a%20receiving%20institution).pdf">https://sharepoint.cotr.bc.ca/Forms/Policies%20and%20Procedures/College%20Policies%20and%20Procedures%20Manual/2%20STUDENT%20AFFAIRS/2.5%20Records/2.5.6%20Transfer%20Credit%20(as%20a%20receiving%20institution).pdf</a>
Corpus Christi College	NA	<a href="http://corpuschristi.ca/">http://corpuschristi.ca/</a>	<a href="http://corpuschristi.ca/channels/future-students/what-are-the-minimum-requirements/">http://corpuschristi.ca/channels/future-students/what-are-the-minimum-requirements/</a>
Douglas College	NA	<a href="https://www.douglascollege.ca/">https://www.douglascollege.ca/</a>	<a href="https://www.douglascollege.ca/study-at-douglas/register/canadian-students/transfer-your-credits">https://www.douglascollege.ca/study-at-douglas/register/canadian-students/transfer-your-credits</a>
Emily Carr University of Art and Design	NA	<a href="http://www.ecuad.ca/">http://www.ecuad.ca/</a>	<a href="http://www.ecuad.ca/admissions/application-info/undergraduate-applications/transfer-students">http://www.ecuad.ca/admissions/application-info/undergraduate-applications/transfer-students</a> <a href="https://www.bcit.ca/files/ices/pdf/application_form_2016.pdf">https://www.bcit.ca/files/ices/pdf/application_form_2016.pdf</a>

Name of Institution	Fees related to transfer credit	Main Website	Transfer Information
Farleigh Dickinson University	NA	<a href="http://view2.fdu.edu/vancouver-campus/">http://view2.fdu.edu/vancouver-campus/</a>	<a href="http://view2.fdu.edu/vancouver-campus/admissions/transfer-students-transfer-credits/">http://view2.fdu.edu/vancouver-campus/admissions/transfer-students-transfer-credits/</a>
Justice Institute of British Columbia	Prior Learning Assessment and Transfer Credit fees vary	<a href="http://www.jibc.ca/">http://www.jibc.ca/</a>	<a href="http://www.jibc.ca/registration/transfer-credit">http://www.jibc.ca/registration/transfer-credit</a> <a href="http://www.jibc.ca/procedure/3212-001">http://www.jibc.ca/procedure/3212-001</a> <a href="http://www.jibc.ca/registration/fees-and-refunds">http://www.jibc.ca/registration/fees-and-refunds</a>
Kwantlen Polytechnic University	No fee for requests for assessing transfer credit at point of admission ; for current students, \$50 for courses taken outside Canada	<a href="http://www.kpu.ca/">http://www.kpu.ca/</a>	<a href="http://www.kpu.ca/sites/default/files/Policies/AR12%20Transfer%20Credit%20and%20Advanced%20Standing%20Policy.pdf">http://www.kpu.ca/sites/default/files/Policies/AR12%20Transfer%20Credit%20and%20Advanced%20Standing%20Policy.pdf</a>  <a href="http://www.kpu.ca/transfercredit">http://www.kpu.ca/transfercredit</a>  <a href="http://www.kpu.ca/future-students/transfer-student#Transfer">http://www.kpu.ca/future-students/transfer-student#Transfer</a>
Langara College (example)	\$4 per course completed at a BC institution \$6 per course completed outside of BC	<a href="https://langara.ca/">https://langara.ca/</a>	<a href="https://langara.ca/about-langara/policies/pdf/E2009.pdf">https://langara.ca/about-langara/policies/pdf/E2009.pdf</a>
LaSalle College Vancouver	Fee for course challenges	<a href="http://www.lasallecollegevancouver.com/">http://www.lasallecollegevancouver.com/</a>	<a href="http://www.lasallecollegevancouver.com/student-resources/academic-calendar/704-credit-transfer-and-recognition-of-prior-learning-policy">http://www.lasallecollegevancouver.com/student-resources/academic-calendar/704-credit-transfer-and-recognition-of-prior-learning-policy</a>
Nicola Valley Institute of Technology	NA	<a href="http://www.nvit.ca/">http://www.nvit.ca/</a>	<a href="http://www.nvit.ca/docs/D650E86EF5E44EF9.pdf">http://www.nvit.ca/docs/D650E86EF5E44EF9.pdf</a>
North Island College	International: \$75 (n/a for exchange students)	<a href="https://www.nic.bc.ca/">https://www.nic.bc.ca/</a>	<a href="https://www.nic.bc.ca/services/recordsandregistration/registration.aspx#tc">https://www.nic.bc.ca/services/recordsandregistration/registration.aspx#tc</a>
Northern Lights College	\$20/transcript; course challenge fees assessed at 75% of tuition	<a href="https://www.nlc.bc.ca/">https://www.nlc.bc.ca/</a>	<a href="https://www.nlc.bc.ca/Admissions/Tuition-Fees">https://www.nlc.bc.ca/Admissions/Tuition-Fees</a>
Okanagan College	\$150/ international transcript	<a href="http://www.okanagan.bc.ca/">http://www.okanagan.bc.ca/</a>	<a href="http://www.okanagan.bc.ca/Assets/Departments+(Administration)/Registrar\$!27s+Office/Forms/Request+for+Transfer+Credit.pdf">http://www.okanagan.bc.ca/Assets/Departments+(Administration)/Registrar\$!27s+Office/Forms/Request+for+Transfer+Credit.pdf</a> <a href="http://webapps-5.okanagan.bc.ca/ok/Calendar/AcademicRequirementsforProgramCompletionandGraduation">http://webapps-5.okanagan.bc.ca/ok/Calendar/AcademicRequirementsforProgramCompletionandGraduation</a> <a href="http://www.okanagan.bc.ca/BecomeaStudent/Registration/transfercredit.html">http://www.okanagan.bc.ca/BecomeaStudent/Registration/transfercredit.html</a>



Name of Institution	Fees related to transfer credit	Main Website	Transfer Information
<b>Quest University</b>	NA	<a href="https://questu.ca/">https://questu.ca/</a>	<a href="https://questu.ca/admissions/apply/transfer-students/">https://questu.ca/admissions/apply/transfer-students/</a>
<b>Royal Roads University</b>	\$121.38 for international credential evaluation (if completed by RRU)	<a href="http://www.royalroads.ca/">http://www.royalroads.ca/</a>	<a href="http://policies.royalroads.ca/academic-regulations/section-1-credit-and-registration">http://policies.royalroads.ca/academic-regulations/section-1-credit-and-registration</a> <a href="http://www.royalroads.ca/prospective-students/ancillary-fees">http://www.royalroads.ca/prospective-students/ancillary-fees</a>  Transfer Agreement Database: <a href="http://www.royalroads.ca/prospective-students/transfer-agreements">http://www.royalroads.ca/prospective-students/transfer-agreements</a>
<b>Selkirk College</b>	NA	<a href="http://www.selkirk.ca/">http://www.selkirk.ca/</a>	<a href="http://www.selkirk.ca/admissions/admissions-office/transfer-credit">http://www.selkirk.ca/admissions/admissions-office/transfer-credit</a>
<b>Simon-Fraser University</b>	NA	<a href="http://www.sfu.ca/">http://www.sfu.ca/</a>	<a href="http://www.sfu.ca/students/calendar/2017/fall/fees-and-regulations/admission/undergraduate-admission.html#transfer-credit">http://www.sfu.ca/students/calendar/2017/fall/fees-and-regulations/admission/undergraduate-admission.html#transfer-credit</a> <a href="http://www.sfu.ca/students/admission/admission-requirements/transfer-credit.html">http://www.sfu.ca/students/admission/admission-requirements/transfer-credit.html</a> [New Admissions]
<b>Thompson River University (TRU)</b>	Part of application fee	<a href="http://www.tru.ca/">http://www.tru.ca/</a>	<a href="http://www.tru.ca/campus/admissions/transfer-credit.html">http://www.tru.ca/campus/admissions/transfer-credit.html</a> <a href="http://www.tru.ca/campus/admissions/apply.html">http://www.tru.ca/campus/admissions/apply.html</a> <a href="https://www.bcit.ca/files/ices/pdf/application_form_2016.pdf">https://www.bcit.ca/files/ices/pdf/application_form_2016.pdf</a>
<b>Trinity Western University</b>	NA	<a href="https://www.twu.ca/undergraduate">https://www.twu.ca/undergraduate</a>	<a href="https://www8.twu.ca/undergraduate/admissions/international-students/#transfer">https://www8.twu.ca/undergraduate/admissions/international-students/#transfer</a>
<b>University of British Columbia (UBC)</b>	NA	<a href="http://www.ubc.ca/">http://www.ubc.ca/</a>	<a href="https://students.ubc.ca/enrolment/registration/transfer-credits">https://students.ubc.ca/enrolment/registration/transfer-credits</a> [Vancouver Campus] <a href="http://students.ok.ubc.ca/transfercredit.html">http://students.ok.ubc.ca/transfercredit.html</a> [Okanagan Campus] <a href="http://students.ok.ubc.ca/advising/_shared/assets/Transfer_Credit_Guide23979.pdf">http://students.ok.ubc.ca/advising/_shared/assets/Transfer_Credit_Guide23979.pdf</a> [UBC Transfer Credit Guide, Okanagan] <a href="http://you.ubc.ca/applying-ubc/international-highschools-requirements/#united-states">http://you.ubc.ca/applying-ubc/international-highschools-requirements/#united-states</a> [International Students High School requirements] <a href="http://www.calendar.ubc.ca/vancouver/index.cfm?tree=2,25,74,0">http://www.calendar.ubc.ca/vancouver/index.cfm?tree=2,25,74,0</a> [Applicants from Post-Secondary Institution]
<b>University of Canada West</b>	NA	<a href="https://ucanwest.ca/">https://ucanwest.ca/</a>	<a href="https://ucanwest.ca/admissions/transfer-credits">https://ucanwest.ca/admissions/transfer-credits</a> <a href="https://ucanwest.ca/media/45002/9004-transfer-credit-rev-feb-2015-approved-by-ac.pdf">https://ucanwest.ca/media/45002/9004-transfer-credit-rev-feb-2015-approved-by-ac.pdf</a> [Complete Transfer Credit Policy] <a href="https://www.bcit.ca/files/ices/pdf/application_form_2016.pdf">https://www.bcit.ca/files/ices/pdf/application_form_2016.pdf</a>
<b>University of Northern BC (UNBC)</b>	NA	<a href="https://www.unbc.ca/">https://www.unbc.ca/</a>	<a href="https://www.unbc.ca/calendar/undergraduate/post-secondary-admissions">https://www.unbc.ca/calendar/undergraduate/post-secondary-admissions</a> <a href="https://www.unbc.ca/apply/undergraduate/transfer-student-admission-requirements">https://www.unbc.ca/apply/undergraduate/transfer-student-admission-requirements</a>

Name of Institution	Fees related to transfer credit	Main Website	Transfer Information
<b>University of the Fraser Valley</b>	\$250 for international students; one fee covers all transcripts submitted at once	<a href="http://www.ufv.ca/">http://www.ufv.ca/</a>	<a href="https://www.ufv.ca/admissions/admissions/transfer/">https://www.ufv.ca/admissions/admissions/transfer/</a>
<b>University of Victoria</b>	NA	<a href="http://www.uvic.ca/">http://www.uvic.ca/</a>	<a href="http://www.uvic.ca/future-students/undergraduate/admissions/transfer-credit/index.php">http://www.uvic.ca/future-students/undergraduate/admissions/transfer-credit/index.php</a> <a href="http://web.uvic.ca/calendar2016-05/undergrad/info/admission/transfers.html">http://web.uvic.ca/calendar2016-05/undergrad/info/admission/transfers.html</a>
<b>Vancouver Community College</b>	NA	<a href="http://www.vcc.ca/">http://www.vcc.ca/</a>	<a href="https://www.bcit.ca/files/ices/pdf/application_form_2016.pdf">https://www.bcit.ca/files/ices/pdf/application_form_2016.pdf</a>
<b>Vancouver Island University</b>	NA	<a href="https://www.viu.ca/">https://www.viu.ca/</a>	<a href="https://www2.viu.ca/transfer/">https://www2.viu.ca/transfer/</a>

*Publicly available fee information collected from institutional websites winter/spring of 2018. Amounts subject to change.*

# Appendix J: Detailed Overview of Assessment Practices

## *Intake Phase*

Different institutional intake practices exist for transfer credit assessment of international credentials many of which align with domestic transfer credit approaches. One group of institutions reportedly integrates the transfer credit application process with the existing admissions process supported by advance submission of all documents including course syllabi and official translations. Another group reported requiring submission of additional documents after admissions without requiring separate application (e.g., such as course syllabi). A third group reported requiring a separate application for transfer credit. As mentioned previously, some charge a fee for transfer credit assessment; most did not.

For exchange, most require an exchange application (and, at times, charge a fee for the entire process) but none of the survey respondents or those interviewed identified a separate application or fee solely for exchange credit assessment.

Interview participants for both transfer and exchange credit indicated students are required to arrange for official academic documents such as transcripts to be sent directly from their home institution(s). When this does not occur, a student's standing is typically verified directly with the originating institution. Documents requested typically include academic documents (e.g., transcripts, diploma supplements), course syllabi, language test results (if applicable), and official translations. Institutions reported accepting academic results in sealed envelopes. One institution indicated they encourage students to upload these documents to an online system; others spoke of allowing submission of hard copies to expedite earlier assessment.

As mentioned, institutional expectations regarding course syllabi requirements tend to be very detailed which represents a significant issue as students experience challenges obtaining sufficient information.

## *Document Verification and Recognition Review Phase*

None of the institutions reported awarding transfer credit through the admissions process without first determining the veracity of a student's documents. Institutions reported this process includes reviewing the documents submitted directly from international institutions or by students for fraud.

Exchange credit assessment practices tend to follow this same approach. Interviewees and survey respondents reported requiring students to provide official transcripts and detailed course outlines upon return to support exchange credit assessment processes as often the courses ultimately taken do not always match that which was originally approved. One respondent in the survey indicated exchange courses are pre-vetted to the extent possible, thereby mitigating a student needing to seek subsequent approval upon return. Another institution indicated exchange credit is guaranteed if a student successfully completes the exchange.

## Institutional Recognition Review Phase

Interview respondents indicated transfer credit is assessed after determining the veracity of a student's former institution. Exchange programs follow this same vetting exercise although do so in the early stages of partnership development rather than at the individual student level.

Interviewees and survey respondents indicated determining institutional recognition at the point of assessment represents an issue primarily with transfer credit assessment of international documents during admissions. Reportedly, this occurs due to a lack of capacity, available expertise, and access to external resources; it appears to be a situation experienced by smaller institutions.

In both the interviews and the national survey, respondents identified the resources they use to guide this research; however, not everyone reported using the same ones (**Table 8**). Some interviewees and survey respondents raised concerns about the costs to institutions to access external resources and participate in third-party services.

**Table 8: Sampling of Resources Used by Survey Respondents to Support Transfer Credit Assessment of International Credentials (n=35)**

Organization	Times Mentioned <sup>102</sup>	Resources
AACRAO Edge and AACRAO TCP – American Association of Registrars and Admissions Officers	8	<a href="http://edge.aacrao.org/aacrao-edge-login-page.php?uri=/">http://edge.aacrao.org/aacrao-edge-login-page.php?uri=/</a> <a href="http://tcp.aacrao.org/search/search_main.php">http://tcp.aacrao.org/search/search_main.php</a>
Australia Government Department of Education and Training - NOOSR – National Office of Overseas Skills Recognition	3	<a href="https://internationaleducation.gov.au/Services-And-Resources/Services/Country-Education-Profiles/Access-CEP/Pages/default.aspx?ReturnUrl=%2fcep%2fPages%2fdefault.aspx">https://internationaleducation.gov.au/Services-And-Resources/Services/Country-Education-Profiles/Access-CEP/Pages/default.aspx?ReturnUrl=%2fcep%2fPages%2fdefault.aspx</a>
CICIC	1	<a href="https://www.cicic.ca/">https://www.cicic.ca/</a>
ECE – Educational Credential Evaluators	3	<a href="https://theconnection.ece.org/Advantage">https://theconnection.ece.org/Advantage</a>
ENIC-NARIC	4	<a href="http://www.enic-naric.net/">http://www.enic-naric.net/</a>
IERF – International Education Research Foundation	1	<a href="http://www.ierf.org/">http://www.ierf.org/</a>
IQAS	5	<a href="https://www.alberta.ca/iqas-overview.aspx#toc-2">https://www.alberta.ca/iqas-overview.aspx#toc-2</a> <a href="https://www.alberta.ca/iqas-education-guides.aspx">https://www.alberta.ca/iqas-education-guides.aspx</a>
NAFSA – Association of International Educators	1	<a href="https://www.nafsa.org/">https://www.nafsa.org/</a>
NUFFIC – Dutch organization for internationalization of education	2	<a href="https://www.nuffic.nl/en">https://www.nuffic.nl/en</a>

Organization	Times Mentioned <sup>102</sup>	Resources
UK NARIC – UK National Recognition Information Centre	5	<a href="https://www.naric.org.uk/naric/Default.aspx">https://www.naric.org.uk/naric/Default.aspx</a>
WENR – World Education News and Reviews	1	<a href="https://wenr.wes.org/">https://wenr.wes.org/</a>
WHED – international Association of Universities' Worldwide Database	2	<a href="http://www.whed.net/results_institutions.php">http://www.whed.net/results_institutions.php</a> <a href="http://whed.net/home.php">http://whed.net/home.php</a>
World Education Services	12	<a href="https://www.wes.org/ca/partners/">https://www.wes.org/ca/partners/</a> <a href="https://applications.wes.org/country-resources/resources.asp">https://applications.wes.org/country-resources/resources.asp</a>
Other Resources	4	UNESCO Guide des niveaux de formation pour l'admission générale des candidats on québécois (2013), CRÉPUQ (maintenant BCI). Google PIER Reports Ministry of Education sites in various countries ARUCC In-house faculty experts or experts in the international areas within institutions

### *Initial Credit Allocation Review Phase*

Practices reported varied by institution in this phase; however, no institution indicated they award transfer credit without first determining a student's admission eligibility. At times, the admit average, a separate higher average and/or individual course averages serve as the criterion for a student to access transfer credit. Some institutions reported offering conditional transfer credit (e.g., for courses in which the student is still enrolled or when an official transcript remains unavailable). As mentioned previously, some also reported offering unassigned credit and, if a precedent exists, assigned credit. However, if a Canadian institution deems the former institution as 'not recognized', the respondents reported not granting any credit unless the process provided for flexible consideration through use of prior learning assessments.

Canadian institutional respondents and interviewees with longer histories and larger international volumes reported systematically researching institutional recognition status, centrally capturing prior equivalency decisions, and engaging in more complex equivalency decisions at the course level. For example, one institution which captures the decisions in an unpublished central equivalency database, reportedly compares course information submitted to long-standing approvals already on file and considering any curriculum changes from the original course content to validate the continued appropriateness (or not) of the previous equivalency decision. Components staff reportedly

<sup>102</sup> Respondents may have reported using more than one resource.

consider when relying on previous decisions include the date the studies were taken, the alignment of learning outcomes, and the shift in course content. In contrast, smaller institutions, those with lower international volumes, and/or those with a shorter history assessing international documents for transfer, reported challenges with this approach to assessment. Institutional recognition research and front-ending transfer credit assessment decisions as part of the admissions offer process are constrained as a result.

### *Additional Credit Equivalency Review Phase*

For those courses lacking previous precedent setting decisions, interviewees and survey respondents emphasized the primary role of faculty discipline experts when determining course equivalencies of prior international studies, particularly for assigned credit. This is true for both transfer credit assessments during admissions and exchange credit equivalency evaluations. None reported providing any training to faculty to assist them with onboarding or to guide them in broader best practices for course equivalency assessments which appears to be a significant gap.

While preapproval of course equivalencies occurs where possible for exchange, the community indicated students often return with unreviewed/unapproved course work which requires additional assessment.

### *Decision Tracking Phase*

This is a critical phase in the overall process. The complexity and the resources and people involved highlight the importance of systematically tracking course equivalency decisions emerging from assessment of international documents. Doing so facilitates leveraging technology to ensure automation, coordination and scalable supports for students, staff, and faculty. At the course level, interviewees and survey respondents reported tracking decision outcomes in systems some of which are publicly available.

A potential exemplar for exchange equivalency tracking includes McGill University with its course equivalency workflow system, database and resource guides for faculty reviewers and administrators (2018).<sup>103</sup> At McGill, two reviewers appointed by a faculty administrator assess every course equivalency taken on exchange. Online guides exist for students, faculty reviewers and administrators that provide detailed instructions on how to use the online workflow management system when adjudicating equivalencies. Students view results and submit new requests online through this system.

### *Results Notification Phase*

Institutions reported notifying students of transfer credit and exchange credit decisions by mail. Those with more sophisticated systems infrastructures which tend to be the larger institutions with higher volumes, reported posting the equivalency evaluations in online student portals. Those that front-end the equivalency review of international documents for transfer reported including the outcomes in the offer letter package (whether online or via mail).

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<sup>103</sup> <https://nimbus-ssl.mcgill.ca/exsa/search/searchEquivalency>

### *Advising Phase*

Institutions reported encouraging students to speak with advisors to ensure their equivalencies mapped appropriately to their programs. Those interviewed indicated students presenting international documents are connected to experts early in the process to help guide them through the transfer credit processes. Exchange students reportedly receive similar support through the study abroad offices. The University of Victoria appears to be an exemplar in this area. Its advisors use detailed reports containing information about transfer and exchange credit awarded which provides calculations and indications of ongoing status towards meeting credential requirements for each student (called the "CAPP" report) (personal communications, February 2018).

### *Appeals Phase (if needed)*

Most of the interviewees spoke of the role of institution-wide appeals policies and practices in adjudicating disagreements about equivalency decisions related to transfer and exchange credit of international documents. These tend to follow broader institutional protocols.

# Appendix K: Summary of Challenges and Opportunities

Reported Challenges	Suggested Opportunities Recommended by those Interviewed
<b>Creating databases and sharing equivalency decisions province-wide</b>	
<ul style="list-style-type: none"> <li>Challenges with creating and maintaining institutionally specific databases of prior articulated courses, programs, institutions.</li> </ul>	<ul style="list-style-type: none"> <li>Support the efforts of centralized allied organizations (BCCAT, PCCAT, ACAT, ARUCC, EducationPlannerBC, etc.) to improve gaps and create shared resources</li> </ul>
	<ul style="list-style-type: none"> <li>Create a province-wide international database of prior articulated courses to enhance consistency of decisions and to facilitate triangulation of equivalency decisions where appropriate</li> </ul>
	<ul style="list-style-type: none"> <li>Create a central list of accredited international institutions and programs</li> </ul>
	<ul style="list-style-type: none"> <li>Exemplars mentioned: SFU's database of recognized institutions; the CanPESC GeoCode Project</li> </ul>
<b>Quality assurance context impacting international credentials</b>	
<ul style="list-style-type: none"> <li>Limited or uneven awareness of CICIC, the <i>Pan-Canadian Quality Assurance Framework</i> and the Lisbon Recognition Convention</li> </ul>	<ul style="list-style-type: none"> <li>Consider corraling existing and expanding centralized information resources in Canada</li> </ul>
<ul style="list-style-type: none"> <li>Risk that institutions, faculty and/or staff will become disconnected from provincial or national communities of practice and related supports and tools</li> </ul>	<ul style="list-style-type: none"> <li>Consider making a formal commitment to the principles of the <i>Pan-Canadian Quality Assurance Framework</i> and the Lisbon Recognition Convention in institutional policy documents and system-level Memorandums of Understanding</li> </ul>
<ul style="list-style-type: none"> <li>Difficulties supporting faculty who review equivalencies and a seeming hesitancy to deliver beyond-disciplinary training to support informed international credential assessment</li> </ul>	<ul style="list-style-type: none"> <li>Develop a training program for staff and faculty (particularly for people new to roles) to enhance their knowledge of external resources and supports – Include...               <ol style="list-style-type: none"> <li>Information about the field of document assessment</li> <li>Information regarding the Lisbon Recognition Convention, <i>Pan-Canadian Quality Assurance Framework</i>, and other resources</li> <li>Concepts that provide examples to inform a deeper understanding of 'substantial difference' versus 'substantial equivalence'</li> </ol> </li> </ul>
<ul style="list-style-type: none"> <li>Lack of formal training on assessing international credentials for transfer or exchange credit for both faculty and staff</li> </ul>	
<ul style="list-style-type: none"> <li>Gaps (or perceptions of gaps) in system-wide international resources and tools and uneven access to necessary external resources and subscription services that support consistent practices for evaluating institutions, documentation, and equivalencies (a noted challenge for smaller institutions, smaller central units, and staff and faculty)</li> </ul>	
<ul style="list-style-type: none"> <li>Potential for a lack of confidence in equivalency decisions</li> <li>Potential for variable review of course equivalencies</li> </ul>	
	<ul style="list-style-type: none"> <li>Create orientation materials to help new staff and faculty members responsible for discipline-specific credential equivalency evaluation of international documents</li> </ul>



Reported Challenges	Suggested Opportunities Recommended by those Interviewed
<ul style="list-style-type: none"> <li>Potential for different decisions in different departments within the same institution (example cited: one department not awarding credit for 300 courses as an 'across the board' practice regardless of evidence of equivalency versus other departments that do)</li> </ul>	<p>Ensure faculty and administrative staff are trained yearly on best practices and emerging trends, principles, and conventions.</p>
<ul style="list-style-type: none"> <li>A hesitancy on the part of administrative staff and faculty members to grant equivalency even when there is evidence of 80% overlap due to enrolment considerations</li> </ul>	
Courses and Course Outlines	
<ul style="list-style-type: none"> <li>Difficult for students to provide course syllabi (not always available from institutions in other countries)</li> </ul>	<ul style="list-style-type: none"> <li>Create a centralized equivalency database (note: ensure it acknowledges relevant differences by region and the date courses were reviewed)</li> </ul>
<ul style="list-style-type: none"> <li>Currently, there's a heavy emphasis on examining inputs (e.g., course workload and structure) rather than outputs (successful completion)</li> </ul>	<ul style="list-style-type: none"> <li>Consider the existing exemplars in Canada and elsewhere that provide a centralized equivalency system</li> </ul>
<ul style="list-style-type: none"> <li>Variable translation quality (e.g., resulting in the same course title being translated differently by different translators)</li> </ul>	<ul style="list-style-type: none"> <li>Reconsider course syllabi expectations and perhaps align requirements within specific international regions to ensure requests are appropriately contextualized</li> </ul>
<ul style="list-style-type: none"> <li>Perceived challenges with creating databases of international equivalencies (no course code or number conventions; perhaps only a title; different translations of the same course)</li> </ul>	<ul style="list-style-type: none"> <li>Consider the existing exemplars in Canada and elsewhere that provide a centralized equivalency system.</li> </ul>
Institutional Recognition Status	
<ul style="list-style-type: none"> <li>Inefficiencies resulting from different people having to research the recognition status of the same international institutions</li> </ul>	<ul style="list-style-type: none"> <li>Create a database of recognized institutions that includes the recognizing authority or support expansion of the international PESC GEOCode project to include recognition status of institutions<sup>104</sup></li> </ul>
<ul style="list-style-type: none"> <li>Highly manual and labour intensive review of individual, paper-based documents and institution recognition status</li> </ul>	<ul style="list-style-type: none"> <li>Continue to support the ARUCC Groningen project which is focused on creating connectivity to internationally trusted credential providers</li> </ul>
External Service Providers	
<ul style="list-style-type: none"> <li>Lack of knowledge and trust in external evaluators</li> </ul>	<ul style="list-style-type: none"> <li>Review and potentially partner with reputable external credential evaluation service providers, particularly those that provide more advanced assessment that will support early stages of the transfer credit and course equivalency processes</li> </ul>

<sup>104</sup> The GEOCode project refers to an initiative of the Post-Secondary Electronic Standards Council (PESC) which is focused on creating a list of institutions from around the world which can then be used by institutions and allied organizations like Education-PlannerBC to support data exchange. Note: the GEOCode institutional list does not currently include recognition status information. (See <http://www.pesc.org/geo-code.html>)

Reported Challenges	Suggested Opportunities Recommended by those Interviewed
<b>Resources</b>	
<ul style="list-style-type: none"> <li>Potentially heavy reliance on one point of risk at the staff and faculty levels resulting in isolated knowledge experts</li> </ul>	<ul style="list-style-type: none"> <li>Develop system-wide partnerships, resources, tools, training, and support services to enhance access to international credential evaluation practices (see examples above)</li> </ul>
<ul style="list-style-type: none"> <li>Absorbing the specialized evaluation needs of international documents for transfer or exchange when student volumes are low</li> </ul>	<ul style="list-style-type: none"> <li>Exemplar noted: the OUAC partnership with WES, the supports provided by external credential evaluation services</li> </ul>
<ul style="list-style-type: none"> <li>Insufficient resources to hire full-time staff to sustain processing and student communication needs as international or exchange numbers grow</li> </ul>	
<ul style="list-style-type: none"> <li>Perceived lack of funding to subscribe to scalable services offered by external credential evaluators to enhance informed and scalable international evaluation decision making</li> </ul>	
<b>Decision Timing and Enrolment Access</b>	
<ul style="list-style-type: none"> <li>Delayed timing of international transfer assessments due to a lack of resources and volume resulting in decisions occurring later in the cycle (e.g., after admissions)</li> </ul>	<ul style="list-style-type: none"> <li>Moving towards a best practice model which involves sharing transfer credit decisions with students in advance either at the system or individual student level within an offer of admissions (or prior to) to improve transparency and support their decision-making processes.</li> </ul>
<ul style="list-style-type: none"> <li>Students registering in courses without knowing transfer credit awards due to untimely equivalency decisions</li> </ul>	<ul style="list-style-type: none"> <li>Provide a single point of contact for the students who have studied internationally to ask questions about the transfer or exchange credit processes and decision outcomes</li> </ul>
	<ul style="list-style-type: none"> <li>Provide access to flexible assessment of prior learning when transfer credit cannot be evaluated</li> </ul>
	<ul style="list-style-type: none"> <li>Create system wide course equivalency database</li> </ul>
<b>Data Analytics</b>	
<ul style="list-style-type: none"> <li>No method to track the intricacies of processing and related volumes; impedes research and subsequent system level improvements (no direct way to quantify the resource impact)</li> </ul>	<ul style="list-style-type: none"> <li>Create a recommended approach to standardizing decision capture of equivalency decisions; leverage student information systems and other central institutional databases</li> </ul>
<ul style="list-style-type: none"> <li>Different institutional approaches to identifying and tracking international transfer and exchange credit decisions (if such occurs)</li> </ul>	<ul style="list-style-type: none"> <li>Develop a recommended approach to capturing data to enhance evidence-informed understanding of volumes and potential efficiency gains from specific system-level projects</li> </ul>

# Exhibit A: Sample of Survey Communications

## Introductory Email

Subject: BCCAT International Transfer Credit Assessment Survey / Enquête du BCCAT sur l'évaluation des crédits de transfert internationaux

Greetings,

Your participation is requested for the BCCAT International Transfer Credit Assessment Survey which is national in scope and intended to identify transfer credit and exchange credit assessment policies, practices, and perspectives at Canadian post-secondary institutions *as these relate to international credential assessment*. Led by Joanne Duklas, Duklas Cornerstone Consulting, the research is funded by the British Columbia Council on Admissions and Transfer (BCCAT). The final research report will be publicly available at [bccat.ca](http://bccat.ca) in spring 2018 and subsequently accessible through the [Arucc.ca](http://Arucc.ca) website. A copy of the survey and additional background information on both it and the research are attached.

Access the survey at the following URL: <http://form.simplesurvey.com/f/I/BCCATInternational>

### Highlights:

- *Responses requested by December 21*
- *Anticipated completion time: 10 to 35 minutes* - Rules are embedded to ensure select questions are presented as appropriate to the expertise of individual respondents.
- *More than one response per institution is welcome* – In addition to a representative from the Registrar's Office or Admissions Office completing the survey, you are welcome to forward this email and attachments to other experts at your institution as appropriate.
- *Use the attached copy of the survey* to assist you with advance preparation.
- *Recommendation:* You will be asked to share the URLs for your institution's transfer credit and exchange credit policies and practices related to international credential assessment and any external resources you would recommend to support these activities. Therefore, you may wish to gather and review these in advance to expedite survey completion.
- *Save and continue is also available for those that need to work on the survey sporadically!*

Questions regarding this research should be directed to Joanne Duklas at [joanne@duklascornerstone.ca](mailto:joanne@duklascornerstone.ca)

Thank you for taking the time to support this research.

Sincerely,  
Joanne Duklas  
Duklas Cornerstone Consulting

## Objet : Enquête du BCCAT sur l'évaluation des crédits de transfert internationaux

Madame, Monsieur,

Nous sollicitons votre participation à l'enquête du BCCAT sur l'évaluation des crédits de transfert internationaux, laquelle est de portée nationale et vise à identifier les politiques, les pratiques et les perspectives liées à l'évaluation des crédits de transfert et d'échange dans les établissements canadiens d'enseignement postsecondaire, *relative-ment à l'évaluation des titres internationaux*. Menés par Joanne Duklas (Duklas Cornerstone Consulting), les travaux de recherche sont financés par le British Columbia Council on Admissions and Transfer (BCCAT). Le rapport final de recherche sera accessible au public par le biais du site [bccat.ca](http://bccat.ca) dès le printemps 2018 et, subséquemment, dans le site Web de l'ARUCC ([arucc.ca](http://arucc.ca)). Nous joignons à la présente un exemplaire du questionnaire de sondage et des renseignements contextuels additionnels sur le sondage et sur les travaux de recherche.

Vous pouvez accéder au questionnaire de sondage de l'enquête à l'adresse URL suivante : <http://form.simplesurvey.com/f/I/BCCATInternational>

*Veillez prendre note de ce qui suit:*

- *Les réponses doivent nous parvenir au plus tard le 21 décembre.*
- *Temps prévu pour remplir le questionnaire : de 10 à 35 minutes* – Des règles intégrées au questionnaire permettent de nous assurer de poser des questions spécifiques selon l'expertise individuelle des répondants.
- *Nous acceptons avec plaisir plus d'un répondant par établissement* – Outre la représentante ou le représentant du registrariat ou du service de l'admission à qui nous demandons de remplir le questionnaire de sondage, libre à vous de faire suivre le présent courriel et ses annexes à tout autre expert de votre établissement, le cas échéant.
- *Utilisez l'exemplaire ci-joint du questionnaire de sondage* pour vous aider à vous préparer d'avance.
- *Recommandation* : L'on vous demandera de nous communiquer les adresses URL des politiques et pratiques de votre établissement en matière de politiques et pratiques liées aux crédits de transfert et d'échange, relativement à l'évaluation des titres internationaux, ainsi que toute autre source externe que vous recommandez, en appui à de telles activités. Par conséquent, vous voudrez peut-être recueillir et revoir ces renseignements à l'avance, histoire de vous permettre de remplir plus rapidement le questionnaire de sondage.
- *L'option « Enregistrer et continuer » est également disponible pour celles et ceux qui prévoient remplir le questionnaire de manière sporadique!*

Si vous avez des questions au sujet des présents travaux de recherche, veuillez en faire part à Joanne Duklas, à l'adresse [joanne@duklascornerstone.ca](mailto:joanne@duklascornerstone.ca).

Je vous remercie de votre précieux appui à l'égard des présents travaux de recherche.

Veillez recevoir, Madame, Monsieur, mes salutations distinguées.

Joanne Duklas

Duklas Cornerstone Consulting

# Exhibit B: Background Document Distributed with the Survey



## BCCAT International Transfer Credit Assessment Survey

### Background Information

This national survey on transfer credit assessment policies and practices for international credentials is being administered by Joanne Duklas, Duklas Cornerstone Consulting, on behalf of a research study funded by the British Columbia Council on Admissions and Transfer (BCCAT). The findings and research report will be published at the BCCAT website at [Bccat.ca](http://Bccat.ca) in spring 2018.

### Survey Link

<http://form.simplesurvey.com/f/l/BCCATInternational>

### Deadline

Responses are requested by **December 15**.

### Estimated Completion Time

It will take approximately **10-35** minutes to complete the survey. Logic rules built into the survey results in the time difference.

### Research Goals

The research is focused on understanding the undergraduate policies, practices, and perspectives regarding transfer credit assessment for international admissions and exchange. The goals of the research and survey include identifying

- evaluation practices and policies at Canadian post-secondary institutions related to transfer and exchange credit assessments of international credentials;
- scalable approaches either in use or suggested to enhance the quality and efficiency of assessment practices;
- examples of resources from third-party providers that facilitate high quality and efficient assessment practices; and,
- perspectives on potential best practice or scalable solutions to enhance international credential assessment for both post-secondary institutions and students.

### Who should complete the survey?

The survey is intended for post-secondary practitioners involved in ***transfer and or exchange credit*** assessment ***as these relate to international credentials***. If you are not the appropriate person to complete this survey, please forward it to those at your institution with expertise in any of these areas.

We recommend a member of the Registrar's Office and or the Admissions Office with expertise in transfer credit assessment of international credentials for admissions and or exchange respond to the survey. Staff or faculty in the international admissions offices, exchange offices, or program areas involved in assessment of international credentials whether for admission or exchange are also welcome to participate.

### Number of Responses per Institution

As these responsibilities may be handled by different individuals and departments within each institution, more than one response per institution is welcome.



### **Voluntary Participation**

Participation in this study is voluntary.

### **Confidentiality and Privacy**

Qualitative data from this research will be reported anonymously and quantitative data will be reported at the aggregate level. Respondents personal information will not be shared; survey results will be shared with BCCAT.

### **Other Comments**

This is an operational survey to assist with identifying current and recommended practices from experts at Canadian post-secondary institutions. Findings and subsequent analysis will be supported by literature and website research and interviews with experts at post-secondary institutions and allied organizations. The final report will be peer reviewed by post-secondary experts through the British Columbia Council on Admissions and Transfer prior to publication.

### **Permission**

By participating in this survey, you are considered to have granted your permission for your responses to be included in the final research study which will be published on the website of the British Columbia Council of Admissions and Transfer at [bccat.ca](http://bccat.ca). Permission will be sought if individual institutional practices are highlighted in the final study.

### **Background on Primary Investigator**

Joanne Duklas is a published author, researcher, and consultant in higher education. Her research interests focus on advancing next generation practices in support of learner success and mobility. Through Duklas Cornerstone Consulting, she brings to her clients more than two decades of expertise in student focused service delivery, strategic enrolment management, business process redesign, research and policy work. Joanne routinely leads large-scale, learner-focused change projects and research studies informed by institutional, provincial, and national consultation in her pursuit of evidence-based standards development and best practice.

A former Assistant Vice President and Registrar, Joanne was the primary author and project lead for Canada's first national transcript and transfer guide which received funding from nine provincial and national bodies including BCCAT (<http://guide.pccat.arucc.ca/en/>). In addition to other published research, she was also the primary author and investigator for a BCCAT funded study regarding credentialing practices for joint programs ([http://www.bccat.ca/pubs/jointprogramcredentialing\\_dec2013.pdf](http://www.bccat.ca/pubs/jointprogramcredentialing_dec2013.pdf)).

Joanne's peers have recognized her nationally and provincially for her volunteer, research, and leadership work in higher education by awarding her honorary membership status in both the Association of Registrars of the Universities and Colleges of Canada (ARUCC) and the Ontario University Registrars' Association (OURA).

### **Questions**

If you have questions about the survey or any of the above, please contact Joanne Duklas at 905 703 7485 or by email at [joanne@duklascornerstone.ca](mailto:joanne@duklascornerstone.ca)

# Exhibit C: Survey Questions

<Highlights in red font denote the survey logic.>

## Introduction

Monday, November 13, 2017

This national survey supports a research study funded by the British Columbia Council on Admissions and Transfer (BCCAT) and led by Joanne Duklas, Duklas Cornerstone Consulting. It is intended to identify current transfer credit and exchange credit assessment policies, practices, and perspectives at Canadian post-secondary institutions as these relate to international document assessment. For this research, examples of international documents include any information from a student needed to make an informed transfer credit or exchange credit decision such as transcripts, course outlines, diploma supplements, credentials, etc. The results of this research will be published in Spring 2018 at [bccat.ca](http://bccat.ca). More details regarding the survey and study are provided with the introductory email.

**Response Recommended by:** December 21

**Responses per Institution:** More than one response per institution welcome

**Time to Completion:** Approximately 10 to 35 minutes (timing dependant on participant responses to questions)

## Participants Recommended:

3. Registrar's Office and/or Admissions Office staff with expertise in transfer credit assessment of international documents for admissions and/or exchange
4. Staff or faculty in international admissions areas, exchange offices, or program areas involved in assessment of international documents whether for admissions or exchange

Please forward the introductory email containing the survey link and the attachment to those at your institution with background in these areas.

**Recommended Background:** Knowledge of (and URLs for) your institution's exchange and transfer credit policies and practices

## Survey Structure:

Institutional demographics (to assist with clarifying any responses and cross tabbing the findings)

Current transfer credit policies and practices for international document assessment

Current exchange credit policies and practices

Issues identification

Expert advice, innovative practices, and collaborative opportunities

Topics for further research

**Participation:** Voluntary

**Questions:** Joanne Duklas, [joanne@duklascornerstone.ca](mailto:joanne@duklascornerstone.ca)

Click on "Next Page" to move forward in the survey.

1. Please provide the following information regarding your institution.  
Institution Province/Territory:
  - ☐ Alberta
  - ☐ British Columbia
  - ☐ Manitoba
  - ☐ New Brunswick
  - ☐ Newfoundland and Labrador
  - ☐ Nova Scotia
  - ☐ Ontario
  - ☐ Prince Edward Island
  - ☐ Quebec
  - ☐ Saskatchewan
  - ☐ Northwest Territories
  - ☐ Nunavut
  - ☐ Yukon
2. Institution Name:
3. Institution Type:
  - ☐ College
  - ☐ University
  - ☐ Institute
  - ☐ Other, please specify:
4. Is your institution:
  - ☐ Public
  - ☐ Private
  - ☐ Other, please specify:
5. What is your primary role at your institution? Identify your primary role at the institution even if you hold more than one role.
  - ☐ Staff
  - ☐ Faculty
  - ☐ Other, please specify:
6. Identify your department.
  - ☐ Central Registrar's/Admissions Office <presented with question 7; other offices directed to question 11>
  - ☐ International Admissions Office
  - ☐ International Exchange Office
  - ☐ International Admissions and Exchange Office
  - ☐ Senior Administrative Department (e.g., Provost Office's, President's Office)
  - ☐ Central Faculty/School Office/Area
  - ☐ Program specific area
  - ☐ Other, please specify:



7. What role(s) do each of the following departments/areas fulfill when assessing international documents FOR TRANSFER CREDIT? Check all that apply.

	Developing Policies and/or Partnerships	Assessing Equivalencies	Evaluating Student Files	Approving Credit Awarded	Managing Appeals	Other Role	No Role/ Not Applicable	Unknown
Admissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registrar's Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central Advising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Faculty/School	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. If selected 'Other Area' and/or 'Other Role', please provide details.

9. What role(s) do each of the following departments/areas fulfill when assessing international documents FOR EXCHANGE CREDIT? Check all that apply.

	Developing Policies and/or Partnerships	Assessing Equivalencies	Evaluating Student Files	Approving Credit Awarded	Managing Appeals	Other Role	No Role/ Not Applicable	Unknown
Admissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registrar's Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central Advising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Faculty/School	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. If selected 'Other Area' and/or 'Other Role', please provide details.

**The next section is intended to identify transfer credit policies and practices at your institution affecting international document assessment.**

11. Are you able to answer survey questions about TRANSFER CREDIT POLICIES AND PRACTICES for international documents assessed during the admissions process?
  - ☐ Yes <directed to question 12>
  - ☐ No <directed to question 23>
12. Does your institution have an institution-wide transfer credit policy?
  - ☐ Yes
  - ☐ We have more than one transfer credit policy
  - ☐ We don't have a transfer credit policy
  - ☐ I don't know
13. Please provide the URL(s) (if available).
14. Does this policy(ies) apply when assessing documents from international education systems?
  - ☐ Yes, this is an institution wide transfer credit policy.
  - ☐ Yes, but there are unique transfer credit policies also available.
  - ☐ No
  - ☐ I don't know
15. Provide the URL(s) for the transfer credit policy(ies) that applies to specific international education systems.
16. Are there any Faculty/School/Program specific transfer credit policies that apply to specific international education systems?
  - ☐ Yes
  - ☐ No
  - ☐ I don't know
17. If available, provide the URL(s).
18. What types of transfer credit exist at your institution when evaluating international documents for undergraduate studies? Check all that apply.
  - ☐ Assigned credit
  - ☐ Unassigned credit
  - ☐ Other, please specify:
  - ☐ I don't know
19. Does your institution use an outside service provider to support international document assessment for admissions and/or transfer?
  - ☐ Yes <directed to question 20>
  - ☐ No, transfer assessments are handled by my institution <directed to question 23>
  - ☐ I don't know <directed to question 23>

20. Identify the outside providers used by your institution. Check all that apply.

- ☐ Comparative Education Services [University of Toronto]
- ☐ International Credential Assessment Services of Canada [ICAS]
- ☐ International Credential Evaluation Service [ICES - BCIT]
- ☐ International Qualifications Assessment Service [IQAS]
- ☐ World Education Services [WES]
- ☐ Other, please specify.

21. Identify the services provided by the outside service provider(s). Check all that apply.

- ☐ Intakes student documents
- ☐ Authenticates official nature of documents submitted
- ☐ Confirms status of educational institution and/or program of study (e.g., accreditation, recognition)
- ☐ Identifies equivalency of a student's international credential to credentials in Canada
- ☐ Identifies grade equivalencies
- ☐ Calculates admissions entering average according to institution's criteria
- ☐ Calculates overall credits achieved according to institution's criteria
- ☐ Identifies potential transfer credit equivalencies at course level
- ☐ Identifies potential transfer credit equivalencies at program level
- ☐ Sends assessment outcome(s) to student
- ☐ All of the Above
- ☐ None of the Above

22. If other practices are handled by an outside provider, provide details here:

23. In your opinion, identify the benefits of using an outside provider to support international document assessments:

	Strongly Agree	Agree	Neutral/ No Opinion	Disagree	Strongly Disagree	Not Applicable	Not Known
Cost effective for the institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost effective for the student	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensures consistent evaluations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensures expert review	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensures timely review	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improves efficiencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Benefit(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24. If selected 'Other Benefit(s)', provide details.

25. Does your department handle any aspect of international document assessment?
- ☐ Yes <directed to question 26>
  - ☐ No <directed to question 28>
  - ☐ I don't know <directed to question 28>
26. Identify the practices your department follows when assessing international documents for admissions and transfer.  
Check all that apply.
- ☐ Intakes student documents
  - ☐ Authenticates official nature of documents submitted
  - ☐ Confirms status of educational institution and/or program of study (e.g., accreditation, recognition)
  - ☐ Identifies equivalency of a student's international credential to credentials in Canada
  - ☐ Identifies grade equivalencies
  - ☐ Calculates admissions entering average according to institution's criteria
  - ☐ Calculates overall credits achieved according to institution's criteria
  - ☐ Identifies potential transfer credit equivalencies at course level
  - ☐ Identifies potential transfer credit equivalencies at program level
  - ☐ Sends assessment outcome(s) to student
  - ☐ All of the Above
  - ☐ None of the Above
27. If other practices are handled by your department, provide details here:
28. When evaluating international documents FOR TRANSFER CREDIT, does your institution adhere to the Quality Assurance Framework and the assessment recommendations published by the Canadian Information Centre for International Credentials (CICIC)? Visit [cicic.ca](http://cicic.ca) for more information.
- ☐ Yes
  - ☐ No
  - ☐ I don't know
29. Do you have alternate transfer credit practices for supporting international students who are unable to provide official academic documents?
- ☐ Yes <directed to question 30>
  - ☐ No <directed to question 31>
  - ☐ I don't know <directed to question 31>
30. Are these alternate practices publicly available?
- ☐ Yes; provide the URL(s):
  - ☐ No
  - ☐ I don't know

31. Does your department rely on any other resources and tools not previously mentioned to support the transfer credit assessment process of international documents during the admissions process?
- ☐ Yes <directed to question 32>
  - ☐ No <directed to question 33>
  - ☐ I don't know <directed to question 33>

32. If available, provide details and/or a URL(s) for those resources you would recommend.  
Use this section to identify any resources or tools for a country or region that you would recommend.

**The following section provides an opportunity to identify any innovations in place at your institution or elsewhere regarding transfer credit policies and processes for international documents.**

33. Has your institution automated the transfer credit process for international document assessment to support the admissions process?
- ☐ Yes <directed to question 33>
  - ☐ We are working on this <directed to 36>
  - ☐ No <directed to question 38>
  - ☐ I don't know <directed to question 38>

34. What has been automated?  
Provide details and/or URL.

35. Rank the degree of improvement the automation provided to each of the following (if applicable). <directed to question 38 after responding>

	1 (most improved)	2	3	4	5 (least improved)	Unknown	Not Applicable
Access to information regarding past course approvals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Approval of courses for transfer credit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment of courses for transfer credit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Student document submission	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trusted credential data exchange	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

36. What processes are you planning to automate?  
Provide a URL(s) with more information if possible.

37. Is this effort anticipated to improve any of the following? Check all that apply.
- ☐ Access to information regarding past course approvals
  - ☐ Student document submission
  - ☐ Trusted credential data exchange
  - ☐ Transfer credit assessment
  - ☐ Transfer credit approval
  - ☐ Other, please specify:
38. Are there any other innovations implemented at your institution that have improved transfer credit assessment of international documents during the admissions process?
- ☐ Yes <directed to 39>
  - ☐ No <directed to 40>
  - ☐ I don't know <directed to 40>
39. Provide details and/or a URL with more information.
40. Do you know of any innovative collaborations that have improved transfer credit assessment of international documents for admissions?
- ☐ Yes <directed to 41>
  - ☐ No <directed to 42>
  - ☐ I don't know <directed to 42>
41. Provide details and/or a URL with more information.

**The following section is intended to identify exchange policies and practices at your institution impacting international document assessment.**

42. Are you able to answer survey questions about your institution's EXCHANGE CREDIT POLICIES AND PRACTICES?
- ☐ Yes <directed to question 43>
  - ☐ No <directed to question 69>
43. Does your institution have an institution wide exchange policy(ies)?
- ☐ Yes <directed to question 44>
  - ☐ No <directed to question 47>
  - ☐ I don't know <directed to question 47>
44. Provide the URL(s).
45. Are changes needed to your institution's exchange policy(ies) to enhance course approval practices?
- ☐ Yes <directed to question 46>
  - ☐ No <directed to question 47>
  - ☐ I don't know <directed to question 47>

46. If known, what top priority changes are being considered?
47. Does your institution's transfer credit policy(ies) also apply to international exchanges?
- ☐ Yes <directed to question 48>
  - ☐ No <directed to question 49>
  - ☐ I don't know <directed to question 49>
48. Provide rationale (if known).
49. Are there any notable gaps in resources or tools that negatively impact EXCHANGE CREDIT assessment of international documents?
- ☐ Yes <directed to question 50>
  - ☐ No <directed to question 51>
  - ☐ I don't know <directed to question 51>
50. Provide details.

**The following section provides an opportunity to identify ANY INNOVATIONS in place at your institution or elsewhere regarding exchange policies and processes as these relate to assessing international documents and evaluating exchange credit.**

51. Has your institution automated any aspect of the exchange process?
- ☐ Yes <directed to question 52>
  - ☐ We are working on this. <directed to question 55>
  - ☐ No <directed to question 58>
  - ☐ I don't know <directed to question 58>
52. What processes has your institution automated?
53. Provide a URL(s) with more information if possible.

54. Rank the degree of improvement the automation provided for each of the following (if applicable). <directed to question 58>

	1 (most improved)	2	3	4	5 (least improved)	Unknown	Not Applicable
Information access to past exchange course approvals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Student document submission	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trusted credential data exchange	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exchange credit assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exchange credit approval	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

55. What processes is your institution planning to automate?

56. Provide a URL(s) with more information if possible.

57. Is this effort anticipated to improve any of the following? Check all that apply.

- ☐ Information access to past exchange course approvals
- ☐ Student document submission
- ☐ Trusted credential data exchange
- ☐ Exchange credit assessment
- ☐ Exchange credit approval
- ☐ Other, please specify:

58. Do you have an alternate exchange credit assessment practice for supporting students who are unable to provide official academic documents?

- ☐ Yes <directed to question 59>
- ☐ No <directed to question 60>
- ☐ I don't know <directed to question 60>

59. Are these alternate practices publicly available?

- ☐ Yes; provide details and/or URL(s):
- ☐ No
- ☐ I don't know



60. Has your institution implemented any innovative practices to facilitate improved exchange credit assessment of international documents?
- ☐ Yes <directed to question 61>
  - ☐ We are working on this <directed to question 61>
  - ☐ No <directed to question 62>
  - ☐ I don't know <directed to question 62>
61. Provide details and/or a URL(s) with more information.
62. Are any outside service providers assisting your institution with international exchange processes?
- ☐ Yes <directed to question 63>
  - ☐ We are working on this <directed to question 66>
  - ☐ No <directed to question 66>
  - ☐ I don't know <directed to question 66>
63. Identify any outside service providers used by your institution.
64. Identify the services provided by the outside service provider(s). Check all that apply.
- ☐ Intakes student documents
  - ☐ Authenticates official nature of documents submitted
  - ☐ Confirms status of educational institution and/or program of study (e.g., accreditation, recognition)
  - ☐ Identifies equivalency of a student's international credential to credentials in Canada
  - ☐ Identifies grade equivalencies
  - ☐ Calculates admissions entering average according to institution's criteria
  - ☐ Calculates overall credits achieved according to institution's criteria
  - ☐ Identifies potential transfer credit equivalencies at course level
  - ☐ Identifies potential transfer credit equivalencies at program level
  - ☐ Sends assessment outcome(s) to student
  - ☐ All of the Above
  - ☐ None of the Above
65. If other practices are handled by the outside provider, provide details here:
66. When evaluating international credentials FOR EXCHANGE CREDIT, does your institution adhere to the Quality Assurance Framework and the assessment recommendations published by the Canadian Information Centre for International Credentials (CICIC)? Visit [cicic.ca](http://cicic.ca) for more information.
- ☐ Yes
  - ☐ No
  - ☐ I don't know

67. Do you know of any external examples of innovative collaboration that have improved exchange credit assessment processes?
- ☐ Yes
  - ☐ No
  - ☐ I don't know

68. Provide details and, if available, a URL(s).

**The following section provides an opportunity to identify challenges impacting transfer credit and exchange credit policies and practices when evaluating international documents.**

69. Are you aware of any challenges with TRANSFER CREDIT OR EXCHANGE CREDIT ASSESSMENT of international documents?
- ☐ Yes <directed to question 70>
  - ☐ No <directed to question 72>

70. Identify your level of agreement with the following TRANSFER CREDIT OR EXCHANGE CREDIT challenges impacting international assessment. Check all that apply.

	Strongly Agree	Agree	Neutral/No Opinion	Disagree	Strongly Disagree	Not Applicable	I don't know
Clarifying differences among educational systems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identifying accreditation and/or recognition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identifying fraudulent documents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

71. If you checked 'Other', provide details here:

72. Do you know of any student related issues with TRANSFER CREDIT OR EXCHANGE CREDIT ASSESSMENT of international documents?
- ☐ Yes <directed to question 73>
  - ☐ No <directed to question 75>

73. Identify your level of agreement with the student related issues identified below as these relate to TRANSFER CREDIT OR EXCHANGE CREDIT ASSESSMENT of international documents. Check all that apply.

	Strongly Agree	Agree	Neutral/No Opinion	Disagree	Strongly Disagree	Not Applicable	I don't know
Ability to provide official documents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to experts to help navigate process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clear nomenclature	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost of assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information transparency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receiving recognition for past post-secondary studies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

74. If you checked 'Other', provide details here:

**The following section is intended to capture your expertise on ways to improve international document assessment policies and practices as these relate to transfer credit and exchange credit.**

75. Identify your agreement with the following statements.

	Strongly Agree	Agree	Neutral/No Opinion	Disagree	Strongly Disagree	I don't know
Institutions should create separate policies for transfer credit and exchange credit for international documents.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutions should create country-specific policies for transfer credit and exchange credit for international documents.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutions should have one policy for ALL FORMS OF TRANSFER CREDIT regardless of when/for what purpose the learning occurred	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

76. Provide a rationale for your responses above.

77. Identify your agreement with the following statements. International document assessments for transfer credit and exchange credit would be improved by...

This question is intended to understand perspective regarding those aspects of the process that might benefit from greater system level supports.

	Strongly Agree	Agree	Neutral/ No Opinion	Disagree	Strongly Disagree	I don't know
Post-secondary institutions using an external service provider rather than managing processes internally.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Post-secondary institutions handling the entire process.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Keeping transfer credit decisions related to admissions distinct from exchange credit decisions, even when establishing equivalencies for the same course from the same institution.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evaluating courses for equivalency in advance (similar to the transfer system in British Columbia).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

78. Provide a rationale for your responses above.

79. Identify your level of agreement with the following statements. Transfer credit and exchange credit assessment of international documents would be improved by...

	Strongly Agree	Agree	Neutral/ No Opinion	Disagree	Strongly Disagree	I don't know
Having results for individual students from prior post-secondary studies available electronically from a trusted source.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Making equivalency decisions available electronically for use by future interested students.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Making equivalency decisions available electronically for use by other institutions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

80. What are the challenges and implications of implementing these?

**The following section represents an opportunity for you to identify future areas of research to improve international document assessment policies and practices as these relate to transfer and exchange credit.**

81. Do you have recommendations for future research needed to improve transfer credit or exchange credit assessment of international documents?

☐ Yes <directed to question 82>

☐ Not at this time <directed to question 83>

82. What are your recommendations for future research needed to improve transfer credit or exchange credit assessment of international documents?

83. Do you have any suggestions to improve system wide coordination efforts related to assessment of international documents for transfer or exchange credit?

☐ Yes <directed to question 84>

☐ Not at this time <directed to question 85>

84. What are your recommendations to improve system wide coordination related to transfer credit or exchange credit assessment of international documents?

You have reached the last question of the survey!

85. Do you have any other comments related to either the topic or the survey? If you have no further comments, leave this section blank.

86. To help us with clarifying any responses, please provide your contact information.

Your personal information will be kept confidential.

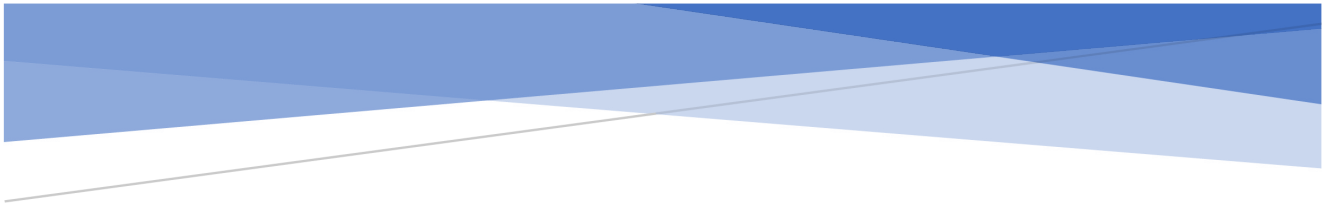
First Name

Last Name

Email:

Phone Number:

## Exhibit D: Interview Guide



# BCCAT INTERNATIONAL CREDIT RECOGNITION/ ASSESSMENT PROJECT

## Interview Guide

### Prepared by:

Joanne Duklas  
Duklas Cornerstone Consulting  
joanne@duklascornerstone.ca  
January/February 2018





## International Transfer Credit and Exchange Credit Recognition/Assessment Project Interview Questions



### Project Overview

**Project:** BCCAT Funded International Recognition and Assessment Project

#### Introduction:

This Interview Guide provides an overview of the project and an outline of select survey findings supported by specific interview questions. Each interview is anticipated to take 1.5 hours and will be conducted via web conferencing. BC registrars supported this research by completing the national survey either directly or through designates and by organizing the interview participants at the campus level. For both the interviews and the survey, the registrars were invited to include those expert members of their staff and faculty and/or staff from across the institution with knowledge of transfer and exchange credit assessment practices of international documents. Joanne Duklas, the Primary Investigator, will lead the interviews with note taking support provided by Matt Schultz, a research assistant with Joanne's firm, Duklas Cornerstone Consulting. The BC institutions involved in the interview process for this research study represent the diversity that exists in the province.

Questions regarding this research study should be directed to Joanne Duklas ([joanne@duklascornerstone.ca](mailto:joanne@duklascornerstone.ca)) or BCCAT.

#### Project Scope:

The scope for this BCCAT funded research study includes reviewing current international credit transfer assessment practices in BC Transfer System member institutions and identifying exemplar practices and opportunities for efficiencies and collaboration.

#### Research Approach:

The research approach involves conducting a review of scholarly and trade literature and websites focused on international credit transfer recognition, processing, and assessment; a review of BC public post-secondary websites; a national survey of Canadian institutions to better understand practices and perspectives on transfer and exchange credit practices as these relate to international documents; interviews of select BC member institutions that reflect the diversity within the province and two other Canadian institutions; and supporting interviews of international and government experts involved in the field.

#### Final Report:

The final report will be subject to peer review through BCCAT with a publication goal of Spring/Summer 2018 through the Council's website. It will contain the research findings and identify a typology of current practices within BC Transfer System member institutions. The report will highlight identified issues, innovative or efficient processes and promising practices within BC and other jurisdictions either at the institutional or system level, and suggestions for further research.

**Primary Investigator:** Joanne Duklas, Duklas Cornerstone Consulting (Bio attached)

## Interview Questions

Please see the attached survey responses submitted for your institution.

### Institutional Context:

1. *Is there anything regarding your institution's context that we should be aware of given the scope of this project?*

Note: as a support to the above question, we encourage you to complete page 4 of this Interview Guide to help the researcher achieve a more nuanced understanding of your institution's context.

### Roles:

In the survey, respondents reported several areas across their institution participate in various activities to support the **transfer and exchange credit assessment of international credentials**. Examples shared indicate different areas develop policies and partnerships, assess and verify documents, establish equivalencies, make decisions, support appeals, etc.

2. *How many staff and faculty would you estimate are involved in this network of activities at your institution?*
3. *How does your institution manage this complexity given its unique context?*
4. *If necessary, what would you change, if anything, to better align supports for students, partners, and the community?*

### Policies:

In the survey, institutions identified two basic types of transfer credit exist: assigned and unassigned; some identified block credit as a third category.

5. *Are there any other types of credit (or subcategories) for international transfer or exchange credit at your institution?*

In the survey, respondents provided differing perspectives and indications of different policy approaches in place at their institution to support transfer and exchange credit assessment of international credentials. For example, some suggested it made most sense to have one policy to support international credit assessment whether for exchange or transfer credit. Others suggested the opposite i.e., to have different policies.

6. *What policy approach would work best at your institution and why?*
7. *What best practice advice would you offer others when developing policies in this area?*

### Practices:

Survey respondents provided a variety of opinions regarding the challenges impacting institutions and students in this area. Examples shared include verifying the bona fides of an institution, program, or document; dealing with fraud; managing a lack of resources, expertise, and/or system wide sharing of equivalency decisions between institutions or with students; etc.

8. *Are there particular challenges related to your institution that you would like to highlight or further explain?*

Page 2



### **Scalable Supports, Resources and Tools, and Inter-Institutional Coordination Opportunities**

In the survey, institutions reported relying on various internal and external supports to enhance transfer and exchange credit assessment of international documents. Examples provided include relying upon/hiring expert staff and/or using third-party assessment organizations (e.g., World Education Services); leveraging system and automation improvements; establishing electronic data exchange networks; using external resources such as the CICIC assessor support tools and Quality Assurance Framework; etc.

9. *What advice or changes would you suggest to improve the scalable supports, resources, tools, or inter-institutional coordination, if any, for the BC Transfer System whether at the institutional level or for the system?*

### **Final Thoughts**

10. *Do you have any other comments you would like to share either about the research topic or the research process?*

### Institutional Demographics:

To help support a deeper understanding of your institutional context, please complete the following table.

Category	2016	2017
<b>Overall Questions</b>		
<b>Total</b> undergraduate student enrolment (domestic and international), if available	Fall 2016 student count (not full time equivalent) _____	Fall 2017 student count (not full time equivalent) _____
<b>Total</b> undergraduate students ( <i>domestic and international</i> ) that presented documents for transfer credit assessment during the admissions process, if available	For Fall 2016 program start date _____	For Fall 2017 program start date _____
<b>Transfer Credit</b>		
<b>Total</b> undergraduate students ( <i>domestic and international</i> ) that presented <i>international</i> documents for <b>transfer credit assessment</b> during the admissions process, if available	For Fall 2016 program start date _____	For Fall 2017 program start date _____
Top four source countries outside Canada for <i>international</i> documents that required transfer credit review during the admissions process (listed in descending order), if available  <i>Note: if not available, name the top source countries for transfer students presenting international credentials.</i>	2016 _____ _____ _____ _____	2017 _____ _____ _____ _____
<b>Exchange</b>		
<b>Total undergraduate</b> students ( <i>domestic or international</i> ) that participated in <b>exchanges</b> outside Canada in each academic year, if available	For 2016/17 academic year _____	For 2017/18 academic year _____
<b>Total undergraduate</b> students ( <i>domestic or international</i> ) whose international documents for studies taken on <b>exchange outside Canada were assessed for credit equivalency</b> , if available	For 2016/17 academic year _____	For 2017/18 academic year _____
<b>Total</b> Institutional Exchange Partnerships (note if estimated)	2016 _____	2017 _____
Top four countries for exchange partnerships (listed in descending order, if possible)	2016 _____ _____ _____ _____	2017 _____ _____ _____ _____



**BCCAT**

*Your guide through post-secondary education.*