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# Welcome to the

# **SPRING 2015 DATA SUMMIT!**

Themed *Best Practices in Education*Data Systems, the Spring 2015 Data

Summit takes place Tuesday April 28,

2015 at The Embassy Row Hotel in

Washington, D.C. Beginning at 7:30am

with continental breakfast and

registration, the Spring 2015 Data

Summit includes PESC's Annual Spring

Reception and Annual Membership

Meeting and concludes by noon on

Thursday April 30, 2015.

All General and Concurrent Sessions and events are open to all registered attendees and dress code is business casual. General Sessions are presented in typical conference format in which featured speakers present on a certain topic followed by brief Q&A; while Concurrent Sessions follow a more informal workshop format in which group members and attendees roll up their sleeves, discuss and interact in more detail in order to advance and progress group activities and maximize in-person convening time.





# BEST PRACTICES IN EDUCATION DATA SYSTEMS FOCUSES ON:

- access, integration & implementation of data systems;
- maintenance & promotion of data exchange standards;
- open, community-driven development & innovation of technology;
- mobility, authentication & data systems connectivity &;
- emerging key factors that drive global education data systems development & technology & overall interoperability

PESC and its Members lead transparent, collaborative development across P20W Education.

Supporting this mission are PESC partners the AACRAQ SPEEDE Committee, Common Education Data Standards (CEDS) Initiative, InCommon/Internet2 and the U.S. Department of Education (FSA, NCES, OUS, OET).

PESC is sponsored annually by DIAMOND SPONSORS Credentials eSCRIP-SAFE, National Student Clearinghouse, Oracle, Parchment & USA Funds.





# COLLABORATION FOR THE GREATER COMMON GOOD OF STUDENT ACHIEVEMENT

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

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

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

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

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

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





Multiple Stakeholders. One Vision.

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1250 Connecticut Ave, NW Suite 200 Washington, D.C. 20036 202-261-6516 phone 202-261-6517 fax www.PESC.org Honorable Herman de Leeuw Secretary, Groningen Declaration c/o Dienst Uitvoering Onderwijs PO Box 9700 LJ, Groningen The Netherlands

Dear Mr. Secretary:

April 23, 2015

On behalf of the Board of Directors and Membership of PESC, please accept this letter as official acknowledgement and acceptance of PESC's approval to join in the numerous leaders in education from around the world, as a *Full Signatory* to the Groningen Declaration Network.

On April 23, 2015, the Board of Directors ratified and adopted a statement of adherence to the Ethical Principles, Statues, Bylaws and Code of Conduct of the Groningen Declaration Network.

The PESC Board of Directors, PESC Membership and I are all very honored and excited about partnering with the Groningen Declaration Network. Our missions intersect on many common, critical points and we believe that our common efforts advance our mutual goals as well.

Going forward, we plan to integrate the value and benefits of the Groningen Declaration Network into all the outreach and efforts we conduct throughout our Membership and the Education Domain. The Board has also appointed me as the official contact and liaison between our two organizations. I will attend meetings and events and contribute to the full extent that I am able.

Thank you for allowing PESC to join the Groningen Declaration Network. We are grateful and appreciative; and we look forward to the good work ahead.

Please feel free to contact me directly should you have questions or concerns.

My warmest regards,

Michael Sessa

Michael D. Sessa President & CEO



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# **CREDENTIALS eSCRIP-SAFE**

### Credentials eSCRIP-SAFE

# Credentials E-SCRIP-SAFE

Contact: J. Jeffrey Geldermann President & COO (847) 716-3010 iig1@credentialssolutions.com



### www.credentialssolutions.com

With flagship product TranscriptsPlus® and integrated automation software RoboRegistrar®, Credentials Solutions supports all major SIS platforms while providing online ordering, automated hold checking, integrated student communications with 12.5x5 customer service, and electronic extraction and delivery including EDI, XML and Secure PDFs. Transcript ExchangePlus™ enables client institutions to send transcripts electronically through Credentials' secure network as well as industry accepted transcript hubs, while integrating with the eRoboMail™ service, which assumes the printing and mailing of paper transcripts. In addition, Credentials also offers ParkingPlus®, which automates parking permit ordering, payment, and fulfillment.

# NATIONAL STUDENT CLEARINGHOUSE

# **National Student** Clearinghouse

# NATIONAL STUDENT **CLEARINGHOUSE**

Contact: Doug Falk **Chief Information Officer** (703) 742-4200 service@studentclearinghouse.org



## www.studentclearinghouse.org

The National Student Clearinghouse (a nonprofit formed in 1993) is the trusted source for and leading provider of higher education verifications and electronic education record exchanges, handling more than 700 million verification requests and over 250 million education record exchanges annually. The Clearinghouse also: serves as a single point of contact for the collection and timely exchange of accurate and comprehensive enrollment, degree, and certificate records on behalf of its more than 3,600 participating higher education institutions, which represent 98 percent of all students in public and private U.S. institutions; provides thousands of high schools and districts with continuing collegiate enrollment, progression, and completion statistics on their alumni; provides accurate, timely enrollment and degree verifications to student loan providers, employers, student credit issuers, the U.S. Department of Education, and others who access its registry more than half a billion times annually.and through its verification, electronic exchange, and reporting services, the Clearinghouse saves the education community cumulatively nearly 500 million dollars annually. Clearinghouse services are designed to facilitate an institution's compliance with the FERPA, the HEA and other applicable laws.

# **ORACLE**

### Oracle

# RACIE

Contact: Andy Wood Vice President Product Engineering (503) 276-2360, andv.wood@oracle.com



# www.oracle.com

Oracle's business is information—how to manage it, use it, share it, protect it. The world's largest enterprise software company, Oracle is the only vendor to offer solutions for every tier of your business-database, middleware, business intelligence, business applications, and collaboration. Oracle is committed to using our technology and resources to advance education in innovative ways, promote diversity, enrich the life of communities, and protect the environment.

# **Parchment**



Contact: Mark N. Cohen, Senior Vice President, Market Strategy and Co-Founder (480) 719-1646 ext. 1009 mcohen@parchment.com



# **PARCHMENT**

www.parchment.com Parchment is an online credential delivery and management platform that works with academic institutions and learners to extend the credential. In a knowledge economy where individuals are defined by what they know and how well they know it, Parchment helps turn credentials into opportunities. Simply put, Parchment makes life easier for students, alumni and administrators, revolutionizing the learner experience, improving operational efficiencies and reducing institutional costs. Since 2003,

15 million credentials have been exchanged between Parchment's member network of senders and receivers. Parchment is headquartered in Scottsdale, AZ, with offices in Roseville, CA, Denver, CO, Grand Rapids, MI, Toronto, ON and Washington, D C.





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# **USA Funds**



Brian Allison
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# www.usafunds.org

USA Funds® is a nonprofit corporation that supports Completion With a Purpose<sup>SM</sup>, building a more purposeful path for America's students to and through college and on to rewarding careers and successful lives. USA Funds pursues its nonprofit mission through philanthropic activities and partnerships, policy research, and programs and services that enhance preparation for, access to and success in higher education. One of USA Funds tools that incorporate PESC standards is USA Funds Borrower Connect™. This is a Web-based tool that makes it easy for schools to contact and counsel their student loan borrowers to promote successful repayment. In addition, USA Funds also offers schools USA Funds Life Skills®, a web-based financial literacy and student success program that equips postsecondary institutions to teach their students to manage their time and money wisely while they are on campus and after graduation. Learn more about USA Funds and its offerings at www.usafunds.org.





# PROGRAM AT-A GLANCE

SCHEDULE	TUESDAY April 28, 2015	WEDNESDAY April 29, 2015			THURSDAY April 30, 2015		
7:30am – 8:30am	CONTINENTAL BREAKFAST						
8:00am – 5:00pm	REGISTRATION						
8:30am – 10:15am	GENERAL SESSIONS	CONCURRENT SESSIONS			CONCURRENT SESSIONS		
	Admiral's Ballroom	ADMIRAL'S	EAST	WEST	ADMIRAL'S	EAST	WEST
	➤ Welcome & Introductions  ➤ PANEL 1: P20W EDUCATION DATA SYSTEMS	CommIT User Group	Student Aid User Group	Academic ePortfolio	EdExchange User Group	TAB/CCB Joint Board Meeting	Education Record User Group
10:15am – 10:30am	BREAK						
10:30am – noon	➤ PANEL 2: STUDENT AID DATA SYSTEMS	ADMIRAL'S  Experiential Learning and  Competency Based Education  Discussion			EdExchange User Group	TAB/CCB Joint Board Meeting	New State Assessment Discussion
Noon – 1:30pm	LUNCH KEYNOTE: MICHAEL REILLY BEST PRACTICES AWARD	LUNCH <b>WORKING LUNCH</b>			ADJOURN		
1:30pm – 3:00pm	➤ PANEL 3: COLLEGE TO CAREER DATA SYSTEMS	*Community Best Practices*  1:30pm—1:55pm					
		National Student Clearinghouse	Ellucian	Eduventures			
		-	2:00pm — 2:25pm				
		Parchment	Hobsons	CommonApp			
		AcademyOne	2:30pm — 3:00pm Data Degree	Credentials eSCRIP-SAFE			
3:00pm – 3:15pm	BREAK						
3:15pm – 5:00pm	➤ PANEL 4: EMERGING TECHNOLOGY & IT STRATEGY	National Student Clearinghouse	3:15pm — 3:45pm Ellucian	Eduventures			
		Parchment	3:50pm — 4:20pm Hobsons	Common App			
		AcademyOne	4:25pm — 4:55pm Data Degree	Credentials eSCRIP-SAFE			
5:30pm – 6:30pm	ANNUAL SPRING RECEPTION	ANNUAL FALL MEMBERSHIP MEETING					





GENERAL SESSIONS

# PANEL 1 | P20W DATA SYSTEMS

Like electronic medical records, the use and electronic exchange of education data is on the rise. As a student's data travels through many data systems along the education lifecycle, not all stops on this trip are smooth. The integration of paper and electronic processes combined with barriers in technological capacity and emerging technologies that seem to overshadow yesterday's technologies, can all contribute to not only a messy process, but increased time delays, disruptions in access to quality data and always increased costs. Larger factors, such as the lack of a central repository, the inconsistent interpretations and applications of privacy, and the lack of consistency and alignment within all levels of public policy, still contribute more to these consequences. This panel will discuss these factors and the value, status and promise of data systems from a variety of perspectives including from states, service providers, colleges and universities, and students.

Moderator

**Andy Wood**, Vice President of Product Engineering, Oracle Corporation *Panelists* 

Jeffrey Alderson, Principal Analyst, Enterprise Software, Eduventures
David K. Moldoff, Founder & CEO, AcademyOne
Brandt Redd, CIO/CTO, Smarter Balanced Assessment Consortium
J.James Wager, Consultant & Education Strategist, Credentials eSCRIP-SAFE

# **PANEL 2 | STUDENT AID DATA SYSTEMS**

The delivery of student aid in the USA is comprised of processing, data matching and exchange among a number of federal data systems including Common Origination & Disbursement (COD) and the National Student Loan Data System (NSLDS) under Federal Student Aid (FSA), institutional financial aid systems and data systems under the Social Security Administration and Internal Revenue Service. Driving this process though are significant rules and regulations that seem to always be changing. At the same time, the National Center for Education Statistics (NCES) is looking to ensure it is tracking national trends and behaviors through a series of separate and distinct data collections, reported to the Integrated Postsecondary Education Data System (IPEDS), by all colleges and universities that receive federal student aid. This panel will highlight some of the major political factors that will affect student aid data systems and the drivers behind what data NCES collects, when and why.

Moderator

**Kristi Blabaum**, Systems Integration Analyst, Great Lakes Higher Education Corporation *Panelists* 

Justin Draeger, President & CEO, National Association of Student Financial Aid Administrators Ross Santy, Associate Commissioner, Administrative Data Division, National Center for Education Statistics, U.S. Department of Education

Francisco Valines, Director of Financial Aid, Florida International University

# PANEL 3 | COLLEGE TO CAREER DATA SYSTEMS

Graduation is a pretty significant milestone in a person's lifetime. Graduation itself though does not guarantee an income or a job. When a student progresses from a college environment to a workforce environment, their data must travel with them. A keener and more demanding workforce requires stronger and stronger talent and skills. But are all skills and talents captured in the traditional education record? This panel will highlight some of the new and emerging



ideas around connecting graduates to employers along with the innovative technological solutions being achieved to ensure connectivity between education and labor data systems.

Moderator

Anne Valentine, Smart Catalog

# A – Best Practices in Experiential Learning and Competency Based Education

Moderator

Mark Cohen, Senior Vice President of Market Strategy & Co-Founder, Parchment

Doug McKenna, University Registrar, American University

Rodney Parks, Registrar, Elon University

Joellen Shendy, Associate Vice Provost and Registrar, University of Maryland University College

# B - Developing a Cybersecurity Skills Based Pipeline

Moderator

**Jim Kathman**, Vice President, Strategy & Business Development, National Student Clearinghouse *Panelists* 

Frank Cicio, CEO & Founder, iQ4

Benjamin Scribner, Program Director, Department of Homeland Security, NICE/NICCS
 Will Simpkins, Director, Center for Career & Professional Development, John Jay College of Criminal Justice, The City University of New York

# **PANEL 4 | EMERGING TECHNOLOGY & IT STRATEGY**

In 2000, PESC formed the STANDARDs FORUM FOR EDUCATION as the forum under which PESC Approved Standards would be developed and delivered. Over the years a variety of heavily used technologies have served as the foundation of PESC Approved Standards, among them EDI, XML and PDF. With the emergence of new initiatives and new technologies, like JSON, social networking and NIEM, this panel will discuss the impact of these emerging technologies and build consensus around PESC's IT Strategy.

Moderator

Charles Leonhardt, Director of Online Applications, Georgetown University

**Panelists** 

Chris Etesse, CEO, Flatworld

**Alex Jackl**, Technical Board Chair, Schools Interoperability Framework Association (SIFA) **Michael Morris**, Director of Test Operations, ACT Inc.

J. James Wager, Consultant & Education Consultant, Credentials eSCRIP-SAFE





# HIGHLIGHTING PESC LEADERS AND EXPERTS,

THEIR THOUGHTS AND IDEAS ON THE STRATEGIC DIRECTION OF EDUCATION TECHNOLOGY AND THEIR COMMITMENT TO PESC, STANDARDS AND INTEROPERABILITY.

# **AcademyOne**

Presented by: David Moldoff, CEO and Founder, AcademyOne

# **Common Application**

Presented by: Tim McGraw, Director of IT, Common Application

# **Credentials eSCRIP-SAFE**

Presented by: J. James Wager, Consultant and Market Strategist, Credentials eSCRIP-SAFE

# **Data Degree**

Presented by: Anne Valentine, President, Data Degree

# Eduventures

Presented by: Jeffrey Alderson, Principal Analyst, Enterprise Software, Eduventures

# Ellucian

Presented by: Rick Skeel, Ellucian

# Hobsons

Presented by: Joe Green, Product Manager, Hobsons

# **National Student Clearinghouse**

Presented by: Doug Falk, Vice President & CIO, National Student Clearinghouse

# **Parchment**

Presented by: Mark Cohen, Senior Vice President of Market Strategy & Co-Founder, Parchment Jason Weaver, Product Manager, Parchment





CONCURRENT SESSIONS

# Common Identity & Trust (CommIT) Collaborative

The Common Identity & Trust (CommIT) Collaborative sprung from a strategic partnership forged between Internet2 and PESC. In realizing that authentication and multiple user names and passwords can be a barrier to interoperability, Internet2 and PESC launched CommIT, an independent unique ID that colleges, universities, schools and various service providers can invoke to experience a 'single sign-on' experience. With three universities already in a pilot stage, that is each has segmented a small population of students that are using CommIT in a production environment, and a number of service providers lining up to engage in CommIT, this session furthers the work of the pilots and prepares the community for the launch of the CommIT product.

# Experiential Learning and Competency Based Education Discussion

A provocative question posed to Education today is how to capture learning that happens outside of the classroom. In addition to the traditional Academic Transcript, many are starting to use competency based transcripts and co-curricular/experiential transcripts as well. Both provide valuable information for admission into the education and workforce environment and both seem to be growing rapidly in use. While data standards are ultimately needed for all transactions in order to achieve full interoperability, final agreement has not been reached on the actual definitions of both items. While the market may need to mature more in order for data standards to be used and accepted, PESC will be discussing the formation of its newest Task Force – *Academic Credentialing & Extended Transcript*. Agreement will be reached on the mission of this Task Force, its governance and operations, and its final output. Included in the output will be a recommendation to the PESC Board of Directors on when an XML Development Workgroup is to be launched to develop PESC Approved Standards for competency-based and co-curricular transcripts.

# TAB/CCB Joint Board Meeting

The Technical Advisory and Change Control Boards of PESC govern the technical standards, the process by which a format is proposed as a PESC Approved Standard and all the technical documentation and tools needed to support the development and use of PESC Approved Standards. At this session, both Boards discuss the additions and revisions to data elements, the NIEM process and the relationship between PESC, XML and other emerging technologies like JSON.

# Student Aid User Group

The PESC Student Aid User Group tracks emerging political and operational factors that impact the delivery of student aid. With FSA's Common Record, a single record from which all student loans and grants (Stafford Loans, PELL Grants, etc.) are made, a PESC Approved Standard, all origination and disbursement of student loans in the USA is made through PESC Approved Standards. Of particular interest to this User Group is standardization of other student-related processes like the Student Aid Award Letter. At this session, attendees will update each other on current factors facing student aid and a new Congress.

# Academic ePortfolio Workgroup

Now in its final development stage, the Academic ePortfolio will soon be processed for public comment and voting on its way to becoming a PESC Approved Standard. The Workgroup leaders have worked long and hard to ensure that not only the Academic ePortfolio includes all data that is necessary, but that it is to be





used once released. This session will serve as a final executive briefing for those looking for more of a general session than an in-depth discussion.

# **EdExchange User Group**

Launched out of PESC's Common Data Services Task Force, EdExchange is to serve as the common data exchange protocols for those looking for standardization in the delivery of education data. Envisioned as open source, PESC is forging a relationship with Apereo as a partner. This session will focus on the additional administrative items necessary to produce these protocols along with an introductory conversation about additional governance over these protocols.

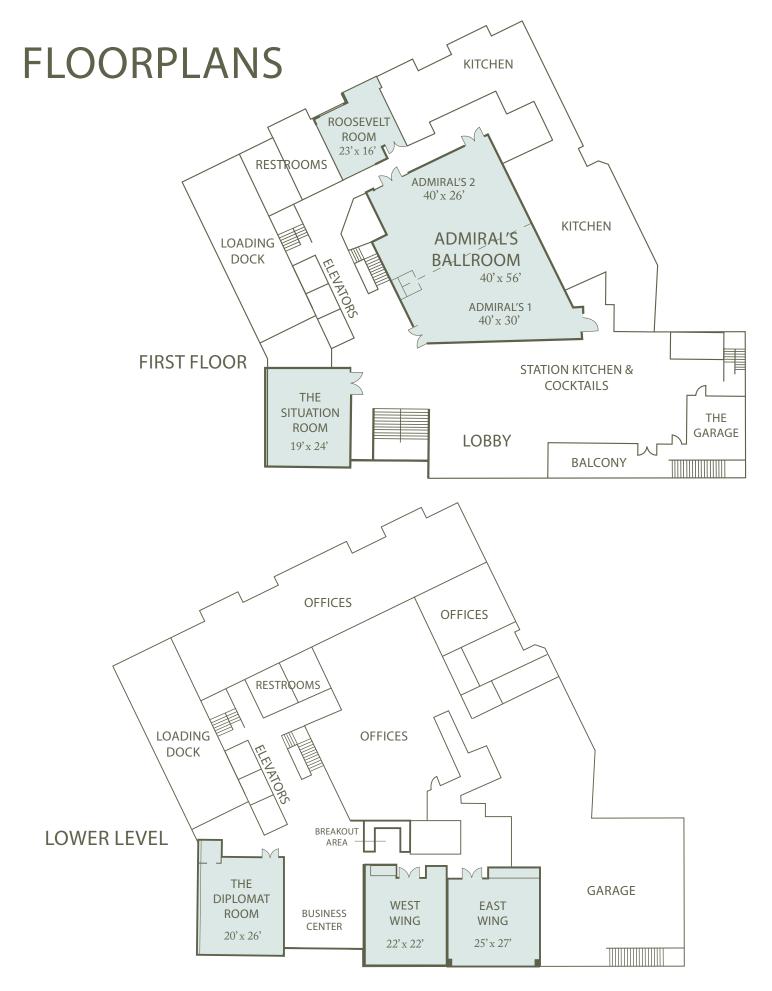
# **Education Record User Group**

The Education Record User Group governs all admissions and registrar based PESC Approved Standards. These include all EDI, XML and PDF technologies used for delivery of Transcripts, Admissions Applications, Test Scores, etc. At this session, the User Group will continue discussing updates and changes originating from the community and scheduling changes through the Change Control Board.

# **New State Assessment Discussion**

Under Common Core, colleges and universities will have access to the new student assessments. As states and/or high schools and districts will need to send these assessments, PESC is working with the Smarter Balanced Assessment Consortium to determine which PESC Approved Standards meet the needs of Common Core and if any standards need to be upgraded.





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## PESC is North America's Standard for Education Data.

Every college and university and the majority of states in the United States, and the largest provinces in Canada ALL USE PESC APPROVED STANDARDS.

PESC APPROVED STANDARDS & CEDS are interoperable.

...so if one state (or school, etc.) uses CEDS, that state, or school is interoperable with PESC APPROVED STANDARDS.

CEDS is interoperable with the SIF Specification, which means **PESC APPROVED STANDARDS & SIF are interoperable.** 



It takes many organizations working together to support the Education Domain and infrastructure. We seek out organizations with common missions as open and transparent collaboration is the cornerstone principle of PESC.

We partnered with the *Office of Federal Student Aid (FSA)* of the U.S. Department of Education early on and merged our separate technical architectures and data modeling guidelines into one combined set of guidelines.

With the deployment of FSA's Common Origination and Disbursement System, which included **Common Record** (one combined record to include all federal grants, loans and work-study), **Common Record** became a **PESC APPROVED STANDARD**.

Since then, all federal grant, loan and work-study files have been issued to every college and university financial aid office in the country  $^{(1)}$  in **Common Record**.

Since then as well, we continued with FSA to make Enrollment Reporting into the National Student Loan Data System (NSLDS) a PESC APPROVED STANDARD. Gainful Employment Reporting standards are expected to be submitted to PESC by FSA in the very near future.

We partnered with the *National Center for Education Statistics (NCES)* of the U.S. Department of Education to make five components of reporting into the **Integrated Postsecondary Education Data System (IPEDS)** a **PESC APPROVED STANDARD**. Through *NCES* reporting, we know that at least 29 states support PESC Approved Standards, while we've heard from at least 6 Canadian provinces directly about full adoption of **PESC APPROVED STANDARDS**.

"Embrace common standards and data systems so we can know where we stand and how to move forward."

-Bill Gates, Chair, Bill & Melinda Gates Foundation

PESC continues to foster new and innovate paths to interoperability and strengthen our partnerships across sectors and systems to expand our footprint around the world:

- We've partnered with the California Community Colleges, National Student Clearinghouse and Parchment to develop EdExchange standardized protocols for common, scalable, international data exchange; and are working with Apereo as an expert organization supporting open source.
- With Internet2 we joined forces to launch the Common Identity & Trust (CommIT) Collaborative to bring sustainable, reliable single signon services to the education domain.
  - (1) Every college and university that receives federal aid.



- With the Association of Registrars of Universities and Colleges of Canada (ARUCC), we exchanged memberships allowing each to access the resources and networks of the other.
- With the Data Quality Campaign (DQC), we are affiliates as we support the DQC in the efforts to ensure the use, sharing and exchange of quality data.
- With the State Higher Education Executive Officers (SHEEO), we are partners as over 29 states reported their support of PESC APPROVED STANDARDS to NCES.
- With the Institute of Education Sciences (IES) of the U.S. Department of Education, PESC has been appointed an Affiliate Member of the National Forum for Education Statistics.
- We're working with PESC Member Smarter Balanced Assessment Consortium to ensure PESC APPROVED STANDARDS satisfy requirements of Common Core.
- As a global leader, PESC has been appointed full signatory to the Groningen Declaration Network which furthers the European partnership we established with the Rome Student Systems and Standards Group (RS3G).

To support the development and implementation of **Common Education Data Standards (CEDS)**, PESC partnered with:

- NCES of the U.S. Department of Education
- Council of Chief State School Officers (CCSSO)
- Data Quality Campaign
- Dell Foundation
- Gates Foundation
- Schools Interoperability Framework Association (SIFA)
- State Higher Education Executive Officers (SHEEO)

Common Education Data Standards (CEDS) span the full student lifecycle from early learning, elementary, secondary, postsecondary and into the workforce and PESC APPROVED STANDARDS remain in full alignment with Common Education Data Standards (CEDS).

With Founding Member American Association of Collegiate Registrars and Admissions Officers (AACRAO), due to common missions PESC has hosted meetings of the AACRAO SPEEDE Committee since PESC's formation.

AACRAO also hosted PESC, its activities and events, until PESC was formally established.

The *SPEEDE Committee and AACRAO* collaborated with *NCES* and *CCSSO* in the early 1990's to develop admissions and registrar standards in <u>EDI</u>, now used by thousands of organizations internationally both through peer-to-peer and through hub models like the *SPEEDE Server*. With PESC's growth, these <u>EDI standards</u>, which served as the foundation for PESC's XML-based data standards, are now <u>PESC APPROVED STANDARDS</u> as well.

Helping drive this mission are dozens of volunteers populating PESC's 14 committees and boards, a dedicated Board of Directors and 5 Annual Diamond Sponsors.

# SAVE THE DATE FALL 2015 DATA SYMPOSIUM & SUMMIT

**OCTOBER 14 - 16, 2015** 

LIAISON CAPITOL HILL | WASHINGTON DC

