Program

May 2023 Data Summit

LEARNER
Lifecycles

Best Practices in Data Systems & Lifelong Learning

May 2 – 3, 2023 | Hyatt Regency Crystal City

PESC®
www.pesc.org

May 2023 Data Summit

On behalf of PESC – the Postsecondary Electronic Standards Council, I am pleased to present the May 2023 Data Summit. In a post-COVID economy, we've made some minor improvements to our prior Summit schedule.

Our focus though remains the same – bringing clarity to the technology and standards community and showcasing the best ideas and practices.

The business case, or use case, remains the primary driver of our work. The rapid evolution of applications, services, products, networks, systems and technology may change **how** we accomplish our tasks, but does the use case – the **why** – also change?

We must preserve the integrity and value of the data regardless of its form, whether it be paper, EDI, PDF, XML or JSON-LD. We must also ensure the right data is being sent to the right place at the right time especially with new emerging technologies like artificial intelligence.

This is the role we've carved out for PESC. Once you take the standards-body perspective, patterns in data, patterns in behavior, patterns in learning, patterns in technology, begin to reveal themselves.

Do we need to understand our past in order to predict our future? Is it a case of "what's new is old" or do none of the old rules apply?

It is under this banner – lifecycles and patterns – that we host the May 2023 Data Summit. Thank you for your continued support of PESC and of the May 2023 Data Summit!
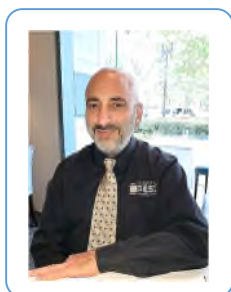
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PROGRAM AT-A-GLANCE

	Tuesday May 2, 2023	Wednesday May 3, 2023
7.30am	Continental Breakfast & Summit Registration	
8.30am–10.00am	General Sessions **Welcome, Introductions & Opening Remarks** - Michael Sessa, Executive Director, PESC **PESC Future Enhancements** - David Moldoff, CEO & Founder, AcademyOne - Ruth Blades, Executive Director, CATNS	**Panel 4: Microcredentials & ARUCC MyCreds Virtual Skills Passport Microcredential Project** - Joanne Duklas, President, Duklas Cornerstone Consulting - Alex Jackl, President & CEO, Bardic Systems - Bert van der Geest, Regional Director NA, Digitary - Doug Holmes, Manager, eTranscripts, OUAC
10.00am–10.30am	B r e a k	
10.30am–12.00pm	10.30am – 11.45am **States, Standards & Blended Solutions for Lifelong Learning** - Ross Santy, Associate Commissioner, Adm. Data, US NCES - Dr. Ken Sauer, Senior Associate Commissioner, ICHE - Roger Petersen, Data Warehouse Team Lead, Iowa DOE 11.45am – 12.00pm PESC Awards	10.30am – 11.30am **Closing the Skills Gap: Empowering Learners for Upward Career Mobility** - University of Phoenix **Common Digital Layout (CDL)** - CanPESC 11.30am – 12.00pm **Student Financial Aid** - Francisco Valines, Director of Financial Aid, FIU
12.00pm–1.30pm	**Luncheon** **James Wiley, VP Product & Research, LISTedTECH: "AI"**	**Lunch On Your Own**
1.30pm – 3.00pm	1.30pm – 2.30pm **Re-engineering the 'All-Or-Nothing' Academic Transcript to Reveal Its Unequivocal Value** - Rick Skeel, Chair, JSON-LD Transcript Workgroup - Ruth Blades, Executive Director, CATNS-CATNE - Jim Kelly, Principal, Jim Kelly Technologies - Phil Barker, Cetis LLP, Metadata Consultant, Credential Engine 2.30pm – 3.00pm **Skills Based Hiring & Advancement & T3 Innovation Network** - Taylor Hansen, Executive Director, Policies & Programs, USCCF	Breakout Session **Microcredentials Task Force Meeting** See Program.
3.00pm – 3.30pm	B r e a k	
3.30pm – 5.00pm	3.30pm – 4.30pm **The Learner Journey: Obtaining Skills, Competencies, Knowledge & Experiences in the New Ecosystem** - David Moldoff, CEO & Founder, AcademyOne - TBD 4.30pm – 5.00pm **Prior Learner Assessment (PLA) in Minnesota** - Mike McIntyre, President, AcademyOne	Breakout Session **Gender Identity Task Force Meeting** See Program.
5.00pm – 6.00pm		Adjourn
6.00pm – 7.00pm	Reception	

PESC DATA SUMMITS span 2 full days, comprised of 1 ½ days of General Sessions, followed by ½ day of Breakout Sessions.
Registration includes all General Sessions, presented in conference-style format with Featured Speakers, Luncheon & Reception; and Breakout Sessions, presented in working-meeting format at which workgroups, initiatives & task forces convene.

Program

	General Sessions (All Day)

8.30am – 9.30am Welcome, Introductions & Opening Remarks
Michael Sessa, PESC President & CEO

9.30am – 10.00am PESC Future Enhancements
David K. Moldoff, CEO & Founder, AcademyOne; Chair, PESC Board of Directors
Ruth Blades, Executive Director, Council on Admission & Transfer for Nova Scotia; Secretary, PESC Board of Directors

10.00am – 10.30am Break

10.30am – 11.45am **States, Standards & Blended Solutions for Lifelong Learning**
Ross Santy, Associate Commissioner, Administrative Data Division, National Center for Education Statistics (NCES), U.S. Department of Education
Dr. Ken Sauer, Senior Associate Commissioner & Chief Academic Officer, Indiana Commission for Higher Education (ICHE)
Roger Petersen, Data Warehouse Team Lead, Iowa Department of Education

The longitudinal data perspective, not very common only a few short years ago, continues to serve as the foundation on which many projects and initiatives have been structured. We have learned though that data alone is not enough, and that measurable outcomes and learner-centric strategies are necessary components.

To meet the ever-increasing demand for data, whether for reporting and/or functional purposes, all organizations must operate, access, understand, and manipulate many disparate systems with many different rules and standards.

As federal agencies, along with state and provincial departments, are among the most interested and vested in education data, this session features three of the best initiatives in the data and standards space: Common Education Data Standards (CEDS) and the extensive work being done for students and learners in the States of Indiana and Iowa.

With well-established governance and committed partnerships, among many other key features, CEDS, Indiana & Iowa are serving and leading in the digital learner space.

Please join us as we hear about how CEDS, Indiana & Iowa impact students and learners, how all are being used, about the vast tools and resources, the importance of alignment with other initiatives, and how you can learn more.

About NCES https://nces.ed.gov/about/   The U.S. National Center for Education Statistics (NCES) is the primary federal entity for collecting and analyzing data related to education. More specifically, NCES is the primary statistical agency of the U.S. Department of Education. It is one of thirteen principal federal statistical agencies whose activities are predominantly focused on the collection, compilation, processing, or analysis of information for statistical purposes. NCES is located within the U.S. Department of Education's Institute of Education Sciences (IES). NCES has a Congressional mandate to collect, collate, analyze, and report complete statistics on the condition of American education; conduct and publish reports; and review and report on education activities internationally.

About CEDS https://ceds.ed.gov/History.aspx   Common Education Data Standards (CEDS) is an education data management initiative whose purpose is to streamline the understanding of data within and across P20W institutions and sectors. The CEDS initiative includes a common vocabulary, data models that reflect that vocabulary, tools to help education stakeholders understand and use education data, an assembly of metadata for other education data initiatives, and a community of education stakeholders collaborate to expand the standard and implement CEDS-based solutions.

About Iowa Department of Education https://educateiowa.gov/about-iowa-department-education   Through leadership and service to the state education system, the Iowa Department of Education (Department) works to ensure all learners are prepared for their future at every step of their educational journey. The Department provides oversight to the state education system that includes PK-12 public elementary and secondary schools, nonpublic schools that receive state accreditation, area education agencies, community colleges, and teacher preparation programs. Under the leadership of the Iowa Department of Education Director and in partnership with the State Board of Education, Department team members, in collaboration with a wide range of community partners, support schools and districts as they prepare students for college and career training and ensure they receive the support needed to succeed.

About Indiana Commission for Higher Education https://www.in.gov/che/about-the-commission/agency-overview/ https://www.in.gov/doe/students/indianas-common-electronic-transcript/   Created in 1971 by an act of the General Assembly and signed into law by then Governor Edgar Whitcomb, the Indiana Commission for Higher Education is now in its fifth decade of service to the State of Indiana. The Commission is a fourteen-member public body created to:

- Define the educational missions of public colleges and universities;
- Plan and to coordinate Indiana's state-supported system of post-high school education, taking into account the plans and interests of independent colleges and universities;
- Review both operating budget and capital budget appropriation requests from public institutions;
- Approve or disapprove for public institutions the establishment of any new branches, campuses, extension centers, colleges or schools;
- Approve or disapprove for public institutions the offering of any additional associate, baccalaureate or graduate degree or certificate program of two semesters or more in duration;

- Review all programs of public institutions and make recommendations to the governing board of the institution, the Governor, and the General Assembly concerning the funding and the disposition of these programs; and,
- Distribute student financial aid from state aid programs.

The Commission is not a governing board, but a coordinating agency that works closely with Indiana's public and independent colleges. In addition, The Commission has strong working relationships with many other State agencies, including: Department of Education, the Department of Workforce Development and the Independent Colleges of Indiana.

11.45am – 12.00pm   PESC Awards

12.00pm – 1.30pm   **PESC Luncheon**

Artificial Intelligence
James Wiley, VP Product & Research, LISTedTECH

1.30pm – 2.30pm   **Re-Engineering the "All-Or-Nothing" Academic Transcript to Reveal Its Unequivocal Value**
Rick Skeel Chair, PESC JSON-LD Academic Transcript Development Workgroup
Ruth Blades Executive Director, Council on Admission & Transfer For Nova Scotia; Secretary, PESC Board of Directors
Jim Kelly Principal, Jim Kelly Technologies
Phil Barker (via zoom), Cetis LLP, Metadata Consultant for Credential Engine

Self-sovereign identity and the emergence of digital wallets in the education space have prompted our most seasoned transcript experts to re-think everything we thought we knew.

How the transcript has been packaged for consumption by student information systems, and all major systems, is based on an 'all-or-nothing' approach, meaning you must consume the entire transcript, even if your interest is only in one part or one block of the transcript data. Our practitioners would add that the need to ensure privacy and protect data integrity are the overriding factors in how the transcript is transmitted, and they are absolutely correct.

What if you could meet those needs and make the data more accessible in a wallet or SSI environment?

JSON-LD and its underlying architecture RDF make that vision possible. With the ability to 'barcode' each and every data element in an academic transcript (with unique, web-based identifiers), those looking to consume transcript data or only a block of data, might now be able to pull (or 'pluck') the exact data, and only the exact data, needed.

What data in an academic transcript are actually unique to the student and/or learner?

PESC's JSON-LD Academic Transcript Development Workgroup has been hard at work to address these issues. With support and guidance from the Access 4 Learning (A4L) Community and Credential Engine, Academic Transcript data (eg. course, degree, etc.) could now be more easily accessible, consumable and linked to the labor and workforce sectors.

How do we make transcripts verifiable and whose role is it to verify?

Will students and learners share their course data, grades and/or degrees earned, awards and achievements in a wallet? Those supporting students and learners know authentication, privacy and security of that information needs to be maintained to ensure that only the right data is available to the right organization at the right time (and legally).

Please join us in-person for this milestone discussion with PESC leaders comprising decades of hands-on experience.

2.30pm – 3.00pm	**Skills Based Hiring & Advancement & T3 Innovation Network** **Taylor Hansen**, Executive Director, Policies & Programs, U.S. Chamber of Commerce Foundation Launched in 2018, the T3 Innovation Network's mission is to accelerate the digital transformation of a more diverse and equitable talent marketplace through data interoperability supported by collective action and shared governance. Composed of employers, K-12 and postsecondary institutions, business and education associations, public agencies, and the data standards organizations and technology partners that support them, the T3 Network has led the way in exploring how data standards and Web 3.0 technologies can transform the education and workforce ecosystem. The T3 Network promotes, coordinates, and facilitates this digital transformation through support of Learning and Employment Records or LERs; more fluid connectivity of competency and skills data for equitable hiring; and empowerment and agency of learners and workers for control of their data. This session will provide an update on recent activities and plans for the next phase of the T3 Innovation Network.
3.00pm – 3.30pm	Break
3.30pm – 4.30pm	**The Learner Journey: Obtaining Skills, Competencies, Knowledge & Experience in the New Ecosystem** **David Moldoff**, CEO & Founder, AcademyOne **TBD** TBD

| 4.30pm – 5.00pm | **Prior Learning Assessment (PLA) in Minnesota** |
| | **Mike McIntyre**, President, AcademyOne |

Prior Learning Assessment (PLA) or Credit for Prior Learning (CPL) acknowledges that learning takes place in many different ways with some critical learning happening outside the traditional classroom. Whether through activities related to community, military and/or non-graded courses, PLA looks to capture this knowledge in digital form, and ensure it is included for the learner in credit assessment. Through AcademyOne and a collaborative teams of partners, the State of Minnesota is implementing an innovative, state-wide initiative for all learners throughout the State. This session will discuss PLA and how Minnesota and AcademyOne's partnership is rolling out along with timelines and milestones.

| 5.00pm – 6.00pm | Break |

| 6.00pm – 7.00pm | Reception |

Program

General Sessions (Until Lunch)

8.30am – 10.00am **Microcredentials in Data Systems & Lifelong Learning | ARUCC MyCreds Virtual Skills Passport Microcredential Project**
Joanne Duklas, President & CEO, Duklas Cornerstone Consulting; Co-Chair, Microcredentials Task Force; Executive Director, Groningen Declaration Network
Alex Jackl, President & CEO, Bardic Systems; Co-Chair, Microcredentials Task Force; PESC Board of Directors; Co-Lead Access 4 Learning (A4L) Community
Bert van der Geest, Regional Director, North America, Digitary by Parchment
Doug Holmes, Manager, eTranscripts, Ontario Universities' Application Centre; Co-Chair, Canadian PESC User Group (CanPESC)

The Award-Winning Best Practice Initiative MyCreds | MesCertif and team have been hard at work in continuing their march toward interoperability across Canada. With the support of members of the Association of Registrars of the Universities and Colleges of Canada (ARUCC), the Canadian PESC User Group (CanPESC), DCC Inc., MATTR, the Government of Ontario, and Digitary by Parchment, the initiative is one of the rare, successful international examples that have actually created, developed and piloted a scaled end-to-end solution for microcredentials.

The ARUCC MyCreds Virtual Skills Passport Microcredential Project team has produced a proposed Microcredentials Standard in XML, updating past PESC efforts, that includes translation of the data format to enable Self-Sovereign Identity (SSI) and Verifiable Credentials (VCs), provisioning of the microcredential in a digital wallet using MATTR technology, and subsequent verification of the microcredential.   Under the project, both microcredentials and badges have been successfully delivered at scale across 10 institutions.

10.00am – 10.30am Break

10.30am – 11.00am **Closing the Skills Gap: Empowering Learners for Upward Career Mobility**
University of Phoenix

University of Phoenix (UOPX) initiated an innovative skills-aligned curriculum and digital badging model to meet working adult learners' need to demonstrate skills attainment for workplace relevancy and to change the value proposition for learners when pursuing higher education. UOPX has issued over 286,653 badges

since September 2021, for skills obtained in undergraduate, graduate, and professional development courses. Currently, more than 85% of UOPX programs open for new enrollment are now skills mapped and create the foundation for us to create badging and micro credential opportunities for students.

11.00am – 11.30am   **Common Digital Layout (CDL)**

Jennifer Kitching, eTranscripts Team Lead, Ontario Universities' Application Centre

The University of Toronto (UofT) has been participating, in partnership with the Ontario Universities' Application Centre (OUAC), to receive electronic postsecondary transcripts through the OUETS (Ontario Universities' Electronic Transcript System) since its creation in the mid-1990s. This transcript system or hub facilitated the exchange of SPEEDE EDI formatted transcripts until several years ago when the decision was made to gradually move towards using the PESC XML transcript suite of transactions better positioned to support the growth of this exchange.

In that first processing year (1997), OUETS exchanged 815 transcripts fully electronically (end-to-end). However, by the end of the 2021 processing year, this number had grown to 278,475 transcripts. This has amounted to well over 2 million Ontario transcripts exchanged fully electronically within the province of Ontario by 2023.

Ontario universities have been transitioning from sending their transcripts in the EDI format to XML, with a focus on being able to begin a reciprocal exchange of transcript data with other provinces. PESC XML is the de facto standard being used to generate transcripts throughout Canada with the support of CanPESC, a dedicated PESC User Group. The standard also grows globally with student information system vendors, digital transcript producers, and post-secondary institutions also rapidly adopting PESC standard XML.

Working closely with OUAC, the UofT initiated a project aimed at transitioning the exchange of transcripts from SPEEDE EDI formatted transcripts to PESC standard XML in 2020. The data exchange standard was successfully migrated to PESC XML in August of 2022.

Building upon this work and utilizing synergies between available admission systems, as well as a desire from administrative staff for human-readable inbound transcripts, **a second project was launched in parallel in the fall of 2020, with the central goal of creating a PDF transcript from the inbound post-secondary XML data received from OUAC through OUETS**.

11.30am – 12.00pm   **Mountain of Data: Changes in Student Financial Aid Systems**
                                      Francisco Valines, Director of Financial Aid, Florida International University; PESC Board of Directors

Recent reports have described the upcoming changes in student financial aid and the FAFSA (Free Application for Federal Student Aid) as a "makeover." Also sometimes referred to as "Simplification," we all know there isn't anything simple about student aid or changing student aid systems. With simplification as the end-result goal, the changes required to reach simplification will be major including: expansion of the free Federal Pell Grant Program for low-income and under-served populations; adjusted eligibility calculations; modifications to data element names and definitions for race, ethnicity and gender identity, among many other changes.

PESC is pleased to present this session with Featured Speaker and PESC Board Member Francisco Valines. With over 40 years' experience in higher education, Francisco will provide an overview of these changes from the perspective of Florida International University.

12.00pm – 1.30pm   Lunch on Your Own

1.30pm – 3.00pm   **Microcredentials Task Force Meeting**

Draft Agenda:
1. Recap on prior discussions (Alex Jackl and Joanne Duklas)
2. Set the context (Alex and Joanne)
3. Discussion question for participants:
    a. What more needs to be done in the standards realm to advance portability and interoperability of microcredentials?
    b. What should be the overarching principles to guide future work?
    c. What should PESC's role be in this ecosystem?
    d. What might be PESC's next steps?
4. Threading the needle (Alex and Joanne)
5. Next Steps

3.00pm – 3.30pm   Break

3.30pm – 5.00pm   **Gender Identity Task Force Meeting**

PESC is pleased to announce Featured Speaker **Steve Brawn**, Director, Product Strategy for Oracle Higher Education Development for the Gender Identity in Data Systems & Lifelong Learning Task Force. Under Steve's direction, Oracle's first step is to develop a strategy for self-chose name in PeopleSoft Campus Solutions. More specifically, incorporated in the strategy is support for new Lived Name (CA Institutions) and Chosen Name (NY Institutions) policies. Oracle has researched relevant policies and regulations, held numerous conversations and meetings with customers to develop a comprehensive strategy to enable its institutions to support these requirements.

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Organized by persona, the use cases cover the majority of these requirements by addressing three main components:

1) Gender Identity
2) Personal Pronouns
3) Self-Chosen Name

The next step is to map these use cases to available capabilities and plan additional ones for the PeopleSoft Campus Solutions roadmap. Beyond the horizon and after PeopleSoft Campus Solutions, these same identified use cases are planned to be utilized for Oracle student.

<u>Oracle's Approach to Gender Identity in PeopleSoft Campus Solutions</u>
Stephen (Steve) J. Brawn, Director, Product Strategy
Oracle Higher Education Development
   » **Wednesday May 3, 2023**
   » **3.30pm – 4.30pm EDT**

Steve is also looking for feedback, input and additional perspectives to incorporate into their strategy.

5.00pm   Adjourn