Welcome to the 5th Annual Conference on Technology & Standards!

In our 5th year on this journey towards interoperability, we reflect back on some of the major factors that we’ve discussed in the past. We’ve showcased the importance of interoperability and stressed the need for “business” interoperability as much as technical interoperability. We’ll continue to illustrate best practices, useful implementations of technology & standards, and to champion the value of data-driven decision-making and systems alignment.

What has emerged this year as a significant factor though impacting all facets of higher education is context. Keeping students in school — and learning — has become a major challenge. The way students communicate, the way they learn, and how they interact in some instances subverts all prior paradigms of teaching and learning. New and disruptive technologies continue to emerge and sometimes makes us wonder if technology is helping or hurting.

At the same time, the rate of students dropping out of high school is described as a crisis while finding and keeping good, qualified teachers could be described as the same. The topic of student aid, sometimes a source of anxiety for students and parents, escalates this year due to significant budget cuts in the Federal Family Education Loan Program (FFELP). Add to the mix the recent credit crunch, worries about campus safety, and a potential recession, and some feel a loss in the ability to maneuver a way forward.

So while we continue to focus on technology, standards and interoperability, this year we expand the discussion to include the environment in which technology and standards run. We are very pleased and excited to bring you a prominent lineup of speakers and sessions in a new hotel. Please make every effort to learn from the sessions we’ve brought to you, meet and network with each other, and ensure that you join us for our wonderful luncheons and for our exclusive cocktail reception in the Thornton Room on the 11th floor.

We thank everyone involved with production of the conference and encourage you to engage with the speakers and with each other.

Enjoy the conference!

Joe Belew  Kathleen Smith  Brett Lief  Michael Sessa
President, CBA  President, EFC  President, NCHelp  Executive Director, PESC
CBA, EFC, NCHELP, and PESC thank the following conference program committee members for their active participation in making this year’s annual conference a success! Thank you!

**Program Committee 2008**

**David Bailey**  
_Guarantee Services Branch Manager_  
Kentucky Higher Education Assistance Authority (KHEAA)

**Mike Balogh**  
_Federal Relations and Industry Operations Officer_  
National Council of Higher Education Loan Programs (NCHELP)

**Laurie Collins**  
_Project Strategist_  
Schools Interoperability Framework Association (SIFA)

**Lisa Elliott**  
Federal Student Aid (FSA), U.S. Department of Education

**Jim Farmer**  
Georgetown University

**Lynn Murphy**  
_Vice President, Guarantee & Customer Services_  
Education Assistance Corporation

**Kathleen Smith**  
_President_  
Education Finance Council (EFC)

**Harrison Wadsworth**  
_Principal_  
Washington Partners
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<td>Lunch — Kuali Project</td>
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## Program At A Glance

### Tuesday
**April 29th**

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<td><strong>CONCURRENT SESSION</strong> — The Business Value of CRM</td>
<td>Ticonderoga Room</td>
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Monday, April 28

7:30 am–9:00 am  
Registration and Continental Breakfast  
Lower Level Foyer

8:30–9:00 am  
Welcome, Opening Remarks, and Awards  
Columbia Room AB

Speaker: Michael Sessa, Executive Director, Postsecondary Electronic Standards Council (PESC)

9:00–10:15 am  
A Roundtable Discussion on the Impact of Politics on Higher Education  
Columbia Room AB

Speakers:  
Brett Lief, President, National Council of Higher Education Loan Programs (NCHelp)  
Kathleen Smith, President, Education Finance Council (EFC)  
Harrison Wadsworth, Principal, Washington Partners

Moderator: Michael Sessa, Executive Director, Postsecondary Electronic Standards Council (PESC)

The presidential campaign, a long-awaited Reauthorization of the Higher Education Act, budget reconciliations, negotiated rulemaking, and the current credit crunch have mixed together to create a perfect storm of uncertainty. With subsidy cuts and new requirements many lenders are analyzing both their participation in the federal student loan programs and offerings of private loans. Colleges, universities and families face uncertainty about the availability of loans for the first time in many years. At the same time, the regulatory burden on colleges and lenders is increasing. In this session Kathleen Smith will provide an overview of the political factors that are impacting higher education. Harrison Wadsworth will discuss impacts to lenders especially as they relate to private loans. Brett Lief will summarize new requirements and new reporting and stress the importance of cost-savings including implementation of already developed standards.

10:15–10:30 am  
Break  
Lower Level Foyer

10:30–11:45 am  
A Community Vision of Interoperability: FFELP Data Standardization  
Columbia Room AB

Speakers:  
Kristi Blabaum, FAMS/Industry Analyst, Great Lakes Higher Education Guaranty Corporation  
Justin Draeger, Assistant Director for Communications, National Association of Student Financial Aid Administrators (NASFAA)  
Pam Eliadis, Director National Student Loan Data Systems (NSLDS) Group, Federal Student Aid (FSA), U.S. Department of Education

Moderator: Mark Putman, Chief Technology Officer, National Council of Higher Education Loan Programs (NCHelp)

As Federal Student Aid continues to work towards its vision for modernizing and integrating its business processes, the FFEL Business Process and Data Standardization Project has been initiated to discuss FFEL process improvement recommendations and define the data standards to be exchanged between Federal Student Aid and its partners throughout the entire life-cycle of FFEL Program loans — from inception to closure and for all loan and organization level reporting requirements. This session provides an overview of the project, including the scope, structure and current status, as well as to highlight the process followed with the larger community to contribute to these efforts. Also, there will be a panel discussion where the Department of Education, FFELP community and schools will provide their perspectives on this project.
**11:45 am–1:15 pm**

**Lunch — Kuali Project**

*Speaker:* Philip McKown, Kuali Project Administrator, Indiana University

*Capitol Room*

**1:15–2:15 pm**

**CONCURRENT SESSIONS**

### Common Record: CommonLine (CR:C) Implementation

*Columbia Room A*

**Speakers:**
- David Bailey, Guarantee Services Branch Manager, Kentucky Higher Education Assistance Authority (KHEAA)
- Jennifer M. Hulvey, Student Systems Lead Functional Analyst, Student Financial Services, University of Virginia
- Rhonda Kilgore, Product Strategy Manager, Oracle Corporation

**Moderator:** Brian Allison, Vice President of Technology and Industry Initiatives, USA Funds

This session will provide a brief overview of the CommonRecord: CommonLine (CR:C) format; its benefits for college/university financial aid offices, lenders, servicers and other organizations; and ensure that attendees have a basic understanding of the functionality within CR:C. A discussion with the NCHELP Electronic Standards Committee and organizations that are utilizing CR:C in production will focus on successes in the implementation process, the importance of its implementation, and the challenges and lessons learned by analysts and developers during their implementation and testing of CR:C.

### Global Authentication: Liberty Alliance Identity Assurance Framework

*Columbia Room B*

**Speaker:** Brett McDowell, Executive Director, Liberty Alliance

**Moderator:** Tim Cameron, Meteor Project Manager, National Council of Higher Education Loan Programs (NCHELP)

Federations inside the enterprise have been advancing globally, but growth outside the enterprise requires better definition of trust/assurance, business rules for governing that assurance and some means of certifying or accrediting levels of assurance offered by organizations and federations. What information is used, how it is shared and how it is protected has been the topic of much discussion and regulatory guidance, and organizations have struggled to grow their identity deployments outside of the virtual walls of the institution, impeding the growth that many have predicted would take place. The Identity Assurance Framework — a product of work from the global membership of the Liberty Alliance — builds on existing NIST assurance level standards and collaborative input from other organizations. This session will provide attendees with a solid understanding of Identity Assurance work underway in the marketplace, tangible guidance on what other institutions are doing, and a blueprint for how to get involved. Some technical knowledge is helpful but not mandatory as the bulk of the presentations will focus on business level case studies.
Evaluating Mass Notification Services for Campus-Wide Communication

Speaker: Jack Sharon, Manager, Technical Solutions Engineering, Blackboard
Moderator: Jennifer Kim, Membership Services Manager, Postsecondary Electronic Standards Council (PESC)

In the wake of recent severe weather, various school and campus incidents, and other safety concerns it is increasingly apparent that campus leaders need a mass notification service that allows them to quickly and effectively communicate with campus students, faculty and staff. Connect-ED for higher education was designed to help higher education administrators send rapid, reliable communication when these types of unexpected events occur. This session will introduce you to institutions that have turned to technology to help drive their communication strategies. Additionally, this session will provide you with the main points to consider when evaluating a mass notification service.

2:15–2:30 pm Break

2:30–3:30 pm CONCURRENT SESSIONS

Recommendations from PESC’s EA2 Task Force

Speakers: Charlie Leonhardt, Principal Technologist, Georgetown University
Tim Cameron, Meteor Project Manager
Moderator: Jim Farmer, Georgetown University

The Meteor Project in the U.S. has exchanged student financial data among lenders, guaranty agencies, the federal and state governments and colleges and universities since 2002. Meteor implemented industry and higher education standards, including Shibboleth authentication and IETF encryption, as they existed in 2001.

This presentation begins describing the status of the Meteor network. It discusses the implementation of “transitive trust” to integrate the network with campus services, comments on other services that Meteor can be used for, and describes future plans for the Meteor network and use of Meteor technology by others.

The second part comments on the use of Meteor, Liberty Alliance, Internet 2, and Kuali Rice technologies as the basis for integration with campus applications and information services from firms, government agencies, research laboratories and other universities. “Trust” may become the final barrier to widespread adoption.

Considerations for Future XML Development Methodologies

Speaker: Steve Margenau, Systems Analyst, Great Lakes Educational Loan Services, Inc.
Moderator: Richard Henninger, Chief Software Architect, Datatel, Inc.

The standards creation process is not standing still. PESC is continually developing new standards. Have we learned anything from our experiences developing these standards? You bet we have! Will the things we learned affect how PESC standards are developed? You bet they will! As PESC grew and achieved momentum, one of the initial milestones we reached was the realization that storing our component definitions in a
few schemas lends itself well to the organizational thought processes of people. It also lent itself well to creating our standards using components stored in a hierarchy of just a few schemas. However, as we have gained experience, we have learned this organizational pattern does not lend itself well to software processing efficiencies. This session will describe the ongoing work of the Technical Advisory Board, aimed at moving PESC to an organizational model of individual XML-based data components that are used to create schemas via a “copy and paste” approach.

**The Application of Business Intelligence in Higher Education**

**Speaker:** John Van Weeren, Product Manager, Technology, Datatel  
**Moderator:** Pete Nalli, Director of Architecture and Software Development, Datatel

Concepts that we’re familiar with in everyday life can be applied to selecting, designing and implementing an effective Business Intelligence solution. There are many components to a B.I. program that lead to successful outcomes. There are also many challenges unique to the higher education industry. Through the use of analogy this session will give an overview of B.I. architectures and technologies with consideration for their application in higher education. For example, what can a car dashboard teach us about the use of analytics and dashboards to more effectively manage an institution? Or what can playing with Lego’s tell us about how data should be organized and shared for answering business questions within the institution and sharing externally for benchmarking? How do standards from PESC and other organizations create benefits for business intelligence solutions?

**Monday, April 28**

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3:30–3:45 pm  **Break**  Lower Level Foyer

3:45–4:45  **CONCURRENT SESSIONS**

**European Initiatives and Impacts on the U.S.**

**Speaker:** Jim Farmer, Georgetown University  
**Moderator:** David Moldoff, CEO and Founder, AcademyOne, Inc.

In the 2006–2007 academic year, 582,984 international students enrolled in U.S. higher education institutions — 3.2% of total enrollment. At the same time, 223,534 students from the United States of America studied abroad with most of these students attending colleges and universities in the 46-nation European Higher Education Area (EHEA). Working with academic organizations, the software suppliers — informally called the “Rome Workshop Group,” as the kick-off for this initiative was held in Rome in December 2007 — are recommending standards for real-time data exchange. When approved, the standards will be required of all participating colleges and universities. The second Rome Workshop meeting to continue this standardization effort is being held April 25, 2008, in Dublin. This session defines and describes the Bologna process, the corresponding recommended standards, the standards-making process in the European Union, and efforts to coordinate the EHEA effort with PESC standards and workgroup activities.
Emerging Trends in Finding Alternative Data Sources and Tools for Loan Underwriting  

**Speaker:** Stuart Pratt, President, Consumer Data Industry Association  
**Moderator:** Harrison Wadsworth, Washington Partners, LLC

Credit providers are currently looking for alternative data sets which are either starting to be reported to traditional credit bureaus or which could be reported. This session will cover the available options in today’s marketplace. It will take a look at the work that is being done on the difficult process of compiling credit reports and scores using alternative data that are appropriate for potential students who don’t have a traditional credit history yet need tens of thousands of dollars to finance higher education.

Standards Initiatives in Development  

**Speakers:** Laurie Collins, Project Strategist, Schools Interoperability Framework Association (SIFA)  
Rick Skeel, Director of Academic Records, University of Oklahoma  
Eddie Upton, Systems Analyst Manager, University of Mississippi  
**Moderator:** Michael Sessa, Executive Director, Postsecondary Electronic Standards Council (PESC)

Leaders from various development organizations will provide an overview of current development and maintenance initiatives. Topics to be discussed include EDI and XML and how standards are most likely to be implemented.

5:00–6:00 pm  
**PESC 10th Annual Membership Meeting**
### Program

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| 9:00–10:15 am    | **PK-20 Data Systems Alignment: Perspective from the U.S. Department of Education**<br>
**Speakers:** Holly Hyland, Project Manager for Enterprise Data Management, Federal Student Aid (FSA), U.S. Department of Education<br>Ross Santy, Director of the Performance Information Management Service (PIMS), Office of Planning, Evaluation, & Policy Development (OPEPD); U.S. Department of Education<br>**Moderator:** Dr. Larry Fruth, Executive Director, Schools Interoperability Framework Association (SIFA)<br>Ross Santy, Director of PIMS, and Holly Hyland, Project Manager for Enterprise Data Management, will present an update on data standardization initiatives across the Department of Education. This presentation will cover new initiatives designed to promote and foster common data standards across the Department and within the education community of interest. | Columbia Room AB |
| 10:15–10:30 am   | **Break**                                                            | Lower Level Foyer |
| 10:30–11:45 am   | **Statewide Student Unit Record Databases in Higher Education: Growth and Applications**<br>
**Speaker:** Peter Ewell, Vice President, National Center for Higher Education Management Systems (NCHEMS)<br>**Moderator:** Michael Sessa, Executive Director, Postsecondary Electronic Standards Council (PESC)<br>Forty-two of the fifty states have established one or more student unit record (SUR) databases to support studies intended to improve higher education policy. Compiled from census date and end-of-term enrollment data provided by each public institution in the state, these records can be used to track students across institutions, to drive funding formulas, and, through links to employment records, estimate returns on investment for training. Based on a detailed fifty-state inventory of SUR databases, this session describes their capabilities, raises core issues associated with their construction and use, and discusses applications of the resulting data. | Columbia Room AB |
| 11:45 am–1:15 pm | **Lunch**                                                            | Capitol Room      |
### Exchange of Electronic Transcripts via Ohio Board of Regents Articulation & Transfer Clearinghouse

**Speakers:** Terry Young, Senior Programmer and Analyst, Computing and Telecommunications, Wright State University  
Allison Rhea, Senior Director of Enrollment Management - Registrar, Sinclair Community College  
**Moderator:** Jennifer Kim, Membership Services Manager, Postsecondary Electronic Standards Council (PESC)

The need to provide better customer service while cutting costs lead to the Ohio Board of Regents to develop the Articulation and Transfer Clearinghouse which serves as a hub for colleges and universities to exchange student data. Recognizing the value such a process would provide, representatives from Sinclair Community College and Wright State University, functioning with competing student information systems, worked together to upgrade their transcript exchange process from paper-based to electronic. For their efforts, Sinclair Community College and Wright State University received PESC’s 2007 Best Practices award. This session will discuss their approach to implementation, how they succeeded, the benefits they are realizing, and the plans they have for the future.

### Web Tools to Improve Customer Service — Part 1, Business Trends

**Speaker:** Tim Bornholtz, President, The Bornholtz Group

Every day a new feature or functionality seems to emerge on the world wide web. Which features bring value? What functionality do you need to know about? What can blogs, syndication, and Facebook do for your organization? This session will review current trends on the web from a business perspective, discuss tools that your organization can use to remain competitive in today’s changing world, and highlight tools that can provide business value to your organization.

### Value of SIFA in PK-12 Interoperability

**Speakers:** Dr. Larry Fruth, Executive Director, Schools Interoperability Framework Association (SIFA)  
Laurie Collins, Project Strategist, Schools Interoperability Framework Association (SIFA)  
**Moderator:** Barbara Clements, Chief Standards Officer, National Transcript Center

Interoperability and the use of standards such as SIF have become the norm in the PK-12 space. What does this mean, how does it work and what are the long term goals of the secondary education community as they start looking at building longitudinal data systems incorporating and linking data in and across a wider PK-20 space. Looking at it from this perspective we will share the work being done between PESC and SIFA, various SIF to PESC e-Transcript and Student Record Exchange Proof of Concept Projects in progress and how we can work with the Higher Education community to ensure everyone’s needs for data are being met by using common definitions and agreed upon standards.
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<td><em>Speakers:</em> Mark Johnson, President, ESP Solutions</td>
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<td>John O’Connell, Senior Vice President of Business Development, Docufide</td>
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<td>Craig Powell, President, ConnectEdu, Inc.</td>
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<td>J. Michael Thompson, CEO, XAP Corporation</td>
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<td><em>Moderator:</em> Bill Hollowsky, General Manager, SunGard Higher Education</td>
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<td>As data and software providers are vitally important to the mission of interoperability, this session will focus on the role and impact of standardization from their perspective. A panel of executives will discuss emerging trends in the market and their corresponding impacts, traits of successes and identification of barriers, increased standards awareness and the impact to the industry, and challenges faced with sustainability.</td>
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<td>This session will discuss current trends on the web but from a technical perspective. Topics to be discussed include technologies and code necessary to make the web work better for us, syndication, Ruby on Rails, and web-based programming interfaces exposed by major sites like Yahoo!, Facebook, and Del.icio.us.</td>
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<td><em>Moderator:</em> Mark Putman, Chief Technology Officer, National Council of Higher Education Loan Programs (NCHELP)</td>
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<td>The Real ID Act, signed into law on May 11, 2005 by President Bush, includes specific requirements for state-based drivers licenses and ID cards. Implementation of Real ID had previously been held up for a variety of reasons. Earlier this year though, the Department of Homeland Security issued final regulations that stipulate compliance deadlines within the next few years. This session will provide an overview of what Real ID is, its requirements and impacts, and will discuss other initiatives related to ID and authentication.</td>
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<td>3:30–3:45 pm</td>
<td><strong>Break</strong></td>
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3:45–4:45 pm

**CONCURRENT SESSIONS**

**The Data Quality Campaign’s Efforts to Build Longitudinal Education Data Systems that Improve Student Achievement**

**Columbia Room B**

**Speaker:** Tom Lindsley, Director, Washington DC Office, National Center for Educational Achievement / ACT, Inc.

**Moderator:** Michael Sessa, Executive Director, Postsecondary Electronic Standards Council (PESC)

This session will examine the status of state efforts to implement statewide longitudinal data systems with appropriate connections to postsecondary education for the purpose of improving student achievement and program effectiveness in P-20 systems. Hear the key findings from a survey of the states conducted for the Data Quality Campaign by the National Center for Educational Achievement. Learn about new P-20 systems being designed and implemented. Get up-to-date information on related federal policy decisions that will affect funding and incentives to help states implement these systems, including efforts to update federal laws that would allow using data systems for appropriate research to improve student achievement.

**Electronic Data Exchange Standards in FFELP**

**Yorktown Room**

**Speakers:** Tim Cameron, Meteor Project Manager, National Council of Higher Education Loan Programs (NCHELP)  
Mark Putman, Chief Technology Officer, National Council of Higher Education Loan Programs (NCHELP)

**Moderator:** Mike Balogh, Federal Relations and Industry Operations Officer, National Council of Higher Education Loan Programs (NCHELP)

Electronic data exchanges have become prevalent in daily operations, improving the efficiency, productivity and security of the exchange of information between organizations. Standards that further enable efficiencies, like Common Record: CommonLine (CRC), Common Account Maintenance (CAM), National Directory of New Hires (NDNH), and METEOR help provide an unparalleled level of service at the lowest possible cost. Is your organization taking full advantage of the many electronic products and processes available today? Do you have ideas for improvement? Join us for an interactive discussion on electronic data exchange standards and protocols currently being utilized and on where higher education service providers are moving as standards continue to be developed and implemented.

**The Business Value of CRM**

**Ticonderoga Room**

**Speaker:** Olin Hyde, Vice President, Sales & Marketing, JustIQ/Integrant

Customer Relationship Management, or CRM, has become a standard for providing and ensuring high quality, value-based products and services and for managing all the various ways in which organizations interact with customers. This session will define CRM, identify its benefits, and help you determine if your company is a prime candidate for a CRM solution. Measurements of success along with tips and best practices for implementation will also be discussed.

6:00–7:00 pm

**Conference Reception**

**Thornton Room**

Please join us for some relaxing food and drink on the 11th floor with stunning views of the U.S. Capitol.
<table>
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<tr>
<th>Time</th>
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<tbody>
<tr>
<td>7:30–9:00 am</td>
<td><strong>Registration and Continental Breakfast</strong></td>
<td>Capitol Room</td>
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<tr>
<td>9:00–10:15 am</td>
<td><strong>Legislative and Regulatory Impacts on Technology and Standards</strong></td>
<td>Capitol Room</td>
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|                 | **Speakers:** Kathleen Smith, President, Education Finance Council (EFC)  
|                 | Wanda Hall, Vice President of Operations and Director of Compliance and Quality Assurance, Edfinancial Services  
|                 | **Moderator:** Mike Balogh, Federal Relations and Industry Operations Officer, National Council of Higher Education Loan Programs (NCHelp)  |
|                 | The recent release of interim and final regulations along with the process of negotiated rulemaking for loans and other student aid programs, as well as several pieces of higher education legislation being introduced and reauthorization still on the calendar, has left some to wonder what is next. Schools, lenders and guarantors and their servicers may need to implement fairly complex changes within a limited timeframe. This panel will provide a highlight of upcoming changes based on negotiated rulemaking as well as what may be coming within Higher Education Act reauthorization. The focus will be on how best to work together to implement these changes, with an emphasis on the use/impact to technology and systems.  |
| 10:15–10:30 am  | **Break**                                                            | Capitol Room      |
| 10:30–11:45 am  | **Perspectives from National, Centralized Data Exchange Service Providers** | Capitol Room      |
|                 | **Speakers:** Doug Falk, Vice President and Chief Information Officer, National Student Clearinghouse  
|                 | Ida Quamina, Director of Product Development, ELM Resources  
|                 | Al Walser, Senior Programmer Analyst, Mapping Your Future  
|                 | **Moderator:** Michael Sessa, Executive Director, Postsecondary Electronic Standards Council (PESC)  |
|                 | Large networks that exchange data nationally can have a significant impact on the development and implementation of standards. Yet networks are also subject to the levels and methods of technology of their customers. Balancing standards and meeting clients at their level becomes a challenge. This session discusses how the National Student Clearinghouse, ELM Resources and Mapping Your Future support standards, the value that standards provide, the challenge faced with clients in implementing standards, strategic plans to migrate to standards, and the need for a national effort by key stakeholders (colleges, universities, vendors and service providers) to coordinate the adoption and implementation of standards.  |
| 11:45 am        | **Adjourn**                                                          |                   |
Best Practices Competition for 2007

Winners:

Sinclair Community College

Wright State University

The Board of Directors of the Postsecondary Electronic Standards Council (PESC) is very pleased to announce Sinclair Community College and Wright State University as Winners of PESC’s 9th Annual Best Practices Competition for 2007. Their submission “Exchange of Electronic Transcripts via Ohio Board of Regents Articulation & Transfer Clearinghouse” received unanimous approval by the PESC Board Review Committee on the Best Practices Competition.

Awards will be presented to Allison Rhea, Senior Director of Enrollment Management/Registrar at Sinclair Community College, and Terry Young, Senior Programmer Analyst for Computing and Telecommunications at Wright State University, at the opening session of the 5th Annual Conference on Technology and Standards being held April 28 – 30, 2008 in Washington, D.C.

The Best Practices Competition is held each year by PESC to promote innovation and ingenuity in the application of standards for business needs. Ms. Rhea and Mr. Young will present their winning submission during a featured session at the 5th Annual Conference on Technology & Standards.

“Wright State and Sinclair Community College are both exporting and importing the PESC XML College Transcript through the Ohio Board of Regents Articulation and Transfer Clearinghouse as is the University of Cincinnati, while Bowling Green State University receives them,” states Terry Young from Wright State University. “As far as cost savings, with a regular [paper] transcript it takes between 5 to 45 minutes to process in the Registrar’s office...now it takes less 2 minutes,” Mr. Young continued.
Distinguished Service Award for 2007

Judith N. Flink

PESC honors Judith N. Flink, Executive Director of University Student Financial Services and Cashier Operations at the University of Illinois, with its 2007 Distinguished Service Award. Ms. Flink is the last founding Director still active on the PESC Board of Directors and has decided not to be renominated when her current term on the Board expires this June 30.

“It’s been wonderful to see the higher education community working together through PESC,” Ms. Flink reflects on her tenure on the Board. “The standards we work on, from the High School and College Transcript to the Admissions Application, Test Score, and Common Record: CommonLine not only make our processes more efficient and contribute to cost-savings, they help ensure that barriers to accessing higher education are removed. It’s very important that organizations use standards and join PESC to help support the growing mission,” Ms. Flink continues.

Ms. Flink currently serves as Chairperson of the Advisory Committee on Student Financial Assistance. She was appointed by the Speaker of the House of Representatives in 1999 to that Committee and reappointed in November 2005 to serve a term that expires in September 2008. Ms. Flink has been with the University of Illinois for over 20 years. She is the Executive Director of University Student Financial Services and Cashier Operations, is a past president of the Coalition of Higher Education Assistance Organizations (COHEAO), and was appointed to the Advisory Council on the Education of Children with Disabilities by Governor Blagojevich of Illinois. Ms. Flink will be awarded at the opening session of the 5th Annual Conference on Technology and Standards.
Keynote Speaker: Phil McKown

Phil McKown serves as the Project Administrator for the application initiatives that the Kuali Foundation oversees. Each of these efforts is a collaboration of institutions organized under the Kuali banner to develop enterprise-class administrative systems for higher-education. Starting out with the initial “Kuali Project” in early 2005 that later became the Kuali Financial Systems (KFS), Mr. McKown has taken on the role of working with both functional and technical leads in each project to manage their scope, support their schedules, and balance their development resources accordingly. As Kuali has added new initiatives for Kuali Research Administration (KRA), Kuali Student (KS), and Kuali “Rice” Infrastructure (KRice), Mr. McKown continues to work with the project leads to encourage consistent processes for project planning, collaboration tools, and functional priorities. He has been a Kuali evangelist from the very start of Kuali and enjoys spreading the word to all interested parties.

Essentials of Kuali

Many of us have heard of the Kuali project, but we may not know as much as we would like. What is Kuali, what is a Kuali project, and what projects are already under the Kuali banner? What will each of the Kuali applications deliver and when? How does it work together and independently? Phil McKown, the Project Administrator for each of the Kuali initiatives, will introduce you to Kuali and discuss what these projects have in common and how Kuali employs its choice of standards to improve development and implementation. Mr. McKown will also discuss how institutes can leverage these community-sourced applications and answer any questions you may have.
CBA, EFC, NCHELP, and PESC thank the following sponsors for their generous support of this year’s conference. Thank you!

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The Consumer Bankers Association (CBA)

The Consumer Bankers Association is the recognized voice on retail banking issues in the nation’s capital. Member institutions are the leaders in consumer financial services, including auto finance, home equity lending, card products, education loans, small business services, community development, investments, deposits and delivery. CBA was founded in 1919 and provides leadership, education, research and federal representation on retail banking issues such as privacy, fair lending, and consumer protection legislation/regulation. CBA members include most of the nation’s largest bank holding companies as well as regional and super community banks that collectively hold two-thirds of the industry’s total assets. CBA’s Education Funding Committee is the public policy voice for private-market capital to fund loans supporting America’s students. Its member banks provide the loans to students and parents that make higher education possible for millions of Americans every year.

Education Finance Council (EFC)

The mission of the Education Finance Council (EFC) is making college more affordable. Together with its members, EFC works to expand access to higher education by ensuring the availability of student loan funds while striving to make paying for college easier and less expensive for all students and families. EFC represents not for profit and state based student loan secondary markets that participate in the Federal Family Education Loan Program (FFELP) as well as affiliated entities including guaranty agencies, lenders, rating agencies, insurers and investment bankers. EFC members are constantly seeking and implementing new technologies to ensure innovation and improvement in the financing of postsecondary education. In existence for more than 40 years, the FFELP has provided more than $500 billion in loans for students and families.
The National Council of Higher Education Loan Programs (NCHELP)

Based in Washington, D.C., the National Council of Higher Education Loan Programs, Inc. (NCHELP) represents a nationwide network of guaranty agencies, secondary markets, lenders, loan servicers, collectors, schools and other organizations involved in the administration of the Federal Family Education Loan Program (FFELP). Since its founding, NCHELP has represented its members on public policy and regulatory issues with the legislative and executive branches of the federal government. NCHELP members promote student access and choice for postsecondary education and training. A key objective is to keep the public informed about the availability of FFELP loans as a method to ensure open access to a postsecondary education. NCHELP is committed to helping its members, and colleges and universities, meet the operational challenges associated with providing financial assistance to millions of American students each year. NCHELP's Electronic Standards Committee is committed to facilitating a coordinated and proactive approach to electronic standardization efforts.

Postsecondary Electronic Standards Council (PESC)

Established in 1997 and located in Washington, D.C., the Postsecondary Electronic Standards Council (PESC) is a non-profit, community-based, umbrella association of colleges and universities; professional and commercial organizations; data, software and service providers; and state and federal government agencies. PESC's mission is to lead the establishment and adoption of data exchange standards in education. The goals of the mission are to enable the improvement of institutional performance and foster collaboration across educational communities in order to lower costs, improve service, and attain system interoperability.
Events

Upcoming Events

NCHELP
www.NCHELP.org

SPRING CONVENTION – 2008
June 2–4, 2008
Tucson, AZ
JW Marriott Starr Pass
(520) 792-3500
Hotel cut-off date: May 10, 2008

LEGISLATIVE CONFERENCE – 2008
September 25–26, 2008
Washington, DC
Omni Shoreham Hotel

TRAINING CONFERENCE – 2008
November 2–5, 2008
Nashville, TN
Gaylord Opryland
Hotel cut-off date: October 11, 2008

INDUSTRY EVENTS

SIFA END-USER CONFERENCE
May 8–9, 2008
Phoenix, AZ
www.sininfo.org

NASFAA ANNUAL CONFERENCE
July 6–9, 2008
Orlando, FL
www.NASFAA.org

AACRAO TECHNOLOGY CONFERENCE
July 10–12, 2008
Baltimore, MD
www.AACRAO.org

EDUCUSE ANNUAL CONFERENCE
October 28–31, 2008
Orlando, Florida
www.educause.edu

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