6th Annual Conference on Technology & Standards
Maximizing Performance Across the Education Lifecycle

April 5 – 7, 2009
Hyatt Regency Washington on Capitol Hill
www.PESC.org

Program

Presented by:
NCHELP – National Council of Higher Education Loan Programs
PESC – Postsecondary Electronic Standards Council
SHEEO – State Higher Education Executive Officers
Welcome

Welcome to the 6th Annual Conference on Technology & Standards! Your hosts NCHELP, PESC, and SHEEO are pleased and excited that you have joined us for this timely and informative conference in the nation’s capital.

Our theme, “Maximizing Performance Across the Education Lifecycle”, signifies a number of key points, many of which are just starting to come to fruition in higher education. Technical standards and technical interoperability will only take us so far. The need for policy makers to understand the importance of business interoperability is reaching a level of awareness never before seen. What we are seeing now is the collaboration of policy and technology to implement systems and processes that save time and save money while improving data quality and providing easier access to data and information.

Technology, in and of itself, and standards for that matter as well, are only effective when the context of their use is truly understood so that the end result is assurance that the solution will meet and satisfy business needs. Several sessions including the ones by the California Community College System and the Georgia Board of Regents are prime examples of how technology and standards can be used to maximize performance. We thank these organizations for the time and effort they’ve put into their processes to make it easier for all stakeholders, especially student and parents.

Another collaboration is also emerging, and this involves the bridging of data between elementary, secondary and postsecondary sectors (or “PK20”). In order to ensure student success and achievement, policy makers are aware of the need for better data and better communications across silos. One major result of this awareness is the formation of state-based PK20 councils and our session on this topic is both timely and a signal of the importance of data-driven decision-making. Taken one step further and our session on collaborating with international organizations also proves to be timely and a telling sign of how quickly education has become truly globalized. Today’s world is moving fast and the need for mobile data is also changing the traditional landscape.

Thank you again for attending the 6th Annual Conference on Technology and Standards. We believe you will find our program informative and timely.

NCHELP – National Council of Higher Education Loan Programs
PESC – Postsecondary Electronic Standards Council
SHEEO – State Higher Education Executive Officers
The 6th Annual Conference on Technology & Standards begins at 8:15am on Monday April 6, 2009 and concludes at 12:00pm on Tuesday April 7, 2009. All featured-speaker sessions are designed as general sessions and all general sessions will occur on the mornings of both days of the conference in the Columbia B ballroom. A pre-conference workshop is being held on Sunday afternoon and separate registration is required. The luncheon on Monday features a guest speaker while on Monday night of the conference, we invite all attendees to an informal and open reception to mix and mingle. The full program includes:

### Sunday April 5, 2009

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>1:00pm – 5:00pm</td>
<td>Pre-Conference Workshop: Campus-Based and Inter-Federation Electronic Authentication</td>
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### Monday April 6, 2009

<table>
<thead>
<tr>
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<tr>
<td>7:30am – 8:30am</td>
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</tr>
<tr>
<td>8:15am – 8:30am</td>
<td>General Session: Opening Remarks &amp; Awards</td>
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<tr>
<td>8:30am – 9:30am</td>
<td>General Session: Emergence of State PK20 Councils</td>
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<td>Break</td>
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<tr>
<td>11:00am – 12:00pm</td>
<td>General Session: RS3G: European Standards Initiative Supporting the Bologna Process</td>
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<tr>
<td>12:00pm – 1:30pm</td>
<td>Lunch: New, Integrated Student Loan Program Model</td>
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</tbody>
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### Program At A Glance

#### Monday April 6, 2009

<table>
<thead>
<tr>
<th>Time</th>
<th>Concurrent Sessions</th>
</tr>
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| 1:30pm – 2:30pm | - California Statewide Electronic Exchange Program  
- Campus-Based Authentication for Meteor |
| 2:30pm – 2:45pm | Break                                                                              |
| 2:45pm – 3:45pm | Concurrent Sessions:  
- University System of Georgia Board of Regents’ Implementation of  
  High School and Postsecondary XML Transcripts  
- DQC: The Right Data to the Right People at the Right Time |
| 3:45pm – 4:00pm | Break                                                                              |
| 4:00pm – 5:00pm | Concurrent Sessions:  
- Restructuring GSA for the 21st Century  
- It’s the Law: Standards Body Participation for all Federal Agencies |
| 5:30pm – 7:00pm | Conference Reception                                                                |

#### Tuesday April 7, 2009

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<td>PK-20 Standards-Setting for Education</td>
</tr>
<tr>
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</tr>
<tr>
<td>11:00am – 12:00pm</td>
<td>FSA Operations and Systems Initiatives</td>
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<td>12:00pm</td>
<td>Conference Adjourns</td>
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The National Council of Higher Education Loan Programs (NCHELP) represents a nationwide network of guaranty agencies, secondary markets, lenders, loan servicers, collectors, schools and other organizations that provide financial assistance to millions of American students and their families each year. Based in Washington, D.C., NCHELP advocates on behalf of 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 for NCHELP is to inform the public about the availability of the Federal Family Education Loan Program (FFELP) and private education loans as a method to ensure open access to postsecondary education. Postsecondary education institutions face significant operational challenges associated with providing financial assistance to their students each year. NCHELP is committed to helping its members and educational institutions achieve efficiencies through the work of the Electronic Standards Committee by facilitating and promoting a coordinated and proactive approach to electronic standardization efforts.

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; non-profit organizations and associations; and state and federal government agencies. PESC’s mission is to lead the alignment of data across disparate systems to improve performance and ensure cost-effective student progression along the higher education lifecycle. PESC achieves its mission by: Leading the establishment and facilitating the adoption and implementation of data exchange standards; Highlighting and supporting best practices for data access and exchange; Maintaining collaborative relationships with all public, private, governmental, and international stakeholders; Serving as a standards-setting body; Advocating for operational efficiencies and simplification in student data exchange from initial access of the student from high school into the college environment through successful completion of the education experience; Promoting cost effectiveness of data alignment across disparate systems and across sectors that help mitigate costs for institutions struggling to keep up with the demands of technology and real-time data exchange while maintaining competitive tuition rates; Building a core competency in XML architecture and data modeling.

The mission objectives of the State Higher Education Executive Officer’s association are to: Assist its members and the states in developing and sustaining excellent systems of higher education; Emphasize the importance of state planning and coordination for higher education by promoting effective strategic planning and statewide coordination and governance; Speak as a national organization in public and private forums, promoting the interests of the states in effectively planning and financing higher education; Promote cooperative relationships with federal agencies, colleges and universities, and higher education and other associations in the collection and exchange of data and information, development of standard definitions and practices, conduct of studies, and development of higher education in the public interest; Formulate and recommend to public and private agencies and governments desirable guidelines for state and federal relationships to institutions of higher education; Encourage studies and other action to advance statewide planning and coordination; Express to the public, and their representatives in state and national legislatures, the collective opinions of state higher education officers to enhance the work of governing and/or coordinating statewide boards of higher education.
Sunday, April 5, 2009

1:00pm – 5:00pm  Campus-Based and Inter-Federation Electronic Authentication
Bryce Room
Charlie Leonhardt, Principal Technologist, Georgetown University
Jack Suess, CIO, University of Maryland Baltimore County and Educause/Internet2
Tim Bornholtz, President, The Bornholtz Group
Tim Cameron, Meteor Project Manager, NCHELP
Doug Falk, Vice President and CIO, National Student Clearinghouse
Jeff Alderson, Director of Data Standards, ConnectEDU, Inc.

This session will function as a round table discussion on the various projects and actual models being used today in higher education for electronic authentication and authorization. Topics include: the role of federations like InCommon and Meteor and the value they provide for users and administrators, student access to federal loan data and other online student services, and other pilots being developed.

Monday, April 6, 2009

7:30am – 8:30am  Registration and Continental Breakfast
Columbia C

8:15am – 8:30am  Opening Remarks and Awards
Columbia B
Michael Sessa, Executive Director, PESC

10th Annual Best Practices Competition Winners:
California Statewide Electronic Exchange Program
University System of Georgia Board of Regents’ Implementation of High School and Postsecondary XML Transcripts

Distinguished Service Awards:
Steve Biklen, NASLA
David Moldoff, AcademyOne, Inc.
Clare Smith-Larson, Iowa State University

8:30am – 9:30am  General Session: Emergence of State PK20 Councils
Columbia B
Hans L’Orange, Vice President for Research and Information Resources and Director of the SHEEO/NCES Network, SHEEO

With the shift to data-driven decision-making, many states are attempting to remove barriers in how student data is collected, monitored, and used. A major rift exists between PK12 and higher education student data as different systems, rules, governance and many other factors exist. Many states are now breaking down those barriers as well by forming PK20 councils consisting of stakeholders from both the PK12 sector as well as higher education. This session will further discuss why PK20 Councils are emerging and the important role they are beginning to assume.
9:45am – 10:45am  Mobile Data: Challenge of a New Paradigm
David Moldoff, Founder and CEO, AcademyOne, Inc.

In today’s world, mobility is the name of the game. Yet in higher education many barriers exist which prevent or slow down the ability for data to follow the student. As the number of transfer students increases year after year, so does the cost and time it takes for data systems to capture this mobility. While not many automated solutions are available now, the tide is changing. This session will highlight the change in student behavior from the traditional role to the new, ever-changing role and identify the challenges all of higher education is facing with each new year.

10:45am – 11:00am  Break

11:00am – 12:00pm  RS3G: European Standards Initiative Supporting the Bologna Process
Manuel Dietz, Founder and Managing Director, unisolution and Steering Committee of RS3G

As European nations migrate toward more common assessments, measurements, and degrees under the Bolgona process, a group of leading providers is simultaneously organizing to ensure the underlying data and processes are made efficient and are standardized. A founder of RS3G (Rome Student Systems and Standards Group — named after the location of the first meeting to launch this initiative) Manuel Dietz of unisolution will provide an update on current activities of RS3G, the focus and disposition the group is striving toward, and discuss the impact to the American education system.

12:00pm – 1:30pm  Lunch: New, Integrated Student Loan Program Model
Justin Draeger, Vice President of Planning and Development, NASFAA

NASFAA recently unveiled a new conceptual framework for student lending that would replace the Federal Family Education Loan Program (FFELP), the Direct Loan Program, and the Federal Perkins Loan Program with a program that integrates the best aspects of all three. The new model is a synthesis of recommendations from thousands of student aid professionals through its National Conversation Initiative on College Access (NCI), input from public policy experts, and careful analysis of more than 40 research studies. NASFAA’s Justin Draeger will present an overview of this new model and how it benefits all stakeholders involved in student aid.

1:30pm – 2:30pm  Concurrent Sessions

California Statewide Electronic Exchange Program
Tim Calhoon, Technical Manager, Butte College and California Community College System
Alan Jewett, Vice President of Marketing, XAP

The Statewide Electronic Exchange Program for the California Community College System (CCCTran) has established the operation of a statewide internet-based system for requesting, viewing and transmitting academic transcripts among authorized educational institutions and their trading partners. Beyond significant cost savings and environmental benefits of electronic transcripts over paper, the most exciting promise of CCCTran is its potential to improve student outcomes by facilitating online academic planning and K-12 to College longitudinal studies from combined academic record data. CCCTran enables highly flexible, secure transcript request and delivery services between the State’s 110 California Community Colleges and between the University of California and California State University.
systems, as well as other higher educational institutions in and via the University of Texas server out-of-state. It is the first true large scale electronic system for transcript exchange between any colleges that does not require negotiating the details of the transcript content. CCCTran interfaces well with all leading student information systems and it automatically translates transcript information into various national standards such that the sending college does not need to identify the format. The system is expeditious, provides tracking of the transcript, and offers data security and integrity with the potential to greatly reduce data entry error or paper forgeries. In addition to saving staff processing time, electronic transcripts reduce paper consumption and waste, office expenses and postage. The CCC System Office has estimated that costs for CCCTran member colleges will drop from an average of $7 per transcript, to less than $0.50 per transcript.

Columbia A

Campus-Based Authentication with Meteor Technology
Tim Cameron, Meteor Project Manager, NCHELP

The Campus-Based Authentication Model for Meteor was developed collaboratively by members of the FFELP community and the National Student Clearinghouse. The model serves as a prime example of best practices for federated models of authentication. Students nationwide are now able to take advantage of valuable services offered by the FFELP community to assist in managing their debt and in avoiding default. Colleges and students can now track and manage their federal and private student loan debt through the Meteor Network. The Clearinghouse provides colleges and students with access to 100% of outstanding FFELP loans and federal Direct Loans, in addition to billions of dollars in private student loans through its LoanLocator service and Meteor implementation. It truly is a model of maximizing opportunities for stakeholders by building a standard process for authentication utilizing industry standards. Reusability for other services is currently being discussed with Meteor participants and with Mapping Your Future.

2:30pm – 2:45pm  Break

Columbia C

2:45pm – 3:45pm  Concurrent Sessions

Columbia B

University System of Georgia Board of Regents’ Implementation of High School and Postsecondary XML Transcripts
Karen Nunn, GaBEST Program Director, Office of Information and Instructional Technology
Board of Regents of the University System of Georgia

In 2005, the University System of Georgia Office of Information and Instructional Technology (OIIT) began working with SunGard Higher Education to develop, test, and implement Postsecondary XML transcript processing. The processes not only provide the means to import and export the data, but also allow a student’s academic data to be securely transmitted between institutions via a dedicated server at the University of Texas-Austin. Implementing electronic transcript exchange in this manner not only facilitates transcript exchange amongst like ERP systems, but allows an open exchange with other trading partners also using the University of Texas-Austin server. Implementation began in February of 2007 with five User Acceptance Training (UAT) sessions for both functional and technical personnel from 35 institutions. Since the trainings, 2,933 transcripts have been exchanged between Georgia institutions. USG institutions have begun to exchange with non-USG institutions as well. The High School XML Transcript project came to life during this same time period. The Georgia Board of Regents has provided leadership in
the area of electronic transcript exchange by recognizing additional benefits in migrating to electronic transcript exchange. Utilizing this functionality creates a seamless and timely flow of transcript data between institutions. Most importantly, the electronic transcript will also save money for paper and postage and in this time of budget shortfalls institutions are looking for additional ways to cut costs.

**Columbia A**

**DQC: The Right Data to the Right People at the Right Time**
Charles McGrew, PK20 Coordinator, Data Quality Campaign

The Data Quality Campaign was established as a nationwide coalition of stakeholders to help facilitate student achievement in the PK12 sector. With DQC’s 10 essential elements, states are beginning to develop the data needed from which policy makers can make informed decisions about improvement areas. After three years and a long line of milestones, the DQC is entering its second phase which is broadened to PK20. This session will provide an overview of the DQC, its role and mission, its future tasks, and how states and organizations are benefitting from improving their data quality.

3:45pm – 4:00pm **Break**

**Columbia C**
4:00pm – 5:00pm  **Concurrent Sessions**

**Columbia B**

**Restructuring GSA for the 21st Century**

GSA has played a very active role in development of authentication and authentication-based services. With the ramp up of the authentication sector and market, more and more business lines and trading partners are forming federations which allows for easier access across systems within that federation and eases the role for single sign-on. GSA has also been instrumental in facilitating a public/private approach to authentication and to federations and is central in helping identify how assessment and assessment criteria for credential providers is established. Recently, GSA has reorganized to better meet the needs of the community and this session will provide an overview of the areas GSA is working in and where authentication may be headed.

**Columbia A**

**It’s the Law: Standards Body Participation for all Federal Agencies**
Michael Sessa, Executive Director, PESC

Several laws and regulations have been established over the years to help facilitate the development and use of voluntary consensus-based standards. Starting with the establishment of the American National Standards Institute (ANSI) after World War II and leading all the way up to the establishment of the National Institute of Standards and Technology (NIST) under the U.S. Department of Commerce, standards have been around for a while. Yet use of standards in higher education or even all of education was slow to catch on. This session will discuss the history of standards development and standards-setting bodies, identify efforts in both PK12 and higher education, and review three specific requirements that impact higher education today: the National Technology Transfer Act of 1995, Office of Management and Budget Circular A-119, and Section 143 of the Higher Education Act of 1965.
Tuesday, April 7, 2009

Registration and Continental Breakfast
Columbia C
7:30am – 8:30am

PK20 Standards-Setting for Education
Columbia B
8:30am – 9:30am
Dr. Larry Fruth, Executive Director, SIFA
Michael Sessa, Executive Director, PESC

The Schools Interoperability Framework Association (SIFA) and the Postsecondary Electronic Standards Council (PESC) have established a close working relationship over the years. By helping to bridge the gap between the PK12 and higher education sectors, both organizations play an integral role for states, districts, colleges and universities, and the U.S. Department of Education’s National Center for Education Statistics (NCES) and Federal Student Aid (FSA). This session will discuss how the organizations are working together and what initiatives are on the horizon.

Breaking the Deadlock: Unifying our Federal Student Loan Programs
Columbia B
9:45am – 10:45am
Paul Combe, President and CEO, American Student Assistance

The Federal Direct Student Loan Program (FDSL) has been a controversial and political topic since it was first introduced in the early 1990’s. Discussions revolve around cost efficiencies when compared to the bank-based Federal Family Education Loan Program (FFELP) which has a 40+ year history of quality service and continuity. Most leaders and expert practitioners believe that both programs can exist side by side. This session proposes an idea of how the two programs can co-exist while ensuring top-notch service to students, parents, and colleges and universities.

FSA Operations and Systems Initiatives
Columbia B
11:00am – 12:00pm
Pam Eliadis, Federal Student Aid (FSA), System Operations and Aid Delivery Management Services, U.S. Department of Education

Starting with modernization efforts in the late 1990’s and leading all the way up to nationwide implementation of XML, FSA has continuously engaged the community in establishing operational rules and systems initiatives. This session provides an overview of the current data and systems initiatives occurring at FSA and a look at what the future holds with a new administration.
Justin Draeger is Vice President of Planning and Development for the National Association of Student Financial Aid Administrators (NASFAA). He is the chief development officer for the Association, its chief fundraiser, and helps oversee the association’s communication efforts. Justin also assists in developing policy positions for the association and is co-chair of NASFAA’s National Conversation Initiative, the campaign to increase college access and success for low-income, minority, first-generation, and other disadvantaged students by improving the U.S. financial aid system. Justin acts as one of the association’s spokespersons and has been featured on “The Today Show” on NBC, National Public Radio, CNBC, and Fox Business News. He is often quoted in The New York Times, The Wall Street Journal, the San Francisco Chronicle, and Kiplinger. Since joining NASFAA in 2006, Justin has also released several research and discussion papers that have gained national attention on student loan default, student loan financing, and college access.

Justin began his career in student aid working as the financial aid administrator for the Douglas J Aveda Institute in East Lansing, MI. He went on to work for the Michigan Guaranty Agency as a lead regulatory analyst. He earned a Bachelor’s of Science Degree in Resource Management from Brigham Young University and a Masters in Business Administration Finance from Baker College. Before completing college, Justin spent two years working with first- and second-generation Mexican Americans to revitalize local barrios in southern California and participating in ESL programs. He loves spending time with his wife Deanne and their two rambunctious children Sophia and Truman. He also enjoys cheering on BYU and Michigan State football, keeping up on his Spanish, engaging in political and social debates via his online blog, and contributing to national publications like The Greentree Gazette, Web Worker Daily, and Brazen Careerist.
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