ROADMAP FOR MIGRATION TO
COMPREHENSIVE LEARNER RECORDS (CLR) AND
INTEROPERABLE LEARNING RECORDS (ILR)

PESC 2.0

MICHAEL D. SESSA FEBRUARY 24, 2020 V 10
www.PESC.org
**Roadmap** is a strategic plan that defines a goal or desired outcome, and includes the major steps or milestones needed to reach it. It also serves as a communication tool, a high-level document that helps articulate the strategic thinking — the why — behind both goal and the plan for getting there.

(https://www.productplan.com/roadmap-basics/)
Change is the only constant in life.

- Heraclitus

Time may change me but I can't trace time.

- David Bowie, Changes

We fear change.

- Garth Algar, Wayne’s World

PESC Roadmap for Migration to CLR/ILR Data
With PESC Approved Standards implemented across Canada & USA, PESC’s responsibility is to provide new versions with CLR/ILR data.

New learner data elements will be added to All PESC Approved Standards.

(eventually)
PESC APPROVED STANDARDS 2.0

All PESC Approved Standards will be upgraded to Version 2.0 ‘CLR/ILR’ version.
**PESC Approved Standards 2.0**

<table>
<thead>
<tr>
<th>PESC Approved Standard</th>
<th>Current Version</th>
<th>CLR/ILR Version</th>
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</thead>
<tbody>
<tr>
<td>Academic Credential &amp; Experiential Learning</td>
<td>1.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Academic College Transcript</td>
<td>1.8</td>
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<tr>
<td>Academic ePortfolio</td>
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<td>Academic High School Transcript</td>
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<td>2.0</td>
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<td>1.1</td>
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<tr>
<td>Academic Record</td>
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<td>2.0</td>
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**PESC Roadmap for Migration to CLR/ILR Data**
PESC Taglines

1) Activating Interoperability Across the Education Lifecycle
2) Collaboration for the Greater Common Good
3) Connecting College & Career
4) Driving Data Systems Alignment
5) Enabling the Portability of Education Data
6) Experience. The Difference.
7) Maximizing the Value & Integrity of Your Technology
8) Multiple Stakeholders. One Vision.
9) Standards Make the World Go ‘Round
10) Unlocking the Power of Education Data

Leading the Establishment & Adoption of Trusted, Free & Open Data Standards Since 1997
NEW PESC TAGLINES

1) Advancing Learner Achievement Worldwide
2) Advocates for Data Standardization/Mobility
3) Architects of Higher Education Data
4) Connecting the New Digital Ecosystem
5) Find It Here
6) Higher Education’s Digital Data Community
7) Leaders in Digital Data Connectivity/Mobility
8) Standards Bodies United
9) The Right Standard/Technology at the Right Time
10) The Power of Community

Leading the Establishment & Adoption of Trusted, Free & Open Data Standards Since 1997
Academic Credentialing & Experiential Learning Task Force
CBE@lists.pesc.org

Admissions Workgroup for Standardizing Recruitment Data
RecruitAdmit@lists.pesc.org

Canadian PESC User Group
CA_UserGroup@lists.pesc.org

Data Privacy & Protection Task Force
Privacy@lists.pesc.org

Global Education Organization Code User Group + Steering Committee
CBE@lists.pesc.org

JSON – LD Task Force
JSON@lists.pesc.org

Board of Directors + Executive Committee
Board@lists.pesc.org

Competencies & Credentials User Group + Steering Committee
CBE@lists.pesc.org

EdExchange User Group + Steering Committee
EdExchange@lists.pesc.org

Seal of Approval Board
SAB@lists.pesc.org

Standards Development Forum for Education + Steering Committee
(CCB@lists.pesc.org, ER_UserGroup@lists.pesc.org, PESCTAB@lists.pesc.org, PESCforum@lists.pesc.org)

PESC Roadmap for Migration to CLR/ILR Data

PESC GROUPS

Free & Open
NEW: EdPlan
Rick Skeel, Ellucian
Mark Cohen, CCC
edplan@lists.pesc.org

PESC Member-Based

- Alex Jackl, Bardic Systems
- Joellen Shendy, Workday
- Michael Hovland, University of Iowa
- Susan McCrackin, College Board
- Doug Holmes, OUAC
- Cathy van Soest, EducationPlannerBC
- Doug Falk, National Student Clearinghouse
- Julia Funaki, AACRAO
- Matt Bemis, University of Southern California
- Jim Kelly, ECE
- Michael Morris, ACT
- Doug Falk, National Student Clearinghouse
- Alex Jackl, Bardic Systems
- Joellen Shendy, Workday
- Mark Cohen, California Community Colleges
- Dave Moldoff, AcademyOne
- Monterey Sims, University of Phoenix
- Kristi Blabaum, Great Lakes, NASLA
- Matt Bemis, USC | Jason Weaver, Parchment
- Michael Morris, ACT
- Susan McCrackin, College Board
Competencies & Credentials
User Group

PESC Roadmap for Migration to CLR/ILR Data
Academic Credentialing & Experiential Learning Task Force

Competencies & Credentials
Steering Committee
Alex Jackl, Co-Chair
Joellen Shendy, Co-Chair

1) Mark Cohen, CCC
2) Simone Ravaoli, Digitary
3) Ken Sauer, ICHE
4) Rick Skeel, Ellucian
5) Anne Valentine, DegreeData
6) Jason Weaver, Parchment
7) Joshua Westfall, USCCF
8) Kim Bartkus, HROS
9) Larry Fruth, A4L

PESC EdExchange
User Group

User Group (No Limit)

1) Matt Bemis, USC
2) Kristi Blabaum, Ascendium
3) Mark Cohen, CCC
4) Andrew Cunsole, HROS
5) Brandon Dorman, ACT
6) Joanne Duklas, Duklas Cornerstone
7) Doug Falk, NSC
8) Julia Funaki, AACRAO
9) Darin Hobbs, WGU
10) Doug Holmes, OUAC
11) Jim Kelly, ECE
12) Jeanne Kitchens, SIU
13) Susan McCrackin, College Board
14) Dave Moldoff, Academy1
15) Carrie Morris, ACT
16) Michael Morris, ACT
17) Robert Powell, Jenzabar
18) Simone Ravaoli, Digitary
19) Paul Robinson, University of Michigan
20) Ken Sauer, Indiana Commission for HE
21) Monterey Sims, Uphoenix
22) Karen Simpson-Alisca, Cal State
23) Rick Skeel, Ellucian
24) Cathy van Soest, EducationPlannerBC
25) Anne Valentine, DegreeData
26) Jason Weaver, Parchment
27) Joshua Westfall, USCCF
28) Kristi Wold-McCormick, UCcolorado
29) ?

CanPESC User Group

Data Privacy & Protection User Group

JSON-LD Task Force

PESC GEO Code User Group

Standards Development Forum for Education

Competencies & Credentials
User Group & Inter-Group Relationships

PESC Roadmap for Migration to CLR/ILR Data
# PESC Roadmap for Migration to CLR/ILR Data

## All PESC Groups

### Competencies & Credentials

- **User Group**
  - Free & Open to Participate
  - PESC Member to Co-Chair
  - PESC Member to Vote

### Academic Credentialing & Experiential Learning Task Force

### Coordination of Activities

- T3 Innovation Network & PESC

## T3 Innovation Network

- [https://www.uschamberfoundation.org/t3-innovation](https://www.uschamberfoundation.org/t3-innovation)

## Assist, Develop & Work Under T3

- **#3 LR Standards**

## Assist, Participate, Contribute Under T3

- **#1 Harmonization**
- **#4 Public/Private/Gov’t**
- **#5 Competency Exchange**
- **#9 Individual Level Data**
- **#10 Student/Worker**

## Meeting Schedules TBD

- Fridays 11am EDT

### Standards Development Forum for Education

- Change Control Board
- Education Record User Group
- Technical Advisory Board

- **Representative Team**
  - XML Development
  - JSON-LD Development
  - Partner with Schema.org
  - Registry & Repository
  - New Policies/Procedures
  - Prioritize Next Standards

### #1 Harmonization

- Free & Open to Participate
- PESC Member to Co-Chair
- PESC Member to Vote

### #3 LR Standards

- Free & Open to Participate
- PESC Member to Co-Chair
- PESC Member to Vote

### #2 PESC EdPlan (following #1)

- Free & Open to Participate
- PESC Member to Co-Chair
- PESC Member to Vote

### #4 Public/Private/Gov’t

### #5 Competency Exchange

### #9 Individual Level Data

### #10 Student/Worker

Meeting Schedules TBD
PESC Roadmap for Migration to CLR/ILR Data

T3 Innovation Network
https://www.uschamberfoundation.org/t3-innovation

Assist, Develop & Work Under T3

#3 LR Standards

Assist, Participate, Contribute Under T3

#1 Harmonization
#4 Public/Private/Gov’t
#5 Competency Exchange
#9 Individual Level Data
#10 Student/Worker

Meeting Schedules TBD

Academic Credentialing & Experiential Learning Task Force

Competencies & Credentials
Steering Committee

Competencies & Credentials
User Group
ePortfolio?

2) PESC EdPlan
• Free & Open to Participate
• PESC Member to Co-Chair
• PESC Member to Vote

Representative Team

Coordination of Activities
T3 Innovation Network & PESC

Mark Cohen, CCC, Co-Chair
Rick Skeel, Ellucian, Co-Chair
Alex Jackl, Bardic Systems
Joellen Shendy, Workday
Anne Valentine, DegreeData
Michael Sessa, PESC

Meeting Schedules TBD

TBD
TBD
TBD
TBD
TBD
TBD
TBD

PESC Roadmap for Migration to CLR/ILR Data
PESC Statement of Work
Timeline: May 1, 2019 – December 30, 2020

1. Project 1: Continue Participation in the Mapping Group for Improving Alignment and Harmonization of Data Standards for Search and Discovery and System to System Data Transfer Use Cases (May 2019 to October 2020)
   a. Assist is in developing a charter for the Mapping Group under the T3 Network.
   b. Assist in developing a standards harmonization process and provide input into the development of a platform for supporting mapping and harmonization.
   c. Assist in developing a two-year work plan starting with T3 Network mapping and harmonization priorities related to competency data; comprehensive CLR/ILRs; and personal identifiers and related protocols for linking individual-level employment and CLR/ILRs as well as self-sovereign data management.
   d. Assist in developing a plan for long-term sustainability of the standards harmonization process under the charter that is established.
   e. Participate in 6-8 webinars to assist in conducting this Project 1 work.

   a. Work with other data standards organizations and leading HR and CLR/ILR system vendors in mapping, aligning and filling gaps in HR systems, resume and CLR/ILR standards to improve interoperability and competency-based hiring.
   b. Assist in developing public and private stakeholder use cases for search and discovery and system to system data sharing between employers records and their talent sourcing partners and learners using a wide variety CLR/ILRs (e.g., transcripts, comprehensive student records, resumes, military transcripts, employee records) and vendor systems with a focus on improving competency-based hiring and advancement.
   c. Identify relevant PESC standards for improving interoperability between HR systems (e.g., ATS candidate records) and systems for managing and sharing CLR/ILR data (e.g., resumes, comprehensive CLR/ILRs).
   d. Work with the Project 1 T3 Network Team and other project partners to map, align and fill gaps in standards to improve interoperability and competency-based hiring and advancement.
   e. Develop proposed revisions for PESC standards for pilot-testing that could be eventually established as PESC standards that are open standards for use in the talent marketplace.
   f. Participate on an advisory group to plan pilot-testing of aligned and enhanced standards for improving interoperability between HR systems and comprehensive CLR/ILRs for improving competency-based hiring and advancement.

   a. Participate in 2-3 meetings with standards bodies and federal and state agencies to review and revise draft guiding principles and processes established by pilot project 4. Explore how federal and state agencies can promote and/or participate in one or more pilot opportunities.

4. Project 5: Competency Data Exchange (July 2019 – April 2020)
   a. Provide input into the design of the competency data exchange.

5. Project 9: Data Collaboratives for Individual-Level Data (July 2019 – April 2020).
   a. Participate 2-3 webinars to coordinate standards development for individual identifiers for employment and earnings and CLR/ILRs.

6. Project 10: Empowering the American Student and Worker (July 2019 – April 2020)
   a. Participate in 2-3 webinars for developing protocols for self-sovereign data management and developing plans for their pilot-testing.

7. Maintain regular contact with the Foundation and consultants throughout the duration of the grant through phone calls, emails, webinars, and in-person meetings.

8. The Consultant understands that Phase 2 of the T3 Innovation Network and all of the pilot project work tasks must be completed by October 2020. Because of this, the Consultant will make every effort to adhere to deadlines for deliverables set forth by the Foundation. Failure to do so may result in termination of this Agreement.

9. The Consultant shall perform all work in a timely and professional manner. The consultant shall not subcontract for any of the services provided to the Foundation without written approval from the Foundation.
PESC Roadmap for Migration to CLR/ILR Data