PROGRAM

OCTOBER 8-10, 2014 | WASHINGTON DC | WWW.PESC.ORG

1ST ANNUAL DATA SYMPOSIUM & SUMMIT

ADVANCING STUDENT ACHIEVEMENT WORLDWIDE
Each Fall as budgets renew and as students return to school, **EDiINTEROP** unites the education domain to collaborate around interoperability under a common mission that leverages innovation, technology & standards for the advancement of student achievement worldwide.

~

Anchored in Washington, D.C. and held each fall, **EDiINTEROP** focuses on local, regional, national & global factors driving education data and data systems, mobility innovation, technology & standards.
PESC thanks the following organizations that provide
Annual Diamond Sponsorship:

[Logos of the organizations]
**Program at a Glance**

### Wednesday
**October 8, 2014**

- **7:30am – 5:00pm**
  - Registration
  - Hyatt

- **7:30am – 9:00am**
  - Continental Breakfast
  - Hyatt

- **8:30am – 10:00am**
  - General Sessions
    - Hyatt
    - Columbia B
  - Concurrent Sessions
    - Hyatt
    - Yellowstone
    - Bryce
    - Common Core Discussion
  - Concurrent Sessions
    - Hyatt
    - Grand Teton
    - Student Aid User Group
    - Hyatt
    - Columbia C
    - AACRAO SPEEDE Committee

- **10:00am – 10:15am**
  - Break

- **10:15am – Noon**
  - General Sessions
    - Hyatt
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- **Noon – 1:30pm**
  - Lunch

- **1:30pm – 3:00pm**
  - General Sessions
    - Hyatt
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  - Concurrent Sessions
    - Hyatt
    - Common Data Services & EdExchange
    - Seal of Approval Board
  - Concurrent Sessions
    - Hyatt
    - Common Data Services & EdExchange
    - Canadian PESC User Group
    - CCB, TAB & Steering Committee

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    - CCB, TAB & Steering Committee

- **5:30pm – 7:00pm**
  - Fall Reception
    - Liaison
    - Art & Soul
  - Annual Fall Membership Meeting
    - Hyatt
    - Congressional C & D

### Thursday
**October 9, 2014**

- **7:30am – 5:00pm**
  - Registration
  - Hyatt

- **7:30am – 9:00am**
  - Continental Breakfast
  - Hyatt

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### Friday
**October 10, 2014**

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  - Hyatt

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  - Continental Breakfast
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Welcome to the FALL 2014 DATA SYMPOSIUM & SUMMIT!

The 1st Annual Data Symposium & Summit takes place Wednesday October 8, 2014 at The Liaison Capitol Hill, an Affinia Hotel in Washington, D.C. Beginning at 7:30am with continental breakfast and registration, the 1st Annual Data Symposium & Summit includes PESC’s Annual Fall Reception and Annual Membership Meeting and concludes by noon on Friday October 10, 2014.

DATA SYMPOSIUM & SUMMITS focus on open, community-driven development and innovation of technology & standards; access, integration and implementation of data systems; maintenance and promotion of data standards; data quality, exchange and usage; mobility and overall interoperability; and political factors that drive global education data and technology.

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 roll up their sleeves, discuss and interact in more detail in order to advance group activities and maximize in-person convening time.

PESC and its Membership lead transparent, collaborative development across P20W Education. Supporting this mission are PESC partners the AACRAO SPEEDE Committee, the U.S. Department of Education, the CEDS Initiative and InCommon/Internet2. PESC is sponsored annually by the Common Application, Credentials Solutions, Oracle, Parchment, National Student Clearinghouse, SIRP-SAFE, USA Funds & XAP.
GENERAL SESSION PROGRAM

8:30am – 8:40am  WELCOME & INTRODUCTIONS

Doug Falk, CIO, National Student Clearinghouse; Chair PESC Board of Directors

8:40am – 9:30am  NEXT GENERATION GLOBAL INTEROPERABILITY

KEYNOTE:  GLOBAL PERSPECTIVES ON DIGITAL STUDENT DATA PORTABILITY FROM THE GRONINGEN DECLARATION NETWORK

Speaker
Herman de Leeuw, Secretary, Groningen Declaration Network and DUO – Education Executive Agency, Netherlands Ministry of Education, Science and Culture

The Groningen Declaration is the declaration of intent signed on April 16, 2012 in Groningen, the Netherlands, at the closure of the Global Founding Seminar Digital Student Data Depositories Worldwide. Digital Student Data Depositories Worldwide, or The Groningen Declaration as the initiative has come to be known, aims to bring about 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.

The inaugural meeting in 2012 was broadened in 2013 with a meeting in Beijing, then in 2014 with a meeting at Georgetown University in Washington, D.C. The next annual meeting of the Groningen Declaration is being held May 4-6, 2015 at the University of Malaga in Spain.

The growing importance of The Groningen Declaration is signified by the number of nations included, from The Netherlands, France, Italy, Spain and the UK, to Mexico, China, Australia, Romania and South Africa to many others, including the United States of America which is represented on the Executive Committee by Michael Reilly, Executive Director of the American Association of Collegiate Registrars and Admissions Officers (AACRAO); Ricardo Torres, President & CEO of the National Student Clearinghouse; and Tom Black, Associate Vice Provost for Student Affairs and University Registrar at Stanford University.

9:30am – 10:15am  NEXT GENERATION OPEN BADGES

Speaker
Sunny Lee, Director of Infrastructure Strategy, The Badge Alliance

The digital age has created unprecedented opportunities to learn, both formally and informally. To have the greatest impact on the life of an individual, those learning opportunities must be made apparent in a way that is digital, interoperable, and verifiable. Open Badges is a new technology that enables the representation, validation, and sharing of skills and knowledge acquired in a classroom, on the job, in the community or online. A digital badge is defined as “an online
representation of a skill you’ve earned.” Open Badges takes that concept one step further, allowing you to verify your skills, interests and achievements through credible organizations and attaching that information to the badge image file, hard-coding the metadata for future access and review. Learn more about how Open Badges can affect the learning and skill building landscape throughout education and the workforce sectors.

10:15am – 10:30am  **BREAK**

10:30am – Noon  **NEXT GENERATION TRANSCRIPTS, COMPETENCY-BASED LEARNING & CREDENTIALS**

**Moderator**  
Rick Skeel, Functional Director, Kuali Student; PESC Board of Directors

**Panel Speakers**  
Thomas Black, Associate Vice Provost for Student Affairs & University Registrar, Stanford University  
Matthew Pittinsky, CEO, Parchment  
Ricardo Torres, President & CEO, National Student Clearinghouse

This panel features experts in education technology who will share their respective views on the evolution of the traditional transcript and the impact competency-based learning and credentialing will have on the education and workforce sectors. Panelists will identify the trends, illustrate the landscape and outline the opportunities competency-based learning can bring across other sectors. Then through open dialogue the session will discuss the implications to credentialing, ePortfolio, student identity, privacy, to the underlying supporting systems and applications and what might be required to prepare for the future. A specific topic of this panel includes focus on the role institutions can play, along with other sectors, including taking advantage of portability and scaling-up existing, proven improvements in student services.

Noon – 1:30pm  **LUNCH**

12:35pm  **DISTINGUISHED SERVICES AWARD CEREMONY**  
**Honoring**  
Brian Allison | Doug Holmes | David RR Webber

12:40pm  **NEXT GENERATION TECHNOLOGY THROUGH OET**

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

**Speaker**  
Richard Culatta, Director, Office of Educational Technology (OET), U.S. Department of Education

OET has been very active in reaching out to the community over the years. Richard continues providing significant and timely updates to the PESC community and this year will discuss their Annual Datapaloozas, held in partnership with the White House; a software developer’s toolkit; and the latest information on the First in the World competition for higher education innovation.
Innovation and new technologies are challenging the traditional definition of privacy and the practice of protecting it. Our panel of experts will focus on six topics and discuss their impacts on data collection, sharing and privacy.

1) The onset of big data and big data collection has created new types of data. Large data sets available to various sectors (education, non-education, 3rd party, workforce, etc.) are now serving millions of students. As we witness the growth and comingling of private, protected and self-attested data and/or artifacts in 3rd party managed data sets, what are the evolving implications to these data aggregators many of whom are also SaaS providers, as it relates to the maintenance of ownership rights with a diverse set of potential data owners?

2) Sharing (or 'trading') partners in some instances may be contractually acting on behalf of another organization. New sharing models, never before thought of, have emerged. We must understand these new business relationships so that both parties sharing know to whom data is being shared, for whom, by whom and for what purpose.

3) With the evolution of privacy, data aggregation has emerged. Those aggregating data & those receiving it are encountering the need for data standards, protocols and student/3rd party access to the data, among others. What else is needed to satisfy privacy concerns & what other trends are influencing the market.

4) State and Federal policymakers have been struggling to get it right. Allowing access and sharing must be balanced with the need for privacy. States do not always agree while federal guidance has just recently improved. Some best practices have emerged along the way though. What can these best practices teach us & what have we learned from the past?

5) The world is experiencing an unprecedented heightened awareness around data and privacy. Major data breaches seem to be an everyday occurrence now. There are a number of myths in the tabloids and it can be difficult to truly understand the risk. What are these myths and is there any relationship to reality?

6) U.S. Federal Regulations are trying to keep pace with the ever-changing face of privacy. What regulations are coming up? Will the community have opportunities to work with government to develop more effective law?
The evolution of student aid is long, winding and complicated. While required use of electronic processing and PESC Approved Standards has resulted in highly automated systems, enhancing these systems with new and emerging features while ensuring that only the right funds are issued to the right student at the right time remains highly complex.

Our panel of experts will make sense of it all through discussion topics including Reauthorization of the Higher Education Act and Elementary and Secondary Education Act (HEA, ESEA), Pending legislative proposals, college rating score card, changes in servicer evaluations and potential implications, gainful employment and student loan repayment issues like pay as you earn, campus debit cards and new repayment plans, among many others. Of particular interest in this panel is the discussion of industry topics from various perspectives (institution, student, service provider, etc.) and the link between the market and the systems, standards and infrastructure providing support.

3:30pm – 3:45pm  BREAK

3:45pm – 4:15pm  NEXT GENERATION STUDENT SERVICES

Moderator
Andy Wood, Vice President of Product Engineering, Oracle; PESC Board of Directors

Panel Speakers
CommIT – Charles Leonhardt, CTO, Georgetown University; PESC Board of Directors

The concept of ‘single sign-on’ is very simple and easy to understand. The key to its success is a unique ID and a network of providers all connected in the background through a trusted federation. Building this infrastructure is the Common Identity and Trust (CommIT) Collaborative, forged through a partnership with PESC and Internet 2/InCommon. With a successful pilot already in place, the leaders are looking to scale-up CommIT and begin offering it for use throughout education in 2015. Which organizations are in the pilot and which are coming on board? Come to this session to hear about this unprecedented service in education.

4:15pm – 5:00pm  NEXT GENERATION DATA STANDARDS

Moderator
Michael Sessa, President & CEO, PESC

Panel Speakers
FASTandard – Jeffrey Alderson, Lead Architect, Alliances and Services, Houghton Mifflin Harcourt; PESC Board of Directors
STUDENT AID – Francisco Valines, Director of Financial Aid, Florida International University; PESC Board of Directors

In looking to the future, PESC and its members are anticipating the need for faster development of standards and further standardization within the student aid sector. President Obama has been aggressive in implementing consumer-friendly tools and information for federal student aid. While Reauthorization of the Higher Education Act remains inactive, certain provisions may be allowed to move forward. Panelists will discuss advancement of standards development through the PESC process, new potential standards and the vital role of community participation and transparency.

5:30pm – 7:00pm  ANNUAL FALL RECEPTION
# Unifying the Education Domain Around Interoperability to Advance Student Achievement

## COMMON APPLICATION

**Common Application**

[The Common Application](www.commonapp.org)

The Common Application is a not-for-profit membership organization that, since its founding over 35 years ago, has been committed to providing reliable services that promote equity, access, and integrity in the college application process. We serve students, member institutions, and secondary schools by providing applications that students and school officials may submit to any of our over 500 members. Membership is open to colleges and universities that promote access by evaluating students using a holistic selection process.

**Contact:**

Tim McGraw
Director, Information Systems
(917) 575-9456
tmcgraw@commonapp.org

## PARCHMENT

**Parchment**

[www.parchment.com](www.parchment.com)

Parchment’s mission is to turn credentials into opportunities. We help learners, educators, associations and employers securely send and receive education credentials online, in simple and insightful ways.

At Parchment, we build a virtual bridge to connect learners, educational institutions, associations and employers who rely on education credentials. The Parchment platform has helped millions of people & thousands of schools & universities to exchange more than 12 million transcripts and other credentials globally.

Parchment is powered by a team of experienced education & technology professionals who have first-hand experience serving students as registrars, admissions officers, teachers and engineers. They are passionate about helping people use their education to achieve their full potential.

## CREDENTIALS SOLUTIONS

**Credentials Solutions**

[www.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.

**Contact:**

J. Jeffrey Geldermann
President & COO
(847) 716-3010
jjg1@credentialssolutions.com

## SCRIP-SAFE

**SCRIP-SAFE**

[www.scrip-safe.com](www.scrip-safe.com)

SCRIP-SAFE International is a global leader for innovative document security solutions for both electronic and paper transcripts. We provide secure electronic ordering and delivery of transcripts through the eSCRIP-SAFE Global Electronic Delivery Network which includes hundreds of schools and organizations worldwide. SCRIP-SAFE is the largest supplier of secure transcript paper to more than 1,800 educational organizations. Our desktop diploma solution, software and decorated paper, is used by collegiate registrars worldwide.

## NATIONAL STUDENT CLEARINGHOUSE

## USA FUNDS
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<tr>
<th>National Student Clearinghouse</th>
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<tr>
<td><strong>Contact:</strong> Doug Falk&lt;br&gt;Chief Information Officer&lt;br&gt;(703) 742-4200&lt;br&gt;<a href="mailto:service@studentclearinghouse.org">service@studentclearinghouse.org</a></td>
<td><strong>Contact:</strong> Brian Allison&lt;br&gt;Vice President of Product Development&lt;br&gt;(317) 806-1286&lt;br&gt;<a href="mailto:brian.allison@usafunds.org">brian.allison@usafunds.org</a></td>
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<td>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.</td>
<td>USA Funds® is a nonprofit organization with more than 50 years of service to more than 22 million students and parents, and thousands of colleges and universities. USA Funds delivers tools and solutions to help postsecondary institutions improve their student loan default prevention, debt management and financial literacy results. USA Funds Borrower Connect™ is a Web-based tool that makes it easy for schools to contact and counsel their student loan borrowers to promote successful repayment. USA Funds Borrower Connect InTouchSM offers schools all the benefits of individual borrower counseling — without all the work. USA Funds Life Skills® is 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.</td>
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<td><strong>Contact:</strong> Andy Wood&lt;br&gt;Vice President Product Engineering&lt;br&gt;(503) 276-2360,&lt;br&gt;<a href="mailto:andy.wood@oracle.com">andy.wood@oracle.com</a></td>
<td><strong>Contact:</strong> Peter Knepper&lt;br&gt;CEO&lt;br&gt;(310) 743-0450,&lt;br&gt;p <a href="mailto:knepper@xap.com">knepper@xap.com</a></td>
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<td>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.</td>
<td>XAP is an industry leader in providing students and adults with online tools to explore careers and discover, plan, and apply to colleges and universities. XAP’s products are used by thousands of K-12 institutions and colleges and universities in the United States and Canada.</td>
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UNIFYING THE EDUCATION DOMAIN AROUND INTEROPERABILITY TO ADVANCE STUDENT ACHIEVEMENT
Unifying the Education Domain Around Interoperability to Advance Student Achievement

Thomas Black, Associate Vice Provost for Student Affairs and University Registrar, Stanford University
tblack@stanford.edu

Thomas Black is the Associate Vice Provost for Student Affairs and University Registrar at Stanford University. He has worked in higher education for thirty-eight years in various administrative positions, serving in registrar positions at the University of Chicago, Duke University, and the University of North Carolina at Chapel Hill. He is an honorary member of the Southern Association of Collegiate Registrars and Admissions Officers and the Carolinas Association of Collegiate Registrars, and he frequently presents at the national conferences of the American Association of Collegiate Registrars and Admissions Officers. Tom also has served as a member of the National Student Clearinghouse Advisory Board. He is interested in global exchange of student data, as articulated in the Groningen Declaration, using best practices and standards to ensure only authorized access to that information. Notably, he is currently involved in an exciting pilot program for the secure exchange of electronic credentials from China to the United States, in an effort to reduce fraud, ensure secure record exchanges, enhance the end user experience and to enable greater student data portability. Most recently, his interests have expanded to the development of electronic portfolios. Tom received his bachelor’s and master’s degrees from Pennsylvania State University.

Mark Cohen, Senior Vice President, Market Strategy & Co-Founder, Parchment
mcohen@parchment.com

Mark Co-Founded Parchment (as Docufide) in 2003 and currently serves as the company’s Chief Security and Privacy Officer with a focus on Parchment’s commitment to security, data privacy and compliance across Parchments vast exchange network. As a member of Parchment’s Executive Management team, Mark is the executive owner for a series of corporate initiatives that includes Parchment’s commitment to data standards and open data, representing Parchment at PESC, SIfA, and a number of industry and policy conferences. Mark has been an active member of PESC since 2004. A vocal proponent of standards-based data, Mark serves as Co-Chair of the Common Data Services Task Force and has participated in a number of PESC workgroups and initiatives beginning with the development of the XML high school transcript standard released in 2006. Previously Mark served as Parchment’s Vice President of Product Development. With a mission to turn credentials into opportunities, Parchment has helped millions of people and thousands of schools and universities to exchange more than 12 million transcripts and other credentials globally through a network that includes more than 3400 high schools, 2600 higher education institutions, members in more than 90 countries, and organizations that include the GED, Common App & the NCAA.

Richard Culatta, Director, Office of Educational Technology, U.S. Dept. of Education
richard.culatta@ed.gov

Richard Culatta is a leader in the field of educational innovation. He has experience in K-12, higher education, and workplace learning environments. As the Director of the Office of Educational Technology for the US Department of Education his work focuses on leveraging technology to create personalized learning experiences for all students and promoting increased connectivity to improve access to education and make college more affordable. Prior to joining the Department of Education, he served as an education policy advisor to U.S. Senator Patty Murray. Culatta’s previous work centered around leveraging social media to create effective large-scale distributed learning environments. Prior to joining the federal government, Culatta was the Director of Operations for the Rose Education Foundation and learning technologies advisor at Brigham Young University where he was instrumental in redesigning the teacher preparation program at the McKay School of Education. He began working with educational technology at the University of Rhode Island where he co-taught the university’s first technology integration workshops for faculty. Culatta is passionate about accelerating innovation in education with a
particular interest in games for learning, personalized learning, and open education. He recently taught EdStartup 101, a massive open online course (MOOC) to support new educational entrepreneurs in developing the next generations of apps and services for teachers and learners. As a former Spanish teacher, Culatta remains an advocate for bilingual education. He lives in northern Virginia with his wife and four children.

Tuan Anh Do, Director of Enrollment Management Technology, San Francisco State University
doey@sfsu.edu
Tuan Anh Do serves as within the Division of Student Affairs at San Francisco State University going on 17 years. He oversees all the Information Technology needs for Enrollment Management and key on-campus auxiliary units. Tuan is Enrollment Management’s main technical contact on a variety of systems, inclusive of being Coordinator for the Student Information System, Coordinator and Oracle DBA for Singularity Document Archive system, Oracle Application Developer, EDI Developer, ASP Web Developer and a shared resource on-campus for issues concerning Data Flow, Transformation and Integration between systems. Tuan has been the California Representative of the AACRAO SPEEDE Committee since 2005 and has served as Chair of the SPEEDE committee. Tuan has also served as Vice-President and President of the Singularity User’s Management Team (SUMiT) as well as being active member of the PESC Change Control Board, PESC Technical Advisory Board & is the former Co-Chair of the PESC Education Record User Group.

Doug Falk, CIO, National Student Clearinghouse
dfalk@studentclearinghouse.org
Doug Falk brings over 27 years of information technology experience to his role as CIO for the National Student Clearinghouse. His extensive experience includes application design and development, software implementation, IT project management, leadership and vision for developing and implementing cost-effective, high quality IT initiatives, including the Clearinghouse’s Web-based enrollment and degree verification services, the largest in the US. Additional responsibilities include ensuring the continuous delivery and operation of the organization’s information systems, strategic and tactical planning, as well as development, evaluation and coordination of all IT systems. Prior to joining the Clearinghouse, Doug spent 10 years in IT at Sallie Mae. He earned an MS in information systems technology from George Washington University and an undergraduate degree in computer information systems from DeVry Institute of Technology. He joined the PESC Board in July 2008.

Sunny Lee, Director of Infrastructure, Badge Alliance
sunny@mozillafoundation.org
Sunny Lee is the Director of Infrastructure at Badge Alliance. In this role, she works closely with the Director of Technology and members of the community to provide the stewardship and support necessary to ensure the ongoing growth and development of the Open Badges Infrastructure, the technical underpinning to support wide adoption of Open Badges and promote the growth of the ecosystem. Prior to that she was the Product Lead of Open Badges when it was incubating within Mozilla. As Product Lead, she oversaw product strategy and daily product management duties but particularly enjoyed talking to members of the community in order to learn from their experiences with badges and how they used badges to meet their community needs. She loves talking to people about badges in general and the potential for open badges as an alternative and complementary system for credentialing. She works tirelessly to promote open badges as a viable and evidence-based way to capture lifelong learning that can be used to evaluate learners for career and educational advancement and opportunities. Sunny has a Master of Information Management & Systems degree from UC Berkeley with an emphasis in Education & Technology. In another lifetime, Sunny used to develop TV shows in Los Angeles.
Herman de Leeuw,
herman.deleeuw@duo.nl

Herman de Leeuw currently works at the Dienst Uitvoering Onderwijs (Education Executive Agency), an agency directly under the Netherlands Ministry of Education, Culture and Science based in Groningen, the Netherlands. Herman is Secretary to the Groningen Declaration Network, a worldwide initiative which promotes the use of digitally stored student data to facilitate academic and professional mobility on a global scale. Herman has been serving in a number of elected positions in EAIE, the European Association for International Education from 2006 onwards, first as member of the ACE Board (Admissions Officers and Credential Evaluators), from 2006-2008; then twice as ACE chair (2008-2012); and from 2012-2014 as member of EAIE’s General Council. Herman is a regular contributor to EAIE, AACRAO and NAFSA conferences, bringing digital student data portability, authenticity and forgery issues to the fore through conference sessions, workshops, and training courses, and by a number of articles on authenticity issues and forgeries. Herman studied Arabic at Leiden University, the Netherlands, from 1979 to 1988. From 1985 to 1991, he worked as a cataloguer/bibliographer in the antiquarian book trade and in academe, specializing in antiquarian Oriental books and manuscripts. Herman has an MA in Arabic Language and Literature from Leiden University, the Netherlands.

Charlie Leonhardt, CTO, Georgetown University
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Charlie Leonhardt is the Chief Technology Officer at Georgetown University. In this role, he has served as the primary advisor on technology issues to the CIO and University administration since 2004. He is responsible for strategic and tactical planning as well as enterprise Scholarly Information Systems that directly support teaching, learning, and research. He leads Georgetown’s participation in federated authentication / authorization research and development. As Georgetown’ primary liaison to technology organizations, Charlie has chaired the Common Solutions Group and has been Co-Chair of the PESC EA2 Task Force since its launch in 2006. He is very excited about the CommIT project forged in partnership with Internet2 and the InCommon Federation. Charlie received the PESC Distinguished Service Award in 2011 and the Educause Exemplary Practices in Information Technology Solutions Award in 2000. Charlie received degrees from Georgetown and American Universities.

Megan McClean, Managing Director of Policy and Federal Relations, National Association of Student Financial Aid Administrators (NASFAA)
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Megan is the Managing Director of Policy and Federal Relations at the National Association of Student Financial Aid Administrators (NASFAA) where she oversees the Association’s policy and advocacy efforts. Prior to joining NASFAA in the fall of 2010, she served as the Director of Government Relations for the federal Advisory Committee on Student Financial Assistance, where she contributed to several congressionally mandated reports on the postsecondary access and persistence of low- and moderate- income students. Megan began her career in higher education as an admissions counselor at Penn State University. She received a master’s in higher education at Penn State and BA in political science from Allegheny College.
Matthew Pittinsky, Ph.D., Chief Executive Officer
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Matthew brings to Parchment a unique background as both an education technology entrepreneur and a sociologist of education. In 1997 he co-founded Blackboard Inc., serving first as Chief Executive Officer and then Executive Chairman. Millions of students across the world use Blackboard technologies. Matthew is on the faculty of Arizona State University, serves on the Board of Trustees of The Woodrow Wilson National Fellowship Foundation and is leading a national effort to establish a national, standardized Postsecondary Achievement Report (PAR), a digital “extended transcript” that would more fully record student achievement and knowledge during their higher education experience. In 2012 the Teachers College at Columbia University awarded Matthew with The President’s Medal of Excellence to recognize his impact and innovation in the field of education technology and entrepreneurship. He is a frequent speaker, and has recently been invited to present at NewSchools Summit, Association of American Universities meeting, National Association for College Admission Counseling National Conference and SXSWedu. Matthew holds a B.S. in Political Science from American University, Ed.M. in Education Policy from Harvard University Graduate School of Education and a Ph.D. in Sociology of Education from Teachers College, Columbia University.

Ross Santy, National Center for Education Statistics (NCES), U.S. Department of Education
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Ross Santy is the Associate Commissioner of the Administrative Data Division within the National Center for Education Statistics. The division was formed in 2013 to consolidate major collections of aggregate statistics that depend upon administrative record systems in K-12 and higher education agencies. In this role, Mr. Santy oversees IPEDS, EDFacts, and the Common Core of Data for NCES. Also included within the division is the team responsible for developing Common Education Data Standards and providing grants and technical assistance for states to develop better longitudinal data systems. Previously Mr. Santy served as the Directory of the Performance Information Management Service, a component of the Office of Planning, Evaluation and Policy Development. Mr. Santy joined the Department of Education in 2005 after serving four years as the co-founder and head of information and operations at Just for the Kids - California, a non-profit organization that maintained and hosted a set of online reports and tools to help school leaders make sense of educational performance data. While at Just for the Kids—California, Mr. Santy designed and built what was at the time the largest data repository of longitudinally linked student level academic performance information in the state. Prior to that he served as Director, Resources and Development Office at the Los Angeles County Office of Education; Director, Instructional Technology at the Browning School in New York and as a high school history teacher in New Jersey. Mr. Santy earned a Master’s in Educational Technology from the Harvard Graduate School of Education, and an undergraduate degree in Educational Psychology from Princeton University. He is also proficient in computer systems networking and data storage.

Mark Schneiderman, Senior Director, Education Policy, Software and Information Industry Association (SIIA)
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Mark Schneiderman represents SIIA’s members before policy makers and education leaders on the government programs, funding and regulations that impact technology at all levels of education. Schneiderman works with SIIA members and other education stakeholders to identify educational trends and needs, formulate a vision for technology and related policies, address industry and market challenges, and advocate for enabling legislation and government programs at the federal and state levels. In so doing, he has built a variety of strategic partnerships and managed SIIA leadership initiatives to address key barriers to the enhanced use of digital learning. He also helps education providers understand the impact of public policies and
regulations on their customers so they can better serve educational needs. Prior to joining SIIA, Schneiderman was Legislative Associate for the Council of Chief State School Officers, where he represented the public officials heading each state's department of education. He holds a BA in Political Science from the University of Pennsylvania and an MPP from Georgetown University. He serves on the executive board of the National Coalition for Technology in Education and Training (NCTET), and he previously served on boards of the KIPP DC/Key Academy charter school and the Committee for Education Funding (CEF).

**Michael Sessa**, President & CEO, PESC  
michael.sessa@pesc.org

Michael serves as president and chief executive officer of PESC, a non-profit 501 (c)(3), community-based, umbrella association and data standards-setting body for education technology stakeholders, a position he’s held since joining PESC in October 2002. Michael is PESC’s chief fundraiser and evangelist promoting open standards and interoperability nationally and internationally. Prior to joining PESC in 2002, Michael worked 10 years at American Student Assistance (ASA) as Director of Program Relations and Planning managing industry and government affairs and strategic technological initiatives. Under (ASA) and representing the National Association of Student Loan Administrators (NASLA), Michael served on the PESC Board of Directors from 1999-2002. He started his career in 1990 at The Boston Five Cents Savings Bank as retail consumer lending underwriter and compliance officer. Michael is a 1989 graduate of Dartmouth College and was born and raised in Revere, Massachusetts. He currently resides in Washington, D.C. where PESC is headquartered.

**Rick Skeel**, Functional Director, Kuali Student, Kuali Foundation  
rskeel@ou.edu

Rick has been a long time member of PESC as a member of the AACRAO SPEEDE Committee, and was on the Committee that formed the foundation for what became PESC. He has worked with national and community standards groups for more than 20 years through his work on SPEEDE. He was a member of the PESC board for more than 7 years and had to step down from his position on the Board because of a change in employment. He worked at the University of Oklahoma for more than 35 years and retired from that institution at the end of October 2012. That retirement also took him off of the AACRAO SPEEDE Committee, at least temporarily. He is now working with the Kuali Foundation as the Functional Director of Kuali Student, which has been a member of PESC for several years and very supportive of national standards. Rick is very interested in returning to the PESC Board to continue the work he has been involved in for so many years, and believes his past experience as well as his new position gives him a breadth of experience that is very valuable to the organization.

**Ricardo Torres**, President, National Student Clearinghouse  
rtorres@studentclearinghouse.org

Rick 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 over 3,600 higher education institutions and over 8,000 high schools, school districts and 43 states executing over one billion electronic transactions annually, saving higher education over $600MM a year in costs. Prior to joining the Clearinghouse, Mr. Torres had a distinguished career in the private sector, both in the U.S. and abroad, including senior executive management roles at Capital One and BestPractices, a nationally-recognized provider of emergency medicine and physician practice management. Mr. Torres’ career includes domestic and international positions in finance, sales, marketing and leadership in leading organizations such as PepsiCo and Philip Morris/Kraft Foods (now known as Altria Group). Mr. Torres is a board member of the John Tyler Community College Foundation, American Association of
Community Colleges (AACC), the National College Access Network (NCAN), and the Cesar Chavez Public Charter Schools for Public Policy. He serves on the Executive Committee of the Groningen Declaration Network Group. He also serves on the Advisory Board of Cohesive Knowledge Solutions (a knowledge management company). He was a recipient of the Washington Business Journal’s 2013 Minority Business Leader Award. Mr. Torres recently wrote an article, entitled “Barriers to Electronic Movement of Credentials,” which was published on September 10, 2013, in the Stanford University’s digital publication, Transcending the Maze on. Mr. Torres holds an MBA in International Finance from Georgetown University and undergraduate degrees in both Marketing and Management from Manhattan College.

Francisco Valines, Director of Financial Aid, Florida International University
valinesf@fiu.edu

With over 30 years’ experience in financial aid, Francisco Valines is Florida International University’s Director of Financial Aid, a position he has held since March 2006. Prior to this role, Francisco worked at University of Maryland as Senior Associate Director and also in a variety of roles before that at University of Tennessee, Washington State University, Texas Tech University and University of Florida. He is a long-time active member of NASFAA, currently serving on its Reauthorization Task Force, and having served on a number of its committees including its Technology Committee and also served on ELM’s Advisory Council for a number of years. Francisco has been a Director on PESC’s Board since December 2006 as was Chair for FY14 and FY15.

Andy Wood, Vice President of Product Engineering, Oracle; PESC Board of Directors
andy.wood@oracle.com

As Vice President of Product Engineering, Andy leads the global team that is responsible for developing Oracle’s higher education student products. He has managed and led both architecture and product development teams for both Oracle and PeopleSoft Student Systems. Andy has a deep background in Financial Aid, Student Records and Admissions. Prior to working in product development for Oracle and PeopleSoft, Andy worked on Campus Solutions implementations as a PeopleSoft Higher Education consultant. Prior to that, Andy spent 13 years at the University of California, Riverside, where he focused exclusively on Student Systems. He held a number of management positions in or involving the Office of the Registrar, Financial Aid and Undergraduate Admissions. Andy managed development and deployment of projects including transfer course articulation, electronic transcripts, financial aid regulatory updates, automated admissions and degree progress. Andy joined the PESC Board in July 2006 and lives in Portland, Oregon with his wife Beena and daughter Sahana.
CONCURRENT SESSION DESCRIPTIONS

**Academic ePortfolio Workgroup** is a temporary, member-appointed development workgroup that is currently developing an XML-based standard for the exchange of ePortfolios by trading partners.

**Canadian PESC User Group** is a permanent, open group that looks to bring global interoperability throughout Canada and the world with the use of PESC Approved Standards.

**Change Control Board** is a permanent, member-appointed committee that oversees the establishment and maintenance of PESC Approved Standards.

**Common Core Discussion** is an ad-hoc group discussing the latest status of Common Core, Race to the Top, and what technology and standards may be needed to support state assessment goals and outcomes.

**Common Data Services & EdExchange** is a permanent, member appointed committee studying data exchange and planning the launch of EdExchange, data exchange protocols that can be used by any education stakeholder to exchange education data, anywhere, anytime.

**Common Identity & Trust (CommIT) Collaborative** is a permanent, member appointed committee working in partnership with InCommon and Internet2 to support the operation of CommIT’s unique ID single sign-on system.

**Education Record User Group** is a permanent, member-appointed committee that oversees all maintenance and development of all registrar- and admission-based PESC Approved Standards.

**Student Aid User Group** is a permanent, member-appointed committee that oversees all maintenance and development of all student aid PESC Approved Standards.

**Technical Advisory Board** is a permanent, member-appointed committee that provides technical assistance and expertise to all other PESC committees, board and workgroups.
WHO WE ARE

Established in 1997 at One DuPont Circle and headquartered in Washington, D.C., PESC is an international non-profit, community-based 501 (c)(3) umbrella association of data, software and education technology service providers; local, state and federal government agencies; colleges, universities and schools; college and university systems; professional and commercial organizations; and non-profit organizations and associations.

OUR MISSION

Through open and transparent community participation, PESC enables connectivity between data systems to accelerate performance and service, to simplify data access and research, and to improve data quality along the education lifecycle.

OUR VISION

PESC Envisions national and international interoperability within the Education domain, supported by a trustworthy, inter-connected network called EdUnify built by and between stakeholders and communities of interest, in which data flows seamlessly from one 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.

ABOUT PRIVACY

While PESC promotes the implementation and usage of data exchange standards, PESC does not set (create or establish) policies related to privacy and security. Organizations and entities using PESC Approved Standards and services should ensure they comply with FERPA and all local, state, federal and international rules on privacy and security as applicable.
PESC Membership

AACRAO - American Association of Collegiate Registrars and Admissions Officers*
AAMC - Association of American Medical Colleges
Accenture
ACE – American Council on Education
ACRP - Alliance of Career Resource Professionals
ACT*
American Student Assistance
ApplyAlberta
Arizona State University
BCCampus
California Community College System
California School Information Services
California State University System
Career Cruising
Central Connecticut State University
College Board*
Community College of the Air Force
Cosumnes River College
Credentials Solutions
Educause
ellucian
ELM Resources
Emory University
Florida International University
Florida State University
George Washington University
Georgetown University
Hobsons
Houghton Mifflin Harcourt Inc.
iData
Jenzabar
IMS Global Learning Consortium
Indiana State University
Kuali Foundation
Memorial University of Newfoundland
Michigan State University
NASFAA - National Association of Student Financial Aid Administrators
NASLA - National Association of Student Loan Administrators
National Student Clearinghouse
NCHER - National Council of Higher Education Resources

North Carolina State University
OCAS - Ontario College Application Services
OUAC - Ontario Universities’ Application Centre
Oracle
Parchment
Pathbrite
PHEAA - Pennsylvania Higher Education Assistance Authority
Pittsburg State University
Purdue University
Purdue University North Central
SCRIP-SAFE International
SHEEO - State Higher Education Executive Officers
SIF Association
Smarter Balanced
Southern Connecticut State University
SSD Technology Partners
Stanford University
The Common Application
University of Arizona
University of British Columbia
University of California, Berkeley
University of Denver
University of Idaho
University of Illinois System
University of Lethbridge
University of Louisiana at Lafayette
University of Mississippi
University of Missouri System
University of North Carolina
University of Oklahoma
University of Oregon
University of Phoenix
University of Puerto Rico
University of South Florida
University of Southern California
University of Texas at Austin
University of Virginia
University of Wisconsin - Madison
US Department of Education*
USA Funds*
Washington State University
XAP Corporation
UPCOMING MEETINGS & EVENTS

**PESC SPRING DATA SUMMIT 2015**
April 22 – 24, 2015 | Hilton Crystal City | Washington, D.C.

**EDiTEROP: PESC 2nd ANNUAL DATA SYMPOSIUM AND SUMMIT**
October 14 – 16, 2015 | Liaison Capitol Hill | Washington, D.C.

**PESC BOARD OF DIRECTORS ANNUAL RETREAT**
June 2015

Also PESC will be attending and/or exhibiting at the following industry conferences and events in 2015:

- **Ellucian Live!**
  - April 11-15, 2015
  - New Orleans

- **AACRAO Annual Conference**
  - April 12-15, 2015
  - Baltimore

- **Groningen Declaration**
  - May 1-4, 2015
  - Malaga

- **Canheitt**
  - TBD
  - TBD

- **AACRAO Transfer/Tech Conference**
  - July 12-14, 2015
  - Austin

- **NCES Stats-DC**
  - TBD
  - Washington, D.C.

- **Sheeo Annual Policy Conference**
  - August 2015
  - TBD

16th ANNUAL BEST PRACTICES COMPETITION

Now in its 16th year, THE ANNUAL BEST PRACTICES COMPETITION is held to highlight and promote innovation and ingenuity in the application and implementation of interoperable data standards. First held in 1999, the competition is open to institutions, associations, organizations, districts & schools, government agencies & departments, districts, consortia, non-profit & commercial service providers and other stakeholders that have collaborated to design and/or adopt an electronic standardization initiative in education.

FOR FIRST TIME ATTENDEES

EDINTEROP: PESC’s Data Symposium and Summit is like no other event in education technology. At PESC, we emphasize that policy and business must drive the systems and technology we develop. Systems, technology and an overwhelming amount of software are available now like never before. The “technical” part of interoperability is the easier piece of the much larger challenge of fully automated, global interoperability.

It is in fact the “business” part of interoperability that presents the most challenges. Interpreting precise protocols, understanding your sharing or trading partner’s exact technical capabilities and limitations – ultimately understanding that the performance, or lack thereof, of your sharing or trading partner could begin to impact your organization’s bottom line and your customers.

This event, therefore, brings technology experts and executive decision-makers together on the first day in general sessions to discuss the “business” or market/industry, latest trends in student and consumer behavior, upcoming rules and regulations, barriers to attaining interoperability, and all other major factors influencing data systems, technology, innovation and standards.

With content in mind, on the second day, all of PESC’s committees, boards, user groups, and workgroups meet in concurrent sessions to progress the activities and goals of their respective groups. Concurrent sessions are working meetings and include highly interactive discussions.

The third day, being held in celebration of International Portability of Education Data Day, serves as an exhibit or demonstration of how PESC Approved Standards are being used throughout the world to solve numerous problems. Organizations showcasing their solutions are experiencing improved data access and quality, reduced costs and simplified processes; and they share their experiences as lessons and/or best practices to follow.

All registered attendees are eligible to participate in any and all events during EDINTEROP.

At PESC, transparent collaboration is our cornerstone principle. We are many stakeholders with many different purposes and roles; yet we come together under one mission. Coupled with our theme of “co-opepetition”, that is ‘competitors cooperating for the greater common good of advancing student achievement’, PESC and its members are bringing interoperability to an unprecedented level of awareness around the world.

While we open all of our groups for the general public to participate in at PESC’s Spring and Fall Data Summits in an effort of transparency, ongoing participation in PESC’s committees, boards, user groups, and workgroups is limited to PESC Members. For information about PESC Membership, to get involved, to join lists and groups, please visit www.PESC.org or contact Jennifer Kim, PESC’s Membership Services Director at 202.261.6514.*

*PESC’s Canadian PESC User Group is the only group open to non-members, meaning the general public can participate in this group any time, but participation in all other PESC groups are limited to PESC Members.
Distinguishing the Education Domain Around Interoperability to Advance Student Achievement