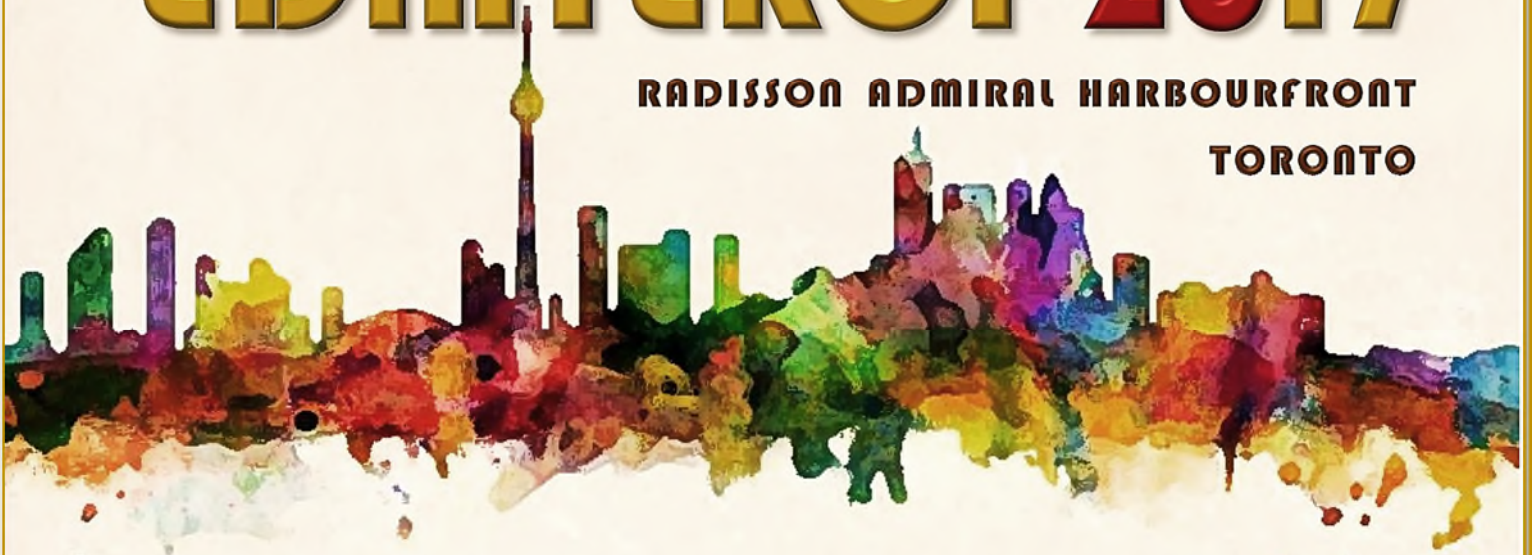# EDiNTEROP 2017

RADISSON ADMIRAL HARBOURFRONT
TORONTO

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

Program

ADVANCING STUDENT MOBILITY IN A DIGITAL WORLD

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A N N U A L   D I A M O N D   S P O N S O R S

Welcome

WELCOME TO THE FALL 2017 DATA SUMMIT!

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

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

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

PESC 20TH YEAR ANNIVERSARY!

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

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

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

Michael D. Sessa

President & CEO

Canada & PESC

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

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

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

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

The Canadian Influence and History within PESC

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

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

Program At-A-Glance

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

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

CANADIAN PESC USER GROUP

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

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Program

TUESDAY OCTOBER 24, 2017

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

WEDNESDAY OCTOBER 25, 2017

7.30am – 5.00pm   REGISTRATION
ATRIUM

7.30am – 9.00am   CONTINENTAL BREAKFAST
ATRIUM

GENERAL SESSIONS (ALL DAY)
ATRIUM

7.30am – 8.15am   **FIRST TIME ATTENDEES OVERVIEW**

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

8.30am – 9.00am   **WELCOME & OPENING REMARKS**

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

9.00am – 9.30am   **IMPACT OF STUDENT MOBILITY ACROSS CANADA**

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

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

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

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

9.30am – 10:00am	**GDN: ESTABLISHING DIGITAL DATA DEPOSITORIES**

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

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

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

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

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

10.00am – 10:30am	**Q & A PANEL**

10.30am – 11.00am	BREAK
	2ND FLOOR FOYER

11.00am – Noon	**MCGILL UNIVERSITY/NATIONAL STUDENT CLEARINGHOUSE and CHESICC**

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

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

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

Noon- 1.30pm	LUNCH
	2ND FLOOR FOYER

1.30pm – 3.00pm	**BLOCKCHAIN INTRODUCTION & ACADEMIC CREDENTIALING**

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

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

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

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

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

3.00pm – 3.30pm	BREAK
	2ND FLOOR FOYER

3.30pm – 5.30pm	**DIPLOMA SUPPLEMENT, EDEXCHANGE & PESC GEO CODE**

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

DIPLOMA SUPPLEMENT RECENTLY THE EUROPEAN UNION (EU) RELEASED ITS FINAL REPORT ON THE *DIGITALISATION OF THE DIPLOMA SUPPLEMENT*. THE DIPLOMA SUPPLEMENT, DEFINED BY THE EU, *IS A DOCUMENT ACCOMPANYING A HIGHER EDUCATION DIPLOMA, PROVIDING A STANDARDISED DESCRIPTION OF THE NATURE, LEVEL, CONTEXT, CONTENT AND STATUS OF THE STUDIES COMPLETED BY ITS HOLDER.* IT IS PRODUCED BY THE HIGHER EDUCATION INSTITUTIONS ACCORDING TO STANDARDS AGREED BY THE EUROPEAN COMMISSION, THE COUNCIL OF EUROPE AND UNESCO. WITH THE NEED FOR A NEW DIGITAL DOCUMENT, THIS SESSION WILL DISCUSS THE IMPACT OF THE DIPLOMA SUPPLEMENT, ITS TIMELINE, AND WHAT ROLE PESC MIGHT PLAY IN STANDARDS DEVELOPMENT.

EDEXCHANGE: PESC'S NEUTRAL DIGITAL LOOK-UP AND DATA TRANSPORT SERVICE EDEXCHANGE IS A DATA EXCHANGE SERVICE OFFERED AND OPERATED BY PESC AND DIRECTLY MANAGED BY PESC MEMBERS. THE FOUNDATION OF THE SERVICE IS A DIRECTORY 'LOOK UP' SERVER THAT LISTS INSTITUTIONS, SERVICE PROVIDERS AND OTHERS THAT ARE ABLE TO EXCHANGE DATA ELECTRONICALLY. THE SERVER ITEMIZES THE TECHNICAL CAPACITY OF EACH, WHICH DOCUMENT TYPES ARE SUPPORTED ELECTRONICALLY AND ADDITIONAL IDENTIFIER DATA. TO EXCHANGE DATA, USERS THEN CONNECT DIRECTLY WITH THE RESPECTIVE RECIPIENT. ACHIEVED THROUGH AN OPEN WEB SERVICES ARCHITECCTURE AND ASSOCIATED STANDARDS, EDEXCHANGE IS DESIGNED AS A PEER-TO-PEER NETWORK PROVIDING A SECURE, RELIABLE AND DIRECT CONNECTION BETWEEN USERS AVOIDING FILE-BASED TECHNOLOGIES. THIS SESSION WILL INTRODUCE ATTENDEES TO EDEXCHANGE, REVIEW CURRENT EDEXCHANGE PILOTS, AND DISCUSS NEXT STEPS.

PESC GEO CODE: A TRUSTED DIGITAL CODE FOR INSTITUTIONS AND EDUCATION ORGANIZATIONS GEO CODE IS A 'LOOK-UP' SERVICE OFFERED AND OPERATED BY PESC AND DIRECTLY MANAGED BY PESC MEMBERS. THE FOUNDATION OF THE SERVICE IS A DIRECTORY 'LOOK UP' SERVER THAT LISTS ACTIVE AND INACTIVE INSTITUTIONS, INCLUDING HISTORICAL DATA PLUS ADDITIONAL DEMOGRAPHIC AND IDENTIFIER DATA. COUNTRIES CURRENTLY LISTED: ANTARCTICA, ARGENTINA, AUSTRALIA, CANADA, BRAZIL, CHINA, FRANCE, INDIA, NEW ZEALAND, PEOPLES' REPUBLIC OF CHINA, PROVINCE OF TAIWAN, POLAND, UNITED KINGDOM AND THE UNITED STATES OF AMERICA. THIS SESSION WILL DISCUSS THE VALUE OF A TRUSTED CODE, THE CURRENT USC PILOT, NEXT STEPS IN THE DEVELOPMENT OF SUPPORTING TECHNOLOGY, AND HOW TO PARTICPATE.

Moderator
- **SUSAN STEIN**, EXECUTIVE DIRECTOR, ALBERTA POST-SECONDARY APPLICATION SYSTEM

6.00pm – 7.00pm	**ANNUAL FALL RECEPTION – PESC 20th YEAR ANNIVERSARY**
	VIEW ROOM

FALL 2017 DATA SUMMIT

THURSDAY OCTOBER 26, 2017

7.30am – 5.00pm	REGISTRATION **ATRIUM**
7.30am – 9.00am	CONTINENTAL BREAKFAST **ATRIUM**
8.30am – 10:30am	**WHAT'S HAPPENING ACROSS CANADA**

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

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

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

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

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

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

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

11.00am	**AWARDS**

PESC 20TH YEAR ANNIVERSARY DISTINGUISHED SERVICE AWARD

ASSOCIATION OF REGISTRARS OF THE COLLEGES AND UYNIVERSITIES OF CANADA

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

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

11.00am – Noon	**INTERNATIONAL PANEL**

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

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

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

Noon- 1.30pm	LUNCH

2ND FLOOR FOYER

VIEW FROM DOWN UNDER: AUSTRALIA/NEW ZEALAND

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

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

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

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

FALL 2017 DATA SUMMIT

Summit Committee

LEISA WELLSMAN *Co-Chair*
ASSOCIATE REGISTRAR | RECORDS, REGISTRATION &
ENROLMENT REPORTING | CONESTOGA COLLEGE
(FORMERLY MANAGER, APPLICANT SERVICES, OUAC)

CATHY VAN SOEST *Co-Chair*
MANAGER | EDUCATIONPLANNERBC TRANSCRIPT SERVICES

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

JOANNE DUKLAS
PRESIDENT | DUKLAS CORNERSTONE CONSULTING

RUTH BLADES
OPERATIONS MANAGER | NOVA SCOTIA COUNCIL ON
ADMISSION & TRANSFER

SUSAN STEIN
EXECUTIVE DIRECTOR | ALBERTA POST-SECONDARY
APPLICATION SYSTEM

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

JENNIFER KIM
DIRECTOR OF MEMBERSHIP SERVICES | PESC

MICHAEL SESSA
PRESIDENT & CEO | PESC

Board of Directors

DOUG FALK *Chair*
VP & CIO | NATIONAL STUDENT CLEARINGHOUSE

J. JAMES WAGER *Vice Chair*
EDUCATION STRATEGIST & CONSULTANT | CREDENTIALS
SOLUTIONS

DAVID MOLDOFF *Treasurer*
CEO & FOUNDER | ACADEMYONE

BRIAN ALLISON *Secretary*
VP ADMINISTRATION | STUDENT CONNECTIONS

RAJEEV ARORA
SR VP PRODUCTS | PARCHMENT

W. MATTHEW BEMIS
ASSOCIATE REGISTRAR | UNIVERSITY OF SOUTHERN CALIFORNIA

KRISTI BLABAUM
SYSTEMS INTEGRATION ANALYST | GREAT LAKES
REPRESENTING NASLA

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

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

JAMES KELLY
SENIOR DIRECTOR OF TECHNOLOGY | ECE

MICHAEL SESSA
PRESIDENT & CEO | PESC

RICK SKEEL
DIRECTOR OF PRODUCT MANAGEMENT | ELLUCIAN

FRANCISCO VALINES
DIRECTOR OF FINANCIAL AID | FLORIDA INTERNATIONAL
UNIVERSITY

EDEXCHANGE

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

ACHIEVED THROUGH AN OPEN WEB SERVICES ARCHITECTURE & ASSOCIATED STANDARDS.

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

Program

BREAKOUT SESSIONS

THURSDAY OCTOBER 26, 2017

1.30pm – 3.00pm	**BREAKOUTS**

- **EDEXCHANGE OVERVIEW – ATRIUM**
- **ACADEMIC CREDENTIALING & EXPERIENTIAL LEARNING – RAIN DANCE**
- **JSON TASK FORCE – RAINBOW**

3.00pm – 3.30pm	BREAK
	2ND FLOOR FOYER

3.30pm – 5.30pm	**BREAKOUTS**

- **EDEXCHANGE USER GROUP – ATRIUM**
- **CANADIAN PESC USER GROUP – RAIN DANCE**
- **GLOBAL EDUCATION ORGANIZATION CODE WORKGROUP – RAINBOW**

5.30pm – 6.00pm	**PESC MEMBER MEETING**
	ATRIUM

FRIDAY OCTOBER 27, 2017

7.30am – 9.00am	CONTINENTAL BREAKFAST
	ATRIUM

8.30am – 10:30am	**BREAKOUTS**

- **DIPLOMA SUPPLEMENT DEVELOPMENT – ATRIUM**
- **ARUCC GRONINGEN PROJECT – RAIN DANCE**
- **AACRAO SPEEDE COMMITTEE – RAINBOW**

10.30am – 11.00am	BREAK
	2ND FLOOR FOYER

11.00am – Noon	**BREAKOUTS**

- **GLOBAL EDUCATION ORGANIZATION CODE COMMUNITY CALL – ATRIUM**
- **STANDARDS DEVELOPMENT FORUM – RAIN DANCE**
- **AACRAO SPEEDE COMMITTEE – RAINBOW**

Noon	**ADJOURN**

Break Out Sessions

Academic Credentialing & Experiential Learning

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

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

Canadian PESC User Group

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

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

EdExchange User Group

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

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

Global Education Organization Code Workgroup

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

Rick Skeel, Ellucian

Seal of Approval Board

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

Monterey Sims, University of Phoenix

Standards Development Forum

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

Susan McCrackin, College Board

Change Control Board

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

Kristi Blabaum, NASLA

Education Record User Group

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

Matt Bemis, USC
Jason Weaver, Parchment

Technical Advisory Board

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

Michael Morris, ACT

FALL 2017 DATA SUMMIT

Mission & Vision

Established in 1997 at the National Center for Higher Education, PESC is an international 501c3 non-profit, community-based, umbrella association headquartered in Washington DC of:

- Data, Software & Technology Service Providers
- Schools, Districts, Colleges & Universities
- College, University & State/Province Systems
- Local, State/Province & Federal Government Offices
- Professional, Commercial & Non-Profit Organizations
- Non-Profit Associations & Foundations

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

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

Goals of the Mission
Goals of the PESC Mission Include: promoting student-centric, hub and spoke, federated identity, and similarly proven models of interoperability; fostering open, transparent collaboration across global education sectors; improving institutional performance and data quality; simplifying access and reducing cost; and enabling sustainable best practices and innovative solutions that streamline emerging technologies and disparate information systems.

Groups & Committees

ACADEMIC CREDENTIALING & EXPERIENTIAL LEARNING TASK FORCE

CANADIAN PESC USER GROUP

CHANGE CONTROL BOARD

EDEXCHANGE USER GROUP

EDUCATION RECORD USER GROUP

GLOBAL EDUCATION ORGANIZATION CODE DIRECTORY WORKGROUP

SEAL OF APPROVAL BOARD

STANDARDS DEVELOPMENT FORUM FOR EDUCATION

TECHNICAL ADVISORY BOARD

GEO CODE

A FREE, OPEN AND STANDARDIZED

ONLINE DIRECTORY OF

INSTITUTION CODES & IDENTIFIERS

FOR USE BY

EDUCATION INSTITUTIONS &

STAKEHOLDERS WORLDWIDE

PESC Approved Standards

PESC APPROVED STANDARDS

are available openly and free of charge, for the PK20 education community, a cornerstone principle of PESC, its Mission and Membership.

PESC APPROVED STANDARDS

are workgroup developed, approved, ratified, and maintained through a transparent, open, rigorous community-based collaborative process, including a formal public notification when development initiates, and a formal public comment period all governed by PESC Members.

PESC APPROVED STANDARDS

are used, implemented, adopted and integrated in applications, products and services; support a business process or transaction, and; can be implemented or used one independently from another.

PESC TECHNOLOGY

PESC Technology is community-sourced and driven by PESC serving as an incubator to pilot and launch data standards using an open, transparent and collaborative process; and serving as a data standards-development and data standards-setting body governing resource mapping and maintenance of education eco-system schemas, taxonomies and shared code sets in various technologies (EDI, XML, PDF, JSON, etc.).

ACADEMIC COLLEGE TRANSCRIPT

ACADEMIC ePORTFOLIO

ACADEMIC HIGH SCHOOL TRANSCRIPT

ACADEMIC RECORD

ADMISSIONS APPLICATION

COMMON CREDENTIAL

CORE MAIN

DATA TRANSPORT

EDI

EDUCATION COURSE INVENTORY

EDUCATION TEST SCORE REPORTING

FUNCTIONAL ACKNOWLEDGMENT

PDF ATTACHMENT

REQUEST - RESPONSE

STUDENT AID

Policies & Logistics

REGISTRATION

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

SUMMIT OVERVIEW

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

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

GENERAL SESSION PRESENTATIONS

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

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

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

BREAKOUT SESSIONS

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

CANCELLATION POLICY

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

About PESC Partners

AACRAO
American Association of
Collegiate Registrars &
Admissions Officers

www.aacrao.org

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

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

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

ARUCC
Association of Registrars of
The Universities and Colleges
Of Canada

www.arucc.ca

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

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

GDN
Groningen
Declaration
Network

www.groningendeclaration.org

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

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

FALL 2017 DATA SUMMIT

About PESC Partners

HR Open Standards

www.hropenstandards.org

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

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

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

EMREX

www.emrex.eu

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

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

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

ERASMUS WITHOUT PAPER

www.erasmuswithoutpaper.eu

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

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

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

PESC Members

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

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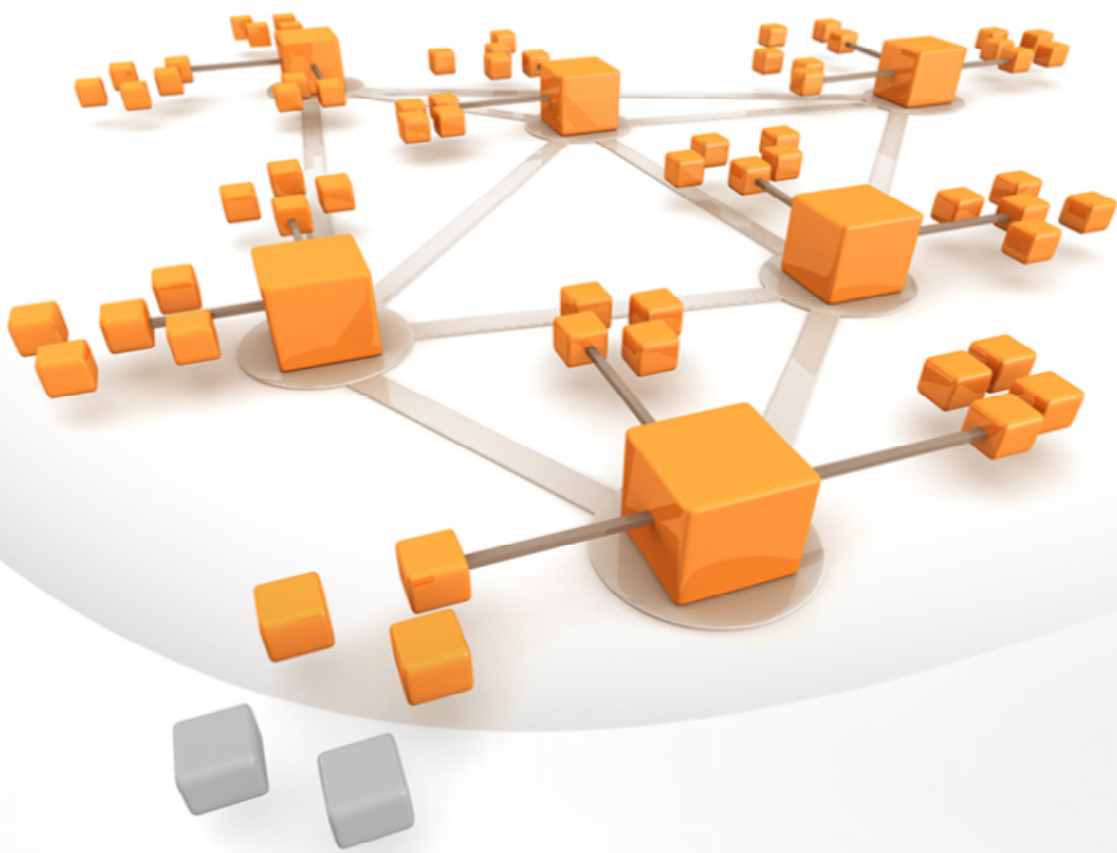
INTEROPERABILITY

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

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

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

PESC & Academic Credentialing

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

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

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

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

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

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

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

Distinguished Service Awards

DISTINGUISHED SERVICE AWARDS

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

20TH YEAR ANNIVERSARY DISTINGUISHED SERVICE AWARD – ARUCC

20TH YEAR ANNIVERSARY DISTINGUISHED ACHIEVEMENT AWARD – MEI HUNG

2016
Thomas Black
Leisa Wellsman
2015
CA Community College Technology Center
Jeffrey Alderson
2014
Brian Allison
Doug Holmes
David Webber
2013
Hans L'Orange
Susan McCrackin
2012
John Ittelson,Ph.D.
2011
AACRAO SPEEDE Committee
Charles Leonhardt
2010
Kristi Blabaum
Michael Morris
2009
Steve Biklen
Dave Moldoff
Clare Smith-Larson
2008
Judith Flink
2007
AACRAO
Jim Farmer

2006
Ed Hauser
Keith Riccitelli
Tom Stewart
2005
Tim Bornholtz
Mark Bolembach
2004
Holly Hyland
Adele Marsh
Dallas Martin
Bruce Marton
2003
Jerry Bracken
2002
Steve Margenau
Adele Marsh
Bruce Marton
Paul Ness
Jeanenne Rothenberger
Michael Sessa
2001
Rebecca Babel
Ellen Blackmun
Steve Margenau
Karl Van Neste
2000
David Leonard
Tim Pavlick
Dave Stones

Menus

Lunch

Wednesday October 25, 2017
Noon

Gathered Greens and Seedlings with Lemon Thyme Vinaigrette

New Potato Salad with Smoked Salmon and Dill

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

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

Butter Chicken with Basmati Rice and Tomato Cucumber Yogurt

Mushroom and Leek Ravioli Tossed in Arugula Pesto with Roasted Tomatoes

Fresh Assorted Sliced Fruit

Mini Pastries

Starbucks Coffee and TAZAO Teas

Reception

Wednesday October 25, 2017
6pm

PESC 20th Year Anniversary

Pecking Duck in Moo Shoo Crepe

Sweet Potato Lentil Croquet

Shrimp Spring roll

Fried chicken and waffles

Beef sliders

Complimentary Beer & Wine Bar

Lunch

Thursday October 26, 2017
Noon

Couscous, Tomato and Baby Shrimp with Basil Olive Oil Dressing

Gathered Greens and Seedlings with Lemon Thyme Vinaigrette

Marinated Seafood Salad

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

BBQ Chicken, Warm Tortillas and Salsa Fresca

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

Fresh Assorted Sliced Fruit

Mini Pastries

Starbucks Coffee and TAZAO Teas

Best Practices Competition

THE ANNUAL BEST PRACTICES COMPETITION IS HELD BY PESC
TO HIGHLIGHT AND PROMOTE INNOVATION AND INGENUITY
IN THE APPLICATION & IMPLEMENTATION OF INTEROPERABLE DATA STANDARDS FOR BUSINESS NEEDS.

First held in 1999, the Competition is open to institutions, associations, organizations, government agencies and departments, districts, consortia, non-profit and commercial service providers and other education stakeholders that have collaborated to design and/or adopt an electronic standardization initiative via a specific implementation, and/or other medium such as, but not limited to, published articles and white papers.

The Best Practices Competition is open for submissions that can include descriptions of the scope of a project, participants, type of standards employed, relevant dates/project milestones, copies of articles (if an article submission), outline of mission/objectives and any related statistics (# of transactions, cost savings, etc.).

SUBMISSIONS FOR 2017's 19TH BEST PRACTICES COMPETITION ARE NOW BEING ACCEPTED THROUGH MARCH 31, 2018!

PAST WINNERS

2016
iQ4 & National Student Clearinghouse
2015
University of Tennessee System & AcademyOne
2014
Elon University & Parchment
2013
University of Phoenix
2012
OCAS
2011
U.S. NCES
2010
South Carolina & AcademyOne
2009
College Found of North Carolina
2008
CA Community College System

2007
Sinclair Community College & Wainwright State
2006
DQC
2005
NCHELP
2004
U.S. FSA
2003
SIFA
2002
ELM Resources & NCHELP
2001
NCHELP
2000
University of Northern Iowa
1999
OUAC

Save the Date!

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

SPRING 2018 DATA SUMMIT

BEST PRACTICES IN EDUCATION DATA SYSTEMS

19TH ANNUAL BEST PRACTICES!

PESC®

PESC PESC PESC PESC PESC PESC PESC PESC PESC PESC PESC PESC PESC

About Our Speakers

KATHLEEN MASSEY

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

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

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

HERMAN DE LEEUW

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

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

DR. ROB FLEMING

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

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

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

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

FALL 2017 DATA SUMMIT

About Our Speakers

DR. ANDREW TRNACEK

Dr. Andrew Trnacek was appointed Chief Executive Officer of Higher Ed Services in July 2016. Previously, a senior partner at Grant Thornton with account responsibility for the public sector and the national lead for education, Dr Trnacek brings to the role more than 14 years' experience and a solid track record of successfully leading high profile engagements, building markets and expanding client bases.

He has in-depth experience in finance, strategy, marketing and business improvement. Dr Trnacek's skills cover funding model design, education systems and program review, market and segmentation analysis, budget builds and financial modelling, in addition to business process improve-ment and stakeholder management.

ANDY DOWLING

Andy Dowling is the Founder and Chief Executive Officer of Digitary. Andy has over seventeen years of experience as a technology leader and has worked for a number of leading multinational companies across a variety of business sectors.

Andy holds B.Sc. and M.Sc. degrees in Computer Science from the National University of Ireland, Maynooth, and is a former University lecturer in Computer Science.

Digitary is used by the world's leading educational institutions to issue transcripts, certificates, and other official academic documents to their students and graduates online. In doing so, they streamline operations, reduce costs, & provide a vastly improved student experience.

CHRIS JAGERS

Chris Jagers is the Chief Executive Officer of Learning Machine, the leader in the development of open standards and commercial solutions that use the blockchain for securing records in a format that is recipient owned, tamper proof, and independently verifiable.

Prior to Learning Machine, Mr. Jagers was the CEO/Founder of SlideRoom, a breakthrough product for university admissions and portfolios.

About Our Speakers

ROMESH VADIVEL

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

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

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

RICK TORRES

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

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

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

W. MATT BEMIS

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

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

About Our Speakers

LIA QUICKERT

Lia Quickert is currently the interim Executive Director, as well as the Strategic Communications and Public Affairs Director at ONCAT — The Ontario Council on Articulation and Transfer.

Prior to ONCAT, Lia was responsible for the communications for the President and Senior Executive of Scotiabank and the President of York University.

Previously, she served the Government of Canada in a number of progressively senior positions, including as communications specialist responsible for developing the communications materials for two Prime Ministers, and as press secretary to the Deputy Prime Minister and Minister of Public Safety and Emergency Preparedness.

PHILIP BELANGER

Originally from Ottawa, ON, **Philip Bélanger** has served the government of New Brunswick, Department of Post-Secondary Education, Training and Labour (PETL) since 1979, with a strong background in project development, management and consulting.

In 2006 Philip joined the Council of Atlantic Ministers of Education & Training (CAMET) to development a strategy for international credentials and competency assessment. With his deep involvement in credentialing, Philip was then approached by PETL to develop a provincial long-term operational structure to facilitate credit transfer and prior learning assessment and recognition (PLAR) in NB, which has led to the establishment of the Council on Articulations and Transfer of New Brunswick (CATNB).

Officially founded in 2010, Philip was appointed Executive Director of CATNB - Council on Articulations and Transfer of New Brunswick.

RAJEEV ARORA

Rajeev Arora has 15 years of sales, marketing, and product development experience in the software & Internet industries. As Senior Vice President of Product at Parchment, Rajeev is responsible for all of product & corporate marketing.

Prior to joining Parchment, Rajeev was VP of Marketing and Strategy at Elluminate, now acquired by Blackboard, where he continued as VP of Marketing and Strategy for Blackboard Collaborate. Prior to Elluminate, Rajeev was Senior VP of Products & Strategic Marketing at Opnix & VP of Product Marketing at Viasoft (now ASG Software).

In the past, Rajeev has served on the Board of Arizona Software Association. Rajeev holds a B.S. in Electrical Engineering from Rensselaer Polytechnic Institute and a M.S. in Engineering Management from Santa Clara University.

About Our Speakers

JAMES KELLY

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

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

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

HEIDI EMAMI

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

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

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

MICHAEL RINGUETTE

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

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

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

PESC Events & Conferences

**US NATIONAL FORUM FOR
EDUCATION STATISTICS CONFERENCE**
JULY 30 - AUGUST 1, 2017
WASHINGTON DC
MAYFLOWER

US NCES STATS-DC CONFERENCE
AUGUST 1 - 3, 2017
WASHINGTON DC
MAYFLOWER

ADL/NDIA iFEST CONFERENCE
JULY 31 - AUGUST 2, 2017
ALEXANDRIA
HILTON MARK

**SHEEO HIGHER EDUCATION
POLICY CONFERENCE**
AUGUST 8 - 11, 2017
MINNEAPOLIS
MARRIOTT CITY CENTER

**BLOCKCHAIN IN EDUCATION
2017 CONFERENCE**
SEPTEMBER 5, 2017
GRONINGEN
UNIVERSITY OF GRONGEN

**ERASMUS WITHOUT PAPER
FINAL CONFERENCE**
SEPTEMBER 25 - 26, 2017
BRUSSELS
UNICA

EMREX UNLEASHED
NOVEMBER 30, 2017
BOLOGNA
UNIVERSITY OF BOLOGNA

AACRAO ANNUAL CONFERENCE
APRIL 25 - 28, 2018
ORLANDO
WORLD CENTER MARRIOTT

GRONINGEN DECLARATION NETWORK
ANNUAL CONFERENCE
APRIL 18 - 20, 2018
PARIS

SPRING 2018 DATA SUMMIT
MAY 2-4, 2018
WASHINGTON DC

PESC ANNUAL BOARD RETREAT
JUNE 27 - 29, 2018
SEATTLE

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FALL 2017 DATA SUMMIT

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TURN ON

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XML

Automation

Data

Cloud

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Standards
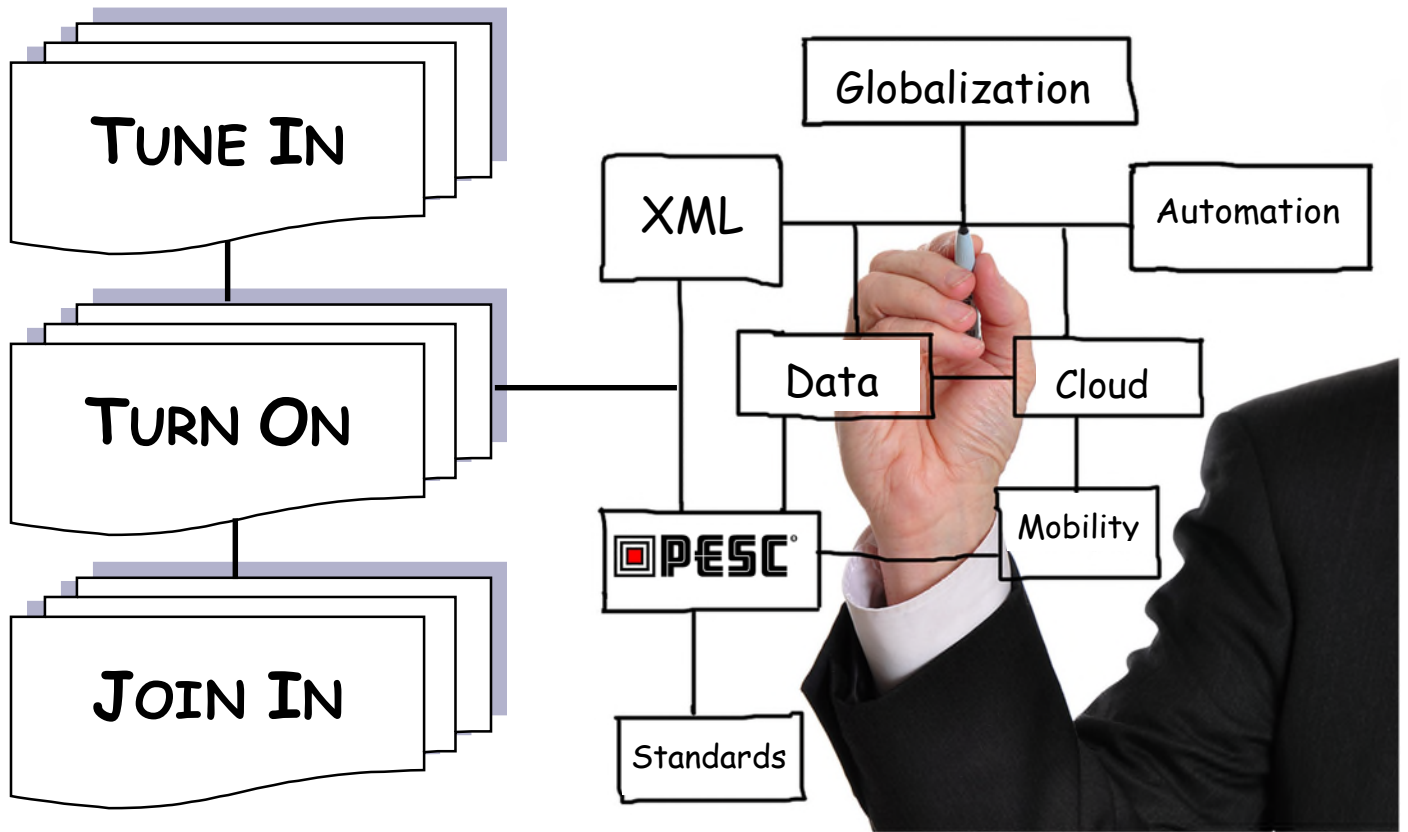
MEMBER LISTS

Representatives of PESC Membership organizations can join any and all of PESC's *Member* email and communication lists. Lists are used for open, public emails sent by and between list members to discuss ideas & issues related to the topic of the list. Please review the list below and indicate which list you'd like to join:

- ☐ EDEXCHANGE USER GROUP
- ☐ EDUCATION RECORD USER GROUP (ERUG)
- ☐ TECHNICAL ADVISORY BOARD (TAB)

PUBLIC LISTS

Any representative within the education community can join all of PESC's *Public* email and communication lists. Lists are used for open, public emails sent by and between list members to discuss ideas and issues related to the topic of the list.

- ☐ ACADEMIC CREDENTIALING AND EXPERIENTIAL LEARNING (ACXL) TASK FORCE
- ☐ CANADIAN PESC USER GROUP (CANPESC)
- ☐ GLOBAL EDUCATION ORGANIZATION (GEO) CODE WORKGROUP
- ☐ JSON TASK FORCE

GENERAL ANNOUNCEMENT LIST

Any representative within the education community can join PESC's *General Interest list* to receive major announcements & communications.

- ☐ GENERAL INTEREST

Your Name (please print)	**Your Email (please print)**	**Your Organization (please print)**

PESC hosts additional lists for: Board of Directors, Change Control Board (CCB), Members & Seal of Approval Board. Joining these lists is by appointment only. Please see PESC to join. PESC does not share or sell lists.

PLEASE COMPLETE THIS FORM AND EMAIL IT TO JENNIFER.KIM@PESC.ORG OR FAX IT TO 202.261.6517.

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FALL 2017 DATA SUMMIT – BREAK OUT PROGRAM

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

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

THE STANDARD

news and commentary on technology and standards in education

XML SOA EDI EDX PDF JSON C++ OPEN SOURCE COBOL HTML XSLT DLL JAVA SSL TCP/IP BASIC
AACRAO ARUCC SHEEO DQC INTERNET2 INCOMMON GRONINGEN DECLARATION NETWORK USED SIFA
ADMISSIONS APPLICATION COURSE CATALOG EDUCATION TEST SCORE REPORT FINANCIAL AID HIGH
SCHOOL TRANSCRIPT COLLEGE TRANSCRIPT IPEDS NSLDS PDF ATTACHMENT ACADEMIC EPORTFOLIO
CREDENTIALS SOLUTIONS NATIONAL STUDENT CLEARINGHOUSE ORACLE PARCHMENT USA FUNDS

EdExchange Breakouts

1) EdExchange Introduction and Overview

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

1.30pm – 3.00pm
Thursday October 26, 2017
PESC GLOBAL MEET
888.205.5513, 952016#

AGENDA

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

2) EdExchange/CDS User Group Working Meeting

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

3.30pm – 5.30pm
Thursday October 26, 2017
PESC GLOBAL MEET
888.205.5513, 952016#

AGENDA

1) **Welcome & Introductions** – Mark Cohen, Michael Sessa 5 mins
2) **Technical Update** – CCC, NSC, Parchment, Credentials – 10 mins
3) **Pilot Update** – Pilots – 5 mins
4) **At 4:00pm** – Conference Call Infiniti – Transition Update – 15 mins
5) **At 4.30pm** – Conference Call Apereo – Open Source Update – 15 mins
6) **Administration** – 10 mins
7) **Global Update** (EWP, EMREX) – Michael – 10 mins
8) **Steering Committee and Next Steps** – 20 mins
9) **NEW MEETING DATES AND TIMES** – All – 20 mins
10) **Adjourn**

Academic Credentialing Task Force Breakout

Academic Credentialing and Experiential Learning Task Force

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

1.30pm – 3.00pm
Thursday October 26, 2017
PHONE?

AGENDA

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

GEO Code Breakouts

1) GEO Code Workgroup Working Meeting

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

03.30pm – 05.30pm EDT
Thursday October 26, 2017

AGENDA

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

2) GEO Code Introduction and Overview

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

11.00am – Noon EDT
Friday October 27, 2017
PESC GLOBAL MEET
888.205.5513, 952016#

AGENDA

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

Diploma Supplement Breakout

Introduction and Overview of Diploma Supplement

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

8.30am – 10.30am
Friday October 27, 2017
PESC GLOBAL MEET
888.205.5513, 952016#

AGENDA

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

JSON TASK FORCE

JSON TASK FORCE

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

1.30pm – 3.00pm
Thursday October 26, 2017

AGENDA

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

ARUCC Groningen Project

ARUCC Groningen Project: An Opportunity to Dive Deep

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

8:30am – 10:30am
Friday October 27, 2017

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

PESC MEMBER MEETING

PESC ANNUAL FALL MEMBERSHIP MEETING

PESC Members convene for their bi-annual Membership Meeting to discuss the status of PESC, the Membership, industry and community initiatives, strategic items, new groups and initiatives and future PESC Data Summits.

5.30pm – 6.00pm
Thursday October 26, 2017

AGENDA

1. **Welcome & Introductions** – Doug Falk 5 mins
2. **Membership and Data Summits** – Jennifer Kim 5 mins
3. **Planning, Events and Finance** – Michael Sessa 5 mins
4. **20th Year Anniversary** – Michael Sessa 10 mins
5. **Open Q & A** – All 5 mins

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FALL 2017 DATA SUMMIT

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FALL 2017 DATA SUMMIT

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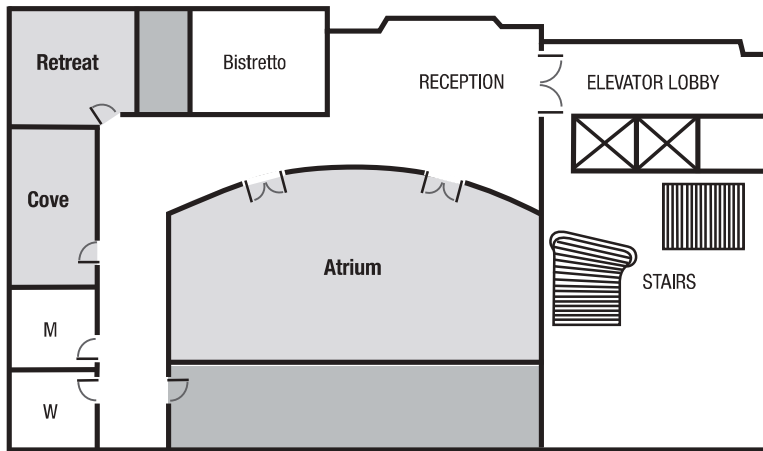**Shelagh Pepper, Associate Registrar, Wilfrid Laurier University**

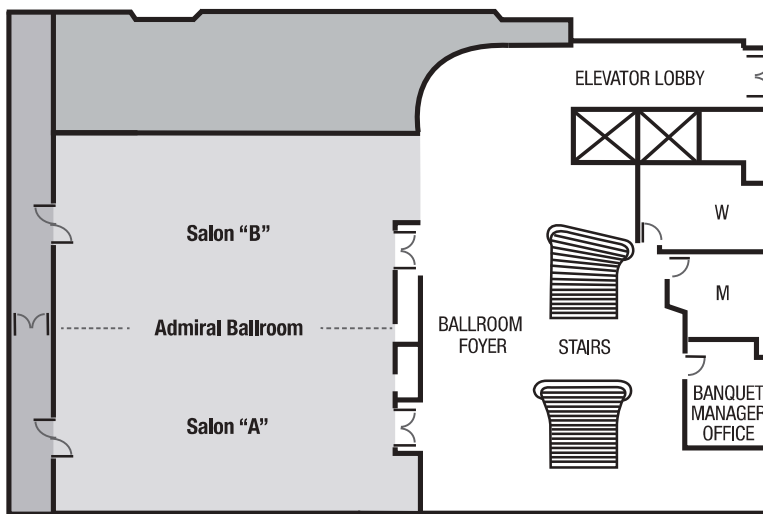spepper@wlu.ca

SEAL OF APPROVAL

APPLICATION AND AGREEMENT
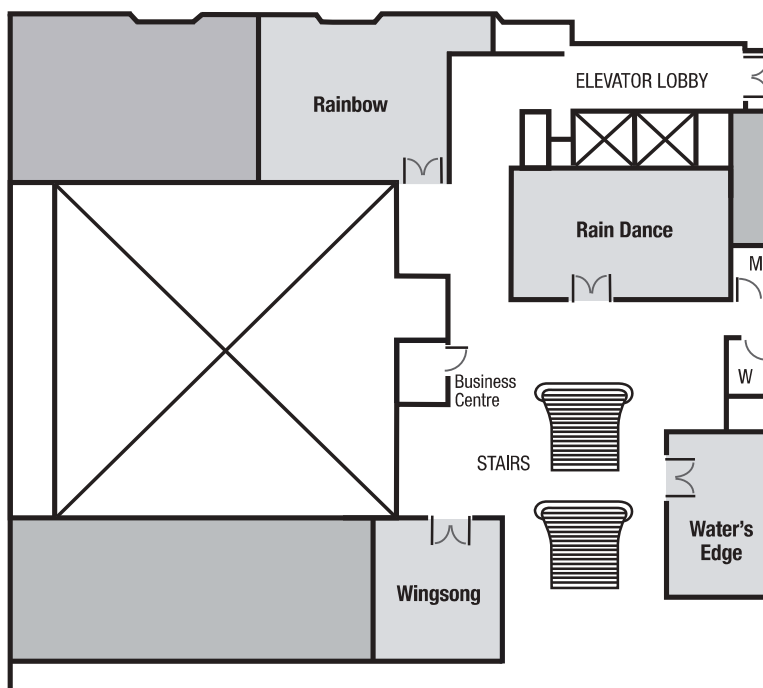### SEAL OF APPROVAL PROGRAM FOR PESC APPROVED STANDARDS

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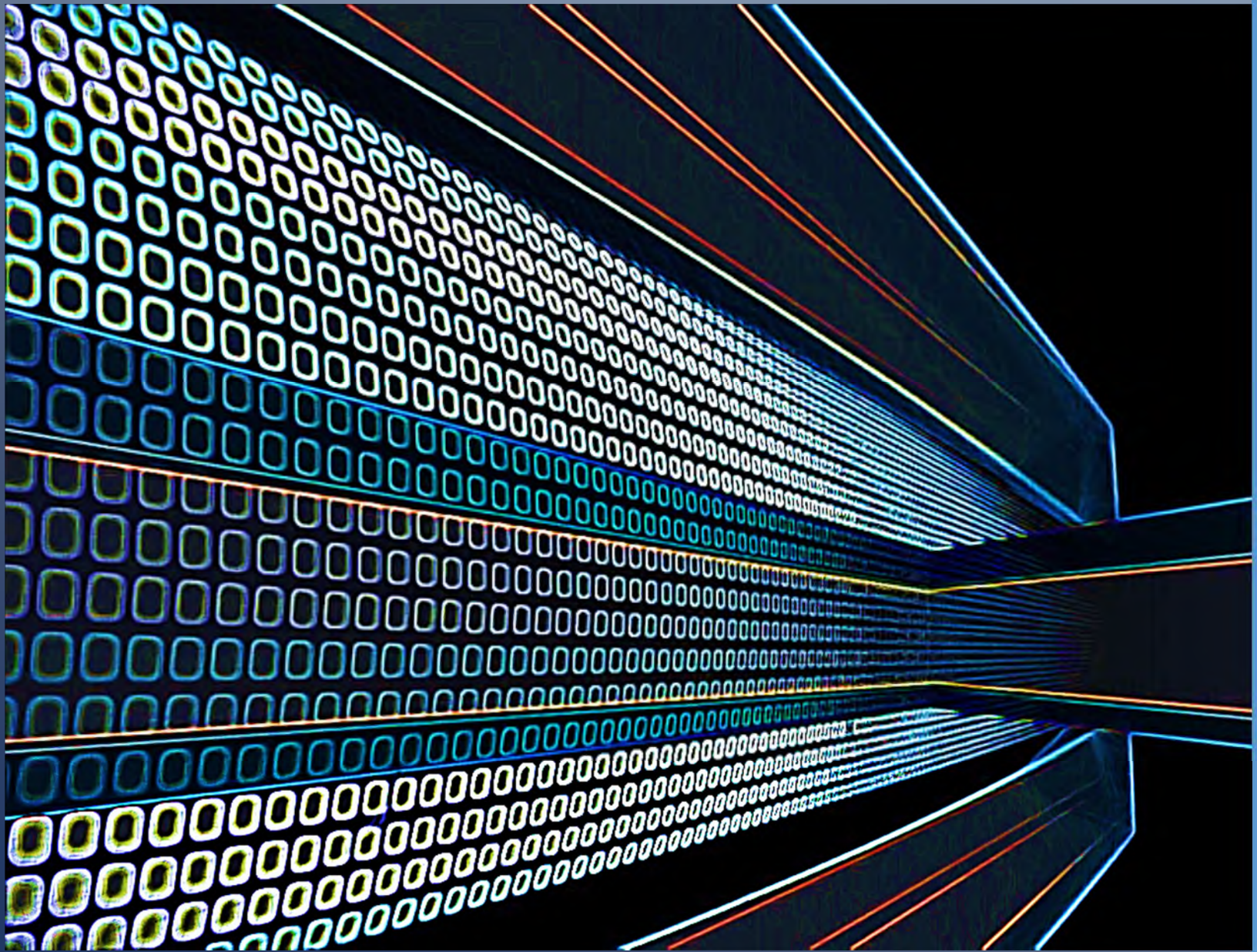### FOR ADMISSIONS, REGISTRAR & FINANCIAL AID

Second Floor

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Bistretto

RECEPTION

ELEVATOR LOBBY

Cove

Atrium

STAIRS

M

W

Second Floor

Third Floor

ELEVATOR LOBBY

Salon "B"

W

Admiral Ballroom

BALLROOM FOYER

M

STAIRS

Salon "A"

BANQUET MANAGER OFFICE

Third Floor

Fourth Floor

Rainbow

ELEVATOR LOBBY

Rain Dance

M

Business Centre

W

STAIRS

Wingsong

Water's Edge

Fouth Floor

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