POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

Leading the establishment and adoption of trusted, free & open data standards across the education domain since 1997
A Thriving, Digital Ecosystem Requires
**Sustainable Standards and Common Infrastructure**

### PESC Partners & Affiliates

- AACRAO
- Access4Learning Community
- apereo
- ARHCC
- Common Education Data Standards
- Credential Engine™
- DSU
- D2TERA Institute™
- erasmus without paper
- Groningen Declaration
- Hi Open Standards Partner
- National Forum on Education Statistics
- SHEEO
- T3 Innovation Network

### PESC Sponsors

- DIGITARY
- National Student Clearinghouse
- parchment
- AcademyOne
- ECE™
- Ascendium
- ORACLE
- ACT
- University of Phoenix

### PESC Approved Standards

- Academic High School Transcript
- ADMISSIONS APPLICATION
- Education Course Inventory
- Education Test Score Reporting
- Academic College Transcript
- Academic Credential & Experiential Learning
- Academic ePortfolio
- Student Financial Aid

### PESC Groups

- Canadian PESC User Group
- EdExchange User Group
- Gender Identity Task Force
- GEO Code User Group
- JSON/JSON-LD Task Force
- JSON Transcript Workgroup
- Standards Forum

---

**25th Anniversary PESC**
Hundreds of millions of students throughout the United States of America, Canada, and around the world have been supported by PESC Approved Standards since our founding in 1997.

From British Columbia to Nova Scotia, to all 114 of the California Community Colleges (alone serving 2.1 million students), to National Student Clearinghouse, Parchment, AcademyOne, Ellucian (among many others) – all users of PESC Approved Standards, PESC is fulfilling its mission of fostering open, transparent collaboration; solving common, industry-shared problems; and bringing much needed clarity and cohesion to the education ecosystem.

Built by Members, PESC Approved Standards are solid, proven and implemented across almost every state in the US and province in Canada. PESC events and Data Summits at which top leaders, best practices and emerging technologies are highlighted and featured, have been held annually since our beginning.

PESC’s outreach is comprehensive and spans PK20W, admissions, registrar, financial aid, education technology, data, research, learning, government, policy, privacy & credentialing communities. The neutral, trusted, open environment, created by PESC, is a critical component and the key to its success.

Now in 2022, we celebrate our 25th year anniversary!

We recognize AACRAO & Ellucian with Founder Awards, for continuous Membership and representation on the PESC Board of Directors, along with recipients of PESC’s Outstanding Service Awards who have dedicated decades of time, effort and outreach within the PESC Community. We are excited about our Keynote Speaker Melanie Gottlieb, AACRAO Executive Director, who will present “Implementing Success” and about the launch of our Gender Identity in Data Systems & Lifelong Learning initiative.

Data Summits are unique convenings at which emerging topics, technologies and policy initiatives are highlighted. Discussion focuses on national and international implementation, cost/benefit analysis, student and learner behavior, use/business cases, and institutional performance. Join us as PESC returns to the beautiful and centrally located Dupont Circle Hotel as we reflect on our first 25 years, and plan for the next!

Michael Sessa
Michael D. Sessa
PESC President & CEO
www.pesc.org
A TIME TO REFLECT

It all started in 1990 with one standard – the transcript.

At that time organizations and leaders across higher education, PK12, technology and government worked together for years to develop and release the first digital format for the machine-to-machine exchange of student data as a public standard.

The transcript standard has been enhanced many times since with updated versions and standardized options available in PDF, XML (and soon to be JSON) in addition to the existing EDI one.

The process of collaboration, the level of detail needed within technical documentation, the talent and expertise gathered under a common mission, combined with an open, transparent and neutral environment, served as the ingredients for successful publication of standards when PESC was founded in 1997.

A TIME TO BE BOLD

Mobility alone is not enough.

The same can be said about standards. We learn through Best Practices that it takes tremendous amounts of time, outreach, effort, collaboration, funding and resources – in normal times, to achieve successful outcomes.

Interoperability alone is not enough.

It is through interoperability we achieve our shared goals of improved user-friendly services and improved efficiencies. Whether you are starting a project or if your project is firmly established and well underway, we know systems are complicated.

At PESC we advocate for the convergence of technical interoperability AND business interoperability. Here are some recommendations to help you along your journey:

> Data Standards – adopt, align with & implement community-sourced data standards

> Data Governance – support (or establish) an open, transparent, collaborative, cross-sector group of stakeholders

> Data Advocacy – advocate & socialize high prioritization of data standards and best practices in both policymaker and IT sectors

> Data Usage – commit to using high quality, open data across all applications, systems and networks

> Data Perspective – adopt and ensure a lifelong (‘P20W’) and international perspective in all aspects of development

The community that convenes at PESC Data Summits best exemplifies these values.

In marking our 25th year, it seems the need for standards and technology have never been greater.

We call on the PESC community to maintain and continue your individual efforts, and to join together under a common mission, as we boldly move forward.

Collaboration is the key.
Welcome!

Welcome to Washington, D.C. and to the PESC April 2022 Data Summit!

We are very pleased and excited to have you join us for a very special event! This Data Summit marks our return to in-person convenings and PESC’s 25th year anniversary! To ensure you have all the information you need for a successful event, some last-minute info and reminders are listed below:

- Face masks are optional at PESC and throughout the hotel. While certain areas or sectors may or may not require face masks, attendees should feel comfortable in wearing masks in PESC sessions and/or in following respective safety guidelines.
- Washington, D.C. is open for business! Restaurants, coffee shops and bars in the Dupont Circle area and throughout DC are open with both indoor and outdoor seating.
- The PESC April 2022 Data Summit begins at 8:30am on Monday morning April 25, 2022 and continues all day with General (Plenary) Sessions. Join us for a Hot Breakfast & Registration which open at 7:30am – all happening in the Glover Park Room (1st Floor).
- On Monday be sure to join us at 9.30am for our Keynote Speaker AACRAO’s Melanie Gottlieb, then at noon for buffet lunch, and for our 25th Anniversary Reception at 6.30pm.
- On Monday we’ll be honoring PESC Founders AACRAO and Ellucian, Outstanding Service Award Recipients, and 1st Place Winners of the 23rd Annual Best Practices Competition.
- The PESC April 2022 Data Summit continues on Tuesday April 26, 2022 at 8:30am with General (Plenary) Sessions until Noon, followed by lunch on-your-own.
- Breakout Sessions begin on Tuesday immediately after lunch and continue through Wednesday.
- Dress code is business casual and all Summit events and activities are open to all registrants.
- PESC is pleased to provide attendees complimentary internet in guest rooms and meeting rooms.

All important information for the PESC April 2022 Data Summit is posted on the PESC website at www.pesc.org/april2022 including the program, speakers, menus, sponsors, hotel/venue, weather and travel information & logistics. Thank you for your continued support of PESC and have a wonderful Summit!

Best Regards,

Michael D. Sessa

Michael D. Sessa
President & CEO
Postsecondary Electronic Standards Council (PESC)
www.pesc.org
Welcome

to the

April 2022

Data Summit
<table>
<thead>
<tr>
<th>Time</th>
<th>Monday April 25, 2022</th>
<th>Tuesday April 26, 2022</th>
<th>Wednesday April 27, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.00AM – 5.00PM</td>
<td>Registration</td>
<td></td>
<td>8.30AM – 9.15AM</td>
</tr>
<tr>
<td>7.30AM – 8.30AM</td>
<td>Continental Breakfast</td>
<td></td>
<td>BREAKOUT</td>
</tr>
<tr>
<td>8.30AM – 8.45AM</td>
<td>WELCOME &amp; OPENING</td>
<td>8.30AM – 9.00AM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Michael Sessa, PESC</td>
<td>VIP REMARKS</td>
<td>BREAKOUT</td>
</tr>
<tr>
<td>8.45AM – 9.30AM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.30AM – 10.00AM</td>
<td>VIP REMARKS</td>
<td>9.00AM – 10.00AM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Melanie Gottlieb, AACRAO</td>
<td>BEST OF BEST PRACTICES</td>
<td></td>
</tr>
<tr>
<td>10.00AM – 10.30AM</td>
<td>KEYNOTE: IMPLEMENTING SUCCESS</td>
<td>- David K. Moldoff, AcademyOne</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.30AM – 11.30AM</td>
<td>ABC’S OF LGBTQ+ TERMINOLOGY</td>
<td>- Frank Cicic, iQ4</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.30AM – 12.00PM</td>
<td>AWARDS CEREMONY</td>
<td>10.00AM – 10.30AM BREAK</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12.00PM – 1.30PM</td>
<td>Lunch on Your Own</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.30PM – 2.00PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.00PM – 3.00PM</td>
<td>VIP REMARKS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>10.30AM – 11.30AM CASE STUDIES IN SYSTEMS INTEGRATION</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.00PM – 3.30PM</td>
<td>BREAKOUT</td>
<td>11.30AM – 12.00PM VIP REMARKS</td>
<td></td>
</tr>
<tr>
<td>3.30PM – 5.00PM</td>
<td>GLOVER PARK ROOM</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1) CanPESC</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Doug Holmes, OUAC</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Kathy van Soest, EducationPlannerBC</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.00PM Adjourn</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.30PM – 7.30PM</td>
<td>25TH ANNIVERSARY RECEPTION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.00PM Adjourn</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day</td>
<td>Breakfast</td>
<td>Lunch</td>
<td>Break</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Monday April 25, 2022</td>
<td><strong>Breakfast</strong>&lt;br&gt;Applewood smoked bacon &amp; pork sausage&lt;br&gt;Cage free scrambled eggs&lt;br&gt;Fried chicken &amp; biscuit, pickles, sriracha aioli&lt;br&gt;Roasted marbled potatoes&lt;br&gt;Assorted Pastries w/ butter, fruit preserves, marmalade, honey&lt;br&gt;Seasonal sliced fresh fruit</td>
<td><strong>Lunch</strong>&lt;br&gt;Roasted chicken breast w/ herb roasted marble potatoes &amp; mushroom hash, haricots vert, chicken jus&lt;br&gt;Seared Scottish ocean trout w/ beluga lentils, roasted pearl onions, zucchini, carrots &amp; herb beurre blanc&lt;br&gt;Classic Caesar salad w/ garlic croutons &amp; shaved Parmigiano Reggiano&lt;br&gt;Seasonal soup of the day&lt;br&gt;Lemon tart&lt;br&gt;Carrot cake w/ cream cheese frosting</td>
<td><strong>Break</strong>&lt;br&gt;</td>
</tr>
<tr>
<td>Tuesday April 26, 2022</td>
<td><strong>Breakfast</strong>&lt;br&gt;Applewood smoked bacon &amp; pork sausage&lt;br&gt;Cage free scrambled eggs&lt;br&gt;Fried chicken &amp; biscuit, pickles, sriracha aioli&lt;br&gt;Roasted marbled potatoes&lt;br&gt;Assorted Pastries w/ butter, fruit preserves, marmalade, honey&lt;br&gt;Seasonal sliced fresh fruit</td>
<td><strong>Lunch</strong>&lt;br&gt;On your own</td>
<td><strong>Break</strong>&lt;br&gt;</td>
</tr>
<tr>
<td>Wednesday April 27, 2022</td>
<td><strong>Breakfast</strong>&lt;br&gt;Non-fat Greek yogurt w/ house made granola&lt;br&gt;Assorted cereals w/ whole, skim, soy or almond milk&lt;br&gt;Selection of breakfast breads&lt;br&gt;Assorted Pastries w/ butter, fruit preserves, marmalade, honey&lt;br&gt;Seasonal sliced fresh fruit</td>
<td><strong>Lunch</strong>&lt;br&gt;Tortilla chips, pita chips, crispy lavish w/ pico do gallo; guacamole; cheddar, gruyere; red pepper hummus; baba ganoush</td>
<td><strong>Break</strong>&lt;br&gt;</td>
</tr>
</tbody>
</table>
### Program

**Monday April 25, 2022**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.00am – 5.00pm</td>
<td>Registration – Glover Park Room, 1st Floor</td>
</tr>
<tr>
<td>7.30am – 8.30am</td>
<td>Hot Breakfast – Glover Park Room, 1st Floor</td>
</tr>
</tbody>
</table>
| 8.30am – 8.45am | Welcome & Overview  
  » Michael Sessa, PESC President & CEO                       |
| 8.45am – 9.30am | PESC 25th Year Anniversary – VIP Remarks  
  » Monterey Sims, Director of Admissions & Evaluation, University of Phoenix; Vice Chair, PESC Board of Directors; Co-Chair  
  » Ruth Blades, Executive Director, CATNS; PESC Board of Directors; Co-Chair  
  » Karen McCredie, Executive Director, EducationPlannerBC                |
| 9.30am – 10.00am | Keynote Address – Implementing Success:  
  » Melanie Gottlieb, Executive Director, AACRAO  
  » Moderator  
  » Vivian W. Wong, Group Vice President, Oracle Higher Education Development, PESC Board of Directors |

*The complicated pressures of the pandemic over the last two years* have collided with lingering national dissatisfaction over the value proposition of higher education, with continued social pressures around access and with the critical challenge of closing equity gaps—all as we lead up to the impending enrollment cliff. We rely on our dedicated practitioners of our organizations who can implement change for a more equitable and successful future for our institutions and our learners. We must activate our practitioners with the vision, knowledge and skills to carry us forward toward a future that ensures learning and valuable credentials provide access and enable better lives for all learners.

**10.00am – 10.30am** Break
Many within the PESC community may not be fully aware or informed on the changes taking place within society with regard to gender identity, gender expression and sexual orientation. Some may think the entire subject unnecessary, while others may believe society is not going far enough. In looking past policy, we must determine what data to integrate, operationalize and make it all work seamlessly, regardless of personal agreement or disagreement with policy. PESC has tapped local and national LGBTQ+ leaders to help in this endeavor. The ABC’s of LGBTQ+ Terminology panel will provide an overview of terms and definitions and attendees will gain a common understanding of what data are changing and why along with corresponding resources.

Student Affairs professionals, including Registrars, Admissions staff and Financial Aid offices are at the forefront of serving students. Meeting student needs in an inclusive and respectful manner though while simultaneously tracking and monitoring local and/or national LGBTQ+ policies and laws – many in conflict with one another – can inadvertently cause confusion, frustration and uncertainty.

What policies and issues are driving student needs? How are institutions responding? Are definitions, terminology and lists standardized or are there differences between campus offices, systems and applications? Leading PESC Members will share their experiences in meeting student needs. The “From My Perspective: Views from the Campus” panel will discuss these challenges and open a dialogue to serve as the basis for the formation of the Task Force.
3.30pm – 5.00pm  **Data Standards Initiatives**  
- **U.S. NCES: CEDS, Gender Identity, Open Source**  
- **Empowering Learners Through Skills and Open Data Standards**  
- **T3 Innovation Network**  

» Duane Brown, Open Source Community Lead, CEDS; Senior Business Analyst, AEM Corporation  
» Darin R. Hobbs, Vice President of Academic Records, Credentials, and Career, Western Governors University  
» Kacey Thorne, M.Ed., Director, Skills Architecture, Western Governors University  
» Jason A. Tyszko, Vice President, Center for Education and Workforce, U.S. Chamber of Commerce Foundation  

**Moderator**  
» Michael Sessa, President & CEO, PESC  

**U.S. NCES:** The core of every data element is its definition. The Common Education Data Standards (CEDS), sponsored by the National Center For Education Statistics (NCES), primary purpose is to help ensure a common vocabulary in the education space by working with stakeholders across the P-20W education spectrum, including standards organizations like PESC. Learn about how CEDS elements are defined through the CEDS Open Source Community and the CEDS Data Models and about CEDS current approach to defining new Sex/Gender elements, recent Postsecondary element additions to CEDS, and work being done with the Institute for Higher Education Policy (IHEP) around the College Transparency Act.  

**WGU:** Learners today face unsettling economic realities. They need powerful, novel approaches from higher education leaders. At Western Governors University, we are accelerating skills-based education and hiring in order to give learners flexibility, address equity gaps, and ensure that every graduate is equipped to thrive. Our approach allows us to better serve students and power partnerships with employers and workforce development systems. During this session, we will share our experience designing, developing, and deploying the Western Governors University Achievement Wallet. We will share learnings across our entire journey including the development of our skills library, our commitment to open standards, and how we have empowered our learners to communicate the value of their skills, talent, and experiences to employers.  

**T3 Innovation Network:** Through the T3 Innovation Network™ organizations across the talent marketplace are working together to build an open, public-private data and technology infrastructure for a more equitable future. This network is exploring emerging technologies and data standards to better align education, workforce, and credentialing data with the needs of the new economy. The T3 Network looks to: • Define what a competency-based lifelong learner record should be so that all learning counts, no matter where it takes place. • Modernize technology and advance data standards to achieve seamless sharing of data throughout a person’s education and career pathway. • Empower individuals with a validated record of their skills and competencies in a way that all employers can understand.

5.00pm – 6.30pm  **Networking Time**

6.30pm – 7.30pm  **Annual Reception**
7.00am – 5.00pm  Registration – Glover Park Room, 1st Floor

7.30am – 8.30am  Continental Breakfast – Glover Park Room, 1st Floor

8.30am – 9.00am  PESC 25th Year Anniversary – VIP Remarks

» Doug Falk, CIO & VP, National Student Clearinghouse; PESC Board of Directors
» Doug Holmes, Manager, eTranscripts, Ontario Universities’ Application Centre (OUAC)
» Francisco Valines, Director of Financial Aid, Florida International University; PESC Board of Directors

9.00am – 10.00am  How The Learning Economy Is Changing – Key Reflections on PESC Best Practices

» David K. Moldoff, CEO & Founder, AcademyOne; PESC Board of Directors, Secretary
» Frank Cicio, President & CEO, iQ4
» Rob Groot, Managing Director, Learner Mobility & Experience, National Student Clearinghouse

Discussing the Learning Economy – is a great theme – it opens a dialogue. How are institutions and their automation adjusting with the use of cloud platforms connected to their own enterprise applications?

How do multiple cloud platforms deliver seamless services from exploration, enrollment, billing, sponsorship/aid/who’s paying to how the learning experiences, measures and outcomes recorded in a safe/secure platform – so that applications can help guide, report progress, and foster greater linkages to the stakeholder needs (like prospective employers seeking access to credentials summarized) and how learners are controlling their own dataset.

How are many content/assessment players accepting best practices? Are they aligning with common tools/services? Or are they still developing their own interfaces? The key take aways is the curation process – is shifting… it is widening so to speak from standalone datastores – to a network interconnected.

A discussion and review of how institutions across three different U.S. States (South Carolina, Tennessee and Wyoming) - and their role/activities(managing the curation of their own dataset) – needs to consider externalized datasets – like the wallet or state led portfolio or other platforms seeking to serve a diversity of needs. Primary use cases are Transfer and Prior Learning Assessment – both are academic led functions. As such, integrating access/services with loosely coupled technologies such as Data warehouses, API’s, JSON Web Services, Request/Reply Services, Conversion of PDF to other formats, etc. are all in play.

10.00am – 10.30am  Break
10.30am – 11.30am  
**Case Studies in Systems Integration**
- Ellucian Implementation of ‘Preferred Name’
- Florida International University Student Aid Lifecycle
- Exploring the Use Case of European Standards for Digital Credentials in Higher Education Institutions

» **Rick Skeel**, Product Manager, Ellucian; PESC Board of Directors, Chair
» **Francisco Valines**, Director of Financial Aid, Florida International University; PESC Board of Directors
» **Dr. Matthias Gottlieb**, Senior Research Associate, Technical University of Munich

**What is ‘preferred name’?** How did Ellucian identify the need for ‘preferred name’? This case study will share the analysis and implementation required to implement ‘preferred name’ across its multiple systems and platforms.

**How many systems are used or accessed to deliver student aid?** With a student body of nearly 54,000, Florida International University (FIU) is among the top 10 largest universities in the nation and has collectively graduated more than 200,000 alumni, 115,000 of whom live and work in South Florida (see https://www.fiu.edu/about/index.html). Financial Aid staff are well-positioned and technically skilled to administer the highly regulated and complex financial platform which includes seasonal deadlines and significant oversight and reporting. What is the overall data flow of the student financial aid lifecycle? How many separate systems and networks support the student financial aid lifecycle?

**European Standards:** Digitization is becoming increasingly important in almost all areas of life and this also applies to the field of higher education. For student mobility, which is of particular interest not only in Europe but also worldwide due to European programs such as ERASMUS, digitization enables a redesign to a process free of media discontinuity with minimal data storage, fast retrieval of information relevant to processing, improved transparency, automated record verification, simplified exchange of information and documents, elimination of paper floods, location-independent and continuous access to information and fulfillment of electronic record keeping according to legislation.

When asked how a trustworthy, distributed, and internationally usable infrastructure standard for issuing, storing, displaying, and verifying academic digital credentials must be designed, we have repeatedly encountered various standards and services whose precise definitions of terms were often ambiguous. This presentation will provide an overview of the most important international, European and national standards in the field of digitization of higher education with an outlook to make these standards interoperable.

Case studies will also discuss various data points along the process, the role of data matching, funding and potential for distributed ledger technologies and other emerging initiatives.

11.30am – 12.00pm  
**PESC 25th Year Anniversary – VIP Remarks**

» **Dr. Larry Fruth**, Executive Director, Access 4 Learning (A4L) Community
» **Dr. Matthew Pittinsky**, CEO, Parchment
» **Michael Sessa**, President & CEO, PESC

12.00pm – 1.30pm  
**Lunch On Your Own**
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.30pm – 3.00pm</td>
<td>Breakout with Zoom Link 1) <strong>Canadian Postsecondary Electronic Standards Council (CanPESC)</strong> – Glover Park Room</td>
<td>Glover Park Room</td>
</tr>
<tr>
<td></td>
<td>» <strong>Doug Holmes</strong>, Manager, eTranscripts, OUAC</td>
<td></td>
</tr>
<tr>
<td></td>
<td>» <strong>Cathy van Soest</strong>, Director, Client Relations, EducationPlannerBC</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2) <strong>JSON/JSON-LD Task Force</strong> – Georgetown Room</td>
<td>Georgetown Room</td>
</tr>
<tr>
<td></td>
<td>» <strong>Michael Morris</strong>, Senior Engineer in Test, ACT</td>
<td></td>
</tr>
<tr>
<td>3.00pm – 3.30pm</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>3.30pm – 5.00pm</td>
<td>Breakout with Zoom Link <strong>Gender Identity in Data Systems Task Force Launch</strong> – Glover Park Room</td>
<td>Glover Park Room</td>
</tr>
<tr>
<td></td>
<td>» <strong>Dennis Becker</strong>, University Registrar, University of Denver</td>
<td></td>
</tr>
<tr>
<td></td>
<td>» <strong>Felicia Perez</strong>, Managing Director, Information as Product Program, National Student Clearinghouse</td>
<td></td>
</tr>
<tr>
<td>5.00pm – 6.00pm</td>
<td><strong>PESC Member Meeting</strong> – Glover Park Room</td>
<td>Glover Park Room</td>
</tr>
<tr>
<td>8.30am – 9.15am</td>
<td>Breakout with Zoom Link <strong>Student Data Privacy Consortium Registry</strong> – Glover Park Room</td>
<td>Glover Park Room</td>
</tr>
<tr>
<td></td>
<td>» <strong>Dr. Larry Fruth</strong>, Executive Director, A4 Community</td>
<td></td>
</tr>
<tr>
<td>9.15am – 10.00am</td>
<td><strong>TAICEP Hub</strong> – Glover Park Room</td>
<td>Glover Park Room</td>
</tr>
<tr>
<td></td>
<td>» <strong>Margaret Wenger</strong>, Senior Director of Evaluation, ECE</td>
<td></td>
</tr>
<tr>
<td>10.00am – 10.30am</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10.30am – 12.00pm</td>
<td>Breakout with Zoom Link <strong>JSON Transcript Standards Development Workgroup</strong> – Glover Park Room</td>
<td>Glover Park Room</td>
</tr>
<tr>
<td></td>
<td>» <strong>Rick Skeel</strong>, Product Manager, Ellucian</td>
<td></td>
</tr>
</tbody>
</table>
Since our founding in 1997, volunteers from the PESC Membership and education community have established a solid foundation and platform for PESC to grow and expand.

PESC volunteers have lead all standards development efforts and have written and produced all PESC Approved Standards, Implementation Guides and Schemas (and continue to do so). PESC volunteers also lead all Boards, Task Forces and User Groups.

Each year about 100-125 volunteers in total participate in PESC groups and initiatives, providing support, participation, governance and funding.

PESC VIPs are longtime volunteers at the forefront of all PESC activities and events, some for decades. Join us at the April 2022 Data Summit and hear from PESC VIPs who will make special remarks and comments on PESC’s 25th Year Anniversary!

» **Kristi Blabaum**, Systems Integration Analyst, Ascendium Education; NASLA; PESC Board of Directors, Treasurer

» **Ruth Blades**, Executive Director, Council on Admission & Transfer for Nova Scotia (CATNS); PESC Board of Directors

» **Doug Falk**, CIO & VP, National Student Clearinghouse; PESC Board of Directors

» **Dr. Larry Fruth**, Executive Director, Access 4 Learning (A4L) Community

» **Melanie Gottlieb**, Executive Director, AACRAO

» **Doug Holmes**, Manager, eTranscripts, Ontario Universities’ Application Centre (OUAC)

» **David K. Moldoff**, CEO & Founder, AcademyOne; PESC Board of Directors, Secretary

» **Dr, Matthew Pittinsky**, CEO, Parchment

» **Monterey Sims**, Director of Admissions & Evaluation, Document Processing, University of Phoenix; PESC Board of Directors, Vice Chair

» **Rick Skeel**, Product Manager, Ellucian; PESC Board of Directors, Chair

» **Rick Torres**, President & CEO, National Student Clearinghouse

» **Jason Tyszko**, Executive Director, Center for Education & Workforce, U.S. Chamber of Commerce Foundation (USCCF)

» **Francisco Valines**, Director, Student Financial Aid, Florida International University; PESC Board of Directors

» **Jason Weaver**, Head of Product, Parchment; PESC Board of Directors

» **Vivian W. Wong**, Group Vice President, Oracle Higher Education Development; PESC Board of Directors
AACRAO’S MELANIE GOTTLIEB TO KEYNOTE DATA SUMMIT
APRIL 2022 DATA SUMMIT MARKS PESC 25TH ANNIVERSARY

Washington, D.C. ~ The Postsecondary Electronic Standards Council (PESC) is pleased to announce Melanie Gottlieb, Executive Director, AACRAO, as Keynote Speaker for the April 2022 Data Summit, Monday April 25, 2022 at 9.30am EDT.

Melanie’s Keynote Address, “Implementing Success – Paving the Way Toward an Equitable Future,” will mark PESC’s 25th year anniversary and serve as a turning point for the PESC community emerging from the COVID-19 pandemic. The complicated pressures of the pandemic over the last two years have collided with lingering national dissatisfaction over the value proposition of higher education, with continued social pressures around access and with the critical challenge of closing equity gaps—all as
we lead up to the impending enrollment cliff. We rely on our dedicated practitioners of our organizations who can implement change for a more equitable and successful future for our institutions and our learners. We must activate our practitioners with the vision, knowledge and skills to carry us forward toward a future that ensures learning and valuable credentials provide access and enable better lives for all learners.

Melanie Gottlieb was recently appointed Executive Director of AACRAO by the AACRAO Board of Directors. The search for a new AACRAO Executive Director began after Michael Reilly announced his retirement and paused with Melanie accepting the role of Interim Executive Director, AACRAO in March 2019. Leading the organization during a pandemic was a challenge she embraced. Her commitment, dedication, and familiarity with the membership were exactly what AACRAO needed.

Melanie is the first woman to hold the role of Executive Director in the association’s history, and is taking the helm at an opportune time as we emerge from the pandemic and look to the future. She brings a global perspective rooted in an understanding of the technological proficiency and flexibility needed to move AACRAO forward.

Melanie steps in as Executive Director after nearly six years as the Deputy Director. She came to the national office with 18 years as an AACRAO member, with experience in Records & Registration, Enrollment Management and International Recruitment and Credential Evaluation. She has served the association in a variety of leadership roles throughout her career, most recently as Vice President for International Education on the AACRAO Board of Directors. Melanie earned an MA in Information Science from the University of Missouri - Columbia and a BA in History /American Studies from Marlboro College in Vermont.

About AACRAO

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. 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 management, administrative information technology, and student services. AACRAO represents institutions in every part of the higher education community, from large public institutions to small, private liberal arts colleges.

The association promotes the well-being and advancement of professionals in the higher education community by engaging members in the collaborative pursuit of excellence in admissions, registration, and enrollment services. The association provides relevant programs, professional development tools, and information resources necessary to chart the course for professional success. For more information, please visit www.aacrao.org.
The Postsecondary Electronic Standards Council cordially invites you to the

25th Anniversary Reception

Dupont Circle Hotel
6.30pm – 7.30pm

DC Slider Bar
Shredded BBQ pork, crispy shallots, coleslaw
Beef, Irish cheddar bacon & tomato compote
   Turkey, brie, cranberry aioli
   Mini crab cake, Old Bay remoulade
   Truffle fries & Sweet potato fries

Cheese & Charcuterie
Artisan local & imported cheeses, cured meats
Grain mustard, pickles, seasonal jam, roasted nuts
   Baguette & crackers

Dessert Station

Complimentary Bar
Speakers & Vip's

Dennis Becker
University Registrar
University of Denver

Kristi Blabaum
Systems Integration Analyst
Ascendium Education;
NASLA; PESC Board of Directors, Treasurer

Ruth Blades
Executive Director
Council on Admission & Transfer for Nova Scotia (CATNS); PESC Board of Directors

Duane Brown
Open Source Community Lead, CEDS; Senior Business Analyst, AEM Corporation

Frank Cicic
CEO
iQ4

Doug Falk
Vice President & CIO
National Student Clearinghouse; PESC Board of Directors

Dr. W. Bryant Faust
Associate Dean & Registrar
Johns Hopkins University, School of Medicine; PESC Board of Directors

Dr. Larry Fruth
Executive Director
Access 4 Learning (A4L) Community
MONTEREY SIMS
DIRECTOR OF ADMISSIONS & EVALUATION, DOCUMENT PROCESSING, UNIVERSITY OF PHOENIX; PESC BOARD OF DIRECTORS, VICE CHAIR

JASON A. TYSZKO
VICE PRESIDENT CENTER FOR EDUCATION & WORKFORCE, U.S. CHAMBER OF COMMERCE FOUNDATION

RICK SKEEL
PRODUCT MANAGER ELLUCIAN; PESC BOARD OF DIRECTORS, CHAIR

FRANCISCO VALINES
DIRECTOR FINANCIAL AID, FLORIDA INTERNATIONAL UNIVERSITY; PESC BOARD OF DIRECTORS

CATHY VAN SOEST
DIRECTOR OF CLIENT RELATIONS EDUCATIONPLANNERBC

JASON WEAVER
VICE PRESIDENT, PRODUCT PARCHMENT; PESC BOARD OF DIRECTORS

KACEY THORNE
DIRECTOR, SKILLS ARCHITECTURE WESTERN GOVERNORS UNIVERSITY

MARGARET WENGER
SENIOR DIRECTOR OF EVALUATION, EDUCATIONAL CREDENTIAL EVALUATORS

RICK TORRES
PRESIDENT & CEO NATIONAL STUDENT CLEARINGHOUSE

VIVIAN W. WONG
GROUP VICE PRESIDENT, ORACLE HIGHER EDUCATION DEVELOPMENT; PESC BOARD OF DIRECTORS
ATTENDEES

Becky Amos  
Product Manager  
National Student Clearinghouse

Simi Bal  
Manager – Information Governance  
National Student Clearinghouse

Janie Barnett  
Managing Director  
Foreign Credentials Services of America

Dennis Becker  
University Registrar  
University of Denver

Kristi Blabaum  
Systems Integration Analyst  
Ascendium Education

Duane Brown  
Open Source Community Lead, CEDS; Senior Business Analyst, AEM Corporation

Frank Cicio  
CEO & Founder  
iQ4

Tara Conrad  
Data Connectivity Manager  
National Student Clearinghouse

Maurice Corbett  
Business Solutions Analyst  
Johns Hopkins University

Dr. Tina DeNeen  
Associate Executive Director  
AACRAO

Doug Falk  
Vice President & CIO  
National Student Clearinghouse

Dr. William Bryant Faust  
Associate Dean & Registrar  
Johns Hopkins University, School of Medicine

Dr. Larry Fruth  
Executive Director  
Access 4 Learning (A4L) Community/SDPC

Dr. Matthias Gottlieb  
Senior Researcher  
Technical University of Munich

Melanie Gottlieb  
Executive Director  
AACRAO

Rob Groot  
Managing Director, Learner Mobility & Experience, National Student Clearinghouse
Darin Hobbs  
Vice President, Academic Records, Credentials & Career  
Western Governors University

Alexander Jackl  
CEO & Founder  
Bardic Systems

James Kelly  
Principal  
Jim Kelly Technologies

Jennifer Kim  
Membership Services Director  
PESC

Ettika Lall  
Manager – Product Management FAS  
National Student Clearinghouse

Susan McCrackin  
CollegeBoard (retired)  
PESC

Karen McCredie  
Executive Director  
EducationPlannerBC

David K. Moldoff  
CEO & Founder  
AcademyOne

Ellen Ostendorf  
Senior Associate Director  
Johns Hopkins University

William Paver  
Executive Director  
Foreign Credentials Service of America & AICE

Felicia Perez  
Managing Director, Information as Product Program, National Student Clearinghouse

Dr. Matthew Pittinsky  
CEO  
Parchment

Michael Sessa  
President & CEO  
PESC

Monterey Sims  
Director of Admissions & Evaluation  
University of Phoenix

Richard Skeel  
Product Manager  
Ellucian

Shelby Stanfield  
Managing Director, Ideation Center  
National Student Clearinghouse
Kacey Thorne  
Director, Skills Architecture  
Western Governors University

Ricardo Torres  
President & CEO  
National Student Clearinghouse

Jason A. Tyszko  
Vice President  
Center for Education & Workforce  
U.S. Chamber of Commerce Foundation

Anne Valentine  
President  
DegreeData

Francisco Valines  
Director of Financial Aid  
Florida International University

Jason Weaver  
Vice President, Product  
Parchment

Margaret Wenger  
Senior Director of Evaluation  
Educational Credential Evaluators

David Yerg  
Director, Product Management, Innovation & Transformation, Ellucian
AACRAO & Ellucian Honored as PESC Founders

Founder Awards Recognize Exceptional Membership and Board Leadership

Washington, D.C. ~ The Postsecondary Electronic Standards Council (PESC) is pleased to recognize and honor the American Association of Collegiate Registrars and Admissions Officers (AACRAO) and Ellucian as “PESC Founders.” With continuous Annual Membership in PESC and successful, continual election to the PESC Board of Directors since PESC’s founding, AACRAO and Ellucian will be presented with PESC Founder Awards at the April 2022 Data Summit in Washington, D.C. on April 25, 2022.

<table>
<thead>
<tr>
<th>2021--</th>
<th>2016--</th>
</tr>
</thead>
<tbody>
<tr>
<td>W. BRYANT FAUST</td>
<td>RICHARD ‘Rick’ Skeel</td>
</tr>
<tr>
<td>Associate Dean and Registrar, Johns Hopkins University School of Medicine</td>
<td>Product Manager</td>
</tr>
<tr>
<td>2019-2021</td>
<td>Ellucian</td>
</tr>
<tr>
<td>MICHAEL ‘Mike’ Reilly</td>
<td>MARK Jones</td>
</tr>
<tr>
<td>Executive Director</td>
<td>Senior Product Officer</td>
</tr>
<tr>
<td>AACRAO</td>
<td>Ellucian</td>
</tr>
<tr>
<td>2015-2019</td>
<td>W. B. MORLEY</td>
</tr>
<tr>
<td>TUAN AN DO</td>
<td>Software Engineer</td>
</tr>
<tr>
<td>Director, Enrollment Management Tech.</td>
<td>Brigham Young University</td>
</tr>
<tr>
<td>San Francisco State University</td>
<td>2003-2005</td>
</tr>
<tr>
<td>2005-2015</td>
<td>VIJAYAN ‘Pete’ Nalli</td>
</tr>
<tr>
<td>RICHARD ‘Rick’ Skeel</td>
<td>Director, Architecture &amp; Software Dvpt.</td>
</tr>
<tr>
<td>Director of Academic Records</td>
<td>Datatel</td>
</tr>
<tr>
<td>University of Oklahoma</td>
<td>2006-2010</td>
</tr>
<tr>
<td>2003-2005</td>
<td>JACK KRAMER</td>
</tr>
<tr>
<td>ROBERT ‘Bob’ Morley</td>
<td>Senior Vice President</td>
</tr>
<tr>
<td>Associate Registrar</td>
<td>SunGard SCT</td>
</tr>
<tr>
<td>University of Southern California</td>
<td>2005-2007</td>
</tr>
<tr>
<td>1997-2003</td>
<td>DAVID K. MOLDOFF</td>
</tr>
<tr>
<td>JERALD ‘Jerry’ Bracken</td>
<td>Senior Vice President</td>
</tr>
<tr>
<td>Software Engineer</td>
<td>SCT Corporation</td>
</tr>
<tr>
<td>Brigham Young University</td>
<td>2003-2005</td>
</tr>
<tr>
<td>1997-2003</td>
<td>JACQUELINE ‘Jackie’ Kessler</td>
</tr>
<tr>
<td></td>
<td>Senior Director, Public Policy</td>
</tr>
<tr>
<td></td>
<td>SCT Corporation</td>
</tr>
</tbody>
</table>

Listed above are representatives of AACRAO and representatives of Ellucian who have been successfully elected from the PESC Membership to the PESC Board of Directors since PESC’s founding.
"We are honored and humbled to accept this award. Evolving technology and the management of data is a major component of every AACRAO profession, and data standards enable the interoperability required to serve our students and our institutions. We strongly support the continued development of standards from within the user community. Our partnership with PESC is more than strategic, it is foundational to the work of our members and higher education community as a whole."

- Melanie Gottlieb, Interim Executive Director

“As we celebrate the milestone anniversary of The Postsecondary Electronic Standards Council, we are honored to be recognized as a founding partner and are grateful to this community for the service to furthering higher education. PESC standards are integral to the solutions Ellucian delivers to our customers and we value our role and participation in the creation of these standards. We appreciate the leadership of PESC and the other members, particularly at a time when data exchanges are growing and expanding for institutions around the world.”

- Mariam Tariq, Senior Vice President, Product Management, Ellucian

“The expertise, knowledge, guidance, commitment and collective wisdom AACRAO and Ellucian bring to PESC and to the education community are immeasurable. AACRAO and Ellucian are among the very best in higher education in every aspect and PESC is honored and grateful for 25 years of support and partnership at every level. Their continued contributions and collaborations within the community solidify AACRAO and Ellucian as leaders in technology and standards.”

- Michael Sessa, President & CEO, PESC
Representatives from both AACRAO and Ellucian have participated in every PESC standards development effort with several serving as Chairs and/or Co-Chairs. Jerry Bracken (representing AACRAO), Pete Nalli, Bill Hollowsky and Rick Skeel (representing Ellucian), have been elected and served as Chair of the PESC Board of Directors. Additionally, the following representatives are recipients of PESC’s Distinguished Service Awards:

- **AACRAO** – Mike Reilly 2020, Janie Barnett 2018, SPEEDE Committee 2011, Jerry Bracken 2003
- **Ellucian** – Rick Skeel 2017, Ed Hauser 2006, Mark Boelmbach 2005

The PESC Founder Awards Ceremony will take place at the April 2022 Data Summit being held in-person in Washington, D.C. April 25-27, 2022. Accepting the Founder Award on behalf of AACRAO is Melanie Gottlieb, Interim Executive Director, AACRAO; while accepting the Founder Award on behalf of Ellucian is Rick Skeel, Product Manager, Ellucian. For more information about the April 2022 Data Summit, please visit [www.pesc.org](http://www.pesc.org).

**About AACRAO**

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. 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 management, administrative information technology, and student services. AACRAO represents institutions in every part of the higher education community, from large public institutions to small, private liberal arts colleges.

The association promotes the well-being and advancement of professionals in the higher education community by engaging members in the collaborative pursuit of excellence in admissions, registration, and enrollment services. The association provides relevant programs, professional development tools, and information resources necessary to chart the course for professional success. For more information, please visit [www.aacrao.org](http://www.aacrao.org).

**About Ellucian**

Ellucian is charting the digital future of higher education with a portfolio of cloud-ready technology solutions and services. From student recruitment to workforce analytics; from fundraising opportunities to alumni engagement; Ellucian’s comprehensive suite of data-rich tools gives colleges and universities the information they need to lead with confidence.

Working with a community of more than 2,700 customers in over 50 countries, Ellucian keeps innovating as higher education keeps evolving. Drawing on its comprehensive higher education business acumen and suite of services, Ellucian guides its customers through manageable, sustainable digital transformation—so that every type of institution and student can thrive in today’s fast-changing landscape. To find out what’s next in higher education solutions and services, visit Ellucian at [www.ellucian.com](http://www.ellucian.com).
Many volunteers from the PESC Membership and education community have helped shape PESC into the strong organization it is today.

The success of PESC is due primarily to the valuable output (from white papers to development, approval, and maintenance of standards) all produced through workgroups and committees that are staffed and run by these volunteers.

Based on openness and transparency, together we support a neutral and welcoming environment with a seat at the table for everyone.

Certain individuals, who exemplify these values and who have performed for PESC above and beyond the call of duty, are recognized by PESC each year with Distinguished Service Awards.

PESC Distinguished Service Awards serve as our opportunity to say thank you for being a leader and for making a positive impact on education.

---

**- Outstanding Service Awards - 2022**

Recognized for long-term support, participation, leadership, and governance in PESC. Honored in 2022 at PESC’s 25th Anniversary.

- Kristi Blaubaum, Ascendium Education
- Michael Morris, ACI
- Doug Falk, National Student Clearinghouse
- Susan McCrackin, CollegeBoard, Inc.
- Doug Holmes, HLSI
- Rick Skeel, Bachelor's
- David K. Moldoff, AcademyOne
- Francisco Vallines, Florida International University

---

**2021**

- Charmaine Hack, Ryerson University
- Romesh Vadivel, McGill University

---

**2020**

- Joanne Duklas, Duklas Consulting
- Alex Jacki, Pacific Systems
- Mike Reilly, AACRAO
- Jason Weaver, Parchment

---

**2019**

- Herman de Leeuw, Graduation Development Network
- Simone Ravaloli, DigiTary
- Monterey Sims, University of Phoenix
- Cathy van Soest, Education Canada B.C.

---

**2018**

- Janie Barnett, AACRAO
- W. Matt Bemis, University of Southern California, National Student Clearinghouse
PESC's 23rd Annual Best Practices Competition is Open Through Friday April 1, 2022.

The PESC 23rd Annual Best Practices Competition recognizes, highlights, and promotes innovation and ingenuity in the application and implementation of interoperable data standards for business needs.

Hallmarks of Best Practices

While innovation and meeting customer needs will continue to ensure the rapid evolution of systems, networks, products, services and applications, those PESC awards & recognitions as Best Practices will share the use and inclusion of:

- Common Data Standards
- Unique Identifiers & Standardized Code Sets
- Quality Control Measures
- Controlled Access and Security
- Comprehensive Management Support
- Flexibility and Scalability
- Student/Learner-Centric
- Formal Data Governance

21st 1st Place Award

HR Open Standards
Recruiting/Candidate Specification

20th 1st Place Award

Council on Admission and Transfer for Nova Scotia
MyTranscripts | Nova Scotia's Electronic Transcript & Data Exchange System

19th 1st Place Award

Indiana Commission for Higher Education
One State, Two Initiatives: Indiana's Embrace of e-Transcripts & Credential Engine

18th 1st Place Award

IQ4 & National Student Clearinghouse
Extending the Capacity of Higher Education to Scale the Output of Verified Workforce-Ready Graduates

17th 1st Place Award

University of Tennessee System & AcademyOne
Automating Reverse Transfer for the State of Tennessee
<table>
<thead>
<tr>
<th>Award Year</th>
<th>Award Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7th 1st Place Award 2005 2006</td>
<td>National Council of Higher Education Loan Programs Common Record; CommonLine (CRC) Beta Test</td>
</tr>
<tr>
<td>6th 1st Place Award 2004 2005</td>
<td>FSA - Office of Federal Student Aid, U.S. Department of Education XML Registry &amp; Repository for Education</td>
</tr>
<tr>
<td>5th 1st Place Award 2003 2004</td>
<td>Access 4 Learning (A4L) Community SIF Specification</td>
</tr>
<tr>
<td>4th 1st Place Award 2002 2003</td>
<td>ELM Resources &amp; NCHELP ELMnet &amp; Meteor</td>
</tr>
<tr>
<td>3rd 1st Place Award 2001 2002</td>
<td>National Council of Higher Education Loan Programs Common Account Maintenance (CAM)</td>
</tr>
<tr>
<td>2nd 1st Place Award 2000 2001</td>
<td>University of Northern Iowa EDI Bridge</td>
</tr>
<tr>
<td>1st 1st Place Award 1999 2000</td>
<td>OUAC - Ontario Universities’ Application Centre Model of Electronic Standardization Initiative: Ontario Universities’ Electronic Transcript Exchange (OEETX) System</td>
</tr>
<tr>
<td>16th 1st Place Award 2014 2015</td>
<td>Elon University &amp; Parchment Elon Experiences Transcript and Integration to the Academic Transcript</td>
</tr>
<tr>
<td>15th 1st Place Award 2013 2014</td>
<td>University of Phoenix eTAPS Electronic Transcript Acquisition Process</td>
</tr>
<tr>
<td>14th 1st Place Award 2012 2013</td>
<td>OCAS - Ontario College Application Service Implementation of High School Transcript</td>
</tr>
<tr>
<td>13th 1st Place Award 2011 2012</td>
<td>NCES - National Center for Education Statistics U.S. Department of Education’s Common Education Data Standards (CEDS)</td>
</tr>
<tr>
<td>12th 1st Place Award 2010 2011</td>
<td>South Carolina &amp; AcademyOne SC-TRAC Transfer &amp; Articulation Center</td>
</tr>
<tr>
<td>11th 1st Place Award 2009 2010</td>
<td>College Foundation of North Carolina Electronic High School Transcript System</td>
</tr>
<tr>
<td>10th 1st Place Award 2008 2009</td>
<td>California Community Colleges &amp; XAP and University System of Georgia Board of Regents California eTranscript and Implementation of High School and Postsecondary XML Transcripts</td>
</tr>
<tr>
<td>9th 1st Place Award 2007 2008</td>
<td>Sinclair Community College &amp; Wainwright State University Exchange of Electronic Transcripts via Ohio Board of Regents Articulation &amp; Transfer Clearinghouse</td>
</tr>
<tr>
<td>8th 1st Place Award 2006 2007</td>
<td>DQG - Data Quality Campaign Longitudinal Education Data Systems: Using Data to Improve Student Achievements</td>
</tr>
</tbody>
</table>
Board of Directors

Postsecondary Electronic Standards Council

25th Anniversary

www.pesc.org
The Board of Directors of the Postsecondary Electronic Standards Council (PESC) consists of twelve (12) elected representatives from Member organizations (serving two-year, staggered terms) and the President & CEO who together have overall authority to govern PESC and administer all corresponding policies and procedures.

The Board of Directors abides by Roberts Rules of Order and the PESC Board Manual of Roles & Responsibilities; and meets monthly (virtually), in-person at annual Data Summits, and for its Annual Retreat each June.
Annual elections for the PESC Board of Directors are held each April with election results announced during the annual April Data Summit. At Annual Retreats, the Board of Directors approves the annual PESC budget for the following fiscal year, conducts evaluation and review exercises and elects Officers (Chair, Vice Chair, Treasurer and Secretary).

**W. Matthew Bemis**

**Associate Registrar, University of Southern California**

“Matt” Bemis is the Associate Registrar at the University of Southern California (USC) and is responsible for the Degree Progress Department operations. In this role, Matt serves as the Administrator over Degree Audit and Transfer Credit applications, serves as USC’s NCAA continuing eligibility certification officer and manages Curriculum Services.

Matt is also Project Lead for the Electronic Data Interchange (EDI) initiative at USC (transcript processing) and served as the Chair for AACRAO Standardization of Postsecondary Education Electronic Data Exchange (SPEEDE) Committee. Matt has served as the Pacific Association of Collegiate Registrars and Admissions Officers (PACRAO) Program Committee Chair and as Vice Chair of the PESC Board of Directors. He is Co-Chair for the PESC Education Record User Group (ERUG), and is Co-Chair and Steering Committee Member of PESC’s Global Education Organization (GEO) Code User Group.

June 30, 2023
KRISTI BLABAUM

SYSTEMS INTEGRATION ANALYST, GREAT LAKES, REPRESENTING NASLA

Kristi brings over 27 years of financial aid experience to her current position as Systems Integration Analyst at Ascendium Education Solutions (formerly Great Lakes Higher Education). For over two decades she has been a leader in many industry initiatives such as CommonLine processing, development of Common Record: CommonLine (CRC), and guiding it through the process to become a PESC Approved Standard. Kristi has been a PESC Board member since 2011 and has been serving on the Standards Development Forum’s Steering Committee since 2009. She has been an active member on the Change Control Board (CCB) for 14 years and has been the Chair for the last 11 years.

Through these leadership positions, in collaboration with the Technical Advisory Board (TAB) and as CCB Chair, Kristi is a positive influence and champion of PESC initiatives. She ensures public collaboration, feedback and guidance to every PESC development workgroup and to external organizations and initiatives looking to analyze, compare and map PESC Approved Standards with new and/or existing data sets, ensuring uniform decision-making and consistent design methodology. Previously she served as the Co-Chair of the Development Workgroup within PESC leading the creation and publication of the Student Loan Portfolio Detail Report – now a PESC Approved Standard and serves as Board Treasurer. For 8 years, Kristi held the position of Co-Chair of the Origination Standards Advisory Team (OSAT) within NCHELP’s Electronic Standards Committee (ESC) setting the data exchange standards for the Student Loan Industry. June 30, 2023

RUTH BLADES

EXECUTIVE DIRECTOR, COUNCIL ON ADMISSION & TRANSFER OF NOVA SCOTIA

Ruth Blades is the Executive Director of the Council on Admission & Transfer for Nova Scotia Inc. (CATNS). What began as a project in 2013 has become a thriving, incorporated entity in 2021, with Ruth as the sole employee. Throughout this time, she has led the eleven universities and colleges in the province in the development of systems that support student enrolment and mobility, including electronic transcript exchange, an application gateway, a transfer credit equivalency database and a common spring & summer course database for Nova Scotia. Ruth has been a member of CanPESC since 2015 and CATNS has been a member of PESC since 2020. She is an active participant in many CanPESC initiatives – Standards Upgrade Pathways WG, Standards of Practice WG, Common Digital Layout WG, Institutional Codes Survey WG, and Standards WG/Liaison to PESC Standards Forum – and PESC working groups - GEOCode (sub-country administrator) and JSON Working Group.

In 2019 the work of Ruth and her colleagues was recognized with CATNS being awarded first place in PESC’s 20th Anniversary Best Practices.
Competition for their MyTranscripts system. Over her 30+ year career Ruth has held senior positions in both the public and private sector in Nova Scotia, including nine years in the Registrar’s Office at Dalhousie University. For 11 years she applied her skills to consulting engagements focused on strategic planning with clients in many sectors including higher education, economic development & immigration. She holds a Bachelor of Commerce (Finance) from Saint Mary’s University and a Master of Library and Information Studies from Dalhousie University, and is a certified Project Management Professional. Ruth also served as both director (2016-2017) & Vice-Chair (2017-2021) of the Board of Directors for the Pan-Canadian Consortium on Admissions and Transfer. June 30, 2023

Doug Falk has served in technology leadership positions for 17 years at the National Student Clearinghouse, where he is currently Vice President and Chief Information Officer. As CIO, Doug provides vision and leadership for information technology initiatives that align with business goals to improve client responsiveness, quality, security and compliance, and cost effectiveness. He is responsible for providing leadership across multiple areas, including development, implementation and governance of information systems, enterprise architecture, information security, and technology infrastructure.

Prior to being named CIO, Doug was the Clearinghouse's long-time Vice President of Information Technology and CTO. He was instrumental in developing the Clearinghouse's Web-based application services and its data management capabilities. Doug has been a member of the PESC board since January 2008, served as Co-Chair of PESC's Data Privacy & Protection Task Force, and he also served as Board Chair. June 30, 2022

Bryant Faust currently serve as Associate Dean and Registrar at Johns Hopkins University School of Medicine. Over the past 35 years, he has worked in higher education as a researcher, faculty member, information technology analyst and registrar. In each of these roles, he has focused on utilizing technology to enhance existing processes and improve outcomes.

Previously he served as University Registrar and Instructor of Pharmacology at Louisiana State University Health Sciences Center in New Orleans. He is a graduate of Southeastern Louisiana University, earned a Masters of Arts in Science Teaching from the University of New Orleans, and completed his doctoral studies in Educational Leadership, Policy, and Technical Studies at the University of Alabama. June 30, 2023
**James Kelly**

**Principal, Jim Kelly Technologies**

For over 18 years, Jim Kelly served as Senior Director of Technology at Educational Credential Evaluators, Inc. (ECE) and recently left to become Principal of Jim Kelly Technologies. At ECE, Jim managed a team of skilled technology professionals, sets technology goals and leads strategic planning initiatives. As part of ECE’s senior leadership team, Jim supported internal & external systems while involved in planning, general leadership and management efforts.

Jim also works with PESC and the Groningen Declaration Network to standardize credential evaluation data and contributes to educational data mobility internationally. Jim serves as Steering Committee Member of the PESC Global Education Organization (GEO) User Group on the PESC EdExchange Steering Committee, having recently served as Co-Chair. Jim has also been representing PESC as speaker and presenter at Annual Meetings of the Groningen Declaration Network.

After graduation from the University of Wisconsin Oshkosh with a degree in Biology and a minor in Chemistry, Jim began a career in business and technology professional consulting for organizations that vary in both size and industry. Jim’s consulting experience brings a wealth of knowledge in technology, project management, business systems, warehousing, and distribution to his current efforts. June 30, 2023

**David Moldoff**

**CEO and Founder, AcademyOne**

David K. Moldoff, Founder and CEO of AcademyOne, Inc., is a visionary in higher education responsible for AcademyOne’s overall strategy with specific emphasis on the technology infrastructure, integration of applications and services as well as exploiting his vast industry network with regards to sales, strategic partnerships, associations, etc. David is a successful entrepreneur with over 34 years of experience in launching and managing new companies and new products in technology for higher education. Before forming AcademyOne in 2005, David was SVP of Solutions Architecture and Infrastructure for SCT, which he was instrumental in selling to SunGard in 2004.

Within PESC, David currently serves as Co-Chair of the EdExchange User Group, on the Steering Committee of PESC GEO Code User Group and active in the Academic Credentialing and Experiential Learning Task Force. David serves as PESC Board Liaison to the Rome Student Systems and Standards Group (RS3G) – now converged with the Groningen Declaration Network, served as Co-Chair of the EdUnify Task Force, and was instrumental in the formation of the Common Identity and Trust (CommIT) Collaborative initiated by PESC’s Electronic Authentication/Authorization (EA2) Task Force which partnered with Internet2. He currently serves as Board Secretary. June 30, 2023
**Michael Sessa**

**President & CEO, PESC**

Michael serves as President, CEO and a member of the PESC Board of Directors, a position he's held since 2002. At PESC Michael manages PESC’s membership, finances, events, marketing and website, strategic planning and PESC’s committees and groups. He began his career in 1990 at a local branch of The Boston Five Cents Savings Bank in student loans and consumer lending and compliance and has dedicated his efforts to standardization and interoperability ever since.

As evangelist at PESC, Michael speaks regularly at conferences and events throughout the USA, Canada and around the world. Michael first served on the PESC Board of Directors from 1999-2002, representing American Student Assistance (ASA) and the National Association of Student Loan Administrators (NASLA), before coming on board in 2002. Prior to PESC, Michael worked 10 years at American Student Assistance (Massachusetts Higher Education Assistance Corporation) as Director of Program Relations and Planning managing industry and government affairs and strategic technological initiatives. Michael is a 1989 graduate of Dartmouth College and was born and raised in Revere, Massachusetts, just north of Boston.

---

**Monterey Sims**

**Director of Admission & Evaluation, University of Phoenix**

Monterey Sims is the Director of Admissions and Evaluation at the University of Phoenix and currently serves on the PESC Board of Directors as the Vice Chair. She has worked at the University for almost 30 years and participated in a variety of process improvement initiatives across the institution. Monterey is directly responsible for the Office of Admissions Document Processing division which includes overseeing transcript processing for University applicants and students and document capture and indexing for Admissions, Records, Internal Veterans Affairs, and Financial Services.

She strongly believes in root cause analysis, continuous relentless improvement and solutions that support both students and staff. She spearheaded the implementation of electronic data exchange (EDI/XML) for incoming and outgoing transcripts at the University over a decade ago and continues to enhance related processes and partnerships through her work in PESC and the AACRAO SPEEDE Committee. Monterey also serves on the PACRAO Board of Directors as Business Partner Liaison, ArmyIgnitED Education Institution Advisory Board and the eTransCA Steering Committee. **June 30, 2022**
**RICK SKEEL**

**PRODUCT MANAGER, ELLUCIAN**

Rick has been a long time member of PESC as a member of the AACRAO SPEEDE Committee, as a member of Kuali, and was on the Committee that formed the foundation for what became PESC. He has worked with national and community standards groups for more than 20 years through his work on SPEEDE. He was a member of the PESC Board for more than 9 years and stepped down temporarily due to a change in employment.

He worked at the University of Oklahoma for more than 38 years, retiring the end of October, 2012. He worked for the Kuali Foundation for 2 years and is now working for Ellucian. Rick is very pleased to be the current Board Chair and continue the work he has been involved in for so many years, and believes his past experience as well as his new position give him a breadth of experience that is very valuable to the organization. June 30, 2022

---

**FRANCISCO VALINES**

**DIRECTOR OF FINANCIAL AID, FLORIDA INTERNATIONAL UNIVERSITY**

Francisco has been involved in Student Financial Aid Administration for over 30 years at various large public Universities including the University of Florida, Texas Tech University, Washington State University, the University of Tennessee, Knoxville, The University of Maryland, College Park, and Florida International University. He is in his tenth year as the Director of Financial Aid at Florida International University, a public research University with 54,000 students, a Law School and a Medical School. FIU is designated as a Hispanic Serving Institution and qualifies for the Title III and Title V exemptions for Title IV Aid matching requirements based on the size and ratio of its Pell Grant recipients. Prior to coming to FIU, Francisco was the Associate Director of Financial Aid at the University of Maryland, College Park for 15 years.

Francisco is currently serving on the PESC Board, served as Board Chair and is the Federal Legislative Relations Chair for the Florida Association of Student Financial Aid Administrators (FASFAA). He was also the 2013-2014 Chair of the NASFAA Technology Initiatives Committee. He has served on many NASFAA committees including the Reauthorization Task Force, Technology, Need Analysis, and College Access. He has presented at State, Regional, and National Conferences in such diverse areas as Technology in the Aid Office, Using Diversity in packaging financial aid, Gramm-Leach-Bliley as it applies to financial aid, Hot topics for Grad and Professional Financial Aid, Disaster Preparedness, BBAY Loans, and many others. June 30, 2022
**JASON WEAVER**  
**HEAD OF PRODUCT, PARCHMENT**

Jason Weaver joined Parchment in 2010 and currently leads the product and design teams in his role of Senior Director of Product Management. In his work, Jason brings extensive practical data expertise from across large scale digital credential initiatives, and has served as a partner and consultant on a myriad of projects with state agencies to implement data exchanges at scale, including Indiana, Montana, and West Virginia.

Jason is responsible for Parchment’s product strategy, roadmap, solution design, partnerships, and standards compliance. Jason has served as the volunteer Co-Chair of PESC’s Education Records User Group from 2014-2018 & as Board Vice Chair. Jason holds a B.S. in Information Science and Technology from Penn State, and currently resides in Omaha, Nebraska. June 30, 2022

**VIVIAN WONG**  
**GROUP VICE PRESIDENT, HIGHER EDUCATION, ORACLE**

Vivian is a dynamic, outcome driven, and accomplished executive who brings a wealth of experience and talent in developing world-class software in leading global engineering teams. She is an excellent collaborator and communicator with strong leadership skills, with over 20 years experience building on-premise, SaaS, and mobile products for PeopleSoft, Oracle, Taleo, ServiceMax, and TargetX. As Group Vice President of Oracle Higher Education, Vivian currently leads the product development team at Oracle for higher education. Under her direction this team is building a next generation student information system - Student Cloud - which through its groundbreaking approach to empowering institutions and students globally will disrupt the industry. Vivian is strategic, results-oriented and highly focused on customers’ success. An expert at building, transforming and leading high-caliber teams, Vivian is talented at fostering an empowering, fun and collaborative environment to unleash the full potential of an organization. Vivian is a strong customer advocate; she ensures quality, usability, performance and scalability are always designed and built into the solutions she delivers. Vivian is passionate about making the world a better place. For team bonding, she leads her teams to practice philanthropy. Among other personal and professional endeavors, she currently serves on the Board of Directors for IMS Global, an education industry standards body. June 30, 2022
Members

AACRAO
AAMC
AcademyOne
AICE
ApplyAlberta
A4L
Bardic Systems
California Community College System
California State University System
Camosun College
Carnegie Mellon University
Common Application
Council on Admission & Transfer for Nova Scotia
Credential Engine
Digitary
Duklas Cornerstone Consulting
Educational Credential Evaluators
EducationPlannerBc
Elucian
ELM Resources
Federation of State Medical Boards
Florida International University
GDN
HR Open Standards
Humber Institute
Indiana Commission for Higher Education
Indiana State University
iQ4
Jenzabar
Jim Kelly Technologies
Liaison International
McGill University
NASLA
National Student Clearinghouse
OCAS
Oracle
OUAC
Paradigm
Parchment
U.S. Chamber of Commerce Foundation
University of Arizona
University of Chicago
University of Colorado Boulder
University of Denver
University of Lethbridge
University of Louisiana at Lafayette
University of Melbourne
University of Michigan
University of Montreal
University of Phoenix
University of Southern California
University of Virginia
Western Governors University
<table>
<thead>
<tr>
<th>Event</th>
<th>Dates</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARUCC 2022 Conference</td>
<td>June 19-22, 2022</td>
<td>Niagara Falls</td>
</tr>
<tr>
<td>PESC Annual Board Retreat</td>
<td>June 23 &amp; 30, 2022</td>
<td>Virtual</td>
</tr>
<tr>
<td>AACRAO Tech &amp; Transfer Conference</td>
<td>July 12-14, 2022</td>
<td>Virtual</td>
</tr>
<tr>
<td>US National Forum on Education Statistics</td>
<td>July 12-14, 2022</td>
<td>Virtual</td>
</tr>
<tr>
<td>GDN 11th Annual Meeting</td>
<td>October 12-14, 2022</td>
<td>Groningen</td>
</tr>
<tr>
<td>October 2022 Data Summit</td>
<td>October 26-28, 2022</td>
<td>Vancouver</td>
</tr>
<tr>
<td>AACRAO 108th Annual Meeting</td>
<td>March 26-29, 2023</td>
<td>Aurora</td>
</tr>
</tbody>
</table>
POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

Gender Identity
IN DATA SYSTEMS & LIFELONG LEARNING

www.pesc.org
Who are you? In education all systems stakeholders must know the exact answer to that question. Societal changes in previously standardized data have left many uncertain on what data to request, collect, store, and report.

How can we ensure we are collecting and managing the ‘right’ data for gender identity, gender expression and sexual orientation? How do we ensure we are following the requirements for collecting this data while maintaining privacy and correct communication?

Several U.S. States and Canadian Provinces are heavily considering – if not already passed and implemented – specific laws regarding collection and management of gender identity, gender expression and sexual orientation data.

To assist PESC Members and all stakeholders in the student and learner ecosystem, PESC establishes the **Gender Identity in Data Systems Task Force**, an open discussion forum to provide a common understanding of these topics and if needed, changes and updates to PESC Approved Standards.
Table of Contents

1) Part I
   Featured Panel at April 2022 Data Summit

2) Part II
   Featured Panel at April 2022 Data Summit

3) Part III
   Featured Panel at April 2022 Data Summit

4) Part IV
   Task Force Launch at April 2022 Data Summit

5) Part V
   Task Force Meetings in June, August & October

6) Part VI
   Featured Panel at October 2022 Data Summit

7) Q & A

8) Resources

9) Supporters
Many within the PESC community may not be fully aware or informed on the changes taking place within society regarding gender identity, gender expression and sexual orientation. Some may think the entire subject unnecessary, while others may believe society is not going far enough.

**In looking past policy, we must determine what data to integrate and what data to operationalize seamlessly, regardless of personal agreement or disagreement with policy.**

PESC has tapped local and national LGBTQ+ leaders to help in this endeavor. The ABC’s of LGBTQ+ Terminology panel will provide an overview of terms and definitions. Attendees will gain a common understanding of what data are changing and why, of health and family concerns, and be provided with corresponding resources.
Student Affairs professionals, including Registrars, Admissions staff and Financial Aid offices are at the forefront of serving students. Meeting student needs in an inclusive and respectful manner though while simultaneously tracking and monitoring local and/or national LGBTQ+ policies and laws – many in conflict with one another – can inadvertently cause confusion, frustration and uncertainty.

**What policies and issues are driving student needs?** **How are institutions responding?** Are definitions, terminology and lists standardized or are there differences between campus offices, systems and applications?

Leading PESC Members will share their experiences in meeting student needs. The “From My Perspective: Views from the Campus” panel will discuss these challenges and open an ongoing dialogue to serve as the basis for the formation of the Gender Identity in Data Systems Task Force.
What is ‘preferred name’? How did Ellucian identify the need for ‘preferred name’? This case study will share the analysis and implementation required to implement ‘preferred name’ across its multiple systems and platforms.

What is the overall data flow of the student financial aid lifecycle? How many separate systems and networks support students along this lifecycle? This case study will share the requirements and responsibilities of a financial aid process in a highly complex and heavily regulated sector.

Both case studies will also discuss various data points along the process, the role of data matching, funding and potential for distributed ledger technologies and other emerging initiatives.
Task Force Launch
Gender Identity in Data Systems

Tuesday April 26, 2022
3.30pm – 5.00pm
Zoom Link

Co-Chairs:
» Dennis Becker, University Registrar, University of Denver

Task Force preliminary mission & agenda…
Task Force Meetings
Gender Identity in Data Systems

Thursday June 23, 2022
1.00pm – 2.30pm
Zoom Link

Thursday August 25, 2022
1.00pm – 2.30pm
Zoom Link

Thursday October 27, 2022
1:30pm – 3:00pm
October 2022 Data Summit – Vancouver
Zoom Link

Task Force preliminary mission & agenda…
<table>
<thead>
<tr>
<th>Speaker 1</th>
<th>Speaker 2</th>
<th>Speaker 3</th>
<th>Speaker 4</th>
</tr>
</thead>
</table>

Moderator: Michael Sessa, President & CEO, PESC

TBD
What is the PESC ‘Task Force on Gender Identity in Data Systems and Lifelong Learning?’

The Task Force on Gender Identity in Data Systems is an open discussion forum (and free to participate), across education and workforce, hosted by PESC.

Why is PESC hosting this Task Force?

Many PESC Members are addressing these concerns and planning how systems should accommodate updates. PESC looks to provide education and bring clarity to this very important topic to ensure proper and accurate data is shared across disparate technologies and disparate systems.
Who can participate in the Task Force?

Participation in the Task Force is free and open to PESC Members, the education community, and PESC Partner and Affiliate organizations.

What topics are within the scope of the Task Force?

The topics of gender identity, gender expression, and sex orientation are broad, multi-leveled and complex. With PESC’s focus on data and data exchange, primary discussion is envisioned to revolve around data, interoperability and corresponding terminology and definitions. Related topics, while important and relevant, like usernames, passwords and the history of LGBTQ+ movement, would be out of scope for the Task Force.

How can I participate in the Task Force?

Participation will be made available on the PESC website and through social media.
RESOURCES

AACRAO
» Gender Identity Expression in Higher Education
» Student Identity Report

Canada
» About Gender Identity and Gender Expression – Government of Canada
» Definitions and Terminology – Government of Canada
» Glossary of Terms – Canada Human Rights Trust
» Being Seen, Being Counted: Establishing Expanded Gender and Naming Declarations – BC Council on Admissions & Transfer

Human Rights Campaign (HRC) Foundation (US)
» Glossary of Terms
» Sexual Orientation/Gender Identity Terminology
» College Resources
The DC Center for the LGBT Community

UNESCO Gender Identity, Gender Expression and Sexual Orientation

U.S. Executive Office of Management and Budget (OMB) Terminology in Data Collection

Other?
SUPPORTERS

AACRAO

Access 4 Learning Community

Bardic Systems

HR Open Standards

MedBiquitous

Other?
Gender Identity in Data Systems & Lifelong Learning