



IN PERSON

Washington, D.C.

APRIL 2022 DATA SUMMIT

APRIL 25 – 27, 2022

A TIME FOR REFLECTION A TIME TO BE BOLD



25th ANNIVERSARY

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POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

Leading the establishment and adoption of trusted, free & open
data standards across the education domain since 1997

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PESC APPROVED STANDARDS
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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.



PESC

APRIL 2022 DATA SUMMIT

WASHINGTON DC APRIL 25–27, 2022 WWW.PESC.ORG

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

Washington, D.C. | APRIL 2022 DATA SUMMIT

PESC[®]

PROGRAM AT-A-GLANCE

<p>MONDAY APRIL 25, 2022 GLOVER PARK ROOM</p>	<p>TUESDAY APRIL 26, 2022 GLOVER PARK ROOM</p>	<p>WEDNESDAY APRIL 27, 2022 GLOVER PARK ROOM</p>
<p>7.00AM – 5.00PM REGISTRATION 7.30AM – 8.30AM CONTINENTAL BREAKFAST</p>		
<p>8.30AM – 8.45AM WELCOME & OPENING -MICHAEL SESSA, PESC</p> <p>8.45AM – 9.30AM VIP REMARKS</p> <p>9.30AM – 10.00AM KEYNOTE: IMPLEMENTING SUCCESS -MELANIE GOTTLIEB, AACRAO</p> <p>10.00AM – 10.30AM BREAK</p> <p>10.30AM – 11.30AM ABC'S OF LGBTQ+ TERMINOLOGY -MICHAEL SESSA, PESC -LUCAS JOHANSEN, DC CENTER</p> <p>11.30AM – 12.00PM AWARDS CEREMONY</p> <p>12.00PM – 1.30PM LUNCHEON</p> <p>1.30PM – 2.00PM VIP REMARKS</p> <p>2.00PM – 3.00PM FROM MY PERSPECTIVE: CAMPUS VIEWS -DENNIS BECKER, UNIVERSITY OF DENVER -W. BRYANT FAUST, JOHNS HOPKINS UNIVERSITY -KATHLEEN MASSEY, UNIVERSITY OF LETHBRIDGE</p> <p>3.00PM – 3.30PM BREAK</p> <p>3.30PM – 5.00PM DATA STANDARDS INITIATIVES -DUANE BROWN, CEDS/AEM CORP -DARIN HOBBS, WGU -KACEY THORNE, WGU -JASON TYSZKO, USCCF</p>	<p>8.30AM – 9.00AM VIP REMARKS</p> <p>9.00AM – 10.00AM BEST OF BEST PRACTICES -DAVID K. MOLDOFF, ACADEMYONE -FRANK CICIO, IQ4 -ROB GROOT, NATIONAL STUDENT CLEARINGHOUSE</p> <p>10.00AM – 10.30AM BREAK</p> <p>10.30AM – 11.30AM CASE STUDIES IN SYSTEMS INTEGRATION -RICK SKEEL, ELLUCIAN -FRANCISCO VALINES, FLORIDA INTERNATIONAL UNIV. -MATTHIAS GOTTLIEB, TUM</p> <p>11.30AM – 12.00PM VIP REMARKS</p> <p>12.00PM – 1.30PM LUNCH ON YOUR OWN</p> <p>1.30PM – 3.00PM BREAKOUT GLOVER PARK ROOM 1) CANPESC -DOUG HOLMES, OUAC -CATHY VAN SOEST, EDUCATIONPLANNERBC GEORGETOWN ROOM 2) JSON/JSON-LD TASK FORCE -MICHAEL MORRIS, ACT</p> <p>3.00PM – 3.30PM BREAK</p> <p>3.30PM – 5.00PM BREAKOUT GLOVER PARK ROOM » GENDER IDENTITY TASK FORCE LAUNCH -DENNIS BECKER, UNIVERSITY OF DENVER -FELICIA PEREZ, NATIONAL STUDENT CLEARINGHOUSE</p>	<p>8.30AM – 9.15AM BREAKOUT » SDPC -DR. LARRY FRUTH, A4L</p> <p>9.15AM – 10.00AM BREAKOUT » TAICEP -MEG WENGER, ECE</p> <p>10.00AM – 10.30AM BREAK</p> <p>10.30AM – 12.00PM BREAKOUT » JSON TRANSCRIPT WORKGROUP -RICK SKEEL, ELLUCIAN</p>
<p>5.00PM ADJOURN</p>	<p>5.00PM – 6.00PM PESC MEMBER MEETING</p>	<p>12.00PM ADJOURN</p> <p>DSU CONVENING @ A4L CHURCHILL HOTEL</p>
<p>6.30PM – 7.30PM 25TH ANNIVERSARY RECEPTION</p>	<p>6.00PM ADJOURN</p>	

— Menu —

Monday April 25, 2022

Breakfast

Applewood smoked bacon & pork sausage

Cage free scrambled eggs

Fried chicken & biscuit, pickles, sriracha aioli

Roasted marbled potatoes

Assorted Pastries w/ butter, fruit preserves, marmalade, honey

Seasonal sliced fresh fruit

Break

Coffee & tea

Lunch

Roasted chicken breast w/ herb roasted marble potatoes & mushroom hash, haricots vert, chicken jus

Seared Scottish ocean trout w/ beluga lentils, roasted pearl onions, zucchini, carrots & herb beurre blanc

Classic Caesar salad w/ garlic croutons & shaved Parmigiano Reggiano

Seasonal soup of the day

Lemon tart

Carrot cake w/ cream cheese frosting

Break

Fresh baked cookies – chocolate chip, oatmeal raisin, sugar, peanut butter, white chocolate macadamia nut, gluten free

Coffee & tea

Tuesday April 26, 2022

Breakfast

Applewood smoked bacon & pork sausage

Cage free scrambled eggs

Fried chicken & biscuit, pickles, sriracha aioli

Roasted marbled potatoes

Assorted Pastries w/ butter, fruit preserves, marmalade, honey

Seasonal sliced fresh fruit

Break

Coffee & tea

Lunch

On your own

Break

Tortilla chips, pita chips, crispy lavish w/ pico do gallo; guacamole; cheddar, gruyere; red pepper hummus; baba ganoush

Coffee & tea

Wednesday April 27, 2022

Breakfast

Non-fat Greek yogurt w/ house made granola

Assorted cereals w/ whole, skim, soy or almond milk

Selection of breakfast breads

Assorted Pastries w/ butter, fruit preserves, marmalade, honey

Seasonal sliced fresh fruit

Break

Coffee & tea

PROGRAM

Monday April 25, 2022

- 7.00am – 5.00pm Registration – Glover Park Room, 1st Floor
- 7.30am – 8.30am Hot Breakfast – Glover Park Room, 1st Floor
- 8.30am – 8.45am **Welcome & Overview**
» **Michael Sessa**, PESC President & CEO
- 8.45am – 9.30am **PESC 25th Year Anniversary – VIP Remarks**

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Program Committee

- » **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

- » **Rick Skeel**, Product Manager, Ellucian; Chair, PESC Board of Directors
- » **David K. Moldoff**, Founder & CEO, AcademyOne; Secretary, PESC Board of Directors
- » **Kristi Blabaum**, Systems Integration Analyst, Ascendium Education, Treasurer, PESC Board of Directors
- » **Vivian W. Wong**, Group Vice President, Oracle Higher Education Development, PESC Board of Directors
- » **Melanie Gottlieb**, Executive Director, AACRAO

- 9.30am – 10.00am **Keynote Address – Implementing Success:
Paving the Way Toward an Equitable Future**

 ORACLE®

- » **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

PROGRAM

10.30am – 11.30am **Gender Identity in Data Systems | ABC's of LGBTQ+ Terminology: Overview & Understanding**

» **Lucas Johansen**, Speakers Bureau, The DC Center

Moderator

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

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.

11.30am – 12.00pm **Awards Ceremony** – PESC Founders, Outstanding Service, Best Practices 1st Place Winners

12.00pm – 1.30pm **Luncheon**



1.30pm – 2.00pm **PESC 25th Year Anniversary – VIP Remarks**

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

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

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

2.00pm – 3.00pm **Gender Identity in Data Systems | From My Perspective: Views from the Campus**

» **Dennis Becker**, University Registrar, University of Denver

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

» **Kathleen Massey**, Associate Vice President (Students), Student Affairs, University of Lethbridge

Moderator

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

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.

3.00pm – 3.30pm **Break**

PROGRAM

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



PROGRAM

Tuesday April 26, 2022

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

PROGRAM

- 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

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**

PROGRAM

Breakout with Zoom Link

- 1.30pm – 3.00pm
- 1) **Canadian Postsecondary Electronic Standards Council (CanPESC)** – Glover Park Room
 - » **Doug Holmes**, Manager, eTranscripts, OUAC
 - » **Cathy van Soest**, Director, Client Relations, EducationPlannerBC
 - 2) **JSON/JSON-LD Task Force** – Georgetown Room
 - » **Michael Morris**, Senior Engineer in Test, ACT

3.00pm – 3.30pm Break

Breakout with Zoom Link

- 3.30pm – 5.00pm
- Gender Identity in Data Systems Task Force Launch** – Glover Park Room
- » **Dennis Becker**, University Registrar, University of Denver
 - » **Felicia Perez**, Managing Director, Information as Product Program, National Student Clearinghouse
- 5.00pm – 6.00pm
- PESC Member Meeting** – Glover Park Room

Wednesday April 27, 2022

Breakout with Zoom Link

- 8.30am – 9.15am
- Student Data Privacy Consortium Registry** – Glover Park Room
- » **Dr. Larry Fruth**, Executive Director, A4 Community
- 9.15am – 10.00am
- TAICEP Hub** – Glover Park Room
- » **Margaret Wenger**, Senior Director of Evaluation, ECE

10.00am – 10.30am Break

Breakout with Zoom Link

- 10.30am – 12.00pm
- JSON Transcript Standards Development Workgroup** – Glover Park Room
- » **Rick Skeel**, Product Manager, Ellucian

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



FOR IMMEDIATE RELEASE
MARCH 7, 2022
CONTACT: JENNIFER KIM
+1.202.261.6516
info@pesc.org
www.pesc.org
www.twitter.com/pescupdates
www.facebook.com/pescupdates
www.linkedin.com/company/pescinfo

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.

KEYNOTE ADDRESS
APRIL 2022 DATA SUMMIT
APRIL 25, 2022



**– IMPLEMENTING SUCCESS –
PAVING THE WAY TOWARD AN EQUITABLE FUTURE**



MELANIE GOTTLIEB
EXECUTIVE DIRECTOR



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

AACRAO'S MELANIE GOTTLIEB TO KEYNOTE APRIL 2022 DATA SUMMIT

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.

– Reception –



*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



FRANK CICIO
CEO
IQ4



KRISTI BLABAUM
SYSTEMS INTEGRATION ANALYST
ASCENDIUM EDUCATION;
NASLA; PESC BOARD OF
DIRECTORS, TREASURER



DOUG FALK
VICE PRESIDENT & CIO
NATIONAL STUDENT
CLEARINGHOUSE; PESC BOARD
OF DIRECTORS



RUTH BLADES
EXECUTIVE DIRECTOR
COUNCIL ON ADMISSION &
TRANSFER FOR NOVA SCOTIA
(CATNS); PESC BOARD OF
DIRECTORS



DR. W. BRYANT FAUST
ASSOCIATE DEAN & REGISTRAR
JOHNS HOPKINS UNIVERSITY,
SCHOOL OF MEDICINE; PESC
BOARD OF DIRECTORS



DUANE BROWN
OPEN SOURCE COMMUNITY
LEAD, CEDS; SENIOR BUSINESS
ANALYST, AEM CORPORATION



DR. LARRY FRUTH
EXECUTIVE DIRECTOR
ACCESS 4 LEARNING (A4L)
COMMUNITY



ROB GROOT
 MANAGING DIRECTOR
 LEARNER MOBILITY &
 EXPERIENCE, NATIONAL
 STUDENT CLEARINGHOUSE



DARIN HOBBS
 VICE PRESIDENT
 ACADEMIC RECORDS,
 CREDENTIALS & CAREER
 WESTERN GOVERNORS
 UNIVERSITY



DOUG HOLMES
 MANAGER, eTRANSCRIPTS
 ONTARIO UNIVERSITIES'
 APPLICATION CENTRE (OUAC)



DR. MATTHIAS GOTTLIEB
 SENIOR RESEARCH ASSOCIATE
 TECHNICAL UNIVERSITY OF
 MUNICH



MELANIE GOTTLIEB
 EXECUTIVE DIRECTOR
 AACRAO



KATHLEEN MASSEY
 ASSOCIATE VICE PRESIDENT
 (STUDENTS), STUDENT AFFAIRS,
 UNIVERSITY OF LETHBRIDGE



KAREN MCCREDIE
 EXECUTIVE DIRECTOR
 EDUCATIONPLANNERBC



DAVID K. MOLDOFF
 CEO & FOUNDER
 ACADEMYONE; PESC BOARD OF
 DIRECTORS, SECRETARY



DR. MATTHEW PITTINSKY
 CEO
 PARCHMENT



MICHAEL SESSA
 PRESIDENT & CEO
 PESC



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



DISTINGUISHED SERVICE AWARDS

POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

– 25TH ANNIVERSARY –

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www.pesc.org



FOR IMMEDIATE RELEASE
 FEBRUARY 22, 2022
 CONTACT: JENNIFER KIM
 +1.202.261.6516
info@pesc.org
www.pesc.org
www.twitter.com/pescupdates
www.facebook.com/pescupdates
www.linkedin.com/company/pescinfo

AACRAO & ELLUCIAN HONORED AS PESC FOUNDERS

FOUNDER AWARDS RECOGNIZE EXCEPTIONAL MEMBERSHIP AND BOARD LEADERSHIP

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



2021--	W. BRYANT FAUST Associate Dean and Registrar, Johns Hopkins University School of Medicine	2016--	RICHARD ‘RICK’ SKEEL Product Manager Ellucian
2019-2021	MICHAEL ‘MIKE’ REILLY Executive Director AACRAO	2012-2015	MARK JONES Senior Product Officer Ellucian
2015-2019	TUAN AN DO Director, Enrollment Management Tech. San Francisco State University	2007-2012	WILLIAM ‘BILL’ HOLLOWSKY General Manager SunGard Higher Education
2005-2015	RICHARD ‘RICK’ SKEEL Director of Academic Records University of Oklahoma	2006-2010	VIJAYAN ‘PETE’ NALLI Director, Architecture & Software Dvpt. Datatel
2003-2005	ROBERT ‘BOB’ MORLEY Associate Registrar University of Southern California	2005-2007	JACK KRAMER Senior Vice President SunGard SCT
1997-2003	JERALD ‘JERRY’ BRACKEN Software Engineer Brigham Young University	2003-2005	DAVID K. MOLDOFF Senior Vice President SCT Corporation
		1997-2003	JACQUELINE ‘JACKIE’ KESSLER Senior Director, Public Policy SCT Corporation

| 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 Bolembach** 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.

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.

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.

DISTINGUISHED SERVICE AWARDS

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 processes of standards) all produced through workgroups and committees that are staffed and run by these volunteers.

Based in 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.



DISTINGUISHED SERVICE AWARDS

- FOUNDER AWARDS -
2022



Recognized for continuous, annual PESC Membership and successful, continual election to the PESC Board of Directors

AACRAO & Ellucian

honored in 2022 at PESC's 25th Anniversary



DISTINGUISHED SERVICE AWARDS

- OUTSTANDING SERVICE AWARDS -
2022

Recognized for long term support, participation, leadership & governance in PESC, honored in 2022 at PESC's 25th Anniversary

Kristi Blabaum

Ascendium Education/NASLA

Doug Falk

National Student Clearinghouse

Doug Holmes

OUAC

David K. Moldoff

AcademyOne

Michael Morris

ACI

Susan McCrackin

College Board, etd.

Rick Skeel

Ellucian

Francisco Valines

Florida International University

AcademyOne
David K. Moldoff

OUAC

Doug Holmes

Florida International University
Francisco Valines

Ellucian

Rick Skeel



DISTINGUISHED SERVICE AWARDS

2021

Charmaine Hack

Ryerson University

Romesh Vadivel

McGill University

2020

Joanne Duklas

Duklas Cornerstone Consulting

Alex Jackl

Bardic Systems

Mike Reilly

AACRAO

Jason Weaver

Parchment

2019

Herman de Leeuw

Granger Declaration Network

Simone Ravaoli

Digitaly

Monterey Sims

University of Phoenix

Cathy van Soest

EducationPartnersBC

2018

Janie Barnett

AACRAO

W. Matt Bernis

University of Southern California

National Student

Clearinghouse



DISTINGUISHED SERVICE AWARDS

2017

ARUCC

Brian Allison
USA Funds

Doug Falk
National Student Clearinghouse

Mei Hung
Stanford University

David K. Moldoff
AcademyOne

Rick Skeel
Ellucian

2016

Thomas Black
Stanford University

Francisco Valines
Florida International University

Leisa Wellsman
Conestoga College

Andy Wood
Oracle

2015

**California Community
Colleges Technology
Center**

Jeffrey Alderson
ConnectEDU



DISTINGUISHED SERVICE AWARDS

2008

Judith Flink
University of Illinois

2007

AACRAO

Jim Farmer
im+m

2006

Ed Hauser
SunGard Higher Education

Keith Riccitelli
Sallie Mae

Tom Stewart
Miami-Dade Community
College

2005

Tim Bornholtz
U.S. Department of Education

Mark Bolembach
SunGard Higher Education

2004

Holly Hyland
U.S. Department of Education

Adele Marsh
AFS

Dallas Martin
NASFAA

Bruce Marton
University of Texas at Austin



DISTINGUISHED SERVICE AWARDS

2014

Brian Allison
USA Funds

Doug Holmes
OUAC

David Webber
CAM

2013

Hans L'Orange
SHEEO

Susan McCrackin
College Board

2012

John Ittelson
California State University
Monterey Bay

2011

AACRAO SPEEDE Committee

Charles Leonhardt
Georgetown University

2010

Kristi Blabaum
Great Lakes Higher Ed/NASLA

Michael Morris
ACT

2009

Steve Biklen
ASA/NASLA

David K. Moldoff
AcademyOne

Clare Smith-Larson
Iowa State University



DISTINGUISHED SERVICE AWARDS

2003

Jerry Bracken
Brigham Young University

2002

Steve Margenau
Great Lakes Higher Ed/NASLA
Great Lakes Higher Ed/NASLA

Adele March
PHEAA

Bruce Marton
University of Texas at Austin

Paul Ness
Sallie Mae

Jeanenne Rothenberger
Purdue University

Michael Sessa
ASA/NASLA

2001

Rebecca Babel
ELM Resources

Ellen Blackmun
NASFAA

Steve Margenau
Great Lakes Higher Ed/NASLA

Karl van Neste
College Board

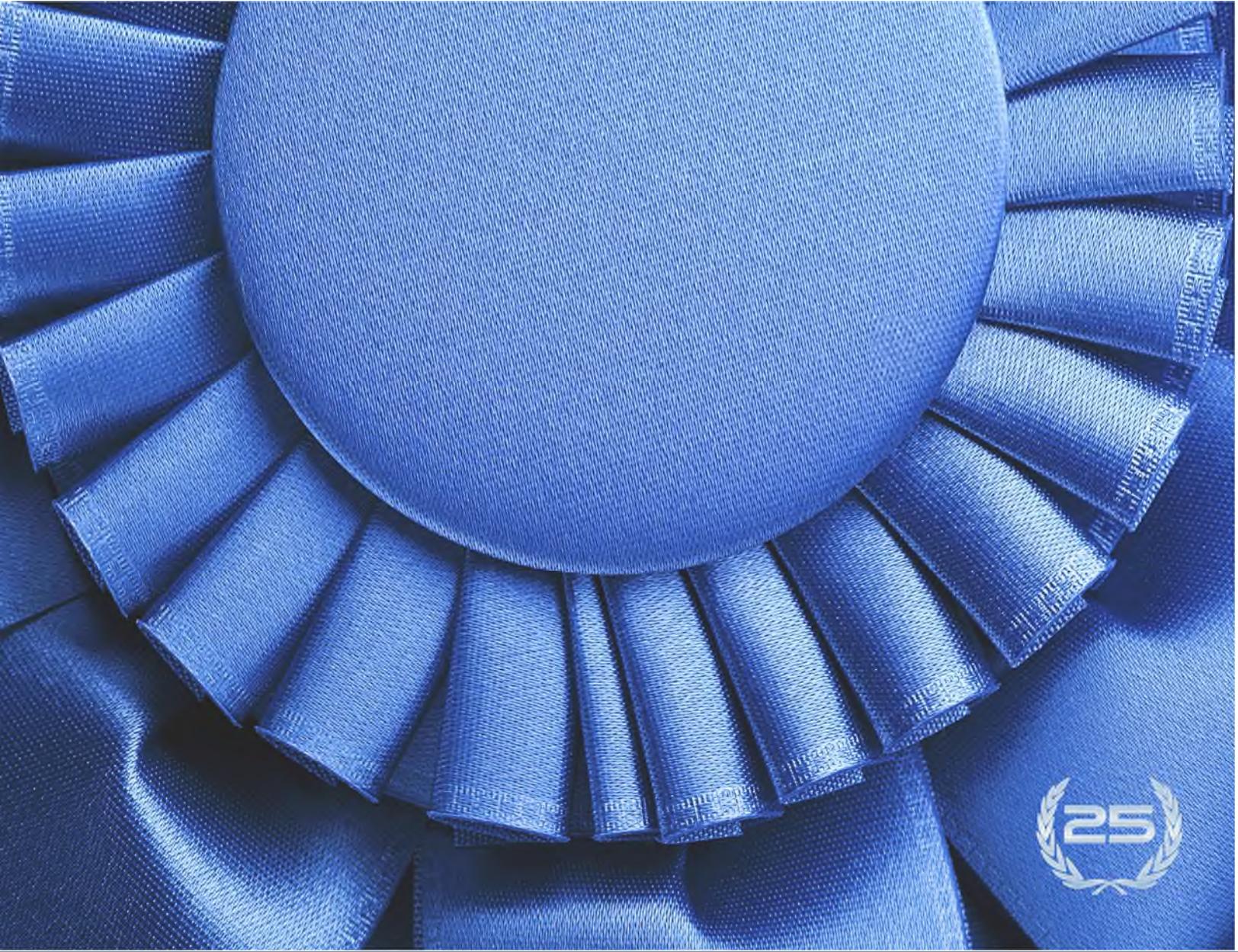
2000

David Leonard
JSA Group

Tim Pavlick
KPMG

Dave Stones
University of Texas at Austin





23RD ANNUAL BEST PRACTICES

POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

– 25TH ANNIVERSARY –

PESC[®]
www.pesc.org

PROMOTING INNOVATION & INGENUITY IN THE APPLICATION & IMPLEMENTATION OF INTEROPERABLE DATA STANDARDS FOR BUSINESS NEEDS



**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.



1st Place Awards



22nd 1st Place Awards

2020-2021

ARUCC

MyCreds™ | MesCertif™
Mobile Learner Role

EMREX Executive Committee

EMREX
Network Technology Role

Groningen Declaration Network

GDN T,R,U,S,T. Hub
Administrative Trust Role



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 & recognizes as 'Best Practice' all 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

2019-2020

HR Open Standards

Recruiting/Candidate Specification

20th 1st Place Award

2018-2019

Council on Admission and Transfer for Nova Scotia

MyTranscripts | Nova Scotia's Electronic
Transcript & Data Exchange System

19th 1st Place Award

2017-2018

Indiana Commission for Higher Education

One State, Two Initiatives; Indiana's Embrace
of e-Transcripts & Credential Engine

18th 1st Place Award

2016-2017

IQ4 & National Student Clearinghouse

Extending the Capacity of Higher Education to
Scale the Output of Verified Workforce-Ready
Graduates

17th 1st Place Award

2015-2016

University of Tennessee System & AcademyOne

Automating Reverse Transfer for the State of
Tennessee



16th 1st Place Award 2014 2015

Elon University & Parchment
Elon Experiences Transcript and Integration to
the Academic Transcript

15th 1st Place Award 2013 2014

University of Phoenix
eTAPS Electronic Transcript Acquisition Process

14th 1st Place Award 2012 2013

OCAS - Ontario College Application Service
Implementation of High School Transcript

13th 1st Place Award 2011 2012

NCES - National Center for Education Statistics
U.S. Department of Education's Common
Education Data Standards (CEDS)

12th 1st Place Award 2010 2011

South Carolina & AcademyOne
SC-TRAC Transfer & Articulation Center

**7th 1st Place Award** 2005 2006

National Council of Higher Education Loan Programs
Common Record; CommonLine (CRC) Beta
Test

6th 1st Place Award 2004 2005

**FSA - Office of Federal Student Aid, U.S. Department
of Education**
XML Registry & Repository for Education

5th 1st Place Award 2003 2004

Access 4 Learning (A4L) Community
SIFA Specification

4th 1st Place Awards 2002 2003

ELM Resources & NCHelp
ELMnet & Meteor

3rd 1st Place Award 2001 2002

National Council of Higher Education Loan Programs
Common Account Maintenance (CAM)

**11th 1st Place Award** 2009 2010

College Foundation of North Carolina
Electronic High School Transcript System

10th 1st Place Awards 2008 2009

**California Community Colleges & XAP and
University System of Georgia Board of Regents**
California eTranscript and
Implementation of High School and
Postsecondary XML Transcripts

9th 1st Place Award 2007 2008

**Sinclair Community College & Wainwright State
University**
Exchange of Electronic Transcripts via Ohio
Board of Regents Articulation & Transfer
Clearinghouse

8th 1st Place Award 2006 2007

DQC - Data Quality Campaign
Longitudinal Education Data Systems: Using
Data to Improve Student Achievements

**2nd 1st Place Award** 2000 2001

University of Northern Iowa
EDI Bridge

1st 1st Place Award 1999 2000

OUAC - Ontario Universities' Application Centre
Model of Electronic Standardization Initiative;
Ontario Universities' Electronic Transcript
Exchange (OUETS) System





BOARD OF DIRECTORS

POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

— 25TH ANNIVERSARY —

PESC[®]
www.pesc.org



PESC BOARD OF DIRECTORS

PESC BOARD OF DIRECTORS

POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

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.

PESC[®]

PESC BOARD OF DIRECTORS

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



VICE PRESIDENT & CIO, NATIONAL STUDENT CLEARINGHOUSE

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

W. BRYANT FAUST



ASSOCIATE DEAN & REGISTRAR, JOHNS HOPKINS UNIVERSITY, SCHOOL OF MEDICINE, REPRESENTING AACRAO

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 Kualii, 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 Kualii 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

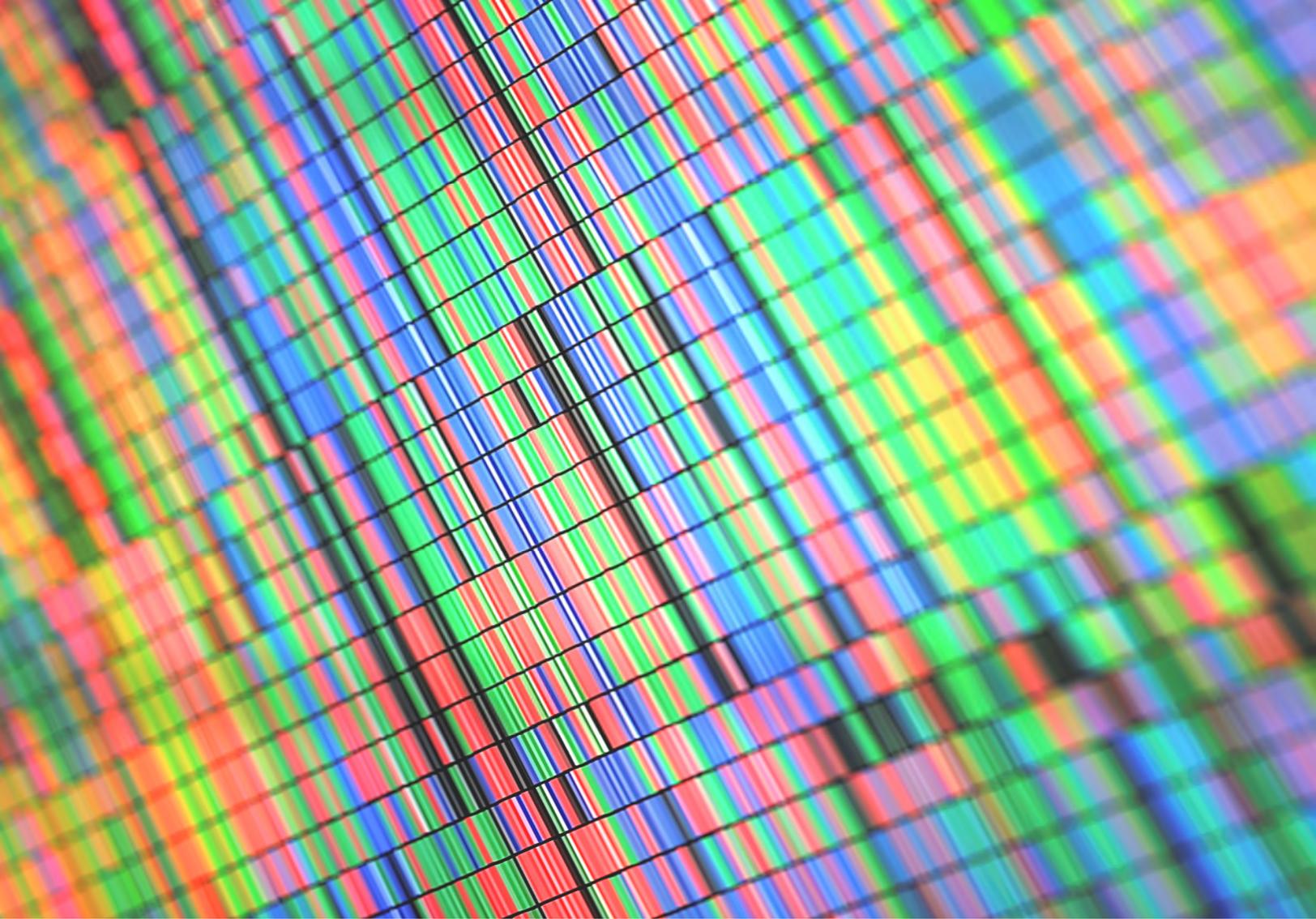
AACRAO	EducationPlannerBc	Oracle
AAMC	Ellucian	OUAC
AcademyOne	ELM Resources	Paradigm
AICE	Federation of State Medical Boards	Parchment
ApplyAlberta	Florida International University	U.S. Chamber of Commerce Foundation
A4L	GDN	University of Arizona
Bardic Systems	HR Open Standards	University of Chicago
California Community College System	Humber Institute	University of Colorado Boulder
California State University System	Indiana Commission for Higher Education	University of Denver
Camosun College	Indiana State University	University of Lethbridge
Carnegie Mellon University	iQ4	University of Louisiana at Lafayette
Common Application	Jenzabar	University of Melbourne
Council on Admission & Transfer for Nova Scotia	Jim Kelly Technologies	University of Michigan
Credential Engine	Liaison International	University of Montreal
Digitary	McGill University	University of Phoenix
Duklas Cornerstone Consulting	NASLA	University of Southern California
Educational Credential Evaluators	National Student Clearinghouse	University of Virginia
	OCAS	Western Governors University





>> *Coming Events*

ARUCC 2022 Conference	June 19-22, 2022	Niagara Falls
PESC Annual Board Retreat	June 23 & 30, 2022	Virtual
AACRAO Tech & Transfer Conference	July 12-14, 2022	Virtual
US National Forum on Education Statistics	July 12-14, 2022	Virtual
GDN 11th Annual Meeting	October 12-14, 2022	Groningen
October 2022 Data Summit	October 26-28, 2022	Vancouver
AACRAO 108th Annual Meeting	March 26-29, 2023	Aurora



POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

GENDER IDENTITY

IN DATA SYSTEMS & LIFELONG LEARNING



PESC
www.pesc.org





Welcome!

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.

GENDER IDENTITY, GENDER EXPRESSION & SEXUAL ORIENTATION IN DATA SYSTEMS & LIFELONG LEARNING TASK FORCE



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>> **FEATURED PANEL** <<

APRIL 2022 DATA SUMMIT | WASHINGTON, D.C.

OVERVIEW & INTRODUCTION
THE ABC'S OF LGBTQ+
TERMINOLOGY

MONDAY APRIL 25, 2022

10.30AM – 11.30AM

**Lucas Johansen**

The DC Center Speakers Bureau

Moderator: Michael Sessa, President & CEO, PESC

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.

>> **FEATURED PANEL** <<

APRIL 2022 DATA SUMMIT | WASHINGTON, D.C.

VIEWS FROM THE CAMPUS
FROM MY PERSPECTIVE

MONDAY APRIL 25, 2022

2.00PM – 3.00PM



Dennis Becker
University Registrar
University of Denver



W. Bryant Faust
Associate Dean & Registrar
Johns Hopkins University
School of Medicine



Kathleen Massey
Associate Vice President
(Students)
Student Affairs
University of Lethbridge

Moderator: Michael Sessa, President & CEO, PESC

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.

>> **FEATURED PANEL** <<

APRIL 2022 DATA SUMMIT | WASHINGTON, D.C.

CASE STUDIES IN SYSTEMS INTEGRATION
**ELLUCIAN IMPLEMENTATION
OF 'PREFERRED NAME'**
**FLORIDA INTERNATIONAL UNIVERSITY
STUDENT AID LIFECYCLE**

TUESDAY APRIL 26, 2022

10.30AM – 11.30AM

**Rick Skeel**Product Manager
Ellucian**Francisco Valines**Director of Financial Aid
Florida International University

Moderator: Michael Sessa, President & CEO, PESCS

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** <<
APRIL 2022 DATA SUMMIT | WASHINGTON, D.C.

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 SCHEDULE << BI-MONTHLY MEETINGS

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...





>> **FEATURED PANEL** <<
OCTOBER 2022 DATA SUMMIT | VANCOUVER

VIEWS
TBD
WEDNESDAY OCTOBER 25, 2022
TIME



Speaker 1 Speaker 2 Speaker 3 Speaker 4

Moderator: Michael Sessa, President & CEO, PESCC

TBD



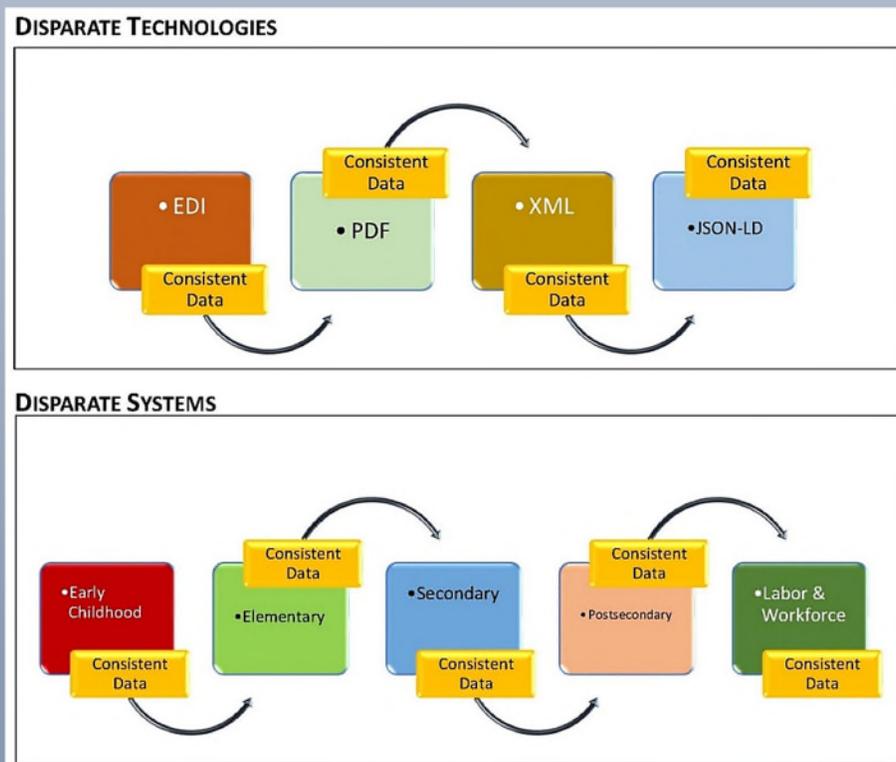
QUESTIONS & ANSWERS

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.



Data Managers must ensure accurate and secure transfer of data across disparate technologies and disparate systems.

Who can participate in the Task Force?

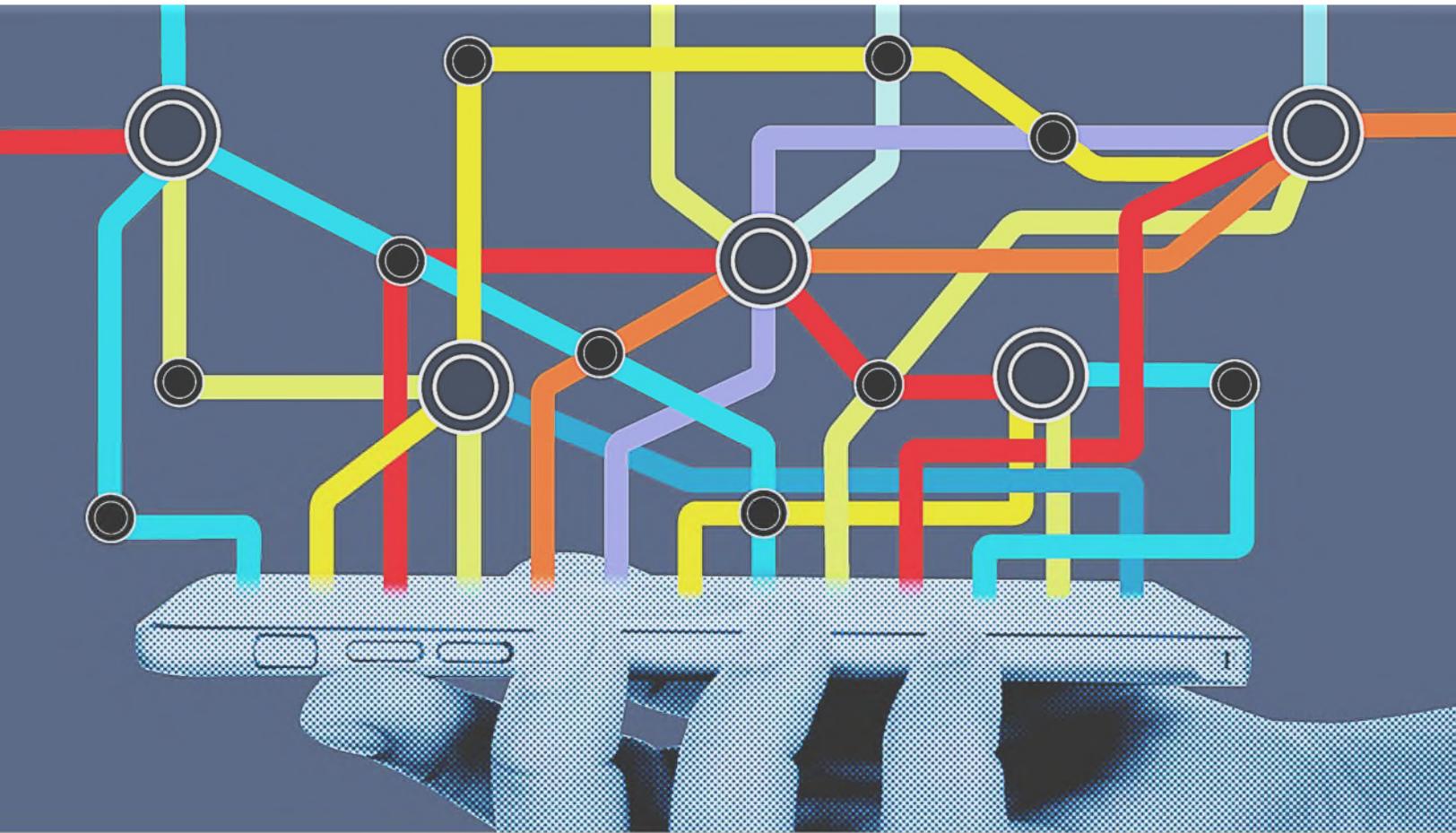
Participation in the Task Force is free and open to PESC Members, the education community, and PESC Partner and Affiliate organizations.

What topics are within the scope of the Task Force?

The topics of gender identity, gender expression, and sex orientation are broad, multi-levelled 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

GENDER IDENTITY

IN DATA SYSTEMS & LIFELONG LEARNING

PESC
www.pesc.org