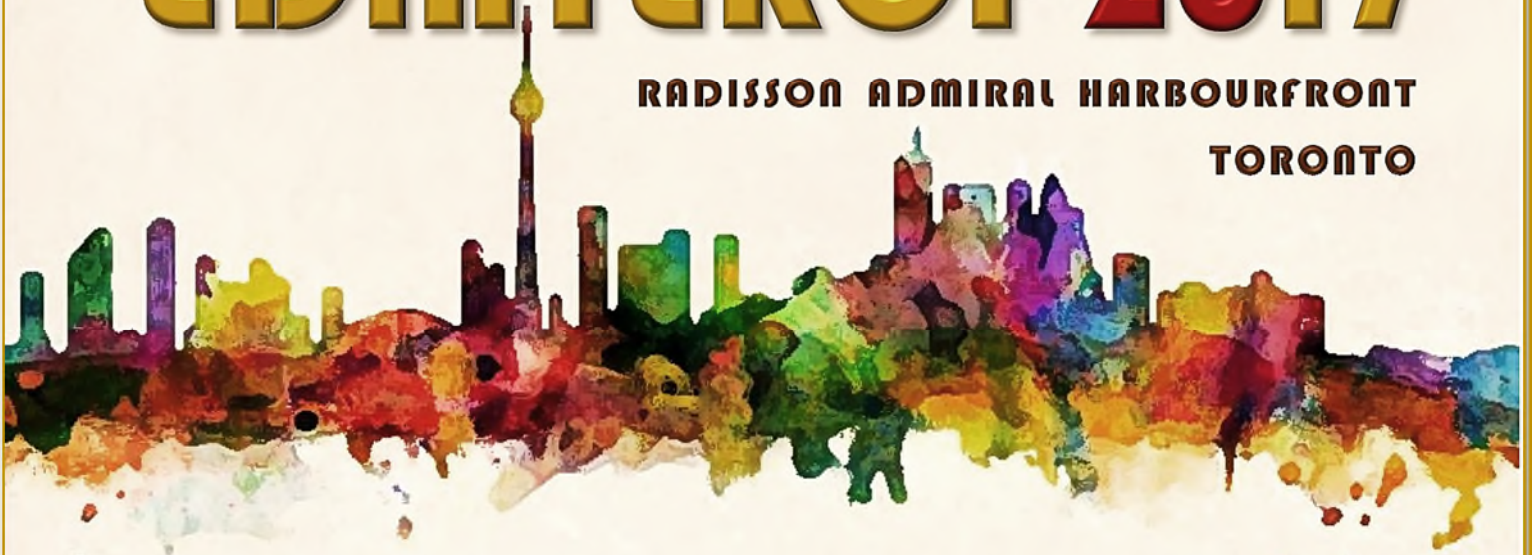




EDiINTEROP2017

RADISSON ADMIRAL HARBOURFRONT
TORONTO



FALL 2017 SYMPOSIUM & DATA SUMMIT
OCTOBER 25-27, 2017 WWW.PESC.ORG

Program

ADVANCING STUDENT MOBILITY IN A DIGITAL WORLD





FALL 2017 DATA SUMMIT



ANNUAL DIAMOND SPONSORS

Welcome

WELCOME TO THE FALL 2017 DATA SUMMIT!

At Fall & Spring Data Summits, PESC convenes the education technology community to provide education and information to attendees on current initiatives and emerging best practices impacting technology & standards; and equally as important, to promote innovative, collaborative, real solutions that maximize automated, reusable and sustainable technologies in order to *improve institutional performance, student and service delivery, and overall connectivity between stakeholders.*

Speakers and Presenters in General Sessions are leaders and experts spanning education policy, practice and technology. In Breakout Sessions, groups focus on a specific topic of interest (Canadian PESC User Group, JSON Task Force, EdExchange, Blockchain) – check the program for a complete list.

Education, in all its facets, is highly complex. The PESC Fall 2017 Data Summit focuses on *DATA* and *PORTABILITY* attracting major

PESC 20TH YEAR ANNIVERSARY!

stakeholders dedicated to student mobility, collaboration and digitalization of student records. Attendees will learn from the tremendous amount of resources provided and be connected through PESC to a growing global community.

PESC welcomes the General Public and all PESC Members for this historic Data Summit in Toronto at which PESC celebrates its 20th Year Anniversary! Founded in 1997 by thirty leading colleges and universities, testing agencies, service providers, government agencies, student financial aid officials, associations and banks, PESC's mission as an open standards-development and standards-setting body has remained true!

Our official celebration takes place at the Annual Fall Reception Wednesday October 25, 2017 at 6pm – please join us!

Michael D. Sessa

President & CEO



Canada & PESC

The Canadian Presence and Influence within PESC has Existed since the very Formation of PESC. As Canadian students cross provincial and international borders to attain their education, the need for institutions, software providers and systems vendors that support Canadian and international markets to ensure mobility and interoperability has never been greater.

The formation of the Canadian PESC User Group (CanPESC) in 2011 solidified the importance of Canada's role within PESC and drew together many Canadians from across the country to work towards a common goal. Its main mission is twofold:

- To encourage participation in PESC XML workgroups developing PESC Approved Standards
- To promote and educate Canadian stakeholders on the importance of data standards and interoperability, thereby avoiding duplication of efforts, costs and of data standards.

As the voice and official committee representing Canadian interests, CanPESC also serves in a liaison role. It coordinates and communicates its efforts across all provinces and territories, and works closely with Canadian organizations such as the Association of Registrars of Universities and Colleges of Canada (ARUCC).

The Canadian Influence and History within PESC

- In PESC's 1st Annual Best Practices Competition in 1999, the Ontario Universities' Application Centre (OUAC) won 1st PLACE for its submission, "Ontario Universities' Electronic Transcript System (OUETS): A Model of an Electronic Standardization Initiative."
- In PESC's 14th Annual Best Practices Competition in 2012, the Ontario College Application Service (OCAS) won 1st PLACE for its submission, "OCAS XML Transcript Initiative."
- For PESC's 10th Year Anniversary, the PESC Fall 2007 Data Summit was held at the Ritz-Carlton Hotel in Montreal.
- At the PESC Fall 2011 Data Summit held October 26, 2011 in San Francisco, PESC launched the Canadian PESC User Group.
- For PESC's 15th Anniversary Year, the PESC Fall 2012 Data Summit was held at the Four Seasons Hotel in Vancouver.
- Through establishment of CanPESC, PESC entered into a formal MOU with ARUCC in 2013, allowing ARUCC and PESC to attend each other's events without charge, thereby fostering a closer working relationship.
- OUAC staff have been recognized with PESC's Distinguished Service Award: Doug Holmes in 2013 and Leisa Wellsman in 2016.
- OCAS' William McKee served on the PESC Board of Directors from 2013-2015.

Please Join the Canadian PESC User Group and Help Continue a Legacy of Excellence!



FALL 2017 DATA SUMMIT



Program At-A Glance

| | WEDNESDAY OCTOBER 25, 2017 GENERAL SESSIONS | THURSDAY OCTOBER 26, 2017 GENERAL / BREAKOUT SESSIONS | FRIDAY OCTOBER 27, 2017 BREAKOUT SESSIONS |
|-------------------|---|--|---|
| 7:30am – 5:00am | REGISTRATION – ATRIUM | | |
| 7:30am – 9:00am | CONTINENTAL BREAKFAST – ATRIUM | | |
| 7:30am – 8:15am | FIRST TIME ATTENDEES – ATRIUM | | |
| 8:30am – 10:30am | ATRIUM WELCOME & OPENING REMARKS FEATURED SPEAKERS KATHLEEN MASSEY , UNIV. OF LETHBRIDGE HERMAN DE LEEUW , GDN | ATRIUM FEATURED SPEAKERS DR. ROB FLEMING , BCCAT PHIL BELANGER , CATNB LIA QUICKERT , ONCAT (INVITED) HEIDI EMAMI , MCGILL UNIVERSITY MICHAEL RINGUETTE , CICIC, CMEC | ATRIUM Diploma Supplement Development RAIN DANCE ARUCC Groningen Project RAINBOW AACRAO SPEEDE Committee |
| 10:30am – 11:00am | BREAK – 2 ND FLOOR FOYER - ATRIUM | | |
| 11:00am – Noon | ATRIUM FEATURED SPEAKERS RICK TORRES , NSC ROMESH VADIVEL , MCGILL UNIVERSITY | ATRIUM DISTINGUISHED SERVICE AWARD INTERNATIONAL PANEL HERMAN DE LEEUW , GDN DR. ROB FLEMING , BCCAT MICHAEL RINGUETTE , CICIC, CMEC CHARMAINE HACK , UNIVERSITY OF RYERSON CLOSING REMARKS | ATRIUM Global Education Organization Code Community Call RAIN DANCE Standards Development Forum (CCB, TAB & Steering Committee) RAINBOW AACRAO SPEEDE Committee |
| Noon – 1:30pm | LUNCH – 2 ND FLOOR FOYER - ATRIUM NETWORKING | FEATURED SPEAKERS DR. ANDREW TRNACEK , HIGHER ED SERVICES ANDY DOWLING , DIGITARY | ADJOURN |
| 1:30pm – 3:00pm | ATRIUM FEATURED SPEAKERS CHRIS JAGERS , LEARNING MACHINE JOELLEN SHENDY , UMUC | ATRIUM EdExchange Overview | RAIN DANCE JSON Task Force RAINBOW Academic Credentialing Task Force |
| 3:00pm – 3:30pm | BREAK – 2 ND FLOOR FOYER - ATRIUM | | |
| 3:30pm – 5:30pm | ATRIUM FEATURED TOPICS - DIPLOMA SUPPLEMENT - EDExchange - PESC GEO CODE | ATRIUM EdExchange User Group | RAIN DANCE CanPESC User Group RAINBOW Global Education Organization Code Workgroup |
| 5:30pm-6:00pm | | PESC MEMBER MEETING – ATRIUM | |
| 6:00pm-7:00pm | ANNUAL FALL RECEPTION: PESC 20 TH ANNIVERSARY CELEBRATION – VIEW | | |

Note: The Seal of Approval Board and the Education Record User Group – ERUG both meet regularly (monthly), but in-person meeting time is NOT scheduled for either group during the Fall 2017 Data Summit.

CANADIAN PESC USER GROUP



**AN OPEN, COLLABORATIVE GROUP
OF CANADIAN STAKEHOLDERS THAT ENSURES
PESC'S MISSION AND ALL PESC DELIVERABLES, INCLUDING
THE DEVELOPMENT AND RELEASE OF PESC APPROVED STANDARDS,
SUPPORTS AND INCORPORATES THE NEEDS AND INTERESTS
OF CANADIAN STUDENTS, INSTITUTIONS AND
CANADIAN-BASED STAKEHOLDERS**



FALL 2017 DATA SUMMIT



Program

TUESDAY OCTOBER 24, 2017

4.00pm – 7.00pm PESC BOARD OF DIRECTORS
WATER'S EDGE

WEDNESDAY OCTOBER 25, 2017

7.30am – 5.00pm REGISTRATION
ATRIUM

7.30am – 9.00am CONTINENTAL BREAKFAST
ATRIUM

GENERAL SESSIONS (ALL DAY)

ATRIUM

7.30am – 8.15am FIRST TIME ATTENDEES OVERVIEW

SUMMIT COMMITTEE MEMBERS & PESC STAFF WELCOME **FIRST TIME ATTENDEES**, AND ALL ATTENDEES, OVER BREAKFAST, FOR A CASUAL WELCOME, INTRODUCTION AND OVERVIEW OF PESC, PESC'S MISSION AND ITS GROUPS AND INITIATIVES.

8.30am – 9.00am WELCOME & OPENING REMARKS

- **MICHAEL SESSA**, PRESIDENT & CEO, PESC
- **CATHY VAN SOEST**, MANAGER, EducationPlannerBC TRANSCRIPT SERVICES
- **LEISA WELLSMAN**, ASSOCIATE REGISTRAR, CONESTOGA COLLEGE

9.00am – 9.30am IMPACT OF STUDENT MOBILITY ACROSS CANADA

- **KATHLEEN MASSEY**, ASSISTANT VICE PRESIDENT (STUDENTS), UNIVERSITY OF LETHBRIDGE

Moderator

- **ROMESH VADIVEL**, ASSISTANT REGISTRAR AND DIRECTOR OF SERVICE POINT, ENROLMENT SERVICES, MCGILL UNIVERSITY; VP ARUCC

AS FORMER PRESIDENT OF THE ASSOCIATION OF REGISTRARS OF THE UNIVERSITIES AND COLLEGES OF CANADA (ARUCC) AND HAVING WORKED IN 3 PROVINCES AT SEVERAL DIFFERENT TYPES OF POSTSECONDARY INSTITUTIONS, KATHLEEN IS UNIQUELY POSITIONED TO SHOWCASE THE EFFORTS AND INITIATIVES OF ARUCC AND OTHER POSTSECONDARY ORGANIZATIONS FOCUSED ON STUDENT MOBILITY IN CANADA.



FALL 2017 DATA SUMMIT



ARUCC, THE FIRST CANADIAN SIGNATORY TO THE GRONINGEN DECLARATION NETWORK, ESTABLISHED THE ARUCC GRONINGEN AND STUDENT MOBILITY TASK FORCE. CHAIRED BY KATHLEEN, THE PURPOSE OF THE TASK FORCE WAS TO EXPLORE AND GARNER SUPPORT FOR A NATIONAL MOBILITY NETWORK, CONNECTING CANADIAN PROVINCES TO EACH OTHER AND ULTIMATELY THE REST OF THE WORLD. THIS SESSION WILL EXPLORE THE EVOLUTION OF A NATIONAL POSTSECONDARY STUDENT MOBILITY DATA-SHARING CULTURE AND NETWORK IN CANADA.

9.30am – 10:00am

GDN: ESTABLISHING DIGITAL DATA DEPOSITORIES

- **HERMAN DE LEEUW**, EXECUTIVE DIRECTOR, GRONINGEN DECLARATION NETWORK

Moderator

- **DOUG FALK**, VP & CIO, NATIONAL STUDENT CLEARINGHOUSE; PESCC BOARD CHAIR

THE GRONINGEN DECLARATION NETWORK, NOW A FORMAL AND LEGALLY ESTABLISHED ORGANIZATION, AIMS TO ADVANCE MOBILITY, TO FOSTER DEVELOPMENT OF BEST PRACTICES AND GLOBALLY ACCEPTED STANDARDS FOR THE SECURE, CITIZEN CENTERED CONSULTATION OF EDUCATIONAL DATA ALLOWING GLOBALLY MOBILE CITIZENS TO SHARE THEIR AUTHENTIC EDUCATIONAL DATA WITH WHOMEVER THEY WANT, WHENEVER THEY WANT, WHEREVER.

ORIGINALLY SIGNED ON APRIL 16, 2012 AT THE CLOSURE OF THE GLOBAL FOUNDING SEMINAR: DIGITAL STUDENT DATA DEPOSITORIES WORLDWIDE IN THE NETHERLANDS, THIS INAUGURAL CONVENING WAS BROADENED IN 2013 WITH A MEETING IN BEIJING; IN 2014 AT GEORGETOWN UNIVERSITY IN WASHINGTON, D.C.; IN 2015 AT THE UNIVERSITY OF MÁLAGA IN SPAIN; IN 2016 IN CAPE TOWN, SOUTH AFRICA; AND IN 2017 AT THE UNIVERSITY OF MELBOURNE, AUSTRALIA.

HERMAN DE LEEUW, EXECUTIVE DIRECTOR, FIRST ADDRESSED THE PESCC COMMUNITY AT THE FALL 2015 DATA SUMMIT AS KEYNOTE SPEAKER, FOLLOWING PESCC'S JOINING THE GRONINGEN DECLARATION NETWORK AS SIGNATORY. IN TWO YEARS SINCE, THE NUMBER OF SIGNATORIES HAS VASTLY EXPANDED, THE MISSION IS RESONATING AROUND THE WORLD, AND PLANS ARE BEING MADE FOR THE NEXT ANNUAL MEETING FOR 2018 IN PARIS. THESE TOPICS, PLUS A PERSPECTIVE ON STUDENT MOBILITY, CREDENTIALS, AND THE IMPORTANT ROLE OF COLLABORATION WILL ALL BE DISCUSSED.

10.00am – 10:30am

Q & A PANEL

10.30am – 11.00am

BREAK

2ND FLOOR FOYER

11.00am – Noon

MCGILL UNIVERSITY/NATIONAL STUDENT CLEARINGHOUSE and CHESICC

- **ROMESH VADIVEL**, ASSISTANT REGISTRAR AND DIRECTOR OF SERVICE POINT, ENROLMENT SERVICES, MCGILL UNIVERSITY; VP ARUCC
- **RICARDO TORRES**, PRESIDENT & CEO, NATIONAL STUDENT CLEARINGHOUSE

Moderator

- **LEISA WELLSMAN**, ASSOCIATE REGISTRAR, CONESTOGA COLLEGE



FALL 2017 DATA SUMMIT



THROUGH THE NETWORK OF THE GRONINGEN DECLARATION, MCGILL UNIVERSITY AND THE NATIONAL STUDENT CLEARINGHOUSE PARTNERED IN A DIGITAL DATA EXCHANGE & MATCHING PILOT INITIATIVE. THIS SESSION WILL DISCUSS THE PURPOSE AND VALUE OF THIS PILOT INITIATIVE, OTHER CURRENT PILOTS AND NEXT STEPS.

Noon- 1.30pm

LUNCH

2ND FLOOR FOYER

1.30pm – 3.00pm

BLOCKCHAIN INTRODUCTION & ACADEMIC CREDENTIALING

- **CHRIS JAGERS**, CEO, LEARNING MACHINE

THE BLOCKCHAIN REVOLUTION HAS RECENTLY COME TO THE EDUCATION SECTOR WITH THE PROMISE OF PROVIDING A TAMPER-PROOF INFRASTRUCTURE TO FACILITATE STUDENT OWNERSHIP AND USE OF ACADEMIC RECORDS. THIS MEANS STUDENTS CAN SHARE THEIR OFFICIAL RECORDS DIRECTLY WITH ANYONE AND HAVE THEM EASILY VERIFIED AS AUTHENTIC. THESE RECORDS NO LONGER HAVE TO BE TRANSMITTED BY A THIRD PARTY, WHICH IS A FUNDAMENTAL BREAK FROM THE TYPICAL VENDOR-CONTROLLED ECOSYSTEMS WHERE RENTS MUST BE PAID TO USE OR TRANSMIT OFFICIAL RECORDS. IN THIS SESSION, ATTENDEES WILL BE INTRODUCED TO BLOCKCHAIN, ITS HISTORY AND APPLICATIONS, AND HOW TRUST, NON-REPUDIATION AND MOBILITY ARE ADDRESSED.

- **JOELLEN SHENDY**, ASSOCIATE VICE PROVOST & REGISTRAR, UNIVERSITY OF MARYLAND UNIVERSITY COLLEGE

ACADEMIC CREDENTIALING ITSELF IS EXPERIENCING AN OVERALL ENTERPRISE-WIDE RE-ENGINEERING. WHILE STUDENT MOBILITY CONTINUES TO DRIVE MANY TECHNOLOGIES AND APPLICATIONS, ENSURING PRIVACY, SECURITY, AUTHENTICITY AND UNDERLYING TRUST REMAIN A CHALLENGE. MANY INSTITUTIONS ARE EXPERIMENTING WITH EMERGING TECHNOLOGIES AND APPLICATIONS AND COLLABORATING WITH LABOR AND WORKFORCE SECTORS. IN THIS SESSION, ATTENDEES WILL LEARN ABOUT NUMEROUS GROUPS AND INITIATIVES INVOLVED WITH UMUC AND WITH PESC'S ACADEMIC CREDENTIALING & EXPERIENTIAL LEARNING TASK FORCE, OF WHICH JOELLEN IS CO-CHAIR, (AACRAO, C-BEN, CAEL, CREDENTIAL MAPPING, AMONG MANY OTHERS), THEIR GOALS AND MISSIONS AND HOW TO GET INVOLVED.

Moderator

- **DAVID MOLDOFF**, CEO & FOUNDER, ACADEMYONE; PESC BOARD

3.00pm – 3.30pm

BREAK

2ND FLOOR FOYER

3.30pm – 5.30pm

DIPLOMA SUPPLEMENT, EDEXCHANGE & PESC GEO CODE

- **SIMONE RAVAIOLI**, DIGITARY
- **W. MATT BEMIS**, ASSOCIATE REGISTRAR, UNIVERSITY OF SOUTHERN CALIFORNIA, PESC BOARD
- **RAJEEV ARORA**, SENIOR VICE PRESIDENT PRODUCTS, PARCHMENT, PESC BOARD
- **JAMES KELLY**, SENIOR DIRECTOR OF TECHNOLOGY, EDUCATIONAL CREDENTIAL EVALUATORS, PESC BOARD



FALL 2017 DATA SUMMIT



THURSDAY OCTOBER 26, 2017

7.30am – 5.00pm REGISTRATION

ATRIUM

7.30am – 9.00am CONTINENTAL BREAKFAST

ATRIUM

8.30am – 10:30am **WHAT'S HAPPENING ACROSS CANADA**

- **DR. ROB FLEMING**, EXECUTIVE DIRECTOR AND CO-CHAIR, BC COUNCIL ON ADMISSIONS AND TRANSFER (BCCAT)
- **PHIL BELANGER**, EXECUTIVE DIRECTOR, COUNCIL ON ARTICULATIONS AND TRANSFER NEW BRUNSWICK (CATNB)
- **LIA QUICKERT**, EXECUTIVE DIRECTOR (INTERIM), ONTARIO COUNCIL ON ARTICULATION AND TRANSFER (ONCAT)

THE PURPOSE OF THE PAN-CANADIAN CONSORTIUM ON ADMISSIONS & TRANSFER (PCCAT) IS TO HELP DEVELOP AND IMPLEMENT POLICIES AND PRACTICES THAT SUPPORT STUDENT MOBILITY AND GRANT TRANSFER CREDIT – BOTH WITHIN AND AMONG CANADA'S PROVINCES AND TERRITORIES – IN ORDER TO IMPROVE ACCESS TO POSTSECONDARY EDUCATION IN CANADA. THIS PANEL PRESENTATION WILL PRESENT PAN-CANADIAN AND PROVINCIAL PERSPECTIVES ON: THE CURRENT ACTIVITIES OF THE SEVEN COUNCILS ACROSS CANADA, HOW THEY ARE WORKING TOGETHER AND INDEPENDENTLY TO FACILITATE STUDENT MOBILITY, AND WHAT THEY SEE AS THE FUTURE OF STUDENT MOBILITY IN CANADA; THE RESULTS OF EXTENSIVE RESEARCH AND ANALYSIS WHICH WILL DESCRIBE THE CURRENT STATE OF STUDENT MOBILITY ACROSS CANADA, AND IDENTIFY NEW AREAS OF COLLABORATIVE RESEARCH THAT ARE BEING PURSUED BY PCCAT; AND, A DISCUSSION OF THE FUTURE OF STUDENT MOBILITY, INCLUDING NON-TRADITIONAL SOURCES OF STUDENTS AND RECORDS, THE EXPANDING TYPES OF RECORDS USED IN STUDENT ASSESSMENT, AND THE IMPACT OF ELECTRONIC RECORDS EXCHANGE IN THE ADMISSION AND ASSESSMENT PROCESS.

- **MICHAEL RINGUETTE**, CICIC COORDINATOR, CANADIAN INFORMATION CENTRE FOR INTERNATIONAL CREDENTIALS (CICIC) AT THE COUNCIL OF MINISTERS OF EDUCATION, CANADA (CMEC)

ASSESSMENT AND RECOGNITION - A PAN-CANADIAN PERSPECTIVE CICIC WILL FOCUS ON PROVIDING A BROAD OVERVIEW OF ASSESSEMENT AND RECOGNITION MECHANISMS AT THE PAN-CANADIAN LEVEL. THIS WILL INCLUDE INTERNATIONAL LEGAL INSTRUMENTS THAT SUPPORT STUDENT MOBILITY AND RECOGNITION, WITHIN THE CONTEXT OF PROVINCIAL AND TERRITORIAL RESPONSABILITIES OVER EDUCATION IN CANADA. THE IMPLEMENTATION OF THESE LEGAL INSTRUMENTS HAS ALSO LED TO THE ESTABLISHMENT OF PAN-CANADIAN STANDARDS, WHERE DIGITIZATION ISSUES MAY NEED TO BE ADDRESSED TO ENSURE PROGRESSIVE ASSESSMENT POLICIES ARE ADOPTED BY ORGANIZATIONS IN CANADA. THE DIVERSITY OF ASSESSMENT SERVICES AND RECOGNITION BODIES WILL BE EXPLORED IN THE CONTEXT OF DATA HUBS AND DATA SOLICITORS. HOW CAN TWO PARALLEL APPROACHES SUPPORT DIGITIZATION EFFORTS IN CANADA, FROM THE LEGAL AND BEST PRACTICES PERSPECTIVES. FINALLY, CICIC'S MANDATE AND THE SERVICES IT PROVIDES WILL ALSO BE HIGHLIGHTED.



FALL 2017 DATA SUMMIT



- **HEIDI EMAMI**, ASSOCIATE REGISTRAR, ACADEMIC RECORDS, EXAMS AND CONVOCATIONS, MCGILL UNIVERSITY

Moderators

- **CATHY VAN SOEST**, MANAGER, EducationPlannerBC TRANSCRIPT SERVICES
- **LEISA WELLSMAN**, ASSOCIATE REGISTRAR, CONESTOGA COLLEGE

10.30am – 11.00am **BREAK**
2ND FLOOR FOYER

11.00am **AWARDS**

PESC 20TH YEAR ANNIVERSARY DISTINGUISHED SERVICE AWARD

ASSOCIATION OF REGISTRARS OF THE COLLEGES AND UYNIVERSITIES OF CANADA

Moderator

- **MICHAEL SESSA**, PRESIDENT & CEO, PESC

Presented to

- **CHARMAINE HACK**, UNIVERSITY REGISTRAR, RYERSON UNIVERSITY; PRESIDENT, ARUCC
- **ROMESH VADIVEL**, ASSISTANT REGISTRAR AND DIRECTOR OF SERVICE POINT, ENROLMENT SERVICES, MCGILL UNIVERSITY; VICE PRESIDENT, ARUCC

11.00am – Noon **INTERNATIONAL PANEL**

- **DR. ROB FLEMING**, EXECUTIVE DIRECTOR AND CO-CHAIR, BC COUNCIL ON ADMISSIONS AND TRANSFER (BCCAT)
- **HERMAN DE LEEUW**, EXECUTIVE DIRECTOR, GRONINGEN DECLARATION NETWORK
- **MICHAEL RINGUETTE**, CICIC COORDINATOR, CANADIAN INFORMATION CENTRE FOR INTERNATIONAL CREDENTIALS (CICIC) AT THE COUNCIL OF MINISTERS OF EDUCATION, CANADA (CMEC)
- **CHARMAINE HACK**, UNIVERSITY REGISTRAR, RYERSON UNIVERSITY
- **MICHAEL SESSA**, PRESIDENT & CEO, PESC

Moderator

- **JOANNE DUKLAS**, PRESIDENT, DUKLAS CORNERSTONE CONSULTING

CONNECTING THE DOTS FOR GLOBAL STUDENT MOBILITY IN CLOSING THE GENERAL SESSION PORTION OF THE DATA SUMMIT, THIS PANEL WILL CONNECT THE DOTS BETWEEN DIGITIZATION, BEST PRACTICE, AND GLOBAL STUDENT MOBILITY; IDENTIFY THEMATIC TRENDS HEARD AT THE CONFERENCE THAT RESONATED; AND HIGHLIGHT ANY OTHER OPPORTUNITIES AND CHALLENGES TO CONSIDER. PANELISTS WILL ALSO DISCUSS: WHERE DO YOU SEE DIGITIZATION AND DATA MOBILITY HEADING IN THE NEXT TEN YEARS? HOW MIGHT BEST PRACTICE INFORM NEXT STAGES? WHAT DO INSTITUTIONS, ALLIED ORGANIZATIONS, AND POTENTIALLY GOVERNMENTS NEED TO DO TO SUPPORT AND ADVANCE MOVING INTO THIS NEXT PHASE? WHAT OTHER CONSIDERATIONS DO YOU WISH TO HIGHLIGHT?



FALL 2017 DATA SUMMIT



Noon- 1.30pm

LUNCH

2ND FLOOR FOYER

VIEW FROM DOWN UNDER: AUSTRALIA/NEW ZEALAND

- **DR. ANDREW TRNACEK**, CEO, HIGHER ED SERVICES
- **ANDY DOWLING**, CEO, DIGITARY

Moderator

- **CATHY VAN SOEST**, MANAGER, EducationPlannerBC TRANSCRIPT SERVICES

AT THE GRONINGEN DECLARATION ANNUAL MEETING IN APRIL 2017 IN MELBOURNE, **MY EQUALS** WAS LAUNCHED. MY EQUALS IS A SHARED PLATFORM THAT IS OWNED BY THE PARTICIPANTS AND THE DIGITAL DOCUMENTS THAT ARE ACCESSIBLE THROUGH THE PLATFORM ARE PROVISIONED BY THE PARTICIPANTS THEMSELVES.

FORTY-SIX UNIVERSITIES ACROSS AUSTRALIA AND NEW ZEALAND ARE PLANNING TO IMPLEMENT THE MY EQUALS PLATFORM IN 2017-2018, PROVIDING THIS SERVICE TO MORE THAN 95% OF THE STUDENT POPULATION. MY EQUALS INITIATIVE IS LED BY HIGHER ED SERVICES (THE PROFESSIONAL SERVICES ARM OF UNIVERSITIES AUSTRALIA) IN PARTNERSHIP WITH DIGITARY AND PESC IS EXCITED TO BRING BOTH ANDREW AND ANDY TO TORONTO TO PROVIDE THIS IMPORTANT PERSPECTIVE!



Summit Committee

Board of Directors

LEISA WELLSMAN *CO-CHAIR*

ASSOCIATE REGISTRAR | RECORDS, REGISTRATION & ENROLMENT REPORTING | CONESTOGA COLLEGE (FORMERLY MANAGER, APPLICANT SERVICES, OUAC)

CATHY VAN SOEST *CO-CHAIR*

MANAGER | EDUCATIONPLANNERBC TRANSCRIPT SERVICES

BRIAN PATTON

MANAGER, APPLICATION SYSTEMS | OUAC - ONTARIO UNIVERSITIES' APPLICATION CENTRE

JOANNE DUKLAS

PRESIDENT | DUKLAS CORNERSTONE CONSULTING

RUTH BLADES

OPERATIONS MANAGER | NOVA SCOTIA COUNCIL ON ADMISSION & TRANSFER

SUSAN STEIN

EXECUTIVE DIRECTOR | ALBERTA POST-SECONDARY APPLICATION SYSTEM

ROMESH VADIVEL

ASSISTANT REGISTRAR & DIRECTOR | SERVICE POINT ENROLMENT SERVICES | MCGILL UNIVERSITY

JENNIFER KIM

DIRECTOR OF MEMBERSHIP SERVICES | PESC

MICHAEL SESSA

PRESIDENT & CEO | PESC

DOUG FALK *CHAIR*

VP & CIO | NATIONAL STUDENT CLEARINGHOUSE

J. JAMES WAGER *VICE CHAIR*

EDUCATION STRATEGIST & CONSULTANT | CREDENTIALS SOLUTIONS

DAVID MOLDOFF *TREASURER*

CEO & FOUNDER | ACADEMYONE

BRIAN ALLISON *SECRETARY*

VP ADMINISTRATION | STUDENT CONNECTIONS

RAJEEV ARORA

SR VP PRODUCTS | PARCHMENT

W. MATTHEW BEMIS

ASSOCIATE REGISTRAR | UNIVERSITY OF SOUTHERN CALIFORNIA

KRISTI BLABAUM

SYSTEMS INTEGRATION ANALYST | GREAT LAKES REPRESENTING NASLA

CARROLL BROWN

SENIOR DIRECTOR, CAMPUS SOLUTIONS PRODUCT DEVELOPMENT, HIGHER EDUCATION APPLICATIONS DEVELOPMENT | ORACLE

TUAN ANH DO

DIRECTOR OF ENROLLMENT MANAGEMENT TECHNOLOGY SAN FRANCISCO STATE UNIVERSITY | REPRESENTING AACRAO

JAMES KELLY

SENIOR DIRECTOR OF TECHNOLOGY | ECE

MICHAEL SESSA

PRESIDENT & CEO | PESC

RICK SKEEL

DIRECTOR OF PRODUCT MANAGEMENT | ELLUCIAN

FRANCISCO VALINES

DIRECTOR OF FINANCIAL AID | FLORIDA INTERNATIONAL UNIVERSITY

E D E X C H A N G E

**A NEUTRAL DATA
EXCHANGE PLATFORM
ENABLING THE ELECTRONIC
EXCHANGE OF STANDARDS-
BASED DIGITAL DOCUMENTS
AND DATA BETWEEN
ACADEMIC INSTITUTIONS &
THEIR SERVICE PROVIDERS.**

**ACHIEVED THROUGH
AN OPEN WEB SERVICES
ARCHITECTURE & ASSOCIATED
STANDARDS.**

**DESIGNED AS A
PEER-TO-PEER NETWORK
PROMOTING SECURE, RELIABLE,
& DIRECT CONNECTIONS
BETWEEN INSTITUTIONS
WHILE AVOIDING FILE-BASED
TECHNOLOGY.**



Break Out Sessions

Academic Credentialing & Experiential Learning

While policy leaders continue to drive and facilitate the transformation of credentialing, this task force is monitoring this transformation and community progress in order to prepare PESC for any new standards as well as any extensions or additions that might be needed to existing PESC APPROVED STANDARDS.

Tom Black, Stanford University
 Alex Jackl, Bardic Systems
 Joellen Shendy, UMUC

Canadian PESC User Group

CanPESC looks to ensure that all PESC development and deliverables support & incorporate Canadian-based stakeholder interests; encourages participation in PESC development efforts and groups; and promotes and educates Canadian stakeholders on the importance of data exchange standards and global interoperability.

Cathy van Soest, EducationPlannerBC Transcript Services
 Leisa Wellsman, Conestoga College

EdExchange User Group

EdExchange looks to establish a data exchange platform enabling the electronic exchange of standards-based data and digital documents. Achieved through an open web services architecture and associated standards, EdExchange is designed as a peer-to-peer network providing a secure, reliable and direct connection between institutions avoiding file-based technologies.

Mark Cohen, California Community Colleges
 Tuan Anh Do, San Francisco State University

Global Education Organization Code Workgroup

The Global ID Workgroup looks to establish a standardized methodology in order to develop a global directory service of institution codes.

Rick Skeel, Ellucian

Seal of Approval Board

The SAB governs the voluntary program offered for implementers of PESC APPROVED STANDARDS to indicate a uniform level of implementation according to the original intent and spirit of development efforts. The SAB follows a formal process governed by specific policies and procedures, and is comprised of PESC members appointed by the Board of Directors.

Monterey Sims, University of Phoenix

Standards Development Forum

The Forum, governed by a Steering Committee, oversees and houses all development efforts (XML, JSON, PDF, EDI) and workgroups and is comprised of PESC members appointed by the Board of Directors.

Susan McCrackin, College Board

Change Control Board

The CCB governs the establishment and management of data elements, core components, taxonomies, schemas and code sets; authorizes all changes and updates to any and all PESC APPROVED STANDARDS; and is comprised of PESC members appointed by the Board of Directors.

Kristi Blabaum, NASLA

Education Record User Group

ERUG governs all admissions and registrar-based PESC APPROVED STANDARDS including XML, EDI, PDF and others works closely to guide all agreed-upon changes through the CCB and TAB; and is comprised of PESC members appointed by the Board of Directors.

Matt Bemis, USC
 Jason Weaver, Parchment

Technical Advisory Board

The TAB is responsible for updating and maintain all PESC technical specifications; for providing guidance and research on technical and architectural issues related to standards development in various technologies; and is comprised of PESC members appointed by the Board of Directors.

Michael Morris, ACT

GLOBAL EDUCATION ORGANIZATION CODE



GEO CODE

A FREE, OPEN AND STANDARDIZED
ONLINE DIRECTORY OF
INSTITUTION CODES & IDENTIFIERS

FOR USE BY

EDUCATION INSTITUTIONS &
STAKEHOLDERS WORLDWIDE



Policies & Logistics

REGISTRATION

PESC requires that all speakers, moderators, chairs and attendees of Data Symposiums & Summits register and remit payment to attend Data Symposiums & Summits. PESC and attendees are thankful to all speakers and grateful for their efforts in volunteering to provide updates and presentations. Only in rare instances, however (that is if a speaker is only attending a Data Symposium & Summit for a specific session or presentation), can registration fees be waived and only by the PESC office.

SUMMIT OVERVIEW

All General and Breakout Summit Sessions and events are open to all registered attendees. Dress code is business casual. Transparent collaboration, engaging discussions, awareness of technical resources and best practices, identification of emerging technologies, new business contacts, and tips from experts of leading community organizations can be expected.

Note that General Sessions are presented in typical conference format in which featured speakers or panelists present (consecutively) on a certain topic followed by brief Q&A; while Breakout Sessions follow a more informal workshop format (concurrently) in which group members roll up their sleeves, discuss and interact in more detail in order to advance the group activities and maximize in-person convening time.

GENERAL SESSION PRESENTATIONS

For MODERATORS, the role is to open the session, welcome attendees, introduce the topic and the speakers, ensure room logistics (volume, sound, temperature), facilitate Q & A, and ensure that sessions start and end on time.

For SPEAKERS, all hardware and software is ready and set up (laptop, projector, screen, podium, microphone, etc.). If speakers have a specific presentation, they can simply bring it with them on USB and plug it in right before the scheduled presentation. PESC can also swap in/out laptops if needed. Note that Powerpoint Presentations are NOT required.

TIPS For PRESENTATIONS: Remember to communicate the basic information and speak directly into the microphone: what is the name of the topic, who owns or administers it, how is it funded, what's its status and when is it effective, who is it for (students?), what are the next steps? Fonts used in Powerpoint should be large (18+). PESC can also coordinate printing and distribution of handouts if submitted one week prior to the Summit. Lastly, there is no template slide to use for presentations. Please use your own logos and your creative energy to capture the attention and imagination of the PESC attendees.

BREAKOUT SESSIONS

For BREAKOUT SESSIONS, each room, if needed, is equipped with projector, screen and speaker phone and may be setup in U-Shape format. Group Chairs are responsible for managing and facilitating all sessions and preparing and distributing respective agendas and information.

CANCELLATION POLICY

Cancellation and refund requests must be made in writing (e.g. email) and will be processed 30 days after the FALL 2017 DATA SUMMIT concludes. Any person who registers and decides not to attend MUST send a formal cancellation request - otherwise payment is due. Requests made by September 1, 2017 may be considered for a refund upon request. Any request made after September 1, 2017 is not eligible for a refund regardless of the attendance of the registrant. Refund and/or cancellation requests must be submitted to the PESC Office.



About PESO Partners

AACRAO

American Association of
Collegiate Registrars &
Admissions Officers

www.aacrao.org

AACRAO is a non-profit, voluntary, professional association of more than 11,000 higher education professionals who represent approximately 2,600 institutions in more than 40 countries.

Founded in 1910 and as one of the oldest higher education associations in the United States, its mission is to provide professional development, guidelines, and voluntary standards to be used by higher education officials regarding the best practices in records management, admissions, enrollment mgmt., administrative IT & student services.

AACRAO represents institutions in every part of the higher education community, from large public institutions to small, private liberal arts colleges.

ARUCC

Association of Registrars of
The Universities and Colleges
Of Canada

www.arucc.ca

ARUCC was created in 1964 in response to the professional needs of student administrative services personnel in universities and provides leadership in the post-secondary education field and service to its member institutions nationally and internationally, helping foster the advancement of registrarial practices in Canada.

In 2017, ARUCC included over 150 member institutions and organizations – represented by almost 800 individuals - from all regions of Canada. Membership from the universities, colleges and institutes include: registrarial support and services; admissions; recruitment; scheduling; systems and reporting; curriculum development; student records; student services; and other personnel representing key SEM offices, including from the areas of academic advising, fees, and student financial aid.

GDN

Groningen
Declaration
Network

www.groningendeclaration.org

Founded in 2012, The Groningen Declaration seeks common ground in best serving the academic and professional mobility needs of citizens world-wide by bringing together key stakeholders in the Digital Student Data Ecosystem.

We make Digital Student Data Portability happen. Citizens world-wide should be able to consult and share their authentic educational data with whomever they want, whenever they want, wherever they are.



About PESC Partners

HR Open Standards

www.hropenstandards.org

Founded in 1999 as the HR-XML Consortium, HR Open Standards is dedicated to the development and promotion of common specifications that simplify human resources-related data exchange.

By championing collaboration and innovation, HR Open Standards leads standards development projects to save HR professionals time and money by providing employers, government, software and service providers with free, flexible, and comprehensive global HR interoperability standards.

Visit the HR Open Standards website for more information and to download their free suite of HR-XML & HR-JSON data exchange standards.

EMREX

www.emrex.eu

EMREX is the solution for electronic transfer of student records between higher education institutions in Europe. The project addresses the EU 2020 target that 20% of higher education students should be mobile.

The biggest benefit of EMREX is the increased availability, quality and reliability of information about student records of achievement information.

The EMREX field trial aims at testing new ways to make the administration of student mobility easier, promoting higher attainment level to student mobility in higher education, encouraging more effective recognition of prior learning and avoiding overlapping studies. In the first phase the trial is set-up between four Nordic countries (Norway, Finland, Denmark and Sweden) and Italy.

ERASMUS WITHOUT PAPER

www.erasmuswithoutpaper.eu

Launched in 2015, EWP is a consortium of 11 partner institutions composed of public institutions, higher education organisations, and companies from 8 European countries with a dissemination potential to over 400 HEIs from 36 European countries along with 11 associate partners.

Together EWP has taken a bottom-up approach to influence the HEIs to exchange student information for mobility programmes fully in an electronic way by providing an evidence-based feasibility study with different use case scenarios and the practical solution to build connect all existing systems in one network.

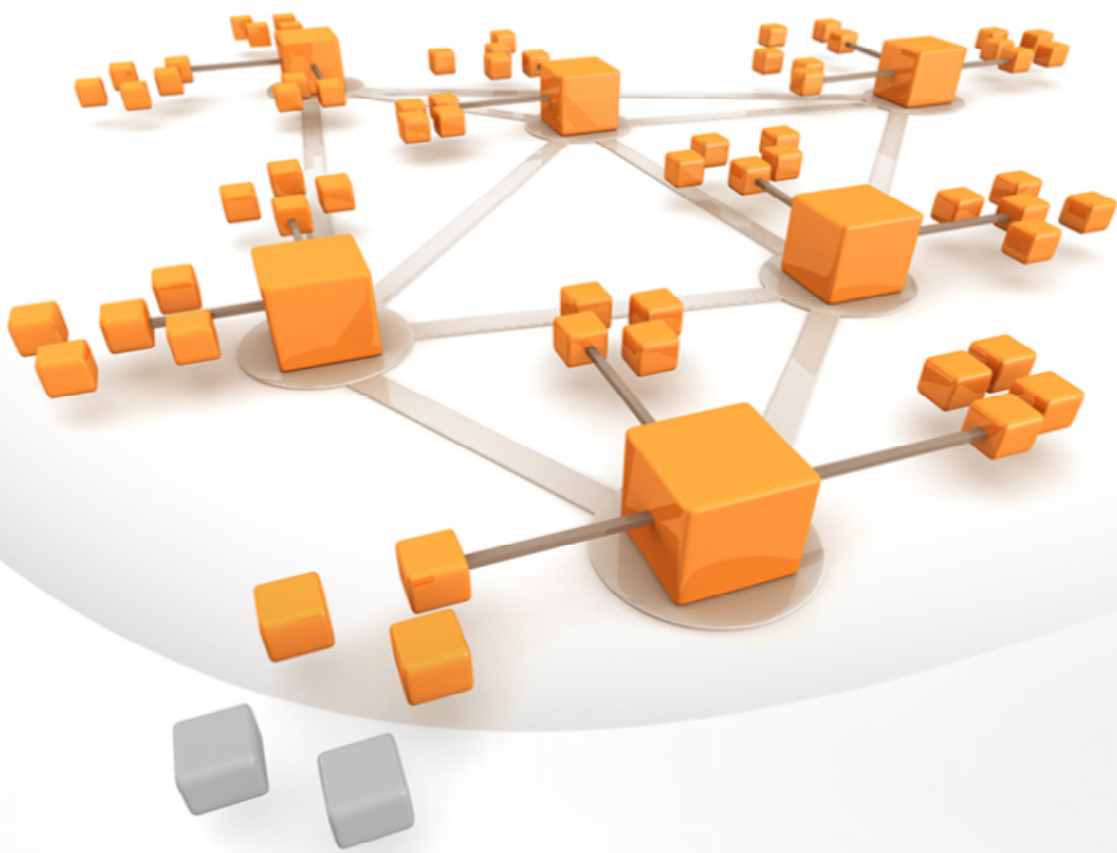
The EWP network is the first attempt to standardize student data transfer on a European-wide scale. It is important to note that the transfer does not involve documents themselves (e.g. scanned copies) but the data themselves that are contained in these documents, so that they can be used for the generation of various documents.



PESC Members

AACRAO – American Association of Collegiate Registrars & Admissions Officers
 ACADEMYONE
 ACCESS4LEARNING
 ACE – American Council on Education
 ACT
 APPLYALBERTA
 ARIZONA STATE UNIVERSITY
 BARDIC SYSTEMS
 BROWN UNIVERSITY
 CALIFORNIA COMMUNITY COLLEGE SYSTEM
 CALIFORNIA STATE UNIVERSITY SYSTEM
 CAPELLA UNIVERSITY
 CENTRAL CONNECTICUT STATE UNIVERSITY
 COLLEGE BOARD
 COLLEGENET
 COMMON APPLICATION
 COMMUNITY COLLEGE OF THE AIR FORCE
 COSUMNES RIVER COLLEGE
 CREDENTIALS SOLUTIONS
 DIGITARY
 ECE – Educational Credential Evaluators
 EDUVENTURES
 ELLUCIAN
 ELM RESOURCES
 EMORY UNIVERSITY
 FEDERATION OF STATE MEDICAL BOARDS
 FLORIDA INTERNATIONAL UNIVERSITY
 GEORGETOWN UNIVERSITY
 GRONINGEN DECLARATION NETWORK
 IERF – International Education Research Foundation
 INDIANA STATE UNIVERSITY
 JENZABAR
 MEMORIAL UNIVERSITY OF NEWFOUNDLAND
 MICHIGAN STATE UNIVERSITY
 NASLA – National Association of Student Loan Administrators

NATIONAL STUDENT CLEARINGHOUSE
 OCAS – Ontario College Application Service
 ORACLE
 OUAC – Ontario Universities’ Application Centre
 PARAGIDM
 PARCHMENT
 PURDUE UNIVERSITY
 SIMON FRASER UNIVERSITY
 SMART CATALOG
 SOUTHERN CONNECTICUT STATE UNIVERSITY
 STANFORD UNIVERSITY
 ST. EDWARDS UNIVERSITY
 Student Connections
 UNIVERSITY OF ARIZONA
 UNIVERSITY OF BRITISH COLUMBIA
 UNIVERSITY OF CALIFORNIA AT BERKELEY
 UNIVERSITY OF COLORADO BOULDER
 UNIVERSITY OF DENVER
 UNIVERSITY OF IDAHO
 UNIVERSITY OF LETHBRIDGE
 UNIVERSITY OF LOUISIANA AT LAFAYETTE
 UNIVERSITY OF MARYLAND UNIVERSITY COLLEGE
 UNIVERSITY OF MICHIGAN
 UNIVERSITY OF MISSISSIPPI
 UNIVERSITY OF MISSOURI SYSTEM
 UNIVERSITY OF NORTHERN IOWA
 UNIVERSITY OF OREGON
 UNIVERSITY OF PHOENIX
 UNIVERSITY OF PUERTO RICO SYSTEM
 UNIVERSITY OF SOUTHERN CALIFORNIA
 UNIVERSITY OF SOUTH FLORIDA
 UNIVERSITY OF TEXAS AT AUSTIN
 UNIVERSITY OF VIRGINIA
 UNIVERSITY OF WISCONSIN AT MADISON
 WASHINGTON STATE UNIVERSITY
 WESTERN GOVERNORS UNIVERSITY
 WORKDAY



INTEROPERABILITY from Wikipedia

Interoperability is a property referring to the ability of diverse products, systems and/or organizations to work together (inter-operate).

The term is often used in a technical systems engineering sense, or alternatively in a broad sense, taking into account social, political, and organizational factors that impact system to system performance.

For systems interoperability specifically, organizations communicate through interfaces which are completely understood...each can work with the other's products or systems without any restricted access or implementation.



PESC & Academic Credentialing

In June 2015 at its Annual Retreat, the PESC Board of Directors, due to the impact of student mobility on the international credentialing landscape, authorized the formation of the *Academic Credentialing and Experiential Learning Task Force*.

This Task Force formed and convened for its inaugural meeting at PESC's Fall 2015 Data Summit in Washington, D.C. With Tom Black, Associate Vice Provost for Student Affairs & University Registrar at Stanford University, as Task Force Chair, and Co-Chairs Joellen Shendy, Associate Vice Provost and Registrar at the University of Maryland University College and Alex Jackl, CEO and Founder of Bardic Systems, the Task Force committed to *monitoring and tracking current initiatives, providing speakers and presenters at several industry-leading conferences and events, serving as a clearinghouse for information, and ensuring PESC is prepared for standards development work* as the community is reaching the point in which standards are needed.

Through analysis and discussion, Chair Tom Black identified an associated gap in the North American market whereby no standards existed for the exchange of certificates, degrees and diplomas. Work began immediately to shape a standard and evolved into the *PESC Approved XML Common Credential for Certificates, Degrees and Diplomas*. The Task Force continues to convene and focus on new and specific use cases (business or process cases) to determine their value and need in the community while leveraging technology and standards to meet the needs of emerging mobile academic credentials.

In June 2016 at its next Annual Retreat, the PESC Board of Directors discussed the numerous industry groups and initiatives focusing on credentials. In-depth discussions lead to the realization that a significant part of community needs are not be addressed in that no organization is showcasing how to work with all the different groups and initiatives, and more importantly how the different groups and initiatives all relate to one another.

With that in mind, the PESC Board of Directors subsequently authorized the dedication of PESC's Spring 2017 Data Summit to this one theme and purpose – *Empowering the Mobility of Digital Academic Credentials*. As PESC is a sponsor of Connecting Credentials, leaders at Connecting Credentials correspondingly co-sponsored the Spring 2017 Data Summit.

In the spirit of interoperability, leaders of Credential Engine proposed a comprehensive data mapping initiative across Credential Engine, PESC, HR-Open Standards, and IMS in order to advance interoperability; and with immediate agreement by all, organizational meetings began in April 2017. As part of this initiative, PESC and HR-Open Standards signed a joint MOU in August 2017.

PESC is corresponding Partners with Erasmus Without Paper and EMREX, and is undertaking additional data mapping exercises including data transmission and exchange.



Menus

Lunch

Wednesday October 25, 2017
Noon

Gathered Greens and Seedlings with
Lemon Thyme Vinaigrette

New Potato Salad with Smoked
Salmon and Dill

Grilled Seasonal Vegetable Salad with
Balsamic Glaze and Chili, Lemon Oil

Pan Roasted Mediterranean Bass with
Fresh Herbs, Olive Medley and Dirty
Rice

Butter Chicken with Basmati Rice and
Tomato Cucumber Yogurt

Mushroom and Leek Ravioli Tossed in
Arugula Pesto with Roasted
Tomatoes

Fresh Assorted Sliced Fruit

Mini Pastries

Starbucks Coffee and TAZAO Teas

Reception

Wednesday October 25, 2017
6pm

PESC 20th Year Anniversary

Pecking Duck in Moo Shoo Crepe

Sweet Potato Lentil Croquet

Shrimp Spring roll

Fried chicken and waffles

Beef sliders

Complimentary Beer & Wine Bar

Lunch

Thursday October 26, 2017
Noon

Couscous, Tomato and Baby Shrimp with
Basil Olive Oil Dressing

Gathered Greens and Seedlings with Lemon
Thyme Vinaigrette

Marinated Seafood Salad

Collops of Atlantic Salmon in a Sesame Crust,
Ginger Wasabi and Teriyaki Drizzle

BBQ Chicken, Warm Tortillas and Salsa Fresca

House-made Spelt Pasta Tossed with
Seasonal Vegetables, Mushrooms and
Arugula Pesto

Fresh Assorted Sliced Fruit

Mini Pastries

Starbucks Coffee and TAZAO Teas

ADVANCING STUDENT MOBILITY IN A DIGITAL WORLD



FALL 2017 DATA SUMMIT



Save the Date!



MAY 2-4, 2018 WASHINGTON DC WWW.PESC.ORG

SPRING 2018 DATA SUMMIT

BEST PRACTICES IN EDUCATION DATA SYSTEMS

19TH ANNUAL BEST PRACTICES!





About Our Speakers

KATHLEEN MASSEY

Kathleen Massey is currently the Associate Vice-President (Students) at the University of Lethbridge in Alberta. Until recently, Kathleen served as the Registrar and Executive Director, Enrolment Services at McGill University in Montreal, Quebec, a position she held for 10 years. Previously, she held senior positions at the Centennial College, University of Calgary & York University.

Massey is a former President of ARUCC and a current co-chair of the Groningen Declaration Network's Pilots Task Force. She is also an active member of many other provincial, national and international professional associations.

A winner of the Queen's Golden Jubilee medal for leadership in Education in 2003, Massey holds a BA in Political Science from York University and an MA in Leadership from Royal Roads University in beautiful British Columbia.

HERMAN DE LEEUW

Herman de Leeuw is the Executive Director of GDN, the Groningen Declaration Network, a position he has held for 7 years, initiated while the Executive Education Agency, Ministry of Education, Culture and Science (known as DUO) in the Netherlands.

Having begun his career as an antiquarian bookseller and bibliographer, Herman's work with handwritten and printed book materials led to a deep interest in transmission of manuscripts and the next step in his long career, when he introduced the concept of document examination as a necessary and needed part of educational credential evaluation.

DR. ROB FLEMING

Prior to being appointed BCCAT Executive Director and Co-chair in 2010, **Dr. Rob Fleming** taught at various institutions in BC and served in faculty and administrative roles, including English department Co-chair, Dean of Humanities, and Associate VP Academic.

Over his career, he has served as a member of several provincial, national, and international post-secondary committees, projects, and organizations.

His scholarship includes presentations & publications on literature & composition, curriculum development and review, post-secondary policy & systems, & organizational cultures.

Dr. Fleming holds Bachelor of Arts and Master of Arts degrees from the University of British Columbia, and a Doctorate from Simon Fraser University.



About Our Speakers

ROMESH VADIVEL

Romesh Vadivel is currently Assistant Registrar and Director of Service Point, Enrolment Services, at McGill University, recently returning to that high-volume frontline service office after having led an Enrolment Services Systems and Project Management team during a colleague's year-long absence.

Well-versed in student services and with an eye to systems and process improvement, he has worked in the Canadian higher education industry for more than twenty years in a variety of challenging roles at each of Concordia University, at Dalhousie University and at McGill since 2005.

He has served on the Executive of ARUCC since 2014, most recently as Vice President, and is a proud champion of not only ARUCC's involvement and role in the Groningen Declaration Network but in all systemic improvements to the student experience.

RICK TORRES

Ricardo D. Torres joined the National Student Clearinghouse as its President and CEO in 2008. Under his leadership the Clearinghouse has continued to successfully extend its' mission delivery of service to education, which today comprises nearly 3,700 higher education institutions and over 8,500 high schools, school districts, and 43 states executing over one billion electronic transactions annually, saving the education community over \$700 million a year.

Prior to joining the Clearinghouse, Mr. Torres spent his career in the private sector, spanning several industry sectors. Mr. Torres has been an active board member of the John Tyler Community College Foundation for the past 17 years and serves on the Boards of the National College Access Network (NCAN), and the Cesar Chavez Public Charter Schools for Public Policy.

He was a founding member and sits on the GDN Board of Directors. Mr. Torres holds an MBA in International Finance from Georgetown University and undergraduate degrees in both Marketing and Management from Manhattan College.

W. MATT BEMIS

Matt Bemis is responsible for the Degree Progress Department operations for the University of Southern California, serving as the administrator over the Degree Audit and Transfer Credit applications, is USC's NCAA continuing eligibility certification officer, and is the project lead for the electronic data interchange (EDI) initiative at USC.

He recently served as the Chair for the AACRAO SPEEDE Committee, is currently serving as the PACRAO Program Committee Chair, serves on the PESC Board of Directors, is Co-Chair for the PESC Education Record User Group, and is a GEO Code Steering Committee Member.



About Our Speakers

JAMES KELLY

Jim Kelly serves as Senior Director of Technology at ECE. Over the last 16 years, he has successfully formed and built a foundational framework for technology to support infrastructure, applications, and strategic activities - key to the growth of services offered by ECE helping the business triple in size during Jim's tenure.

As part of ECE's senior leadership team, Jim supports internal and external systems while involved in planning, general leadership and management efforts. Jim also works with PESC and GDN to standardize credential evaluation data and contributes to educational data mobility internationally.

Jim graduated from the University of Wisconsin Oshkosh with a degree in Biology and a minor in Chemistry.

HEIDI EMAMI

Heidi Emami is Associate Registrar, Management of Academic Records, Exams & Convocation in Enrolment Services at McGill University.

With over 20 years of experience in higher education, she has worked in a variety of challenging roles focusing on academic records, student services, systems implementation and change management.

Heidi's current focus is applying Lean methodology to different areas of her unit to improve and streamline process and introduce an environment of continuous improvement.

MICHAEL RINGUETTE

In 2011, **Michael Ringuette** joined the team of the Canadian Information Centre for International Credentials (CICIC), at the Council of Ministers of Education, Canada (CMEC). In July of this year, he was appointed to take the leadership of CICIC.

At the pan-Canadian level, he has worked on the development of standards and tools for the community of academic credential assessors and organizations involved in qualification recognition issues, to support Canada's obligations under the Lisbon Recognition Convention (LRC).

At the international level, he held the Vice-Presidency of the European Network of Information Centres (ENIC) from 2013 to 2014. He currently Chairs a working group led by the Council of Europe, UNESCO and the European Commission to facilitate communications between those 55 information centres that make up the ENIC-NARIC networks.



PESC Events & Conferences

**US NATIONAL FORUM FOR
EDUCATION STATISTICS CONFERENCE**

JULY 30 - AUGUST 1, 2017
WASHINGTON DC
MAYFLOWER

US NCES STATS-DC CONFERENCE

AUGUST 1 - 3, 2017
WASHINGTON DC
MAYFLOWER

ADL/NDIA iFEST CONFERENCE

JULY 31 - AUGUST 2, 2017
ALEXANDRIA
HILTON MARK

**SHEEO HIGHER EDUCATION
POLICY CONFERENCE**

AUGUST 8 - 11, 2017
MINNEAPOLIS
MARRIOTT CITY CENTER

**BLOCKCHAIN IN EDUCATION
2017 CONFERENCE**

SEPTEMBER 5, 2017
GRONINGEN
UNIVERSITY OF GRONGEN

**ERASMUS WITHOUT PAPER
FINAL CONFERENCE**

SEPTEMBER 25 - 26, 2017
BRUSSELS
UNICA

EMREX UNLEASHED

NOVEMBER 30, 2017
BOLOGNA
UNIVERSITY OF BOLOGNA

AACRAO ANNUAL CONFERENCE

APRIL 25 - 28, 2018
ORLANDO
WORLD CENTER MARRIOTT

**GRONINGEN DECLARATION NETWORK
ANNUAL CONFERENCE**

APRIL 18 - 20, 2018
PARIS

SPRING 2018 DATA SUMMIT

MAY 2-4, 2018
WASHINGTON DC

PESC ANNUAL BOARD RETREAT

JUNE 27 - 29, 2018
SEATTLE



Please Join Us!

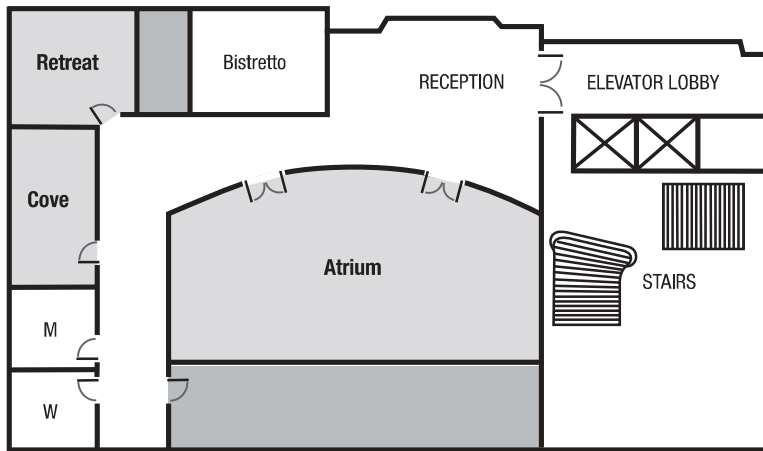


ANNUAL FALL RECEPTION | WEDNESDAY OCTOBER 25, 2017 | 6pm

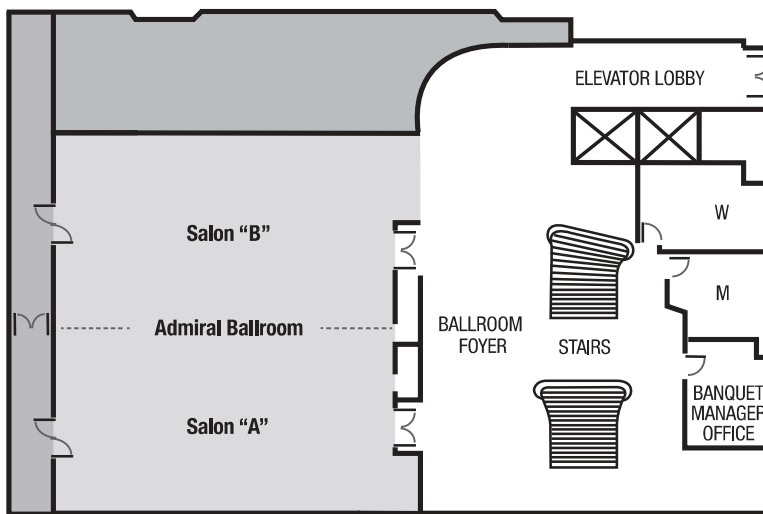
1250 Connecticut Ave
NW Suite 200
Washington, D.C. 20036
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+1.202.261.6517 f



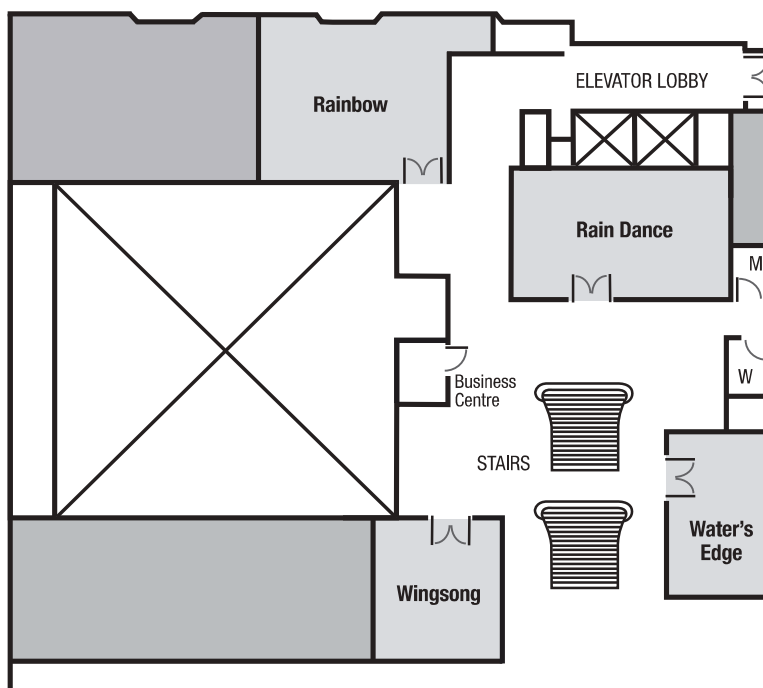
www.PESC.org
info@PESC.org
facebook.com/PESCupdates
twitter.com/PESCupdates



Second Floor



Third Floor



Fourth Floor

FALL 2017 DATA SUMMIT – BREAK OUT PROGRAM

| THURSDAY OCTOBER 26, 2017 BREAKOUT SESSIONS | | | |
|---|---|--|----------------------------------|
| | ATRIUM Screen/Cart, Speakerphone | RAIN DANCE Screen/Cart, Speakerphone | RAINBOW Speakerphone |
| 1:30pm – 3:00pm | EdExchange Overview & Community Call | JSON Task Force | Academic Credentialing |
| 3:00pm – 3:30pm | BREAK | | |
| 3:30pm – 5:30pm | EdExchange User Group | CanPESC User Group SEE CANPESC FOR AGENDA | GEO Code Workgroup |
| 5:30pm-6:00pm | PESC MEMBER MEETING | | |

| FRIDAY OCTOBER 27, 2017 BREAKOUT SESSIONS | | | |
|---|---|--|--|
| 7:30am – 9:00am | CONTINENTAL BREAKFAST – ATRIUM | | |
| | ATRIUM Screen, Cart, Speakerphone | RAIN DANCE NA | RAINBOW NA |
| 8:30am – 10:30am | Diploma Supplement Development | ARUCC Groningen Project | AACRAO SPEEDE SEE SPEEDE FOR DETAILS |
| 10:30am – 11:00am | BREAK – 2 ND FLOOR FOYER | | |
| 11:00am – Noon | GEO Code Overview & Community Call | Standards Development (CCB, TAB & SC) SEE CCB FOR AGENDA | AACRAO SPEEDE SEE SPEEDE FOR DETAILS |
| Noon | ADJOURN | | |

EdExchange Breakouts

1) EdExchange Introduction and Overview

A general overview and introduction of EdExchange, a neutral data exchange platform for digital data and documents and look-up service, Application Platform as a Service (aPaaS or PaaS), designed as a peer-to-peer network, providing a secure, reliable & direct connection between users avoiding file-based technologies.

1.30pm – 3.00pm

Thursday October 26, 2017

PESC GLOBAL MEET

888.205.5513, 952016#

AGENDA

- 1) **Welcome & Introductions** – Mark Cohen, Michael Sessa 10 mins
- 2) **Overview Presentation of EdExchange** – Michael and Steering Committee – 20 mins
- 3) **Webinar/Demo** (from PESC Website) – Example of EdExchange in Process – 30 mins
- 4) **What's Planned Next** – Michael and Steering Committee – 15 mins
- 5) **Q & A** – 15 mins

2) EdExchange/CDS User Group Working Meeting

The Common Data Services (CDS) Task Force and EdExchange Steering Committee, both comprised of PESC Members, convene for regular working meetings to advance and progress the action items and overall EdExchange project.

3.30pm – 5.30pm

Thursday October 26, 2017

PESC GLOBAL MEET

888.205.5513, 952016#

AGENDA

- 1) **Welcome & Introductions** – Mark Cohen, Michael Sessa 5 mins
- 2) **Technical Update** – CCC, NSC, Parchment, Credentials – 10 mins
- 3) **Pilot Update** – Pilots – 5 mins
- 4) **At 4:00pm** – Conference Call Infiniti – Transition Update – 15 mins
- 5) **At 4:30pm** – Conference Call Apereo – Open Source Update – 15 mins
- 6) **Administration** – 10 mins
- 7) **Global Update** (EWP, EMREX) – Michael – 10 mins
- 8) **Steering Committee and Next Steps** – 20 mins
- 9) **NEW MEETING DATES AND TIMES** – All – 20 mins
- 10) **Adjourn**

Academic Credentialing Task Force Breakout

Academic Credentialing and Experiential Learning Task Force

The PESC ACADEMIC CREDENTIALING & EXPERIENTIAL LEARNING Task Force is an open (and free to participate), collaborative group of stakeholders in the issuance and authentication of academic credentials serving as an information clearinghouse for the education community and ensuring PESC is prepared for any corresponding standards development and production of PESC Approved Standards. The Task Force is a permanent group within PESC and also focuses on monitoring and tracking current credentialing initiatives (i.e. Blockchain, Badges, ePortfolio, Credential Engine), providing speakers and presenters at several industry-leading conferences and events, serving as a liaison with other organizations and associations.

1.30pm – 3.00pm

Thursday October 26, 2017

PHONE?

AGENDA

- 1) Welcome & Introductions**
- 2) Overview of PESC Academic Credentialing and Experiential Learning Task Force**
- 3) Blockchain & Badges**
- 4) Credential Engine**
- 5) AACRAO and Other Global Initiatives**
- 6) What's Coming Up Next?**
- 7) Join the Task Force!**
- 8) Adjourn**

GEO Code Breakouts

1) GEO Code Workgroup Working Meeting

The GEO Code Workgroup and Steering Committee convene for regular working meetings to advance and progress the action items and overall GEO Code project.

03.30pm – 05.30pm EDT

Thursday October 26, 2017

AGENDA

- 1) **Welcome & Introductions** – Rick Skeel, 10 mins
- 2) **Review of AACRAO Webinar** – Matt Bemis, All – 10 mins
- 3) **Status Update on Current List** – ALL – 10 mins
- 4) **Moving Toward an Online Directory Server** – Jim Kelly and Steering Committee – 45 mins
- 5) **Strategy and Timeline** – Michael Sessa, All – 30 mins
- 6) **NEW Meeting Date and Time** – 15 mins
- 7) **Other?**

2) GEO Code Introduction and Overview

A general overview and introduction of PESC GEO Code, a free, open and standardized online directory of codes and identifiers of education organizations for use by institutions & stakeholders worldwide, scheduled at this time to encourage participation from across Canada and Europe.

11.00am – Noon EDT

Friday October 27, 2017

PESC GLOBAL MEET

888.205.5513, 952016#

AGENDA

- 1) **Welcome & Introductions** – Rick Skeel, 15 mins
- 2) **Presentation/Overview** – *Solving the International Institution Code Problem: USC and IERF Pilot* – Matt Bemis, All 30 mins
- 3) **Display of Current Directory** – Rajeev Arora 10 mins
- 4) **Global Update** (EWP, EMREX, GDN) – Michael Sessa – 10 mins
- 5) **Steering Committee & Next Steps** – 10 mins
- 6) **Adjourn**

Diploma Supplement Breakout

Introduction and Overview of Diploma Supplement

Recently the European Union (EU) released its final report on the Digitalisation of the Diploma Supplement. The Diploma Supplement, defined by the EU, is a document accompanying a higher education diploma, providing a standardized description of the nature, level, content, content and status of the studies completed by its holder. It is produced by the higher education institutions according to standards agreed by the EU, the Council of Europe and UNESCO. With the need for a new digital document, this session will continue the discussions on the impact of the diploma supplement, its timeline, and what role PESC might play in standards development.

8.30am – 10.30am

Friday October 27, 2017

PESC GLOBAL MEET

888.205.5513, 952016#

AGENDA

- 1) Welcome & Introductions**
- 2) Overview of Diploma Supplement**
- 3) Timelines & Actions**
- 4) PESC Strategy**
- 5) Open Discussion**
- 6) Next Steps**
- 7) Adjourn**

JSON TASK FORCE

JSON TASK FORCE

JSON technology is emerging as organizations are transforming their XML in order to be more web services friendly. PESC formed a JSON TASK FORCE to convene technical leaders and experts to help determine and recommend the strategic direction to take with regard to JSON. As the technology is new, PESC is working through collaborations and outreach in an effort to make an industry-wide coordinated approach to JSON .

1.30pm – 3.00pm

Thursday October 26, 2017

AGENDA

1. **Welcome & Introductions** – Michael Morris 10 mins
2. **Status Update** – Where We Are Right Now – Michael Morris 10 mins
3. **Collaborating with A4L** – ALL 10 mins
4. **Deliverables:** Mission Statement, Guiding Principles, PESC Executable – ALL 20 mins
5. **Approach:** Pure JSON, XML Transformation? ALL – 30 mins
6. **Assignments and Next Steps** – Michael Morris 5 mins
7. **Next Meeting** – Monday October 30, 2017 at 1pm EDT

ARUCC Groningen Project

ARUCC Groningen Project: An Opportunity to Dive Deep

Join ARUCC Groningen Project Steering Committee members for an informal overview session of this initiative followed by a question and answer period to extend the conversation about potential models and possibilities for Canada.

8:30am – 10:30am

Friday October 27, 2017

Session leads:

- Charmaine Hack, Chair, ARUCC Groningen Steering Committee; Ryerson University
- Romesh Vadivel, ARUCC Vice President and Member, ARUCC Groningen Steering Committee; McGill University
- Joanne Duklas, Duklas Cornerstone Consulting and Project Support
- Dr. Rob Fleming, BCCAT
- Cathy van Soest, Co-Chair, CanPESC; EducationPlannerBC
- Kathleen Massey, University of Lethbridge

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WHAT ARE YOU ASKING YOURS TO DO?

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SEAL OF APPROVAL

APPLICATION AND AGREEMENT

SEAL OF APPROVAL PROGRAM FOR PESC APPROVED STANDARDS



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