

# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS



## PROGRAM

SPRING 2017 DATA SUMMIT

WASHINGTON DC

MAY 3-5, 2017



DATA SYSTEMS ONLY DO WHAT YOU ASK THEM TO DO.

WHAT ARE YOU ASKING YOURS TO DO?

SOLUTIONS ARE AVAILABLE.  
NOW IS THE TIME. PESc IS THE PLACE.

FOR THE COMMUNITY.  
BY THE COMMUNITY.





# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS



## INTRODUCTION

### **Student mobility combined with**

emerging, innovative technologies and systems continues to transform learning and academic credentialing around the world.

PESC began discussions in 2015 with its Membership and Board of Directors about this changing landscape and subsequently that year formed the *Academic Credentialing and Experiential Learning Task Force*.

This highly knowledgeable group of leaders and experts spanning education policy, practice and technology, has been meeting since to ensure that standards development efforts within PESC keep pace with the digital needs of institutions, their partners and service providers all driven by student mobility.

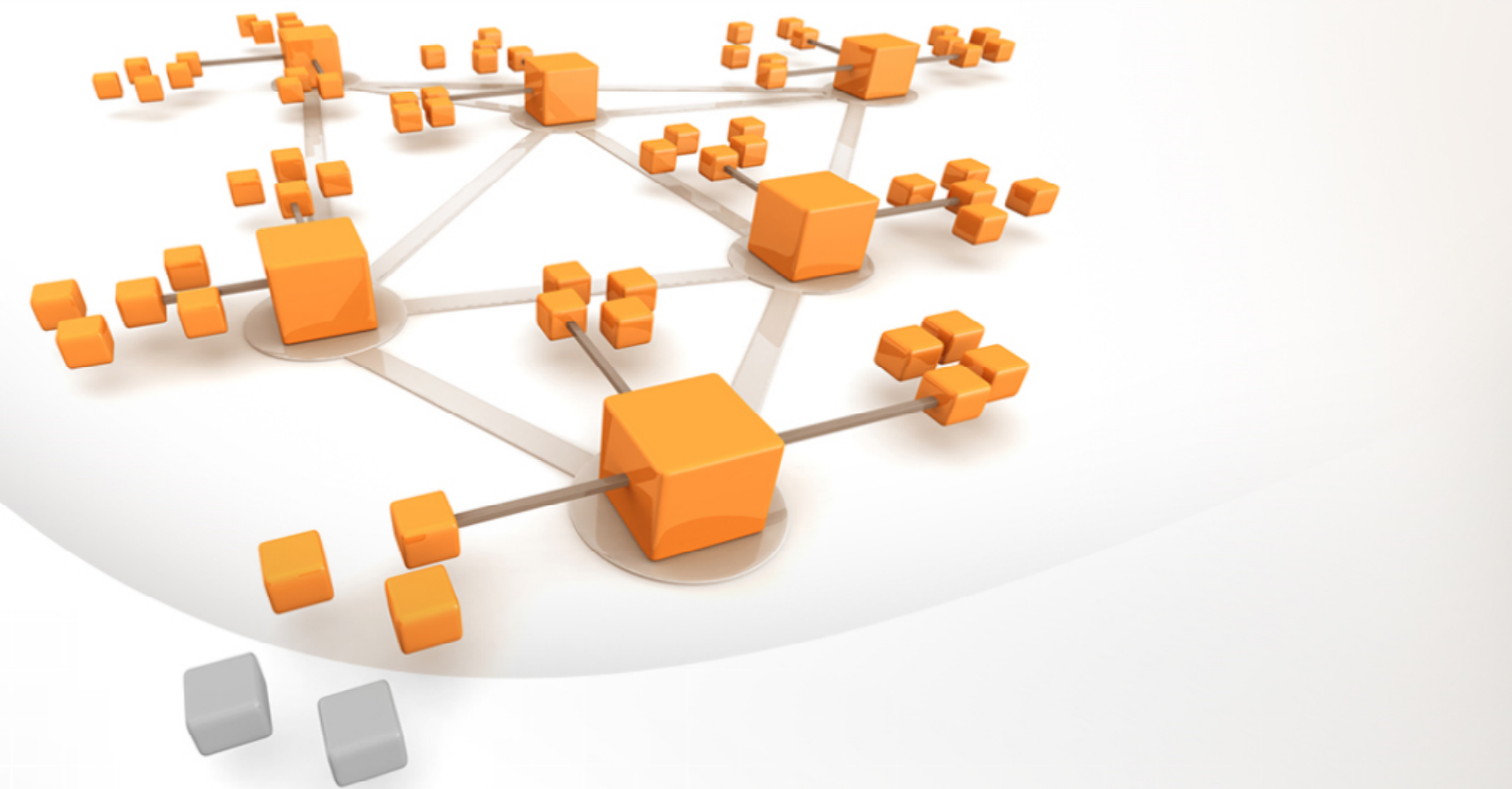
Since then, a number of community and industry credentialing initiatives have been established to facilitate and administer the integration of this digital transformation within the credentialing environment.

### **The supportive, complementary**

message to each initiative from PESC is that fostering collaboration across educational sectors to solve industry-shared problems brings much needed clarity and coherence to the education eco-system.

For the Spring 2017 Data Summit | *Best Practices in Education Data Systems* PESC underscores this message and elevates this need to the forefront by showcasing many of these initiatives under one common theme: *Empowering the Mobility of Digital Academic Credentials*.

The goals of the Spring 2017 Data Summit include educating and informing attendees on current initiatives and emerging best practices impacting technology & standards; and promoting innovative, collaborative solutions that employ automated, reusable and sustainable technologies in order to improve institutional performance, service delivery, and overall connectivity between stakeholders.



# 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.

# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

## WELCOME

EMBASSY ROW HOTEL  
2015 Massachusetts Ave NW  
Washington DC 20036  
855-893-1011

### Data Summits

focus on access, integration and implementation of data systems; maintenance and portability of data exchange standards; open, community-driven innovation and development; mobility and overall interoperability; and other key factors that drive global education data systems development and technology.

### PESC Technology

is driven by PESC serving as an incubator to pilot and launch standards using an open, transparent and collaborative process; and serving as a data standards-setting body governing resource mapping and maintenance of education eco-system schemas, taxonomies and shared code sets.

### PESC and its Membership

lead transparent, collaborative development across the education landscape. Supporting this mission are PESC partners:

AACRAO

ARUCC

Groningen Declaration Network

Internet2

SHEED

US Department of Education's CEDS Initiative

### PESC Annual Sponsors

Credentials Solutions

National Student Clearinghouse

Oracle

Parchment

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# PROGRAM COMMITTEE



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UNIVERSITY OF PHOENIX

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PARCHMENT



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# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

## PESC AND THE TRANSFORMATION OF ACADEMIC CREDENTIALING

In June 2015 at its annual planning 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 *XML Common Credential for Certificates, Degrees and Diplomas*. While the finalization of this development work continues with the intention that it become a PESC Approved Standard, Stanford University included this development work under its grant award with AACRAO, which is funded by the Lumina Foundation.

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 planning 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 one theme and purpose – *Empowering the Mobility of Digital Academic Credentials*.



# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

## PROGRAM AT A GLANCE

	Wednesday May 3, 2017	Thursday May 4, 2017	Friday May 5, 2017
8:30am – 10:00am	 <b>Admission/Registrar</b> 1	 <b>Policy/Research</b> 5	Gender & Student Identity in Education Data Systems 8
10:00am – 10:30am	BREAK	BREAK	
10:30am – Noon	 <b>Admission/Registrar</b> 2	 <b>Labor/Workforce/ Users</b> 6	
Noon – 1:30pm	LUNCH	LUNCH	ADJOURN
1:30pm – 3:00pm	 <b>International</b> 3	PESG Groups/Committees 7  - Academic Credentialing & Experiential Learning - EdExchange - Single Institution Code - Change Control Board/ Technical Advisory Board	
3:00pm – 3:30pm	BREAK		
3:30pm – 5:00pm	 <b>Systems/Technology</b> 4		
5:30pm – 7:00pm	SPRING RECEPTION	PESG MEMBER MEETING	

The program spans 1 ½ days starting at 8:30am on Wednesday May 3, 2017 and concludes with lunch at noon on Thursday May 4, 2017. All other events, meetings, and activities conducted at the Summit are open to all registered attendees.

# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

## P E S C M E M B E R S

AACRAO – American Association of Collegiate Registrars  
& Admissions Officers

ACADEMYONE

ACCENTURE

ACCESS4LEARNING

ACE – American Council on Education

ACT

APPLYALBERTA

ARIZONA STATE UNIVERSITY

BARDIC SYSTEMS

CALIFORNIA COMMUNITY COLLEGE SYSTEM

CALIFORNIA STATE UNIVERSITY SYSTEM

CAPELLA UNIVERSITY

CENTRAL CONNECTICUT STATE UNIVERSITY

COLLEGE BOARD

COLLEGENET

COMMUNITY COLLEGE OF THE AIR FORCE

COSUMNES RIVER COLLEGE

CREDENTIALS SOLUTIONS

DECISIONDESK

DIGITARY

ECE – Educational Credential Evaluators

EDUVENTURES

ELLUCIAN

ELM RESOURCES

ELON UNIVERSITY

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

PARADIGM

PARCHMENT

PURDUE UNIVERSITY

SIMON FRASER UNIVERSITY

SMART CATALOG

SMARTER BALANCED ASSESSMENT CONSORTIUM

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 DENVER

UNIVERSITY OF IDAHO

UNIVERSITY OF LETHBRIDGE

UNIVERSITY OF LOUISIANA AT LAFAYETTE

UNIVERSITY OF MARYLAND UNIVERSITY COLLEGE

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

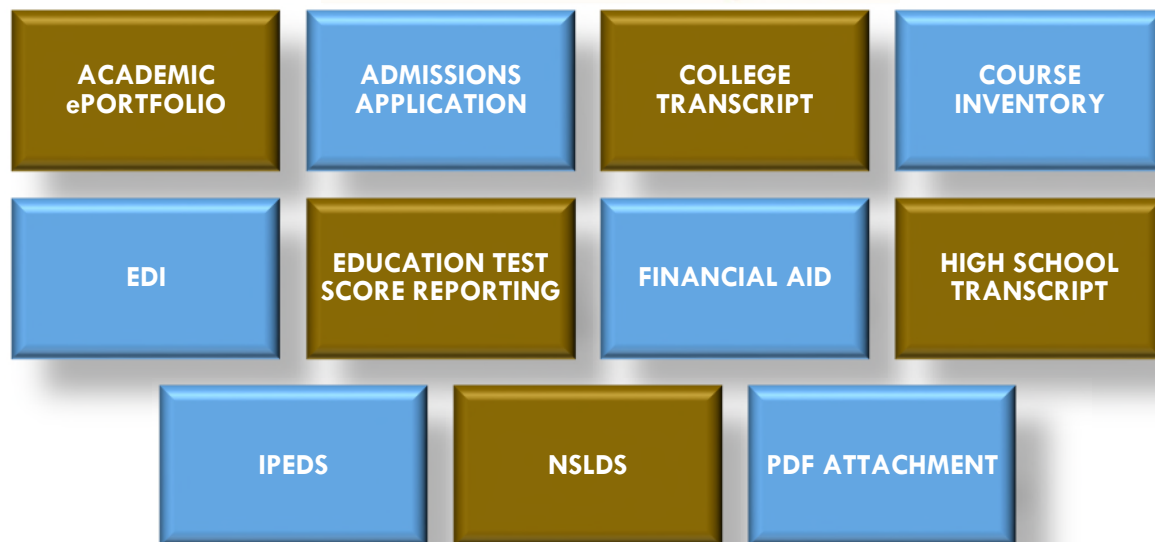
WASHINGTON STATE UNIVERSITY

WESTERN GOVERNORS UNIVERSITY

WORKDAY

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# PESC APPROVED STANDARDS



- **PESC APPROVED STANDARDS** are available free of charge to the education community, a cornerstone principle of the PESC Membership and Mission.
- **PESC APPROVED STANDARDS** are developed, approved and maintained through an open, transparent and community-based collaborative process, which includes a public comment period for newly developed and proposed standards, all governed by PESC Members.
- **PESC APPROVED STANDARDS** support a business process or transaction and each can be implemented or used one independently from another.
- **PESC APPROVED STANDARDS**, dependent on when developed and released, are each based on a specific version of the Academic Record Sector, on a specific version of Core Main Components, and on PESC's XML Technical Specification.





# SEAL OF APPROVAL

## APPLICATION AND INFORMATION

SEAL OF APPROVAL PROGRAM FOR PESC APPROVED STANDARDS



**PESC APPROVED STANDARDS**  
FOR ADMISSIONS, REGISTRAR & FINANCIAL AID

# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS



## WHO WE ARE

Established in 1997 at the National Center for Higher Education and headquartered in Washington, D.C., PESC is an international, 501 (c)(3) non-profit, community-based, umbrella association of data, software and education technology service providers; schools, districts, colleges and universities; college, university and state systems; local, state/province and federal government agencies; professional, commercial and non-profit organizations; and non-profit associations & foundations.

## OUR MISSION

Through open and transparent community participation, PESC enables cost effective connectivity between data systems to accelerate performance and service, to simplify data access and research, and to improve data quality along the education lifecycle.

## OUR VISION

PESC envisions global interoperability with the education domain, supported by a trustworthy, inter-connected network built by and between communities of interest in which data flows digitally and seamlessly from one community or system to another and throughout the entire eco-system when and where needed without compatibility barriers but in a safe, secure, reliable, legal, and efficient manner.

## ABOUT PRIVACY

While PESC promotes the implementation and usage of data exchange standards, PESC does not set (create or establish) policies related to privacy and security. Organizations and entities using PESC Approved Standards and services should ensure they comply with FERPA and all local, state, federal and international rules on privacy and security as applicable.

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# PESC SPONSORS

## ANNUAL DIAMOND SPONSORS



# PESC PARTNERS

AACRAO

APERED

ARUCC

GRONINGEN DECLARATION NETWORK

INTERNET2

SHEED

US DEPARTMENT OF EDUCATION'S CEDS



# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

## PESC GROUPS

### 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.

### SINGLE INSTITUTION CODE

- The Single Institution Code workgroup looks to establish a standardized methodology in order to develop a global directory service of institution codes.

### STANDARDS DEVELOPMENT FORUM

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

### CANADIAN PESC USER GROUP

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

### 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.

### EDUCATION RECORD USER GROUP

- ERUG governs all admissions and registrar-based PESC Approved Standards including XML, EDI and PDF; 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.

### 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.

### 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.

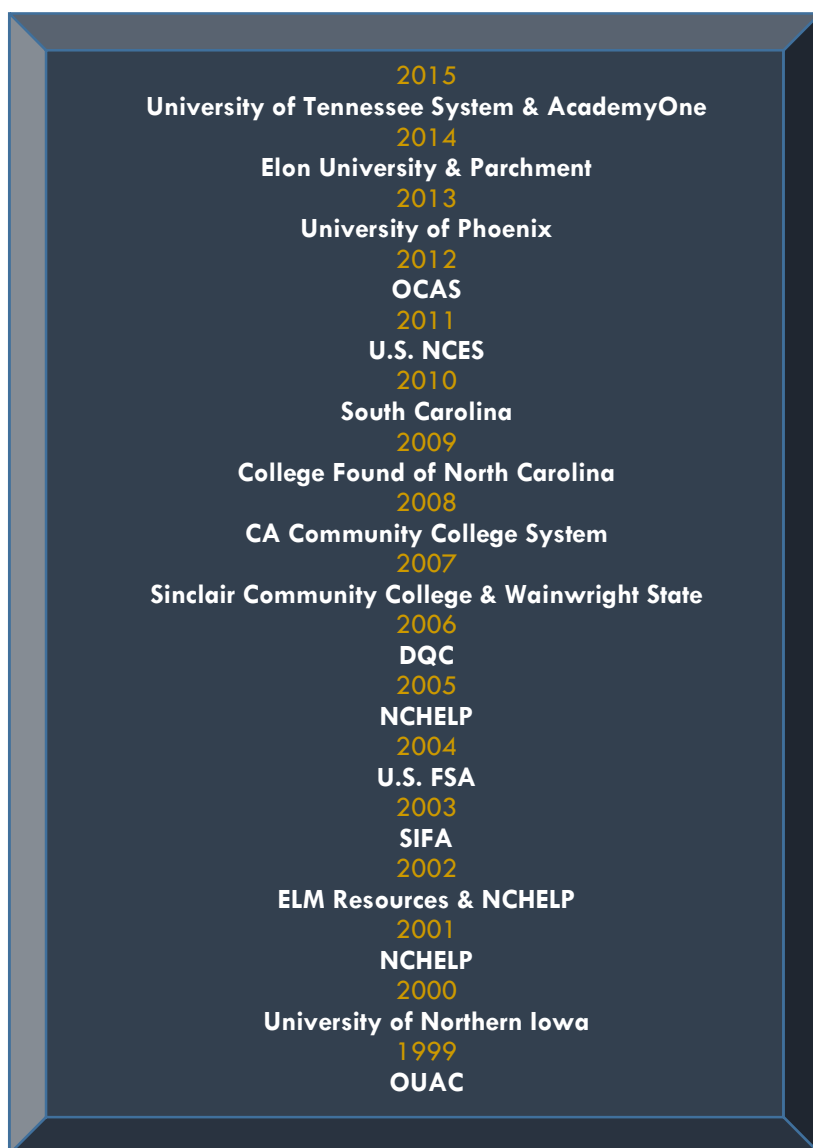
### TECHNICAL ADVISORY BOARD

- 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.

## EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

# BEST PRACTICES AWARDS

The Annual Best Practices Competition is held by PESC to highlight and promote innovation and ingenuity in the application and implementation of interoperable data standards for business needs. First held in 1999, the Competition is open to institutions, associations, organizations, government agencies and departments, districts, consortia, non-profit and commercial service providers and other education stakeholders that have collaborated to design and/or adopt an electronic standardization initiative via a specific implementation, and/or other medium such as, but not limited to, published articles and white papers. Submissions may include descriptions of the scope of a project, participants, type of standards employed, relevant dates of project milestones, copies of articles, outline of mission/objectives and any related statistics (number of transactions transmitted, estimated cost savings, etc.).



# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

## SERVICE AWARDS

Many, many volunteers from the PESC membership and education community have helped shape PESC into the organization it is today and we truly thank everyone. The success of PESC is due primarily to the valuable output (from white papers to development, approval and maintenance processes of standards) produced through workgroups and committees that are staffed and run by these volunteers. Certain individuals have gone above and beyond the call of duty and PESC takes the opportunity each Fall to recognize them with *Distinguished Service Awards*. *Distinguished Service Awards* serve as our opportunity to say thank you for being a leader and for making a positive impact on education.





# EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

## EVENTS

Access 4 Learning Annual Meeting

Parchment Summit on Credentials

AACRAO Annual Conference

Groningen Declaration Network

ARUCC Annual Meeting

PESC Annual Board Retreat

AACRAO Technology Conference

NCES STATS-DC

SHEEO Policy Conference

SPRING 2017 DATA SUMMIT - BEST PRACTICES IN EDUCATION DATA SYSTEMS

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**SAVE THE DATE**

**EDiINTEROP>>2017**

SPRING 2017 DATA SUMMIT - BEST PRACTICES IN EDUCATION DATA SYSTEMS



**JOIN THE COMMUNITY.**

**JOIN THE EFFORT.**

**JOIN PESC.**

## **COLLABORATION FOR THE GREATER COMMON GOOD OF STUDENT ACHIEVEMENT**

Powered by the strength and passion of volunteers from its membership base, PESC maintains a transparent, trusting, open and neutral environment. With this unique community perspective, together we are breaking down all costly, proprietary barriers, and we have mapped out a common, strategic path for the future.

This path includes continued development of common data standards, establishment and support of data networks and infrastructure, common authentication and web services protocols enterprise-wide, seamless connections bridging postsecondary education systems to secondary and labor and workforce systems, and an eye on emerging technologies like social networking.

Together we are not only helping students across the country and all over the world, but with transparent collaboration as our cornerstone principle, we are supplying state administrators and government officials, researchers, CIOs, admissions officers, registrars, financial aid officers and architects the tools they need to do their jobs better.

The political will and demand for improvement have never been greater and continue to increase with time as budgets tighten and common solutions like standardization are being viewed as wise, cost-saving investments.

With membership and active participation from all leading stakeholders in education technology, PESC serves as the umbrella organization to coordinate and advocate for student-centric data standardization and interoperability across the P20W education lifecycle.

We boldly accept that mission and work diligently to continue our proven record of success and achievement. We now elevate the mission to the next level.





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# MENUS

TBD

## EMPOWERING THE MOBILITY OF DIGITAL ACADEMIC CREDENTIALS

# CANCELLATION POLICY

Cancellation and refund requests must be made in writing (e.g. email) and will be processed 30 days after the 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 April 3, 2017 may be considered for a refund upon request. Any request made after April 3, 2017 is not eligible for a refund regardless of the attendance of the registrant. Refund and/or cancellation requests must be submitted directly to:

*Jennifer Kim*  
*Membership Services Director*  
*PESC*  
*1250 Connecticut Ave, NW*  
*Suite 200*  
*Washington, DC 20036*

Requests may also be sent by email to [Jennifer.Kim@PESC.org](mailto:Jennifer.Kim@PESC.org).

# REGISTRATION POLICY

PESC requires that all speakers, moderators, chairs and attendees of Data Symposiums & Summits register and pay to attend Data Symposiums & Summits. PESC thanks all speakers and is 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.



STOP PASSING COSTS ON TO STUDENTS, PARENTS, INSTITUTIONS & TAXPAYERS.

How much could you be saving with PESC Approved Standards?  
We all need to be smarter about how we get our business done. If you aren't considering long-term, sustainable solutions that lower costs, improve service and increase data quality, what are you waiting for? Solutions are available. Now is the time. PESC is the place.

JOIN THE COMMUNITY.  
JOIN THE EFFORT.  
JOIN PESC.



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Washington, D.C. 20036  
202.261.6516  
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PESC Approved Standards  
**PESC Approved Standards**

Connecting Kids to College and Career

# Unlocking the Power of Data

Maximizing the Value and Integrity of Your Technology

**Maximizing the Value and Integrity of Your Technology**

Enabling the Portability of Education Data

Activating Interoperability Across the Education Lifecycle

Driving Data Systems Alignment PK20w

Collaborating for the Greater Common Good of Student Achievement

