



PROGRAM

UNLOCKING THE POWER OF STUDENT DATA

OCTOBER 2022

Data Summit



National Student
Clearinghouse



parchment



AcademyOne



EducationPlannerBC



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EVALUATION INSTITUTE, INC.

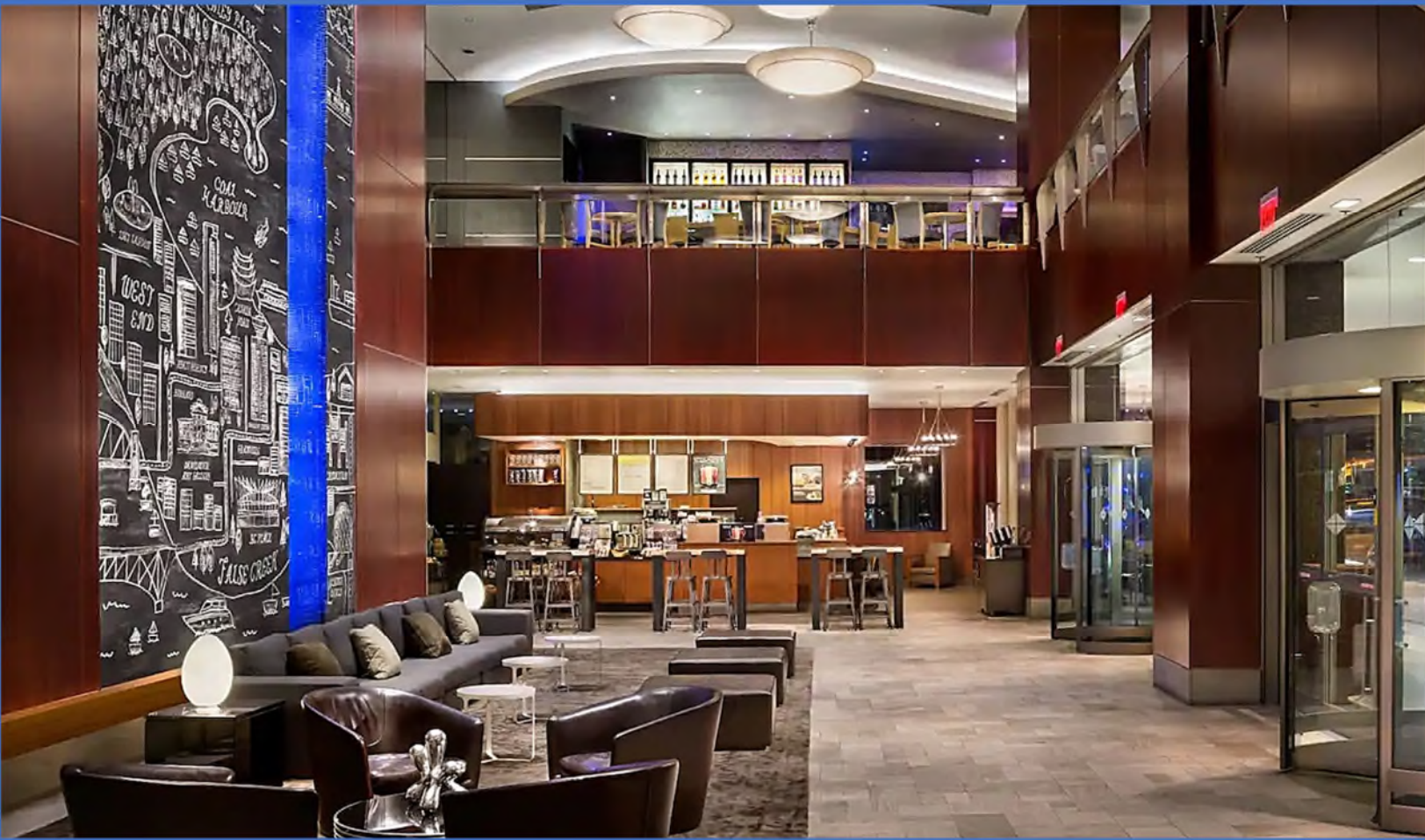
HYATT REGENCY VANCOUVER

OCTOBER 26–28, 2022



25TH ANNIVERSARY

PESC



Welcome
TO THE
OCTOBER 2022
Data Summit

HYATT REGENCY VANCOUVER

PESC

INDIGENOUS LAND ACKNOWLEDGEMENT

PESC acknowledges that the October 2022 Data Summit will occur on the territory of the Coast Salish Peoples, including the territories of the Musqueam, Squamish, and Tsleil-Waututh Nations.

We are honoured to spend time learning, sharing and growing on these territories.





National Student
Clearinghouse



OCTOBER 2022

Data Summit

PESC welcomes you to the October 2022 Data Summit!

Join us for a very special in-person convening at the October 2022 Data Summit to celebrate PESC's 25th Year Anniversary!

Data Summits are unique convenings at which emerging topics, technologies and policy initiatives are highlighted. Topics and discussion focus on regional, national and international implementation, cost/benefit analysis, student and learner behavior, use or business cases, and institutional performance.

We are thrilled and excited to be returning to Vancouver! This Data Summit marks the fifth Data Summit held in Canada. Once again, we are thrilled to include a day-long convening of the Canadian Postsecondary Electronic Standards Council (CanPESC).

Along with Featured Speakers and Panelists from across Canada and the USA, this Data Summit is not to be missed.

For all current information, please visit www.pesc.org/october2022.



PROGRAM AT-A-GLANCE

	Wednesday October 26, 2022	Thursday October 27, 2022	Friday October 28, 2022
7.30am – 9.00am	Continental Breakfast & Registration		
8.30am–10.00am	Welcome & Opening Remarks -David Moldoff, AcademyOne -Monterey Sims, University of Phoenix -Ruth Blades, CATNS-CATNE -Karen McCredie, EducationPlannerBC -Jennifer Kim, PESC -Michael Sessa, PESC Keynote	Speakers -Bert Van der Geest, Digitary Panel	Breakouts C 1) JSON-LD Transcript & JSON-LD Task Force (Combined) 2) PESC Office & Lounge
10.00am–10.30am	Break		
10.30am–12.00pm	Equity, Diversity, Inclusion & Gender Identity Panel -Melanie Gottlieb, AACRAO -Bryant Faust, Johns Hopkins University	Microcredentials & Skills Panel -David Moldoff, AcademyOne -Alex Jackl, Bardic Systems Data Standards United -Alex Jackl, Bardic Systems -Michael Sessa, PESC	Breakouts D 1) Microcredentials Task Force 2) PESC Office & Lounge
12.00pm–1.30pm	Luncheon & Awards	Lunch On Your Own	
1.30pm – 3.00pm	CanPESC User Group -Doug Holmes, OUAC -Cathy van Soest, EducationPlannerBC App Centres, Hubs & Councils Panel -Susan Stein, APAS invited -Ruth Blades, CATNS-CATNE -Karen McCredie, EducationPlannerBC -Marc Provencher, OCAS -Heather Lane, OUAC	Breakouts A 1) Gender Identity Task Force 2) PESC Office & Lounge	
3.00pm – 3.30pm	Break		
3.30pm – 5.00pm	Skills Based Hiring & Advancement -Alex Jackl, Bardic Systems, T3	Breakouts B 1) GEO Code User Group 2) PESC Office & Lounge	
5.00pm – 6.00pm			
6.00pm – 7.00pm	25th Reception		

HYATT REGENCY VANCOUVER



HYATT REGENCY VANCOUVER
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ANNUAL MEETING

TUESDAY OCTOBER 25, 2022

8.30AM – 5.00PM



CANPESC ANNUAL MEETING

609 GRANVILLE STREET – SUITE 950

VANCOUVER BC V7Y 1H2



EducationPlannerBC

- Sponsor and Host -



FOR IMMEDIATE RELEASE
 JULY 28, 2022
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PESC BOARD OF DIRECTORS FOR FY 2023

New Board Members & Officers in PESC's 25th Year!

Washington, D.C. ~ The Postsecondary Electronic Standards Council (PESC) is pleased to announce its Board of Directors and Officers for FY 2023!



CHAIR

DAVID K. MOLDOFF
 CEO & FOUNDER
 ACADEMYONE



VICE CHAIR

MONTEREY SIMS
 DIRECTOR OF EVALUATION &
 ADMISSIONS, UNIVERSITY OF
 PHOENIX



TREASURER

KRISTI BLABAUM
 SYSTEMS INTEGRATING ANALYST
 ASCENDIUM EDUCATION
 REPRESENTING NASLA



SECRETARY

RUTH BLADES
 EXECUTIVE DIRECTOR
 COUNCIL ON ADMISSION &
 TRANSFER FOR NOVA SCOTIA



MATT BEMIS
 SR. ASSOCIATE REGISTRAR
 UNIVERSITY OF SOUTHERN
 CALIFORNIA



DOUG FALK
 VICE PRESIDENT & CIO
 NATIONAL STUDENT
 CLEARINGHOUSE



BRYANT FAUST
 ASSOCIATE DEAN &
 REGISTRAR, JOHNS
 HOPKINS UNIVERSITY



ALEX JACKL
 PRESIDENT & CEO
 BARDIC SYSTEMS



MICHAEL D. SESSA
 PRESIDENT & CEO
 PESC



FRANCISCO VALINES
 DIRECTOR OF FINANCIAL AID
 FLORIDA INTERNATIONAL
 UNIVERSITY



JASON WEAVER
 VICE PRESIDENT, PRODUCT
 PARCHMENT



VIVIAN W. WONG
 GROUP VICE PRESIDENT, HIGHER
 EDUCATION DEVELOPMENT, ORACLE



DAVID YERG
 DIRECTOR OF PRODUCT MANAGEMENT,
 SAAS PLATFORM, ELLUCIAN

At their 24th Annual Meeting held during the April 2022 Data Summit in Washington, D.C., PESC Members elected **David Yerg**, Director of Product Management, SaaS Platform, Ellucian to its Board of Directors and re-elected incumbents **Doug Falk**, Vice President & CIO, National Student Clearinghouse; **Monterey Sims**, Director of Admissions & Evaluation, University of Phoenix; **Francisco Valines**, Director of Financial Aid, Florida International University; **Jason Weaver**, Vice President, Product, Parchment; and **Vivian W. Wong**, Group Vice President, Oracle Higher Education Development. **Alex Jackl**, President & CEO, Bardic Systems joins the Board of Directors through appointment to fill a midterm vacancy.

At its Annual Meeting held last month, the Board of Directors elected Officers for the new fiscal year which began July 1, 2022:

- **David K. Moldoff** – *Chair*, CEO & Founder, AcademyOne¹
- **Monterey Sims** – *Vice Chair*, Director of Admissions & Evaluation, University of Phoenix²
- **Kristi Blabaum** – *Treasurer*, Systems Integration Analyst, Ascendium Education, Representing NASLA²
- **Ruth Blades** – *Secretary*, Executive Director, Council on Admission & Transfer for Nova Scotia

At-Large Board Members include:

- **Matt Bemis**, Senior Associate Registrar, University of Southern California
- **Doug Falk**, Vice President & CIO, National Student Clearinghouse³
- **Bryant Faust**, Associate Dean & Registrar, Johns Hopkins University, School of Medicine, Representing AACRAO
- **Alex Jackl**, President & CEO, Bardic Systems
- **Michael D. Sessa**, President & CEO, PESC
- **Francisco Valines**, Director of Financial Aid, Florida International University
- **Jason Weaver**, Vice President, Product, Parchment³
- **Vivian W. Wong**, Group Vice President, Higher Education Development, Oracle²
- **David Yerg**, Director of Product Management, SaaS Platform, Ellucian

¹ *Annual Gold Sponsor*

² *Data Summit Sponsor*

³ *Annual Diamond Sponsor*

ABOUT PESC

Established in 1997 at The National Center for Higher Education, the Postsecondary Electronic Standards Council (PESC) operates as an international 501(c)(3) non-profit, community-based, umbrella association headquartered in Washington, D.C. of: Data, Software, Technology Service Providers and Vendors; Schools, Districts, Colleges and Universities; College, University and State/Provincial Systems; Local, State/Provincial and Federal Government Offices; Professional, Commercial and Non-Profit Organizations; Non-Profit Associations and Foundations.

PESC leads the establishment and adoption of trusted, free and open data standards across the education domain by serving as an open standards-development and open standards-setting body (governed by a voluntary, consensus-based model), independently funded by annual membership dues, meetings and sponsorships, enabling PESc to support, publish and maintain PESc Approved Standards and technical information free and without charge. PESc celebrates its 25th year anniversary in 2022! For more information, please visit www.pesc.org.





BOARD OF DIRECTORS

POSTSECONDARY ELECTRONIC STANDARDS COUNCIL

— 25TH ANNIVERSARY —

PESC[®]
www.pesc.org

PESC BOARD OF DIRECTORS

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

The Board of Directors abides by *Roberts Rules of Order* and the *PESC Board Manual of Roles & Responsibilities*; and meets monthly (virtually), in-person at annual Data Summits, and for its Annual Retreat each June.

PESC BOARD OF DIRECTORS

Annual elections for the PESC Board of Directors are held each April with election results announced during the annual April Data Summit. At Annual Retreats, the Board of Directors approves the annual PESC budget for the following fiscal year, conducts evaluation and review exercises and elects Officers (Chair, Vice Chair, Treasurer and Secretary).

W. MATTHEW BEMIS



SENIOR ASSOCIATE REGISTRAR, UNIVERSITY OF SOUTHERN CALIFORNIA

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

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

June 30, 2023

KRISTI BLABAUM



TREASURER

SYSTEMS INTEGRATION ANALYST, ASCENDIUM, REPRESENTING NASLA

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

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

RUTH BLADES



SECRETARY

EXECUTIVE DIRECTOR, COUNCIL ON ADMISSION & TRANSFER FOR NOVA SCOTIA

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

In 2019 the work of Ruth and her colleagues was recognized with CATNS being awarded first place in PESC's 20th Anniversary Best Practices

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

DOUG FALK



VICE PRESIDENT & CIO, NATIONAL STUDENT CLEARINGHOUSE

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

Prior to being named CIO, Doug was the Clearinghouse's long-time Vice President of Information Technology and CTO. He was instrumental in developing the Clearinghouse's Web-based application services and its data management capabilities. Doug has been a member of the PESC board since January 2008, served as Co-Chair of PESC's Data Privacy & Protection Task Force, and he also served as Board Chair. *June 30, 2024*

W. BRYANT FAUST



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

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

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

ALEXANDER JACKL



PRESIDENT & CEO, BARDIC SYSTEMS

Alex is a technology strategist, futurist, and data scientist who specializes in developing eco-systems that support learners and educators. He is a leader in developing, maintaining and in the practical application of the use of standards and data. His focus is on the implementation of mature, modern architectures and strategies. He provides vision and strategy around developing approaches, projects, and programs to create the future of education now and to build systems that are sustainable and can stay modern with as little TCO as possible. Alex works in the Pre-Kindergarten to K12 to PostSecondary to Workforce educational space, primarily, though not exclusively, in the United States. Over the last 21 years he has been focusing on enterprise data and system architecture in the district, state and federal education agency space.

He is also the Chair of the North American Technical Board of the Access For Learning (A4L) Community, who support the Schools Interoperability Framework (SIF), and the Co-Chair of the PESC Competencies & Credentials Task Force, and the Reusable Competency Definitions Workgroup for IEEE. He has worked on Common Education Data Standards (CEDS), the National Education Data Model (NEDM), the Student Data Privacy Consortium (SDPC), and the LER/ILR projects with the T3 Innovation Network, the U.S. Chamber of Commerce Foundation, and the White House. *June 30, 2023*

DAVID MOLDOFF



CHAIRPERSON

CEO AND FOUNDER, ACADEMYONE

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

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

MICHAEL SESSA



PRESIDENT & CEO, PESC

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

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

MONTEREY SIMS



VICE CHAIRPERSON

DIRECTOR OF ADMISSION & EVALUATION, UNIVERSITY OF PHOENIX

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

She strongly believes in root cause analysis, continuous relentless improvement and solutions that support both students and staff. She spearheaded the implementation of electronic data exchange (EDI/XML) for incoming and outgoing transcripts at the University over a decade ago and continues to enhance related processes and partnerships through her work in PESC and the AACRAO SPEEDE Committee. Monterey also serves on the PACRAO Board of Directors as Business Partner Liaison, ArmyIgnitED Education Institution Advisory Board and the eTransCA Steering Committee. *June 30, 2024*

FRANCISCO VALINES



DIRECTOR OF FINANCIAL AID, FLORIDA INTERNATIONAL UNIVERSITY

Francisco has been involved in Student Financial Aid Administration for over 35 years at various large public Universities including the University of Florida, Texas Tech University, Washington State University, the University of Tennessee, Knoxville, The University of Maryland, College Park, and Florida International University. He is in his tenth year as the Director of Financial Aid at Florida International University, a public research University with 54,000 students, a Law School and a Medical School. FIU is designated as a Hispanic Serving Institution and qualifies for the Title III and Title V exemptions for Title IV Aid matching requirements based on the size and ratio of its Pell Grant recipients. Prior to coming to FIU, Francisco was the Associate Director of Financial Aid at the University of Maryland, College Park for 15 years.

Francisco is currently serving on the PESC Board, served as Board Chair and is the Federal Legislative Relations Chair for the Florida Association of Student Financial Aid Administrators (FASFAA). He was also the 2013-2014 Chair of the NASFAA Technology Initiatives Committee. He has served on many NASFAA committees including the Reauthorization Task Force, Technology, Need Analysis, and College Access. He has presented at State, Regional, and National Conferences in such diverse areas as Technology in the Aid Office, Using Diversity in packaging financial aid, Gramm-Leach-Bliley as it applies to financial aid, Hot topics for Grad and Professional Financial Aid, Disaster Preparedness, BBAY Loans, and many others. *June 30, 2024*

JASON WEAVER



VICE PRESIDENT, PRODUCT, PARCHMENT

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

Jason is responsible for Parchment's product strategy, roadmap, solution design, partnerships, and standards compliance. Jason has served as the volunteer Co-Chair of PESC's Education Records User Group from 2014-2018 & as Board Vice Chair. Jason holds a B.S. in Information Science and Technology from Penn State, and currently resides in Omaha, Nebraska. *June 30, 2024*

VIVIAN WONG



GROUP VICE PRESIDENT, HIGHER EDUCATION, ORACLE

Vivian is a dynamic, outcome driven, and accomplished executive who brings a wealth of experience and talent in developing world-class software in leading global engineering teams. She is an excellent collaborator and communicator with strong leadership skills, with over 20 years experience building on-premise, SaaS, and mobile products for PeopleSoft, Oracle, Taleo, ServiceMax, and TargetX. As Group Vice President of Oracle Higher Education, Vivian currently leads the product development team at Oracle for higher education. Under her direction this team is building a next generation student information system - Student Cloud - which through its groundbreaking approach to empowering institutions and students globally will disrupt the industry.

Vivian is strategic, results-oriented and highly focused on customers' success. An expert at building, transforming and leading high-caliber teams, Vivian is talented at fostering an empowering, fun and collaborative environment to unleash the full potential of an organization. Vivian is a strong customer advocate; she ensures quality, usability, performance and scalability are always designed and built into the solutions she delivers. Vivian is passionate about making the world a better place. For team bonding, she leads her teams to practice philanthropy. Among other personal and professional endeavors, she currently served on the Board of Directors for IMS Global, an education industry standards body, in which Oracle remains on the Board.

June 30, 2024

DAVID YERG



DIRECTOR OF PRODUCT MANAGEMENT, SAAS PLATFORM, ELLUCIAN

David currently serves as Director, Product Management at Ellucian overseeing the Innovation and Transformation team. The team is focused on disruptive innovation and digital transformation initiatives within the Ellucian ecosystem to improve student outcomes. Prior to his most recent role, David has led the strategy for Ellucian Workflow and the Experience SaaS Platform.

Prior to Ellucian, David has worked in a range of product roles over 2 decades in the ed-tech and wireless industries serving both B2B and B2C customers. David's range of experience reflects his curiosity and drive to solve problems. As an English major in college with uncertain career options upon graduation, David is gratified at how far a liberal arts education can take someone. He currently resides in Northern Virginia.

June 30, 2024

PESC STAFF

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data standards across the education domain since 1997.*



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