

Table of Contents

	Page
Welcome Message	iii
Elementary-Secondary Education Cooperative (EL-SEC) Forum Steering Committee	v
Forum Agenda At-A-Glance	1
Forum Agenda	
Monday, March 1, 2010	3
Tuesday, March 2, 2010	5
NESAC Standing Committee Agenda	
Monday, March 1, 2010	7
Tuesday, March 2, 2010	8
PPI Standing Committee Agenda	
Monday, March 1, 2010	9
Tuesday, March 2, 2010	10
TECH Standing Committee Agenda	
Monday, March 1, 2010	11
Tuesday, March 2, 2010	13
New Forum Members	15
Summer 2009 Forum Meeting Notes	17
The Forum Voice Newsletter (Fall 2009)	37
New Forum Publication Summaries	43
Forum Listserv Groups	47
Forum Member Handbook	49
Forum Membership	
State Education Agency Liaisons (SEAs) Membership Roster	71
Local Education Agency Liaisons (LEAs) Membership Roster	81
Associates Membership Roster	86
Federal Membership Roster	88

***Welcome to the
National Forum on Education Statistics
Winter 2010 Meeting***

Dear Forum Members,

On behalf of the National Forum on Education Statistics, we are pleased to welcome you to Phoenix, Arizona for the Winter 2010 meeting of the National Forum on Education Statistics.

The Forum's commitment, and our mission as a group, is to improve the quality, comparability, and usefulness of elementary and secondary education data, while remaining sensitive to data burden concerns. Forum meetings are a venue in which representatives from state and local education agencies, the federal government, and other organizations interested in education data gather to plan, recommend, and implement strategies for building an education data system that will support local, state, and national efforts to improve public and private education throughout the United States.

This week, Forum members can expect to consider a wide range of issues, such as common data standards, the linkage of PK-12 data with early education childhood and postsecondary education, the linkage of student and teacher data, Race to the Top and State Fiscal Stabilization Fund data requirements, crime and violence data, data privacy, elementary and middle school course codes, website accessibility, NCES's recent work, and more.

Clearly, Forum members will have many opportunities this week to share knowledge and ideas about high profile data issues and cutting edge technology use in schools, school districts, state departments of education, and the U.S. Department of Education. We urge you to take this opportunity to attend standing committee meetings and the joint sessions we have planned. Critical to our mission are communication, innovation, and examination of our practices and the assumptions under which we operate. Therefore, we encourage you to engage your peers from schools, districts, state education agencies, federal offices, and national organizations—your most valuable resource at this meeting—and offer ideas, ask questions, and help the Forum continue to make a difference in the collection and use of education data across the nation.

We hope that you enjoy your week in Phoenix, develop and renew relationships with colleagues, and take a new idea, concept, or perspective home to your organization following our time together here at the Forum.

Most sincerely,

Linda Rocks

Linda Rocks
Bossier Parish Public Schools (LA)

Ghedam Bairu

Ghedam Bairu
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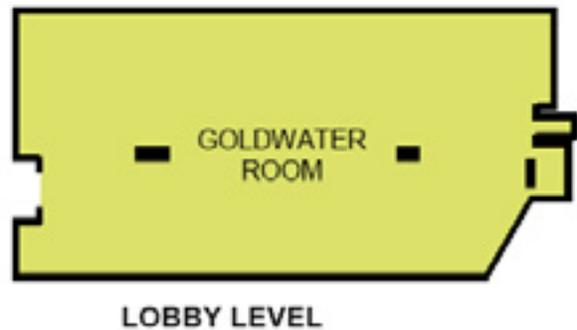
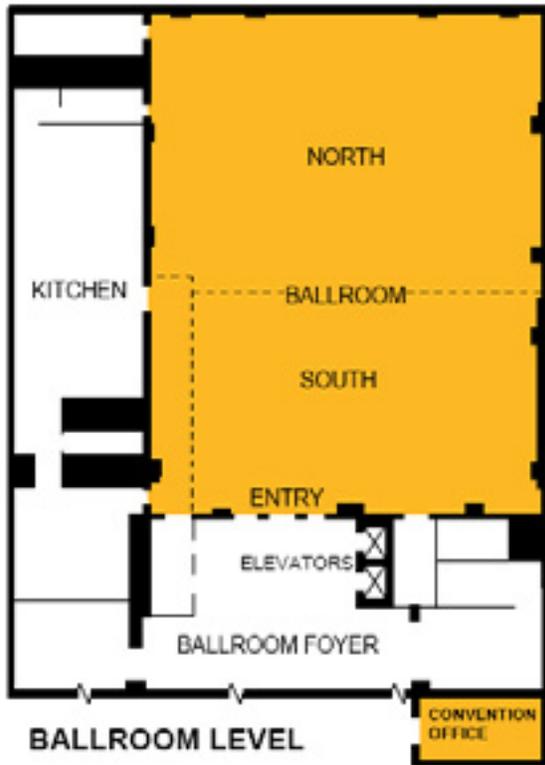
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Winter Forum Meeting – March 1-2, 2010 – Agenda At-A-Glance

Room Name	Salons 1 & 2	Salon 4	Salons 5 & 6	Salons 7 & 8
Monday, March 1, 2010				
8:00 a.m. - 8:30 a.m.		New Member Welcome		
8:45 a.m. - 10:30 a.m.	Forum Opening Session – North Ballroom			
10:45 a.m. - 12:15 p.m.	TECH Standing Committee		PPI Standing Committee	NESAC Standing Committee
12:15 p.m. - 1:15 p.m.	Lunch on Your Own			
1:15 p.m. - 3:15 p.m.	TECH Standing Committee		PPI Standing Committee	NESAC Standing Committee
3:30 p.m. - 4:45 p.m.	Linking Student and Teacher Data – North Ballroom			
4:45 p.m. - 5:15 p.m.		Steering Committee Meeting		
Tuesday, March 2, 2010				
8:15 a.m. - 9:45 a.m.	State Fiscal Stabilization Fund (SFSF) Metrics & Race to the Top Panel – North Ballroom			
10:00 a.m. - 12:00 p.m.	TECH Standing Committee		PPI Standing Committee	NESAC Standing Committee
12:00 p.m. - 1:30 p.m.	Lunch on Your Own			
1:30 p.m. - 3:45 p.m.	TECH Standing Committee		PPI Standing Committee	NESAC Standing Committee
4:00 p.m. - 5:00 p.m.	Forum Closing Session – North Ballroom			
5:00 p.m. - 5:30 p.m.		Steering Committee Meeting		

Wyndham Phoenix Hotel





Winter Forum Meeting

AGENDA

MONDAY, MARCH 1, 2010

Registration 7:30 a.m. – 5:00 p.m. **Ballroom Foyer**
Cyber Café 7:30 a.m. – 5:00 p.m. **South Ballroom**
Morning Break 7:30 a.m. – 8:30 a.m. **South Ballroom**

New Member Welcome
8:00 a.m. – 8:30 a.m. **Salon 4**

Forum Opening Session
8:45 a.m. – 10:30 a.m. **North Ballroom**

Forum Agenda Review

Linda Rocks, Forum Chair, Bossier Parish Schools (LA)

Welcome to Arizona

Jeff Stowe, Arizona Department of Education

Common Data Standards Initiative

Nancy J. Smith, NCES, U.S. Department of Education

Linking Early Childhood and Postsecondary Education to PK-12

Elizabeth Laird, Data Quality Campaign

Hans L'Orange, State Higher Education Executive Officers

Moderator: Nancy J. Smith, NCES, U.S. Department of Education

Break
10:30 a.m. – 10:45 a.m.

Standing Committee Meetings
10:45 a.m. – 12:15 p.m.

National Education Statistics Agenda Committee (NESAC) Salons 7 and 8

David Weinberger, Yonkers Public Schools (NY)

Policies, Programs, and Implementation Committee (PPI) Salons 5 and 6

Vince Meyer, Wyoming Department of Education

Technology Committee (TECH) Salons 1 and 2

Patsy Eiland, Alabama Department of Education



Winter Forum Meeting

AGENDA

MONDAY, MARCH 1, 2010

(Continued)

Lunch on Your Own
12:15 p.m. – 1:15 p.m.

Standing Committees Reconvene
1:15 p.m. – 3:15 p.m.

Break
3:15 p.m. – 3:30 p.m.

Linking Student and Teacher Data
George Noell, Louisiana Department of Education
3:30 p.m. – 4:45 p.m. **North Ballroom**

Steering Committee Meeting
4:45 p.m. – 5:15 p.m. **Salon 4**



Winter Forum Meeting

AGENDA

TUESDAY, MARCH 2, 2010

Registration 7:30 a.m. – 5:00 p.m. **Ballroom Foyer**
Cyber Café 7:30 a.m. – 5:00 p.m. **South Ballroom**
Morning Break 7:30 a.m. – 8:15 a.m. **South Ballroom**

State Fiscal Stabilization Fund (SFSF) Metrics and Race to the Top Panel

Cathy Solomon, Office of the Deputy Secretary, U.S. Department of Education

Kathy Gosa, Kansas State Department of Education

Irma Jones, Tennessee Department of Education

8:15 a.m. – 9:45 a.m. **North Ballroom**

Break

9:45 a.m. – 10:00 a.m.

Standing Committee Meetings

10:00 a.m. – 12:00 p.m.

National Education Statistics Agenda Committee (NESAC) Salons 7 and 8

David Weinberger, Yonkers Public Schools (NY)

Policies, Programs, and Implementation Committee (PPI) Salons 5 and 6

Vince Meyer, Wyoming Department of Education

Technology Committee (TECH) Salons 1 and 2

Patsy Eiland, Alabama Department of Education

Lunch on Your Own

12:00 p.m. – 1:30 p.m.

Standing Committees Reconvene

1:30 p.m. – 3:45 p.m.

Break

3:45 p.m. – 4:00 p.m.



Winter Forum Meeting

AGENDA

TUESDAY, MARCH 2, 2010

(Continued)

Forum Closing Session North Ballroom
4:00 p.m. - 5:00 p.m.

NCES Update

Stuart Kerachsky, Deputy Commissioner, NCES, U.S. Department of Education

Standing Committee Progress Reports

David Weinberger, NESAC Chair

Vince Meyer, PPI Chair

Patsy Eiland, TECH Chair

Task Force/Working Group Progress Reports

Crime, Violence, and Discipline Working Group William Smith, Chair

Education Privacy Working Group Levette Williams, Chair

Elementary/Middle School Course Code

Classification Working Group Helene Bettencourt, Chair

Longitudinal Data Systems Task Force Bruce Dacey, Chair

Section 508 Accessibility Working Group Lee Rabbitt, Chair

Recognition of Completed Projects

Linda Rocks, Forum Chair, Bossier Parish Schools (LA)

Meeting Evaluations

Steering Committee Meeting Salon 4
5:00 p.m. - 5:30 p.m.



Winter Forum Meeting

NESAC Standing Committee

AGENDA – MONDAY, MARCH 1, 2010

Standing Committee Meetings

10:45 a.m. – 12:15 p.m. Salons 7 and 8

Welcome, Introductions, and Agenda Review

David Weinberger, Chair, Yonkers Public Schools (NY)
Patricia Sullivan, Vice Chair, Texas Education Agency

Summer 2009 NESAC Meeting Review

David Weinberger, Chair, Yonkers Public Schools (NY)

National Education Data Model

Hugh Walkup, U.S. Department of Education

Elementary/Middle School Course Code Classification Working Group Update

Helene Bettencourt, Massachusetts Dept. of Elementary and Secondary Education

Discipline Working Group Update

William Smith, Sioux Falls School District (SD)

EIMAC CRDC Workgroup Update

Linda Rocks, Bossier Parish Schools (LA)

Lunch on Your Own

12:15 p.m. – 1:15 p.m.

Standing Committees Reconvene

1:15 p.m. – 3:15 p.m.

Educational Alignment for Systemic Excellence (EASE)

Meredith Bickell, Wyoming Department of Education
Rick Rozzelle, Center for Education Leadership and Technology

Data Governance: Stories of Success

Pat Sullivan, Vice Chair, Texas Education Agency
James Harrington, Hillsboro School District (OR)

SEA/LEA Breakout: Data Governance

David Weinberger, Chair, Yonkers Public Schools (NY)
Pat Sullivan, Vice Chair, Texas Education Agency



Winter Forum Meeting

NESAC Standing Committee

AGENDA – TUESDAY, MARCH 2, 2010

Standing Committee Meetings

10:00 a.m. – 12:00 p.m. Salons 7 and 8

Common Data Standards Initiative and Discussion of NESAC Support

Nancy J. Smith, NCES, U.S. Department of Education
Elizabeth Laird, Data Quality Campaign
Hans L'Orange, State Higher Education Executive Officers

IES Statewide Longitudinal Data System Grant Update

Tate Gould, NCES, U.S. Department of Education

SFSF Metrics for Race to the Top

Cathy Solomon, Office of the Deputy Secretary, U.S. Department of Education

Lunch on Your Own

12:00 p.m. – 1:30 p.m.

Standing Committees Reconvene

1:30 p.m. – 3:45 p.m.

Teacher-Student Data Linkage Discussion

David Weinberger, Chair, Yonkers Public Schools (NY)

SFSF Data Burden Discussion

David Weinberger, Chair, Yonkers Public Schools (NY)

Topics from the Floor

David Weinberger, Chair, Yonkers Public Schools (NY)

EDFacts Update for 2010-11 through 2012-13

Ross Santy, U.S. Department of Education

Steering Committee Business/Report

David Weinberger, Chair, Yonkers Public Schools (NY)

Meeting Review/Summer 2010 Planning

David Weinberger, Chair, Yonkers Public Schools (NY)



Winter Forum Meeting
PPI Standing Committee
AGENDA – MONDAY, MARCH 1, 2010

Standing Committee Meetings

10:45 a.m. – 12:15 p.m. Salons 5 and 6

Welcome and Introductions

Vince Meyer, Chair, Wyoming Department of Education

Agenda Review

Vince Meyer, Chair, Wyoming Department of Education

Summer 2009 PPI Meeting Review

Vince Meyer, Chair, Wyoming Department of Education

Privacy Working Group Update

Levette Williams, Georgia Department of Education

Common Data Standards Initiative and Discussion of PPI Support

Nancy J. Smith, NCES, U.S. Department of Education

Elizabeth Laird, Data Quality Campaign

Hans L'Orange, State Higher Education Executive Officers

Lunch on Your Own

12:15 p.m. – 1:15 p.m.

Standing Committees Reconvene

1:15 p.m. – 3:15 p.m.

Elementary/Middle School Course Code Classification Working Group Update

Helene Bettencourt, Massachusetts Dept. of Elementary and Secondary Education

National Education Data Model

Hugh Walkup, U.S. Department of Education

PPI Discussion: State Higher Education Executive Officers (SHEEO)

Hans L'Orange, SHEEO

SEA-LEA Breakout Sessions

Vince Meyer, Chair, Wyoming Department of Education



Winter Forum Meeting
PPI Standing Committee
AGENDA – TUESDAY, MARCH 2, 2010

Standing Committee Meetings
 10:00 a.m. – 12:00 p.m. Salons 5 and 6

SFSF Metrics for Race to the Top

Cathy Solomon, Office of the Deputy Secretary, U.S. Department of Education

SFSF Data Burden Discussion

Vince Meyer, Chair, Wyoming Department of Education

Teacher Student Linkages Discussion

Vince Meyer, Chair, Wyoming Department of Education

Lunch on Your Own
 12:00 p.m. – 1:30 p.m.

Standing Committees Reconvene
 1:30 p.m. – 3:45 p.m.

How Federal Programs Fit Together and the LEA Role in Federal Programs

Vince Meyer, Chair, Wyoming Department of Education

IES Statewide Longitudinal Data System Grant Update

Tate Gould, NCES, U.S. Department of Education

EDFacts Update

Ross Santy, U.S. Department of Education

PPI Business

Vince Meyer, Chair, Wyoming Department of Education

Topics from the Floor

Vince Meyer, Chair, Wyoming Department of Education

Steering Committee Business/Report

Vince Meyer, Chair, Wyoming Department of Education

Meeting Review/Summer 2010 Planning

Vince Meyer, Chair, Wyoming Department of Education



Winter Forum Meeting
TECH Standing Committee
AGENDA – MONDAY, MARCH 1, 2010

Standing Committee Meetings
 10:45 a.m. – 12:15 p.m. Salons 1 and 2

Welcome and Introductions

Patsy Eiland, Chair, Alabama Department of Education
 Lee Rabbitt, Vice Chair, Newport Public Schools (RI)

Common Data Standards Initiative and Discussion of TECH Support

Nancy J. Smith, NCES, U.S. Department of Education
 Elizabeth Laird, Data Quality Campaign
 Hans L’Orange, State Higher Education Executive Officers

Agenda Review

Patsy Eiland, Chair, Alabama Department of Education

Summer 2009 TECH Meeting Review

Patsy Eiland, Chair, Alabama Department of Education

EDFacts Update for 2010-11 through 2012-13

Ross Santy, U.S. Department of Education

Task Force and Working Group Update

Data Ethics Task Force (Completed) Tom Purwin
 Jersey City Public Schools (NJ)

Longitudinal Data Systems Task Force Bruce Dacey
 Delaware Department of Education

Section 508 Accessibility Working Group Lee Rabbitt
 Newport Public Schools (RI)

Lunch on Your Own
 12:15 p.m. – 1:15 p.m.



Winter Forum Meeting
TECH Standing Committee
AGENDA – MONDAY, MARCH 1, 2010

(Continued)

Standing Committees Reconvene
1:15 p.m. – 3:15 p.m.

State of Washington's Shared Services Model

Peter Tamayo, Washington Office of Superintendent of Public Instruction

SEA-LEA Breakout Sessions

Patsy Eiland, Chair, Alabama Department of Education

Lee Rabbitt, Vice Chair, Newport Public Schools (RI)



Summer Forum Meeting
TECH Standing Committee
AGENDA – TUESDAY, MARCH 2, 2010

Standing Committee Meetings

10:00 a.m. – 12:00 p.m. Salons 1 and 2

IES Statewide Longitudinal Data System Grant Update

Tate Gould, NCES, U.S. Department of Education

TECH Publications Review

Patsy Eiland, Chair, Alabama Department of Education

SFSF Metrics for Race to the Top

Cathy Solomon, Office of the Deputy Secretary, U.S. Department of Education

SFSF Data Burden Discussion

Patsy Eiland, Chair, Alabama Department of Education
Lee Rabbitt, Vice Chair, Newport Public Schools (RI)

Lunch on Your Own

12:00 p.m. – 1:30 p.m.

Standing Committees Reconvene

1:30 p.m. – 3:45 p.m.

Teacher Student Linkages Discussion

Patsy Eiland, Chair, Alabama Department of Education

National Education Data Model

Hugh Walkup, U.S. Department of Education

Section 508 Accessibility

Lee Rabbitt, Vice Chair, Newport Public Schools (RI)

Topics from the Floor

Patsy Eiland, Chair, Alabama Department of Education

Steering Committee Business/Report

Patsy Eiland, Chair, Alabama Department of Education

Meeting Review/Summer 2010 Planning

Patsy Eiland, Chair, Alabama Department of Education

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Summer 2009 Forum Meeting Notes

Professional Development: Table and Graph Design for Effective Communication

Monday, July 27, 2009

Table and Graph Design for Effective Communication

Stephen Few of Perceptual Edge led a full-day professional development workshop entitled, "Table and Graph Design for Effective Communication." During this lively and engaging session, Mr. Few delivered a message about simplicity in design, stressing the importance of effectively communicating information by focusing on your message, medium, and key information, while avoiding visual clutter in the pursuit of clarity. Mr. Few offered three "fundamental steps" in the table and graph design process:

1. Determine your message.
2. Select the best medium to display your message.
3. Design all components of the display to show the data.
 - Make the data (not the "non-data") prominent and clear.
 - Remove all components that aren't necessary (both data and support components).
 - Mute the support components that remain.
 - Highlight the data that are most important to your message.

In the morning, Mr. Few set the stage, demonstrating how we often fail to translate our large supply of data into useful information. Drawing on lessons from scientific research on human perception, Mr. Few illustrated how the information contained in graphic displays of data is often obscured by poor design. Mr. Few introduced attendees to a host of suggested graphic dos and don'ts, considered the merits of both tables and graphs, and reviewed several types of graphs and the functions for which each is best suited. He also warned that while many software vendors market flashy graphic capabilities, these trappings can actually interfere with efforts to clearly communicate data. With "advances" in technology, it is often too easy to make attractive, yet ineffective graphs.

The afternoon portion of the session challenged Forum members to apply the lessons they had learned in the morning to critique various practical examples. Mr. Few made liberal use of many tables and graphs submitted by Forum members to illustrate his lessons using education data. Attendees worked in groups to come up with suggestions to improve the graphs so that they would more clearly present the highlighted information and convey the intended message.

Many of the lessons from the session were drawn from Mr. Few's book, *Show Me the Numbers: Designing Tables and Graphs to Enlighten*, which is available online.

Opening Session

Tuesday, July 28, 2009

Welcome and Opening Comments

Forum Chair Bruce Dacey (Delaware Department of Education) welcomed Forum members to the 2009 Summer Forum Meeting in Bethesda, Maryland. Bruce introduced this year's Forum officers and announced three recently released Forum products – *Forum Guide to Metadata: The Meaning Behind Education Data*, the *Education Data Model, Version 1 (PK-12)*, and *Every School Day Counts: Forum Guide to Collecting and Using Attendance Data*.

He reviewed the meeting agenda and reported that Forum website traffic continues to grow with an average of 7,170 visits per month since June 2007. During this same period, Forum publications were downloaded as PDFs or were visited on their home pages over 6,500 times per month. The Chair then welcomed twenty-one new members to the Forum:

- Linda Atwood, Montana Office of Public Instruction
- Sharon Betts, Maine School Administrative District #52
- Steve Canavero, Nevada Department of Education
- Sheila Corey, Alaska Department of Education and Early Development
- Edward Eiler, Lafayette School Corporation (IN)
- David Feliciano, Savannah-Chatham County Public Schools (GA)
- Lisa Gauvin, Vermont Department of Education
- James Harrington, Hillsboro School District (OR)
- Tom Howell, Michigan Center for Educational Performance and Information
- Craig Hoyle, Regional Education Laboratory – Northeast & Islands
- Gayle Johnson, Illinois State Board of Education
- Whit Johnstone, Irving Independent School District (TX)
- Irma Jones, Tennessee Department of Education
- Brent Kay, Orange Southwest Advisory Union (VT)
- Frank “Steve” Snow, North Dakota Department of Public Instruction
- Julius Tufa, American Samoa Department of Education
- Ken Wagner, New York State Department of Education
- Gary West, South Carolina Department of Education
- Troy Wheeler, Idaho State Department of Education
- Hans P. L’Orange, State Higher Education Executive Officers (SHEEO)
- Baron Rodriguez, Data Quality Campaign (DQC)

Stimulus Funds for Education

Carmel Martin, Assistant Secretary for Planning, Evaluation, and Policy Development, U.S. Department of Education (USED), presented to the Forum on the Department's "Visions and Initiatives" related to programs under the American Recovery and Reinvestment Act (ARRA). President Obama and Secretary Duncan “get it,” Assistant Secretary Martin told Forum members. Not only have these leaders made education a high priority, but they have shifted to a more “holistic” view of education – including early learning and outcomes beyond K-12 in their vision for reform. And they see better data systems as one of our core tools for improving the educational system, allowing us to “focus on data, not narratives.” Ms. Martin outlined the Department’s goals for education reform and provided an overview of the funding and grant opportunities intended to help the education community realize this vision.

The Department would like to expand and improve early learning opportunities by improving the quality of early learning systems and better aligning early learning programs with the public school system and other social service providers. K-12 initiatives include four core areas: raising standards and improving assessments; recruiting, retaining and supporting effective educators and ensuring that they are distributed equitably; turning around low-performing schools; and building robust data systems that track student progress and help improve practice. In this latter area, the Department is promoting the use of data systems for accountability, transparency, and performance management, as well as to fuel innovation. Increasing the consistency of data standards and getting more detailed data into the hands of end users like teachers, principals and parents are key goals in this area. At the postsecondary level, the Department will work with states to improve community colleges, ensure college readiness among high school graduates, and expand awareness of and access to financial aid options.

The Assistant Secretary also discussed funding that is becoming available to support these initiatives. Ms. Martin broke down the various formula funds and competitive grant opportunities under the ARRA and provided an introduction to some of the requirements and metrics by which applicant agencies would be assessed in Phase II of the State Fiscal Stabilization Fund. Additional resources, preliminary timelines for the grant application processes, and other discretionary grant programs were also discussed. A Q&A session followed the presentation, during which Ms. Martin fielded questions on topics such as teacher preparation programs, help for agencies in the grant application process, P-20 management and coordination, common assessments, and the Family Educational Rights and Privacy Act (FERPA).

Forum's Role in Supporting National Data Standards Efforts

Lee Hoffman (NCES) and Kathy Gosa (Kansas State Department of Education) provided the Forum with a thought-provoking call to action, asking members to reflect on what the Forum's vision and ongoing role should be in support of national data standards efforts.

Ms. Hoffman began by framing the question and discussing the Forum's long history as a source of data standards and best practices. After reviewing many of the Forum's products and publications dating back to 1990, she asserted that Forum members offer a unique and deeper understanding of data and how to ensure that data systems provide quality data that are feasible, useful to stakeholders, and respectful of the law. While there are many voices helping to drive a national vision, people like Forum members must be involved in the conversation if that vision is to be effectively implemented.

Ms. Gosa added to these points by reviewing how the Forum's work has helped education agencies over the years, detailing her state's experiences as an example. Ms. Gosa suggested that the Forum and its partners, rather than taking a passive role in the current data standards movement, should actively assist in any national efforts to establish standards. The Forum should work to ensure that data standards are drawn from and build upon the rich foundation of past work (rather than duplicate, contradict, or ignore it), and that any such efforts be feasible, technically excellent, and maintained over time. To facilitate a strong start in this effort, Ms. Gosa provided Forum Standing Committees with templates to guide further discussions about this issue. First steps will be to refine a vision and establish a plan of action, including a gap analysis and prioritized list of activities. Standing Committee suggestions were to be summarized in the Closing Session and used to guide future discussions and work around this important issue.

Tribute to Stephen Metcalf (VT)

Tom Purwin (Jersey City Public Schools, NJ) and Stacey Murdock (Vermont Department of Education) honored Stephen Metcalf with a brief presentation. Stephen, a former member of the Forum who represented Montpelier School District (VT), passed away in May. He contributed to many Forum efforts including several publications and task forces.

Brownbag Lunch with Contracts Office for SEAs: Basic Participation Task Orders

Tuesday July 28, 2009

Over lunch, Contract Specialist William Spitzgo and Contracting Officer Sharon Masciana (Contracts Office, U.S. Department of Education) and Renee Rowland (NCES) provided state representatives with guidance concerning Basic Participation Task Orders. The presenters provided an overview of the program and stressed the importance of keeping bank account information up-to-date and sending emails, invoices, and deliverables to the correct address (ocfocaminvoicing@ed.gov) with a "cc" to William Spitzgo and Renee Rowland. They also

reviewed and distributed a document containing frequently asked questions about the NCES State Cooperative Systems Contract, Basic Participation task order, and other USED programs.

Joint Session: FERPA Update

Tuesday July 28, 2009

FERPA Update

Paul Gammill [Family Policy Compliance Office (FPCO), U.S. Department of Education] presented to the Forum on amended FERPA regulations effective since January 2009. Mr. Gammill reviewed changes to the definitions of four key terms including attendance, directory information, disclosure, and personally identifiable information. He then discussed regulations on various types of disclosures and related issues, such as outsourcing, de-identification, disclosures to school officials and researchers, use of Social Security numbers, and redisclosure. The presentation was followed by a Q&A period that included inquiries about the length of time for which researchers can keep sensitive data, data sharing through the workforce (FPCO is actively working to clarify guidance in this area), teacher access to data about past students (also an area on which FPCO is currently focusing), data use agreements, and rumors of a new interpretation of FERPA.

National Education Statistics Agenda Committee (NESAC) Standing Committee

Tuesday, July 28, 2009

Morning Session

Welcome, Introductions, Agenda Review

NESAC Chair Helene Bettencourt (Massachusetts Department of Elementary and Secondary Education) opened the committee meeting and welcomed members to the 2009 Summer Forum. Members introduced themselves by sharing a highlight from their summer. Ms. Bettencourt quickly reviewed the activities of the Winter 2009 Forum Meeting and walked the committee members through the agenda.

Discipline Task Force Proposal

Ghedam Bairu (NCES) and Barbara Timm (USED) presented to the committee a proposal for reviewing and updating the Forum's discipline data publication, *Safety in Numbers*. The Forum originally published the document in 2002, printing around 10,000 copies, all of which have been distributed. Recently, the U.S. Department of Education convened an internal task force to look at the discipline data elements needed for each program area and how they map back to information and best practices provided in the publication. The Department created a crosswalk of these elements as well as a list of elements that do not appear in the document. Incident reporting and the confusion surrounding some of those elements were identified as key areas that need to be clarified in the proposed publication update.

The Department would like the Forum to convene a working group to review and update the document. Simultaneously, the Department will work with each of the program offices that use the original the document. A motion was made to form this working group. After a second motion, the committee voted unanimously in favor of this work. A sign-up sheet for this group was circulated to the NESAC members.

Forum's Role in Supporting National Data Standards Efforts

During the Forum's Opening Session, Lee Hoffman (NCES) and Kathy Gosa (Kansas State Department of Education) spoke to members about the effort to establish national data standards and asked members to consider what, if any, role the Forum should play in the development and implementation of national data standards.

IES Statewide Longitudinal Data System (SLDS) Grant Program Update

Tate Gould (NCES) updated the committee on the Statewide Longitudinal Data Systems (SLDS) grant program. To date, the program has awarded 54 grants to 42 SEAs. The program's main objective is to create a robust community and extend access to that community as well as non-grantees. To that end, the program will:

- Host regular webinars on best practices with presentations by both SEAs and LEAs;
- Re-launch LDS Share as an online document library; and
- Open the annual grantee meeting (occurring on November 16-17, 2009) to the larger audience.

On Friday, July 24, 2009, President Obama and U.S. Secretary of Education Arne Duncan released the request for applications (RFA) for the fourth round of grants under funding allocated through the American Recovery and Reinvestment Act (ARRA). Applications for this round are due on November 19, 2009. This round of grants will have a strong focus on linking data through the P-20 spectrum and on connecting student and teacher records. The ARRA legislation emphasizes 12 elements included in the America COMPETES Act as requirements for building longitudinal data systems. NCES will be convening webinars to answer questions about the RFA and the application process. Thus far, informational webinars have been scheduled for:

- Thursday, August 27, 2009 from 1:00-2:30 p.m. EST
- Friday, September 18, 2009 from 2:00-3:30 p.m. EST
- Monday, October 5, 2009 from 12:00-1:30 p.m. EST

For more information, visit <http://nces.ed.gov/programs/slds/>.

Lessons Learned in Building and Using Longitudinal Data Systems (Connecticut)

Al Larson (Meriden Board of Education, CT) presented to the committee on the effective use of data at the LEA level. Larson has been working in his LEA to convert assessment data into meaningful information for teachers. He reported that teachers are more interested in the growth their individual students have demonstrated than in performance on a single test. However, even single test data can be useful if results show granular details that can illuminate the specific areas in which a student is struggling. Giving teachers information about what types of items each student is missing on a test can be very powerful information, allowing them to tailor instruction to meet the individual needs of their students. New tools are making it easier to collect more formative assessment data and to access these data much more quickly (near real time). Larson is working with teachers using their input to build assessments capable of delivering this type of information and to train them on the use of these data.

Afternoon Session

Lessons Learned in Building and Using Longitudinal Data Systems (Virginia)

Susan Williams (Virginia Department of Education) and David Uhlig (Charlottesville City Public School, VA) provided both a state and district perspective on building and using a longitudinal student data system. From the SEA perspective, the system was driven by accountability and decisions support. SEA lessons learned included:

- It is essential for the state to get data back into the hands of educators.

- The SEA does not have to serve as the auditor of the data, but it is able to provide oversight. The SEA can also provide clarity to collections and even rate calculations.
- One of the state's biggest roles is to provide dynamic rosters, which identify groups of students beyond simple class rosters. For example, a dynamic roster might be created for members of the football team or the chess club to allow districts and schools to assess whether any of these students are having academic trouble. Other groups that might be "watched" might include: 20% absent rate, multiple transfers, was previously retained, failed an assessment for 2+ years, etc.
- The SEA can also forge postsecondary linkages. For example, Virginia has established data sharing agreements with the National Student Clearinghouse, the Advanced Placement (AP) program, College Board's SAT, International Baccalaureate (IB), and the American College Testing (ACT) program. They use rigorous matching criteria to link data back to the student information system (SIS).

Virginia's motto is that "it takes a village to raise a child, but the whole Commonwealth to build an SLDS." For that reason, it is essential that relationships be forged cooperatively with the districts. From the LEA perspective, the system has provided several advantages, such as giving districts the ability to assign user rights for local level users and to locate students when they transfer between districts within the state. The SEA has also been helpful in providing frequent webinar training on how to access and use the data.

Teachers in Virginia currently only have access to the data upon request. There is an understanding that the data needs to get into educators' hands more frequently and training is needed on how to properly use that information.

New Financial Reporting Elements

Frank Johnson (NCES) joined the committee to give an update on collecting financial data related to ARRA and Title I. There are potentially six new data elements focusing on per pupil expenditures that will be included in the school-level financial collection for FY09. The potential elements include:

1. Current Expenditures
2. Property
3. Instructional Expenditures
4. Other Programs
5. Title I, Title V Part A
6. School Construction

Learning Exchange and Resource Network

Chris Lohse [Council of Chief State School Officers (CCSSO)] joined the committee to discuss the work going on at CCSSO and what the long-term goals are for data work. The Council's work focuses on four strategic areas:

1. Next Generation Learning
2. System of Educator Development
3. Standards, Assessment and Accountability
4. Comprehensive Data Systems and Research

It is the Council's belief that focusing on these four areas will have the greatest impact on improved outcomes for all learners.

In focusing on the data piece, CCSSO identified five issues with the current state of education data systems across the country:

1. Liquidity—data are not able to be shared across borders or through the education pipeline;

2. Relevance—data collection is too focused on administrative data and not data that improve instruction; teachers receive “autopsy” data rather than “x-ray” data;
3. Accuracy—data are often inaccurate or do not measure the appropriate indicators;
4. Timeliness—data take too long to get from their point of creation into systems; and
5. Quality—the quality of data is suspect at best.

If we can put liquid, relevant, accurate data in the hands of teachers and district officials, we almost certainly solve the issues of timeliness and quality. To begin to address these five issues, the Council believes that states need to adopt common data standards. Having a common standard will allow data to flow more seamlessly between districts and states, and through the entire P-20 pipeline.

The longer term goal of the Council is being called the Learning Exchange and Resource Network (LEARN). This work is intended to connect existing data systems in a safe, authenticated way that manages privacy and security yet leaves control in the hands of the states. LEARN will attempt to accomplish this using existing standards for information exchange, and newly-enabled “smart content” that knows how to avail itself to teachers, students, and parents in a “just-in-time” way. By making permissioned data and smart content available to third-party application developers, market forces will be able to drive continuous improvement for learners, all while realizing greater efficiencies and cost savings.

LEA/SEA Breakout: Continued Discussion of Data Standards

The committee has often engaged in breakout sessions to discuss topics in smaller groups of LEA and SEA representatives. This breakout was originally meant to focus on operating during lean economic times; however, during the meeting, the decision was made to alter this conversation to have a deeper dialogue on the topic of the Forum’s role in national efforts to develop common data standards. The Chairs attempted to refocus earlier conversation by asking pointed questions about whether the Forum should be reactive or proactive and what relevant tasks the organization should take on.

In the LEA breakout, members felt strongly that the Forum needs to be proactive. It is important that the Forum be engaged in any discussions around data standards because of its long history in the area. LEA members agreed that for a data standard to be adopted, there will need to be SEA and LEA buy-in. This gets to the heart of the Forum. The group had several ideas about the tasks the Forum should tackle:

- Operationalize and refresh its existing work;
- Take a comprehensive look at what is missing from current Forum guides and publications; and
- Be ready to accept invitations to engage in the conversation and respond appropriately in a timely manner.

The SEA breakout led to similar conclusions. The state representatives felt that the Forum has historically been and should remain proactive. The SEAs had a discussion about the changing responsibilities of, and interplay between, CCSSO’s Education Information Management Advisory Consortium (EIMAC) and USED’s *EDFacts* work. They agreed that each of these groups has an important role to play and that they need to work in tandem. The Forum has a litany of excellent products that need to be leveraged. SEA representatives asserted that it is evident that the environment is changing rapidly and it is increasingly important that our organization is involved in the conversation.

NESAC Election

David Weinberger (Yonkers Public Schools, NY), was officially nominated to assume the role of Chair and Patricia Sullivan (Texas Education Agency) was nominated for the role of Vice Chair. Both nominations were seconded and approved unanimously.

Wednesday, July 29, 2009

Morning Session

Stimulus Funding Follow Up

At the Opening Session, Carmel Martin, Assistant Secretary for Planning, Evaluation, and Policy Development, USED, presented to the full Forum on the different strands within the ARRA funding and how the Department plans to use that funding to further its overall goals and push for the alignment of early childhood, K-12, and postsecondary education. NESAC used this time to react to the presentation and to discuss the Race to the Top (RTTT) and State Fiscal Stabilization Fund (SFSF) guidance that was released on July 24, 2009.

- Few states have viable teacher evaluation systems or teacher performance information. Policymakers do not have a full understanding of the data issues surrounding evaluation systems and how complex the problem is.
- In light of the emphasis on collecting and publicizing information on teacher performance, would it be advantageous to build this piece of the National Education Data Model (NEDM) to aid in establishing consistency across states?
- Should the metrics outlined in the four assurances be added to the NEDM?
- If we are headed toward consistencies in teacher evaluation, is there a role for the Forum? Should we define the needed data elements? Should NEDM be expanded to encompass these elements and relationships?
- While the Forum structure is not designed to collectively respond to Federal Register postings, states and districts can individually respond to the guidance released on both RTTT and SFSF.

Professional Development Session Follow Up

NESAC members provided feedback on the professional development session offered on Monday, July 27, 2009. The members found the course to be one of the most useful sessions the Forum has provided in a long time. They felt the session was relevant and interesting. Members would have liked to see the session include how tables and graphs can become ADA compliant for online publication.

FERPA Follow Up

In Tuesday's general session, Paul Gammill (USED) spoke to Forum members about the Family Educational Rights and Privacy Act (FERPA). NESAC members were given the opportunity to discuss his presentation and identify any outstanding questions and follow-up items.

- The committee members saw Mr. Gammill as approachable and straightforward. His awareness of the controversy and problems with FERPA is refreshing.
- The Forum's Education Privacy Working Group will update the current privacy-related publications and create a suite of tools to use based on the new FERPA guidance.
- The question remains: Are there plans to rewrite FERPA? Regardless of any new guidance, committee members felt that the way the law is written makes it impossible to share data in several meaningful ways, such as from the state to users at the local level.

Mobility Rate Discussion

At the Winter 2009 Forum Meeting, a discussion topic was raised regarding mobility rate calculations. Members were interested in finding out more about how states and districts are

handling the mobility issue. The NESAC Chair led a discussion on the topic using information volunteered by several states. Many members found this to be a timely topic as many stakeholders are now asking for the rate.

- In Massachusetts, a consortium of low performing districts asked the state to calculate the rate in an attempt to identify a reason for their poor performance. The Massachusetts Department of Elementary and Secondary Education came up with a few preliminary calculations using snapshot data. The districts were less than happy with the initial findings because the mobility numbers were lower than expected.
- ESP Solutions Group drafted a white paper on mobility. This is a great resource and is available online at www.espsolutionsgroup.com.
- The Department of Defense Schools have used mobility rates for years to: anticipate what circumstances schools will face and as baselines to help educators and administrators make decisions for the following school year. There is significant mobility in the DOD schools with some rates as high as 45%. This poses a real challenge for teachers.
- States and districts are using a number of different calculations to calculate mobility rates.
- The real question is how the data are being used.

Topics from the Floor

Lavan Dukes (Florida Department of Education) brought a topic regarding virtual schools and attendance data to the attention of the committee. The Florida legislature passed a virtual education bill that obligates full-time virtual education for all districts. By its definition, virtual instruction is any time, any place, any space, any pace. Attendance is not something that is measured and funding for virtual schools is based on completion. However, federal collections require attendance data. So, the question is: How do you take this model and convert to the 180 day school year model for purposes of federal reporting? This is an emerging issue for a number of states and districts as virtual education becomes more popular. Note that the Forum has developed a document about collecting virtual education data, titled the *Forum Guide to Elementary/Secondary Virtual Education*.

Policies, Programs and Implementation (PPI) Standing Committee

Tuesday, July 28, 2009

Morning Session

Introductions and Agenda Review

PPI Chair James Haessly (Waukesha School District, WI) called the PPI committee to order. He then asked for members to introduce themselves and describe their experiences with the Forum.

IES Statewide Longitudinal Data System (SLDS) Grant Program Update

Tate Gould (NCES) reported on the SLDS grants. Twenty-seven states were given FY09 grants. There are now 54 SLDS grants in 42 states. A fourth set of grants totaling \$245 million will be available through ARRA funds. The Request for Applications has been posted and applications are due in November. Institute of Education Sciences (IES) will open the annual grantee meeting in November to all states. They are also currently working on an on-line data share called LDS Share as an document library. The goal is to expand resource access to the wider community, not just existing grantees. IES will also be improving technical assistance to grantees.

PPI Discussion: The Forum's Role in Supporting National Data Standards Efforts

James Haessly (Waukesha School District, WI) led a discussion on the presentation at the Opening Session regarding what the Forum should be contributing to the national data standards conversation. The committee modified the mission statement and generated task ideas for the Forum as follows.

Proposed Mission Statement: "The NCES Forum, through its members and associate members, capitalizing on its decades of a cooperative system and its multiple publications, data definitions and best practice collections as well as ongoing working groups and task forces, commits to act as the logical system (or entity) for leading the continued definition, development, and maintenance of national education data standards. Toward that end, the group of SEA and LEA representatives coupled with the other critical partners from/with the USED, commits to work and educate in unison ethically and timely with (CCSSO, NGA, GATES, DQC, SHEEO, unions, etc.), to provide leadership on the following:

- Continued refinement of data resources (e.g., exit codes, attendance data, course classification, privacy issues, virtual education, crime-discipline-violence, etc.).
- Best practice recommendations and guides that assist state, local, and school-based stakeholders in implementation (defining, collecting, and reporting) of quality data for school improvement.
- Assist in the immediate completion of definitions and best practices for current 'hot button' topics such as:
 - Linking teachers and students;
 - PK-20 connections and communications;
 - P-workforce and early childhood linkages; and
 - Others that may arise."

Forum activities identified included answering the following questions:

- Who are the other data standardization groups and what are their roles in this movement? What are the current data standards that already exist? What is the Forum's role in this effort? Are there lines of responsibility? How do we promote the Forum and its role?
- With respect to operationalizing best practices, how do we make some of this work at the state, local, and school level?
- What are the valid end uses of P-20/workforce and teacher-student linkage data? How are these operationalized?
- How can we get federal offices or other groups to ask our opinion before legislation or regulation is written or data collection items are created?
- What are "data standards?"
- How do we develop processes for engagement this late in the national data standards movement?
- How can we increase the rate at which we update our data resources (e.g., exit codes, etc)? What about other, smaller publications that can be completed within a shorter time frame and more cheaply? White papers?
- What is our process for informing people about different organizations and issues for each state, LEA, school, etc. (e.g., there is no State Higher Education Executive Officer in Michigan; early childhood is spread out in different state agencies; corrections institutes may or may not be covered; etc.)?

Crisis Data Management Task Force Update

Linda Rocks (Bossier Parish Schools, LA) provided an update on behalf of the Crisis Data Management Task Force. The group last met at the Winter 2009 Forum. The group's product focuses on the data items and management surrounding the displacement of students due to a crisis. The task force plans to have a draft for PPI review shortly after this Summer

Meeting. The document will then go for a full Forum vote and formatting and should be available in print by the fall.

EIMAC Civil Rights Data Collection (CRDC) Workgroup Update

Linda Rocks (Bossier Parish Schools, LA) provided an update on the EIMAC Civil Rights Data Collection (CRDC) Workgroup. The workgroup consists of LEA and SEA members who provide the USED with suggestions for the collection. Linda said the workgroup has made many suggestions and the Office of Civil Rights has responded positively and has made changes based on their comments. The collection will go out in the 2009-2010 school year. It will include some changes but will use the same sample already selected. They are working on a new collection tool and are also migrating toward using ED*Facts* data when applicable.

Afternoon Session

Elementary/Middle School Course Code Classification Working Group Update

Carol Jones (Michigan Center for Educational Performance and Information) provided the update for the new Elementary/Middle School Course Code Classification Working Group. The group met on Sunday for the first time. MPR and CCSSO will be supporting this effort and develop recommendations for a coding structure. The group would like to use the same structure as the SCED codes if possible. They will report back to PPI at the Winter 2010 Meeting with more details, anticipated products, and a timeline for the project.

PPI Discussion: SHEEO and P-20 Data Sharing

Hans L'Orange [State Higher Education Executive Officers, (SHEEO)] talked about the work that has been undertaken by the postsecondary community since the Winter 2009 Meeting. PPI Chair James Haessly (Waukesha School District, WI), Kathy Gosa (Kansas State Department of Education), and Tate Gould (NCES) spoke at a SHEEO meeting recently. There is an upcoming SHEEO policy conference in August.

Forum Professional Development Feedback

In general, PPI members had a very favorable view of the professional development session that occurred on Monday. There were some suggestions regarding the room layout and the length of the session, but most felt it was very informative. Some suggestions for future professional development topics included: FERPA, higher education, teacher-student connections, and managing messaging.

PPI Elections

PPI members nominated Vince Meyer (Wyoming Department of Education) as the Chair and David Fringer (Council Bluffs Community School District, IA) as the Vice Chair. The nominations were seconded and approved unanimously.

Wednesday, July 29, 2009

Morning Session

FERPA Joint Session Follow Up

Paul Gammill (USED) provided PPI members with an opportunity to ask questions as a follow up to his joint session presentation the previous afternoon. PPI members asked questions regarding direct control, following students over time, sharing test scores with multiple teachers, sharing data with non-education agencies, and penalties.

Education Privacy Working Group Update

Levette Williams (Georgia Department of Education) updated PPI on the work of the Education Privacy Working Group. The group met for the first time on Sunday to discuss their task. The work will focus on updating the Forum's student privacy document (*Forum Guide to Protecting the Privacy of Student Information: State and Local Education Agencies*), then creating smaller subsidiary documents, and also possibly adding staff privacy issues. The final product may be one comprehensive website on all privacy topics organized by user type. The older Forum documents will be updated based on the new FERPA regulations as well as changes in the education climate. The group will meet in the late fall and at the Winter 2010 Meeting and hope to be complete with their work by next summer.

Winter 2010 Planning

James Haessly (Waukesha School District, WI) opened a discussion on topics of interest for the Winter 2010 Forum Meeting. Topic suggestions included: student-teacher linking, P-20 in SLDS, value-added work, teacher performance measures and who is responsible for the measurements, and FERPA.

Technology (TECH) Standing Committee

Tuesday, July 28, 2009

Morning Session

Welcome and Introductions

Chair Tom Purwin (Jersey City Public Schools, NJ) called the meeting to order.

Introductions and Agenda Review

Members and attendees introduced themselves and reviewed the TECH agenda. Chair Purwin reviewed the work TECH accomplished at the Winter 2009 Meeting in Seattle, Washington. This included discussions and activities related to general session speakers, task orders, task force updates, data analysis and mining tools, Section 508 Accessibility, longitudinal data systems, and the use of data to improve learning.

Monday Professional Development: Table & Graph Design

Members agreed that the session by Stephen Few was especially relevant to our Forum. Presenting data in an appropriate manner is an important task in education agencies, but few staff are trained to do this seemingly simple yet exceedingly specialized job. Mr. Few was an engaging speaker with a lot of good information, but members felt like a whole day was a long time to sit and listen—even to such a skilled presenter. While dedicating an entire day to Mr. Few worked out, perhaps a half-day session would be more appropriate for other speakers in the future. TECH would like the Forum to consider whether it should develop a short publication designed especially for presenting education data in tables and graphs.

Forum's Role in Supporting National Data Standards Efforts

During the Opening Session, Lee Hoffman (NCES) and Kathy Gosa (Kansas State Department of Education) asked the Forum to consider its role in the development of national data standards. There appears to be several competing efforts underway to accomplish this objective, but TECH members feel that this work needs to be coordinated at the national level. Otherwise, there will surely be duplication of effort and competing standards. Questions raised included: Who is the authoritative body? Can it be the Forum?

As one member said, "Who would be better to develop data standards than the Forum?" We have a very good reputation nationally, including at the U.S. Department of Education. If we leave the chore to others, states and districts may find themselves being told what to do by people who see education only from the national perspective. In a nutshell, the Forum is the only national body that is neutral and practical. We could plug into existing resources like the National Education Data Model (NEDM), the NCES Handbooks Online, SIFA, and PESC.

Several questions were raised, including:

1. What are "data standards?" Are we talking about definitions, layouts, exchange protocols, collection and reporting standards? All of these?
2. What standards currently exist? Where are the gaps? How does postsecondary education fit in? Does this information need to be shared with the Data Quality Campaign (DQC), which appears to be planning standards development as though nothing currently exists?

TECH believes we need to engage our partners at the national level. We need to actively do so or else these projects will advance without the benefit of our unique perspective and experience (as well as our neutrality and practicality). Having said this, we should view this as a cooperative rather than competitive effort. The Forum can be the "honest broker" in this discussion.

TECH identified the following content priorities for this work:

1. Gap Analysis
2. Early Childhood Data
3. Instructional (Teacher) Use of Data
4. Other Metrics from the Federal Stimulus RFAs

National Education Data Model (NEDM) Update

Hugh Walkup (USED) reported on the progress of the NEDM. As stated earlier, the Forum draft was a good start for this project, which is now growing to become more comprehensive and useful. It could eventually include data about pre-Kindergarten, U.S. Department of Agriculture programs, and data collections at Health and Human Services. The NEDM is now moving from a descriptive model to a logical model with formal connections between entities, data elements, etc. This more explicit guidance will help vendors incorporate and implement NEDM standards.

One concern about the project stems from the earlier conversation about national standards. The NEDM only works if it is *THE* national model, rather than one type of model.

Decision Support Architecture Consortium (DSAC) Update

Tom Ogle (Missouri Department of Elementary and Secondary Education) reported that CCSSO has announced a new opportunity to help state education agencies align their data systems with local education agencies and schools. The Educational Alignment for Systemic Excellence (EASE) will be piloted in Fall 2009 and open to all states in 2010. For more information, visit <http://www.ccsso.org>.

Task Force and Working Group Updates

Data Ethics Task Force: Task Force Chair Tom Purwin (Jersey City Schools, NJ) reported that the draft is complete, has been approved by TECH, and will be sent to the Forum for a final approval vote later this summer.

Metadata Task Force: Task Force Chair Tom Ogle (Missouri Department of Elementary and Secondary Education) reported that the document has been released and is now available at http://nces.ed.gov/forum/pub_2009805.asp.

Longitudinal Data Systems Task Force: Task Force Chair Bruce Dacey (Delaware Department of Education) reported that the group continues to advance a draft of its product. The task force has completed several chapters and hopes to have a final product by the Winter 2010 Forum.

Section 508 Working Group: Task Force Chair Lee Rabbitt (Newport Public Schools, RI) reported that the group will develop a short document to promote awareness about this important topic. It will be developed on a short timeline (no more than 6-9 months).

TECH Election

Patsy Eiland (Alabama Department of Education) was elected Chair and Lee Rabbitt (Newport Public Schools, RI) was chosen as Vice Chair for 2009-2010.

Afternoon Session

EIMAC Update and Its Implications

Patsy Eiland initiated a discussion about a topic that first arose in May 2009 at the Education Information Management Advisory Consortium (EIMAC) meeting sponsored by CCSSO. Chris Lohse (CCSSO) followed with a presentation about the proposed Learning Exchange and Resource Network (LEARN). TECH had a lively discussion about how this initiative fits into other work at the national level and how the Forum may or may not be involved.

TECH Professional Development: Data Release Policies and Procedures

Kathy Gosa (Kansas State Department of Education) and Bethann Canada (Virginia Department of Education) shared a presentation about data release policies and procedures. TECH members recognized that most of them face similar issues on this front and that they could share ideas and resources for dealing with this important topic.

TECH Discussion: How Can SEAs Help LEAs Collect & Report High Quality Data?

Tom Purwin (Jersey City Public Schools, NJ) and Patsy Eiland (Alabama Department of Education) led a discussion about how SEAs may be able to help LEAs collect and report high quality data. This discussion continues TECH's recent tradition of exchanging perspectives between SEA and LEA members.

SEA members generated several ideas. For example, they recognized that they can:

- Try to align data and policies more carefully.
- Provide LEAs with professional development about data quality.
- Recognize when things are done well (not just when there are problems).

LEA members also created a list of ideas. For example, they suggested:

- More two-way data flow between SEAs and LEAs (e.g., how can there be mandatory summative assessments without formative assessment data to help guide instruction?).
- Increased SEA efforts to "listen" to LEAs in their own states (e.g., SEAs have to recognize that a sick child is at least temporarily more important than a data submission timeline if that child has an upset stomach in the entry clerk's office).
- SEAs supplement LEA data tools (e.g., SEAs could develop and share web applications).
- SEAs need to provide feedback about data quality (e.g., errors) in a timely manner.
- SEAs can't change data demands too frequently.

- SEAs should permit more flexibility in reporting (e.g., allow big districts to submit multiple files simultaneously rather than facing the burden of one giant submission in the face of a deadline).

Wednesday, July 29, 2009

Morning Session

SIF Implementation at the Message Level

Larry Fruth and Laurie Collins (SIFA) shared a presentation about the technical details of sending messages using the SIF specifications. Members felt it was right on target for the TECH meeting. It was good to get beyond the conceptual discussion and into the details.

NCES Data Use Project

Kashka Kubzdela (NCES) and Sandy Eyster (ESSI) gave a presentation to TECH about the new NCES data use project.

IES Statewide Longitudinal Data System (SLDS) Grant Program Update

Tate Gould and Emily Anthony (NCES) shared an update on the SLDS program at the U.S. Department of Education. They also demonstrated the new SLDS resource sharing website at <http://nces.ed.gov/Programs/SLDS/LDSShare/SLDS.aspx>. LDS Share is a dissemination venue for non-proprietary products and "lessons learned" from longitudinal data systems work conducted by state and local education agencies, including work funded by the SLDS Grant Program. LDS Share is intended to facilitate sharing and collaboration among education agencies and the education community in general, related to the design, development, implementation, use, and evaluation of longitudinal data systems. TECH will explore the possibility of using or adapting this webpage to share resources.

Winter 2010 Planning

- TECH would like to hear more about the NCES Data Use Project announced by Kashka Kubzdela (NCES).
- TECH will expect to hear more about the Forum's effort to identify its role in efforts to establish national data standards.
- TECH wants to be kept up-to-date on the status and vision of the various federal education stimulus initiatives.

Closing

Chair Tom Purwin thanked the TECH Committee for its hard work at the meeting and welcomed Patsy Eiland (Alabama Department of Education) as the TECH Chair for 2009-2010. Lee Rabbitt (Newport Public Schools, RI) will serve as the Vice Chair. Patsy reported that she expects to continue these important discussions with state and local education agency representatives over the next year.

Closing Session

Wednesday, July 29, 2009

Overview and Agenda

NCES Update

Stuart Kerachsky, NCES Acting Commissioner, updated Forum members on recent business and coming plans at NCES and the Institute of Education Sciences (IES). Mr. Kerachsky told Forum members that agency leaders like themselves are at the center of the President's effort to improve education. The federal government is waiting to see what innovation and

successes come from states and districts. Mr. Kerachsky highlighted the progress made by IES Statewide Longitudinal Data System (SLDS) grantee states, noting that most have implemented student and teacher identifier systems and can calculate the National Governors Association graduation rate. Many have established data sharing with postsecondary, early education and even workforce agencies, while others have emerged as leaders in data quality training. He noted the recent release of the new SLDS grant RFA and outlined the seven capabilities that eligible states will have in place or must pursue with the funding, such as linkages of individual student data from early education through the workforce, broad interoperability, and the matching of individual teacher and student data. Mr. Kerachsky then discussed the ARRA funds and its four assurances along with the Race to the Top grants. Finally, the Acting Commissioner gave a tour through many other activities going on at NCES including:

- The High School Longitudinal Study of 2009 (HSL:2009) examines students' decisionmaking regarding postsecondary education. A field test has been completed and the full study will launch soon.
- The Early Childhood Longitudinal Study Class of 2010-11 (ECLS-K:2011) will begin a field test soon and will include a one-on-one reading assessment.
- The National Assessment of Educational Progress (NAEP) was discussed:
 - *The Nation's Report Card: Long-term Trend 2008* report was released in April and provided a look at math and reading trends since the 1971.
 - *The Nation's Report Card: Arts 2008* was released in June and included assessments in music and the visual arts.
 - A report on achievement gaps between black and white students, *Achievement Gaps: How Black and White Students in Public Schools Perform in Mathematics and Reading on the NAEP*, was released in July.
 - This summer, the high school transcripts of NAEP participants are being collected for analysis of the relationship between NAEP performance and course taking.
 - Work is underway to develop a common proficiency scale, which will provide a metric with which to analyze academic standards in each state based on the state's performance on the NAEP scale over time. Progress has also been made in benchmarking NAEP to international assessments in order to create a common international metric.
- International assessments and related issues were discussed:
 - The Program for International Student Assessment (PISA) 2009 will be administered from September to November and will focus on reading literacy. School cooperation has been a big challenge in this effort.
 - Results from the 2007 Trends in International Mathematics and Science Study (TIMSS) were released in December. Comparisons of TIMSS and NAEP results have been conducted recently.
- The *Condition of Education 2009* was released in May. Mr. Kerachsky reviewed some of the report's contents, highlighting areas where students are doing well and others where they are struggling. A small report will soon look at the performance of U.S. students compared to others around the world based on results from several international assessments.
- Postsecondary issues were discussed:
 - QuickStats is NCES's new tool to help users create basic tables and charts using postsecondary data.
 - The Integrated Postsecondary Education Data System (IPEDS) has a new website which serves as a source of data on colleges, universities, and technical and vocational postsecondary institutions in the U.S.
 - The National Postsecondary Student Aid Study (NPSAS) is a student aid study that analyzes data on the cost of postsecondary education and examines how students and families finance their education.

- IES hosted the 2009 Research Conference in June. Attendees shared research findings over three days of sessions and via hundreds of poster presentations. Highlights included plenary presentations from Cecilia E. Rouse (Council of Economic Advisers, Princeton University) and Secretary Arne Duncan (USED).

Standing Committee Feedback: Forum and National Data Standards

Bruce Dacey presented some general feedback from Standing Committees on the issue of the Forum's role in supporting national data standards. Over the previous two days, Forum members had asserted that the Forum should be involved in this effort because the Forum is neutral, possesses both a unique set of expertise and wide range of perspectives, has experience with data standards, is practical in its approach, and has a long track record in developing data standards. In terms of the role we can take, members suggested that we commit to being a leader in this area and take a proactive role. Going forward, we should work collaboratively (not competitively) with other organizations involved, educate others and make sure that efforts build on rather than ignore or contradict the past and current work of the Forum and other standards developing bodies. The Forum may work to flesh out basic questions (e.g., What are "data standards?" What standards exist? Where are the gaps?), continue to update past publications based on gap analysis, continue to create best practice guides on implementation, and move immediately to address hot button issues. Over the next several weeks, the Steering Committee will review and consolidate Standing Committee ideas, refine our vision and plan of action, and provide feedback to the Forum.

Standing Committee Progress Reports

- National Education Statistics Agenda Committee (NESAC)
- Policies, Programs and Implementation (PPI)
- Technology (TECH)

Task Force/Working Group Progress Reports

- Crisis Data Management Task Force
- Data Ethics Task Force
- Longitudinal Data Systems Task Force
- Section 508 Accessibility Working Group
- FERPA Working Group
- Course Code Classification Working Group

Recognition of Completed Projects and Forum Officers

Ghedam Bairu (NCES) distributed plaques to the members of the Metadata Task Force and the 2008-2009 Forum officers to recognize their contributions to the Forum.

Forum Election

The following slate of officers was elected to lead the Forum in 2009-2010:

Forum Chair:	Linda Rocks, Bossier Parish Schools (LA)
Forum Vice Chair:	Kathy Gosa, Kansas State Department of Education
Past Chair:	Bruce Dacey, Delaware Department of Education
NESAC Chair:	David Weinberger, Yonkers Public Schools (NY)
NESAC Vice Chair:	Patricia Sullivan, Texas Education Agency
PPI Chair:	Vince Meyer, Wyoming Department of Education
PPI Vice Chair:	David Fringer, Council Bluffs Community School District (IA)
TECH Chair:	Patsy Eiland, Alabama Department of Education
TECH Vice Chair:	Lee Rabbitt, Newport Public Schools (RI)

Bruce Dacey thanked the Forum for the opportunity to serve as Chair in 2008-2009. Linda Rocks, the Chair for 2009-2010, pledged to keep up the good work of the Forum during her tenure.

Meeting Evaluations

Forum members shared their opinions on the Summer 2009 Forum Meeting by completing evaluations.

Steering Committee

Tuesday, July 28, 2009

Welcome and Agenda Review

Chair Bruce Dacey (Delaware Department of Education) opened the Steering Committee meeting and welcomed participants to the 2009 Summer Forum Meeting.

Working Group/Task Force Updates

Sunday's working group and task force meetings were discussed.

- The Section 508 Working Group has an outline for their product, which will provide basic guidance for designing (or revising) websites to improve accessibility and adhere to accessibility laws.
- The Education Privacy Working Group will review the current Forum documents on privacy and determine the scope of the revisions needed based on recent FERPA guidance and changes in the education climate (e.g., Hurricane Katrina, Homeland Security, etc.).
- The Facilities Working Group will develop and consolidate national standards for describing buildings based on standards developed by various organizations including a focus on "green" schools.
- The Elementary/Middle School Course Code Classification Working Group will create a taxonomy for assigning standard codes to elementary and middle school courses. All working groups plan on finishing their work by the summer of 2010.
- The LDS Task Force continues to advance a draft of its product. The task force has completed several draft chapters, which have been posted on the group's webpage, and hopes to have a final product by the Winter 2010 Forum.

Professional Development Discussion

Steering Committee members discussed Monday's professional development workshop with Stephen Few. Members reported mostly positive feedback on the session, noting that they and others they spoke with found the workshop to be both engaging and informative, offering valuable and relevant information that could benefit many attendees in their every day work. However, some suggested that consolidation into a half-day session may have been preferable and thought, in the future, a less entertaining speaker may have trouble pulling off a full-day session as well as Mr. Few was able to do. Others felt that the room setup was less than ideal and that a two-screen arrangement would have made it easier to follow the presentation from the back of the room (based on this suggestion, the room setup was changed for the Closing Session on Wednesday). Another member suggested moving the New Member Orientation session to Tuesday in the future so that all could have the option of attending the Monday professional development session.

Review of Tuesday's Events

Members thought that the presentation from Lee Hoffman (NCES) and Kathy Gosa (Kansas State Department of Education) was interesting and thought-provoking. They were also

very pleased with Assistant Secretary Carmel Martin's (USED) presentation on stimulus funds and appreciated the time she took to address the Forum and answer questions.

Next, Standing Committee Chairs reported on the day's discussions:

- NESAC Chair, Helene Bettencourt (Massachusetts Department of Elementary and Secondary Education) reviewed the committee's day, which included an update on the IES SLDS grant program; presentations on LDS lessons learned, new financial reporting elements, and CCSSO's Learning Exchange and Resource Network (LEARN); an election; a proposal for a new discipline task force; and a lengthy discussion of the Forum's role in supporting national data standards efforts. Some planned discussions had to be postponed due to the overwhelming interest in this latter issue.
- PPI Chair, James Haessly (School District of Waukesha, WI) summarized the day's events which included updates on the IES SLDS grant program, Crisis Data Management and Elementary/Middle School Course Code Classification Working Groups, and EIMAC Civil Rights Data Collection Workgroup; discussions about the professional development workshop and P-20 data sharing with SHEEO; and an election.
- TECH Chair, Tom Purwin (Jersey City Public Schools, NJ) reported that the committee reflected on the professional development workshop; had a lively discussion about the Forum's role in national data standards efforts; heard updates on the National Education Data Model, the Decision Support Architecture Consortium, and task force and working group progress; and held an election.

Renee Rowland (NCES) reported on the SEA Brownbag Lunch with the Contracts Office. Participants seemed to find the session useful and offered positive feedback.

Steering Committee members thought that Paul Gammill (USED) brought a new and refreshing perspective to the FERPA discussion. Although his presentation offered little in the way of new information, they looked forward to future interpretations or clarifications of FERPA that are reportedly in the works.

Forum's Role in Supporting National Data Standards Efforts

All Standing Committees focused heavily on the issue of the Forum's role in supporting national data standards efforts. The three committees had lively discussions on the topic and compiled extensive notes. TECH and PPI drafted vision statements and lists of action steps. Members agreed that the main ideas from Standing Committee on this issue should be reported back during the Closing Session. Furthermore, they felt strongly that conversations to refine our vision and plan action steps should resume shortly after this Summer Meeting.

Wednesday, July 29, 2009

Welcome to New Steering Committee Members

New Forum Chair Linda Rocks (Bossier Parish Public Schools, LA) welcomed new Steering Committee members and pledged to be receptive to Forum members' ideas over the coming year. Linda reviewed how the committee operates and explained how we communicate via periodic conference calls.

Review of Wednesday's Events and General Meeting Discussion

Members thought that NCES Acting Commissioner Kerachsky's presentation was informative and well-received. They expressed appreciation for the time he had taken to address the Forum.

The report to the Forum about our role in the national data standards conversation went well. Members reinforced the need to continue this work in the near future.

PowerPoint presentations used by speakers in the General Session and Standing Committees will be posted to the Forum website with the meeting notes. Assistant Secretary Carmel Martin's (USED) presentation will be posted as soon as possible and questions from the Q&A session following her presentation will be submitted to her office.

Winter 2010 Forum

The Winter 2010 Forum meeting will be held in Phoenix, Arizona on March 1-2, 2010 and followed by the annual MIS Conference. Note that this is one week later than usual (i.e., it is not the last full week of February). Planning for this meeting will be conducted over the coming months.

The Forum Voice: Fall 2009 (Volume 12, No. 2)

[Released: November 2009]

Editorial Board

Kathy Gosa, Kansas State Department of Education
Patricia Sullivan, Texas Education Agency
David Fringer, Council Bluffs Community School District (IA)
Lee Rabbitt, Newport Public Schools (RI)
Ghedam Bairu, NCES

Letter from Chair

While I have found myself somewhat reluctant to accept previous leadership roles within the Forum, accepting the position of Forum Chair was a much easier choice for me. I have gained so much experience along the way, and my confidence is boosted because of support from the fabulous NCES staff and Steering Committee. I am honored to be in this position and look forward to leading us into an exciting new year. Going forward, I will continue to rely on my best asset – a strong calling to serve. My primary agenda is to continue to provide an environment where you can share expert opinions, launch new ideas, and learn from others.

The backbone of the Forum is our diverse membership, which has successfully collaborated time after time to produce high quality products for the educational data community. With the completion of every Forum project, one or more initiatives takes its place to further our working body's mission: to develop and recommend strategies for building an education data system that will support local, state, and national efforts to improve public and private education throughout the United States. The Forum website is a great source to review completed works or to check on the status of our current projects. I encourage you to visit the site periodically and to share this collective resource with others in your district or state.

And now we are rolling into a stimulating new era with two simple words driving the train: data usage. Our fundamental goals of providing timely, quality, and comparable data are being considered as “must-haves” at the highest of levels. And, in light of our proven track record in this area, representatives from the Forum have been asked to be contributors to the national Common Data Standards effort. I look forward to sharing this group's initial work at our next meeting in March, and I fully expect some lively discussions. See you in warm and sunny Phoenix!

-Linda Rocks, Bossier Public Schools (LA)

Welcome New Members

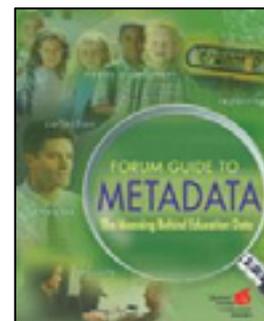
At this year's Summer Meeting, the Forum welcomed twenty-one new members. We look forward to working with them and seeing them again at the Winter 2010 Forum Meeting in Phoenix, Arizona. The new members include:

Linda Atwood, Montana Office of Public Instruction
Sharon Betts, Maine School Administrative District #52
Steve Canavero, Nevada Department of Education
Sheila Corey, Alaska Department of Education and Early Development
Edward Eiler, Lafayette School Corporation (IN)
David Feliciano, Savannah-Chatham County Public Schools (GA)
Lisa Gauvin, Vermont Department of Education
James Harrington, Hillsboro School District (OR)
Tom Howell, Michigan Center for Educational Performance and Information
Craig Hoyle, Regional Education Laboratory – Northeast & Islands

Gayle Johnson, Illinois State Board of Education
Whit Johnstone, Irving Independent School District (TX)
Irma Jones, Tennessee Department of Education
Brent Kay, Orange Southwest Advisory Union (VT)
Frank "Steve" Snow, North Dakota Department of Public Instruction
Julius Tufa, American Samoa Department of Education
Ken Wagner, New York State Department of Education
Gary West, South Carolina Department of Education
Troy Wheeler, Idaho State Department of Education
Hans P. L'Orange, State Higher Education Executive Officers (SHEEO)
Baron Rodriguez, Data Quality Campaign (DQC)

New Resources

- ✓ **Metadata Guide**—The *Forum Guide to Metadata: The Meaning Behind Education Data* was released in July 2009. The document offers best practice concepts, definitions, implementation strategies, and templates/tools for an audience of data, technology, program, policymaking, and administrative staff in state and local education agencies. The main objectives of this guide are to enhance this audience's awareness and understanding of metadata, to improve the quality of the data in the systems they maintain, and ultimately, to empower people to more effectively use data as information. To accomplish this, the publication explains what metadata are; why metadata are critical to the development of sound education data systems; what components comprise a metadata system; what value metadata bring to data management and use; and how to implement and use a metadata system in an education organization.



- ✓ **Handbooks Online Version 7.0**—A new version of the NCES Handbooks Online is now available to help education agencies and institutions collect uniform and comparable data. Version 7.0, which reflects changes made during the latest annual revision of the Handbooks, includes new and revised data elements and options. This version contains new attendance codes from the Forum publication on the topic, AYP elements, a highly-qualified teacher indicator, assessment item elements, and staffing categories. Additionally, option numbers have been reduced from six to five digits, with the removal of the leading zero.

Handbooks Online

Summer 2009 Meeting Recap

The Summer 2009 Forum Meeting took place in Bethesda, Maryland from July 27-29. Stephen Few of Perceptual Edge welcomed the Forum on Monday with a professional development session on effective graphical presentation of data. Tuesday morning opened with an address from Carmel Martin, Assistant Secretary for Planning, Evaluation, and Policy Development (USED), on the Department's visions and initiatives related to programs under the American Recovery and Reinvestment Act. Next, Lee Hoffman, NCES, and Kathy Gosa, Kansas State Department of Education, presented to the Forum about the increasing momentum around common data standards and challenged members to articulate the Forum's role in this national movement—a topic that sparked lengthy and lively discussions in Standing Committee Meetings. Later in the day, Paul Gammill of the Family Policy Compliance Office provided the Forum with an overview of current FERPA regulations and took questions about the privacy law and efforts to further clarify the regulations. Tom Purwin, Jersey City Public Schools (NJ) and Stacey Murdock, Vermont Department of Education, paid tribute to Steve Metcalf, a former LEA member from Montpelier School District (VT).



Finally, many Forum members attended a brownbag lunch with the USED Contracts Office. On Wednesday morning, Stuart Kerachsky, Acting NCES Commissioner, reviewed some of the Center's recent activities and many accomplishments. The meeting closed with a Forum election in which Chair Bruce Dacey, Delaware Department of Education, and Standing Committee Chairs passed the reins to a new slate of officers led by Linda Rocks, Bossier Parish Schools (LA). Detailed meeting notes—including joint sessions, Standing Committee and Steering Committee meetings, and presentations—are now available [see Summer 2009 Forum Meeting Notes on pages 17-36 of this program].

NCES's Common Data Standards Initiative

In recent months, the development of common data standards has emerged as an important topic on the national stage, with numerous organizations investigating the issue and beginning work to develop standards. For data standards to be "common," they must 1) have uniform definitions, code sets, and technical specifications, and 2) be widely adopted and strictly adhered to by education agencies. After months of discussion, a three-pronged approach to standards development has emerged, focusing on: technical, communications, and adoption. NCES, under the direction of Nancy Smith, will lead the technical effort by convening representatives from a variety of organizations—including the Forum—to work quickly, yet carefully, to compile and refine a set of core data standards. Working in concert with NCES, several other organizations—including the Data Quality Campaign and, potentially, the Bill & Melinda Gates Foundation—will spearhead the communications and adoption portions of the initiative to market these standards and encourage the education community (and vendors) to spend the time and resources required to implement them.

From early on, local-level buy-in from school districts, the entities that will ultimately implement data standards, has been acknowledged as critical to the effort's success. Accordingly, numerous Forum representatives from states and districts have been asked to serve on NCES's new Technical Working Group on data standards, which will convene over the coming months to develop the standards. Working group goals will be to:

- define the project scope;
- define the benefits of having common data standards;
- identify questions to be answered and metrics to be measured;
- find out who's using current standards (e.g., NCES Handbooks) and why others are not;
- identify core data elements and either modify existing or craft new definitions when necessary;
- and
- define technical specifications.

Over the next year, the group's work will be shared with the full Forum. First, an initial draft set of elements and definitions will be provided for feedback at the Winter 2010 Forum/MIS Conference. At the Summer 2010 Forum/STATS-DC Conference, the final data standards will be shared upon the project's completion.

Forum Task Force and Working Group Updates

- ✓ **Crime, Violence, and Discipline Working Group**—The Crime, Violence, and Discipline Working Group was formed at the Summer 2009 Forum and met for the first time in October 2009. Sparked by interest from USED in standardizing this area of data, the group's charge is to update the 2002 Forum document *Safety in Numbers: Collecting and Using Crime, Violence, and Discipline Incident Data to Make a Difference in Schools* to help establish a consistent body of terms and definitions in the field.
- ✓ **Crisis Data Management Task Force**—The Crisis Data Management Task Force has recently released a draft document for Forum approval. The document is intended to aid elementary and secondary education agencies in the establishment of policies and procedures for collecting and managing education data before, during, and after a crisis. It will present a collection of data

items useful in situations in which an agency is impacted either directly or indirectly (e.g., only receiving displaced students) by a disaster. The finished publication is expected by the Winter 2010 Forum.

- ✓ **Data Ethics Task Force**—The Data Ethics Task Force recently received Forum approval for its Code of Ethics. The Code is intended for a broad range of stakeholders in the education data community and will address ethical issues focused on the management and use of education data, with particular emphasis on individually identifiable student and staff data. Supporting text will be specific enough to make ethical principles understandable and actionable for staff in an education organization. The final product will be released later this calendar year.
- ✓ **Education Privacy**—The Education Privacy Working Group first met at the Summer 2009 Forum. The group will review the current Forum documents on privacy and determine the scope of the revisions needed based on recent FERPA guidance and other changes in the education climate (e.g., Hurricane Katrina, Homeland Security, etc.). The group will work on a single revised privacy product that will replace all current related documents. A webinar was held in September 2009 and the group will meet again this winter before gathering in Phoenix at the Winter 2010 Forum.
- ✓ **Elementary/Middle School Course Code Classification Working Group**—The Elementary/Middle School Course Code Classification Working Group met at the Summer 2009 Forum to begin their work to create a taxonomy for assigning standard codes to elementary and middle school courses. Similar to the Secondary School Course Classification System (SCED), this taxonomy is intended to make it easier for school districts and states to maintain longitudinal student records electronically. It will also help them transmit course-taking information among student information systems—from one school district to another, and from a school district to a state department of education. The group is currently working with a consultant to develop a proposed coding structure. The Working Group's next meeting will be at the Winter 2010 Forum.
- ✓ **Longitudinal Data Systems Task Force**—The Longitudinal Data Systems (LDS) Task Force is currently developing *Traveling Through Time: The Forum Guide to Longitudinal Data Systems* to help state and local education agencies meet the many challenges involved in building robust LDSs, populating them with quality data, and using this new information to improve the educational system. With emphasis on the non-technical, business side of LDS development, this document explores a broad range of issues involved in establishing an LDS that will have lasting and far-reaching impact. The group has posted a partial draft document on its webpage and hopes to release the final product by the Winter 2010 Forum Meeting.
- ✓ **Section 508 Accessibility Working Group**—The Section 508 Accessibility Working Group is beginning its work to develop a short document to increase awareness of Federal Section 508 regulations for public organizations that receive federal funds (including SEAs, LEAs, and schools). Section 508 requires that electronic information be accessible to all people, including those with disabilities. The working group will also provide basic guidance for designing (or revising) websites to improve accessibility. This working group first met at the Summer 2009 Forum and then again in October. The Working Group will convene again at the Winter 2010 Forum.

2009–10 Forum Officers

Forum Chair: Linda Rocks, Bossier Parish Schools (LA)
Vice Chair: Kathy Gosa, Kansas State Department of Education
Past Chair: Bruce Dacey, Delaware Department of Education
Staff: Ghedam Bairu, NCES

NESAC Chair: David Weinberger, Yonkers Public Schools (NY)
Vice Chair: Patricia Sullivan, Texas Education Agency
Staff: Renee Rowland, NCES
Consultant: Maureen Matthews, CCSSO

PPI Chair: Vince Meyer, Wyoming Department of Education
Vice Chair: David Fringer, Council Bluffs Community School District (IA)
Staff: Ghedam Bairu, NCES
Consultant: Beth Young, QIP

TECH Chair: Patsy Eiland, Alabama Department of Education
Vice Chair: Lee Rabbitt, Newport Public Schools (RI)
Staff: Tate Gould, NCES
Consultant: Tom Szuba, QIP

Newsletter Information

The *Forum Voice* is released as an electronic publication. To subscribe, visit the NCES News Flash [<http://ies.ed.gov/newsflash/>]. To contact the Forum, e-mail: Ghedam.Bairu@ed.gov, fax: (202) 502-7475, or write: NCES-Forum, 1990 K Street, NW, Room 9095, Washington, DC 20006-5651.

**Crisis Data Management:
A Forum Guide to Collecting and
Managing Data about Displaced Students**
<http://nces.ed.gov/forum/crisisdata.asp>

Floods, fires, epidemics, ice storms, chemical spills, etc. ... these extreme events can have a substantial effect on communities, schools, and students. When a crisis shuts down a school building or otherwise disrupts the education system, educators must be prepared to respond in a manner that quickly provides a safe and stable learning environment for students. These crises can happen anywhere and widespread crises, such as Hurricane Katrina in 2005, can impact schools and districts all over the country.

The immediate demand for data about students displaced by Hurricanes Katrina and Rita was overwhelming for many school districts that gained or lost students because of the disasters. *Crisis Data Management: A Forum Guide to Collecting and Managing Data about Displaced Students* provides recommendations for collecting and maintaining data about students displaced by such a crisis, whether they are moving in or out of your organization. The document includes guidelines that can be used by elementary and secondary education agencies to establish policies and procedures for collecting and managing education data before, during, and after a crisis. Specifically, this guide focuses on data system planning activities intended to minimize the impact of a crisis and preserve or restore business continuity (i.e., providing educational services to students) during and following a crisis. It is not presented as a comprehensive disaster recovery planning tool, nor does it address all aspects of crisis response.

The guide begins by defining the terms "crisis" and "displaced student" and discusses key issues including the sharing of individual student data in a timely manner within and between states. It then recommends planning activities to help education organizations prepare for a crisis, including issues such as the formation of a disaster recovery team, assessment of existing data systems, implementation of displaced student placeholders, and maintenance of related data. The document also offers guidance regarding the collection and dissemination of data about displaced students during a crisis, including the crisis declaration and subsequent data collection and exchange efforts. And, for the period following a crisis, the guide describes effective data reporting and evaluation, which includes ongoing data sharing, state and federal reporting, auditing expectations, suspension or termination of temporary systems, and process evaluations. Several special challenges related to managing data about displaced students are also identified, including implications of statewide student information systems, the need for unique statewide student identifiers, the timing of the crisis, and the implementation of displacement status records. A timeline for action is also included to help organize agency efforts.

This publication is available electronically at <http://nces.ed.gov/forum>. Instructions for ordering print copies are also available on the National Forum on Education Statistics website.

Crisis Data Management: A Forum Guide to Collecting and Managing Data about Displaced Students is a product of the National Forum on Education Statistics. The project was sponsored by the National Center for Education Statistics (NCES), U.S. Department of Education, under the auspices of the National Cooperative Education Statistics System. For more information about the National Forum on Education Statistics, visit <http://nces.ed.gov/forum>.



Forum Guide to Data Ethics

<http://nces.ed.gov/forum/dataethics.asp>

This document presents a code of ethics for data management in education settings. Its canons, examples, descriptions, and recommendations reflect situations that arise in real schools, school districts, and state education agencies. The guidance is intended to supplement existing data ethics policies in education organizations or serve as a template when organizations create new policies.

While laws may set the legal parameters that govern data use, ethics establish the fundamental principles of “right and wrong” that are critical to the appropriate management and use of education data. The ethics of collecting, maintaining, reporting, and using data are far too complicated to manage effectively unless education leaders support data ethics as an important organizational priority. School leaders can set expectations that make ethical behavior an organizational norm or, alternatively, they can intentionally or unintentionally accept behavior that routinely or even systematically falls short of accepted ethical standards. Good communications and training help data handlers to both understand and exhibit reasonable standards of ethical behavior. As such, this document recommends that education organizations train staff about their ethical responsibilities; clearly state expectations for ethical behavior; create explicit policies and procedures pertaining to data ethics; determine the consequences of unethical behavior; and enforce these rules uniformly so that everyone is accountable.

While the Code encompasses a wide range of ethical considerations and scenarios, it is not presumed to be an exhaustive representation of ethical issues facing educators.

The Forum Code of Data Ethics:

- I. Demonstrate honesty, integrity, and professionalism at all times
- II. Appreciate that, while data may represent attributes of real people, they do not describe the whole person
- III. Be aware of applicable statutes, regulations, practices, and ethical standards governing data collection and reporting
- IV. Report information accurately and without bias
- V. Be accountable and hold others accountable for ethical use of data
- VI. Promote data quality by adhering to best practices and operating standards
- VII. Provide all relevant data, definitions, and documentation to promote comprehensive understanding and accurate analysis when releasing information
- VIII. Treat data systems as a valuable organizational asset
- IX. Safeguard sensitive data to guarantee privacy and confidentiality

This publication is available electronically at <http://nces.ed.gov/forum>. Instructions for ordering print copies are also available on the National Forum on Education Statistics website.

The *Forum Guide to Data Ethics* is a product of the National Forum on Education Statistics. The project was sponsored by the National Center for Education Statistics (NCES), U.S. Department of Education, under the auspices of the National Cooperative Education Statistics System. For more information about the National Forum on Education Statistics, visit <http://nces.ed.gov/forum>.

**Traveling Through Time:
The Forum Guide to
Longitudinal Data Systems**
<http://nces.ed.gov/forum/longitudinal.asp>

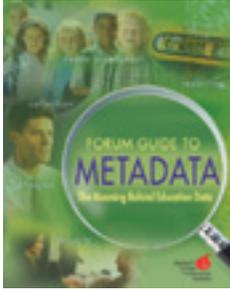


By facilitating the collection and use of detailed, high quality student- and staff-level data linked over time, longitudinal data systems (LDSs) hold the promise of revolutionizing the way we educate our students and vastly improving the way we do business from the policy level, to the school office, and into the classroom. *Traveling Through Time: The Forum Guide to Longitudinal Data Systems* is intended to help state and local education agencies meet the many challenges involved in building robust LDSs, populating them with quality data, and using this new information to improve the educational system. With special emphasis on the business-level perspective, this document explores a broad range of issues involved in establishing an LDS that will have lasting and far-reaching impact.

The guide's Introduction discusses its purpose, format, and intended audience. Chapter 1 is a primer on LDSs, which defines and discusses overarching benefits, lays out key steps to planning and implementing an LDS, and presents both the technical and non-technical components that generally comprise such a system. Chapter 2 discusses in more detail the planning, implementation, and evaluation phases of an LDS project. It guides readers through the process of engaging a wide variety of stakeholders to create a vision for an LDS, building support for the undertaking, developing the system, and gauging how well it is meeting its intended goals. Chapter 3 explores several fundamental challenges of data management, focusing largely on defining and reviewing the benefits of strong data governance, and providing a basic model for establishing a sound governance structure and process. Additional sections of the chapter address data quality, privacy, and security issues. Chapter 4 considers the effective use of LDS data, including the "prerequisites" of data use, ways in which various stakeholders can benefit from the system, the importance of training and professional development, the many potential uses of the data, and the various types of tools that can be used to turn student-level longitudinal data into actionable information at all levels of the educational system. The guide includes many semi-fictional vignettes and real life stories from education agencies around the country.

An early draft of this guide is available electronically at the Longitudinal Data System Task Force website at <http://nces.ed.gov/forum/longitudinal.asp>. The final product release is expected in early 2010.

Traveling Through Time: The Forum Guide to Longitudinal Data Systems is a product of the National Forum on Education Statistics. The project is sponsored by the National Center for Education Statistics (NCES), U.S. Department of Education, under the auspices of the National Cooperative Education Statistics System. For more information about the National Forum on Education Statistics, visit <http://nces.ed.gov/forum>.



Forum Guide to Metadata: The Meaning Behind Education Data

http://nces.ed.gov/forum/pub_2009805.asp

In the complex world of education data, answers to even apparently straightforward questions often depend on highly complicated and technical data. Take, for example, the “simple” question, *How many eighth grade English teachers are in your schools?* On one end of the spectrum, there may not be any full-time certified English teachers teaching an English class to only eighth-grade students in the single middle school in the district this semester. At the same time, 50 or more full- or part-time teachers may be leading reading, writing, or language classes with at least one eighth-grade student at some point during the academic year. Clearly, the “right” answer depends on the context of the question and the data being used to answer it—and metadata provide that context.

Metadata are defined as “data about data.” A well-managed metadata system ensures that the definitions, parameters, usage instructions, and history of each element are maintained in an accurate and up-to-date manner. Additionally, metadata are essential for bridging programs and databases because they provide the framework for data exchange and communication within and between organizations.

Metadata systems may not have been necessary when data sets were relatively small and simply organized. Under these circumstances, data were usually used by only a handful of people who were intimately familiar with each data element’s definition, source, uses, limitations, and technical characteristics. But the education enterprise has grown in complexity over the past decades, resulting in the seemingly exponential growth of information collected, stored, managed, used, and reported. In the field of education, as with other industries, metadata have become a necessary component of sound data systems.

The purpose of this guide is to empower people to more effectively use data as information. To accomplish this, the publication explains what metadata are; why metadata are critical to the development of sound education data systems; what components comprise a metadata system; what value metadata bring to data management and use; and how to implement and use a metadata system in an education organization. The primary audiences for this guide include technology, program, policymaking, administrative, and data staff in state and local education agencies. It may also be useful to other education stakeholders, including anyone engaged in operations or decisionmaking that depend on accurate, reliable, and timely information.

This publication is available electronically at http://nces.ed.gov/forum/pub_2009805.asp. Instructions for ordering print copies are also available on the National Forum on Education Statistics website.

The *Forum Guide to Metadata: The Meaning Behind Education Data* is a product of the National Forum on Education Statistics. The project was sponsored by the National Center for Education Statistics (NCES), U.S. Department of Education, under the auspices of the National Cooperative Education Statistics System. For more information about the National Forum on Education Statistics, visit <http://nces.ed.gov/forum>.



Forum Listserv Groups

Group Name	Listserv Address
Crime and Violence Working Group	CRIME-VIOLENCE@NCESlistserv.com
Education Privacy Working Group	EDUCATIONPRIVACY@NCESlistserv.com
El/Sec Steering Committee	ELSEC-STEER@NCESlistserv.com
Elementary/Middle School Course Code Classification Working Group	EMSCOURSECLASS@NCESlistserv.com
Forum Members	FORUMMEMBERS@NCESlistserv.com
Local Education Agency Liaisons (LEAs)	LEA@NCESlistserv.com
Longitudinal Data Systems Task Force	LDS@NCESlistserv.com
National Education Statistics Agenda Committee (NESAC) Standing Committee	NESAC@NCESlistserv.com
Policies, Programs and Implementation (PPI) Standing Committee	PPI@NCESlistserv.com
Section 508 Accessibility Working Group	SECTION508@NCESlistserv.com
State and Local Agency Members	SEA-LEA@NCESlistserv.com
State Education Agency Liaisons (SEAs)	SEA@NCESlistserv.com
Technology (TECH) Standing Committee	TECH@NCESlistserv.com

Forum Listserv Instructions

The steps below use a fictitious "name of group" to explain the Forum listserv process.

How to send a message to your group:

1. Compose a new email to NAMEOFGROUP@nceslistserv.com and send the message as you normally would. You may also add attachments to your message.

Or

2. Visit <http://nceslistserv.com/archives/NAMEOFGROUP.html> and sign in with your email address and password, (see below for instructions for obtaining a password). Click the link "Post New Message" and complete the form.

How messages are received:

Messages sent to the group will be delivered as would any ordinary email message. As a member of the listserv, you will receive a copy of any message you send.

How to view the group archive:

Visit <http://nceslistserv.com/archives/NAMEOFGROUP.html> and sign in with your email address and password. At the bottom of the group home page, you will see links to the group archives listed by month and year. Click on the month you wish to access; you will see the archived messages from that time period.

How to get a password:

Visit <http://nceslistserv.com/archives/NAMEOFGROUP.html> and click on the link "Get Password." Fill in your **email address** and create a **password** for yourself. An email will be sent to your inbox with a link to complete the registration. After you confirm your email address, you can sign in at the web site to create a new post and view the archives.



Forum Member Handbook

National Cooperative Education Statistics System

The National Center for Education Statistics (NCES) established the National Cooperative Education Statistics System (Cooperative System) to assist in producing and maintaining comparable and uniform information and data on early childhood education and on elementary and secondary education. These data are intended to be useful for policymaking at the federal, state, and local levels.

The National Forum on Education Statistics (the Forum) is an entity of the Cooperative System, and among its other activities, proposes principles of good practice to assist state and local education agencies in meeting this purpose. The Cooperative System and the Forum are supported in these endeavors by resources from NCES.

Publications of the Forum do not undergo the same formal review required for products of NCES. The information and opinions published here are those of the National Forum on Education Statistics and do not necessarily represent the policy or views of the U.S. Department of Education or the National Center for Education Statistics.

July 2007 (revised January 2010)

This publication and other publications of the National Forum on Education Statistics may be found at the websites listed below.

The NCES World Wide Web Home Page is <http://nces.ed.gov>

The NCES World Wide Web Electronic Catalog is <http://nces.ed.gov/pubsearch>

The Forum World Wide Web Home Page is <http://nces.ed.gov/forum>

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Ghedam Bairu
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ghedam.bairu@ed.gov

Foreword

The National Forum on Education Statistics is supported by the National Center for Education Statistics of the U.S. Department of Education. Its mission is to develop and recommend strategies for building an education data system that will support local, state, and national efforts to improve public and private education throughout the United States. Forum members include representatives of state and local education agencies, offices of the U.S. Department of Education, other federal agencies, and national associations with an interest in education data.

This document was written for Forum members, and interested nonmembers, to improve their understanding of the Forum's goals and objectives, the processes and mechanisms the Forum uses to accomplish those goals and objectives, and the resources it develops for the education community.

Visit <http://nces.ed.gov/forum> for more information about the National Forum on Education Statistics, and to find the most up-to-date version of this resource.

Acknowledgments

The development of this document was overseen by the 2007 Steering Committee of the National Forum on Education Statistics. Members include:

National Forum on Education Statistics

Chair: Derrick Lindsay, Mississippi Department of Education
Vice-Chair: Susan VanGorden, Lakota Local School District (OH)
Immediate Past Chair: Bill Smith, Sioux Falls School District (SD)

National Education Statistics Agenda Committee (NESAC)

Chair: Sonya Edwards, California Department of Education
Vice-Chair: Linda Rocks, Bossier Parish Schools (LA)

Policies, Programs and Implementation Committee (PPI)

Chair: Robert Beecham, Nebraska Department of Education
Vice-Chair: Levette Williams, Georgia Department of Education

Technology Committee (TECH)

Chair: Jeff Stowe, Arizona Department of Education
Vice-Chair: Kathy Gosa, Kansas State Department of Education

Forum members reviewed the document in its draft form and provided valuable comments and suggestions for improving its quality and utility. Lee Hoffman and Ghedam Bairu (NCES) and Tom Szuba (Quality Information Partners) provided useful recommendations to improve the handbook. Joyce Stern (Synergy Enterprises, Inc.) provided editorial and design services.

Part One: About the Forum

About the Member Handbook

This Member Handbook of the National Forum on Education Statistics is designed to serve as a single, comprehensive resource about the purpose and operations of the National Forum on Education Statistics (the Forum). It is written for members of the Forum, and for interested nonmembers, to improve their understanding of the Forum’s goals and objectives, the processes and mechanisms the Forum uses to accomplish those goals and objectives, and the resources it develops for the education community.

New members may find it helpful as they prepare for their roles in the Forum, whether as a state education agency liaison, a local education agency liaison, a federal agency member, or an associate member. Typically, it takes some time for a new member to become familiar with the Forum’s culture, processes, and opportunities, and having a Member Handbook to consult should help expedite and simplify that process.

Seasoned members may find the Member Handbook useful as they engage in new activities, serve on committees and task forces, and accept leadership roles in the organization. It may also be a useful tool when mentoring new members and making presentations about the Forum and its resources to outside audiences.

The Handbook has two parts: “About the Forum” and “Forum Resources.” The first part reviews the mission of the Forum, its membership, organizational structure, and operating processes. The second part describes Forum resources, including free publications and presentation materials, the outreach toolkit, web resources, and links to related organizations.

What is the National Forum on Education Statistics?

Background of the Forum

The National Forum on Education Statistics provides an arena for local, state, and national leaders in the education data community to discuss issues, address problems, develop resources, and consider new approaches to improving data collection and utility. It is a voluntary, democratic, and participatory federal-state-local body that identifies and addresses education data needs at the national, state, and local levels. The Forum was established by the National Center for Education Statistics (NCES) of the U.S. Department of Education in 1989.

The Hawkins-Stafford Elementary and Secondary Education Improvement Amendments of 1988 (P.L. 100–297) gave NCES the authority to establish a National Cooperative Education Statistics System. NCES established the Cooperative System to “produce and maintain, with the cooperation of the States, comparable and uniform educational information and data that are useful for policymaking at the federal, state, and local level.” The legislation identified seven broad topics as examples of areas that could be addressed by the data collection and reporting system. They are

1. schools and school districts;
2. students and enrollments, including special populations;
3. availability of school libraries and their resources;
4. teachers, librarians, and school administrators;
5. financing of elementary and secondary education;
6. student outcomes, including scores on standardized tests and other measures of education achievement; and
7. progress of educational reform in the states and in the nation.

NCES established the Forum to assist the National Cooperative Education Statistics System in achieving its congressional mandate. The Forum held its first meeting in March 1989, and the Forum formalized its goals, objectives, functions, organizational structure, and operations in January 1990 with the adoption of a *Policies and Procedures Manual* by the Forum membership. The *Policies and Procedures Manual* has since been revised several times. The latest version, revised in October 2003, is available at <http://nces.ed.gov/forum/polmanual.asp>. In 1996, Forum membership was extended to incorporate local education agency representatives.

The Forum's Mission

The major purposes of the Forum are to

develop and propose, cooperatively, a national education data agenda and model(s) for a national data system that will meet the needs of education policymakers and program planners in the coming decade and beyond; inform federal, state, and local decision makers on the goals and progress of this cooperative education statistics system; and provide an arena in which federal, state, and local education interests can identify, debate, mediate, and where appropriate, recommend action on issues, emerging needs, and technological innovation salient to the improvement of education data comparability, uniformity, timeliness, and accuracy at the national level.

Forum's Mission Statement

The mission of the Forum is to develop and recommend strategies for building an education data system that will support local, state, and national efforts to improve public and private education throughout the United States. It is committed to improving the quality, comparability, and usefulness of elementary and secondary education data, while remaining sensitive to data burden concerns.

Who are the Forum Members?

Forum members include representatives from local and state education agencies, and federal agencies that have an interest in elementary/secondary education data. Federal, state, and local agency representatives are eligible to be full members of the Forum. Representatives of other organizations participate as associate members.

Education Agencies and Their Representatives Who are Members of the Forum

- The education agencies of the 50 states, the District of Columbia, and Puerto Rico (hereafter referred to as the states)
- One local education agency within a state selected by each Chief State School Officer
- The NCES Commissioner (ex officio), the Associate Commissioners of major NCES divisions, and the office of the NCES Chief Statistician
- The other principal offices of the U.S. Department of Education or programs within these principal offices that collect or use elementary/secondary education data, including but not limited to
 - Office of Elementary and Secondary Education
 - Office of Vocational and Adult Education
 - Office of English Language Acquisition
 - Office of Migrant Education
 - Office of the Chief Information Officer
- U.S. Department of Defense Education Activity

State Education Agency (SEA) Liaisons

An SEA representative to the Forum is formally appointed by the Chief State School Officer of each state and is expected to speak on his or her behalf regarding education data issues. The SEA representatives contribute valuable perspective and experience concerning state education data needs. The state representative may designate a permanent alternate who will attend meetings and manage other Forum responsibilities in the representative's place. In the absence of the state representative, the permanent alternate has the same voting and participation rights as a full member. A state representative's responsibilities include

- acting as a representative in the coordination of federal data collections at the state level and in other matters concerning the Cooperative System to promote the efficiency, quality, and usefulness of data;
- attending two annual meetings of the National Forum on Education Statistics and voting on any issues that may come before the full Forum for approval;
- participating in the annual NCES Data Conference and in the Management Information Systems (MIS) Conference;
- serving as the principal contact for all Cooperative System Contracts awarded to states;
- serving as a member of a standing committee;
- volunteering to work with one or more task forces;
- reviewing Forum/NCES publications as a preliminary step to Forum approval; and
- managing work relating to contracts for basic participation and for special task awards. (The basic participation contracts cover the costs of travel to meetings of the Forum while the special task awards cover specific state data improvement projects.)

Local Education Agency (LEA) Liaisons

An LEA representative is formally appointed by the Chief State School Officer of each state and is expected to participate in all Forum meetings as a full member. LEA representatives are authorized to vote on issues that come before the Forum and to hold office in the Forum. They are expected to contribute valuable perspective and experiences regarding local education agency data needs. Other responsibilities include

- attending two annual meetings of the National Forum on Education Statistics and voting on any issues that may come before the full Forum for approval;
- participating in the annual NCES Data Conference and in the Management Information Systems Conference (MIS);
- serving as a member of one standing committee of the Forum;
- volunteering to work with one or more task forces; and
- reviewing Forum/NCES publications as a preliminary step to Forum approval.

Associate Members

Associate members participate in Forum standing committee meetings and take an active role in committee, subcommittee, and task force activities. They participate in the discussion of issues, but they do not participate in formal decisionmaking of the full Forum, and do not vote for Forum officers or on policies and procedures. They may not hold office. In addition, the responsibilities of associate members include promoting the work of the Forum among the membership of their respective organizations and providing the Forum with valuable input from the perspective of their organizations.

Forum Organization

The Forum meets semiannually (each winter and summer) to discuss and work on data issues and specific topics related to education data in schools, districts, state education agencies, and the U.S. Department of Education. The Forum achieves its mission and objectives primarily through the deliberations and work of a Steering Committee and three standing committees designed to address major interests of the National Cooperative Education Statistics System. The committees may propose and support task forces, which are appointed for a specified time period to develop products about a specific topic (e.g., education indicators and virtual education data elements).

Forum Committees

Forum Steering Committee

The Forum Steering Committee oversees and coordinates all Forum activities. Members of the Steering Committee include the Forum chair, vice-chair, and immediate past chair, and the chairs and vice-chairs of the three standing committees. The Commissioner of the NCES is a member ex officio. The chairperson of the Forum leads the Steering Committee.

Committee Meeting Notes

The meeting notes of the committees may be accessed on the Forum's website at: http://nces.ed.gov/forum/meeting_notes.asp.

Standing Committees

Forum standing committees are designed to address the major mandates of the Cooperative System, promote long-range planning, and foster continuity in Forum activities. Membership in standing committees is limited to members and associates of the Forum. There are three standing committees: the National Education Statistics Agenda Committee (NESAC), the Policies, Programs, and Implementation Committee (PPI), and the Technology Committee (TECH).

1. *National Education Statistics Agenda Committee.* NESAC's mission is to develop a national education statistics agenda. The agenda identifies issues and policy concerns bearing on the development of comparable and effective nationwide elementary and secondary education data collection, reporting, and use. The agenda focuses on the major areas of student, staff, fiscal, institutional, and other information that yields valuable perspectives on education in the United States.
2. *Policies, Programs, and Implementation Committee.* PPI addresses ways to help SEAs and LEAs improve their efforts to collect and report comparable, accurate, and timely data. It also works to improve coordination among federal agencies and between federal and state agencies. In addition, PPI develops ways to reduce paperwork burdens at all levels of government, and explores ongoing and emerging issues such as data sharing and confidentiality of education records. PPI is also responsible for recommending amendments to the Forum Policy and Procedures Manual and for reviewing and recommending the formation of new task forces.
3. *Technology Committee.* TECH is concerned with new and proven technology strategies to improve the management and exchange of student and staff information and the technical infrastructure that supports these technologies. TECH's role and responsibilities include promoting the development and adoption of standards for electronic data exchange; sponsoring pilot and developmental projects in the exchange of data about students and education staff; examining the impact of new technologies on information exchange; and producing "best practices" guides to help schools, school districts, and state education agencies make good decisions about selecting hardware, software, and networking services for information management.

Subcommittees, Working Groups, and Task Forces

Standing committees may appoint subcommittees and working groups (which may become task forces upon additional approval).

Subcommittees

Standing committees may establish subcommittees to address ongoing issues beyond the scope of regular committee work (e.g., the Forum Communications Subcommittee). Subcommittees consist of members of the standing committee with a chairperson determined by the standing committee. Subcommittees do not require substantial resources to complete their assignments, although the chair of the standing committee may request that a listserv be created or that conference telephone calls be convened to conduct subcommittee work.

Working Groups

Working groups are convened by standing committees to determine whether there is merit in establishing a Forum task force to produce a specific product. If it is the consensus of the standing committee to establish a working group to investigate whether such a project should be pursued, the chair appoints an individual or group to complete the Request to Form a Working Group. Upon Steering Committee approval, the working group is authorized to meet once outside of regularly scheduled full Forum meetings to research a specific issue and determine whether there is a need for the Forum to formally establish a task force to produce a publication or other product.

Working groups may consist of Forum members, members of partnering organizations who bring expertise on the topic of interest, an NCES liaison, and a consultant who is contracted to perform support work. The working group may decide that additional research about the topic is not necessary (i.e., resources are already available) or not feasible (i.e., the topic cannot be addressed in a timely or cost-effective manner). Should the working group determine that additional work is desirable, it proposes a product development and dissemination plan for a proposed task force (see the Forum Product Development and Dissemination Guide at http://nces.ed.gov/forum/pdf/guide_04.pdf for more information about the publication development process).

Should the parent standing committee agree with a working group recommendation to form a task force, the product development and dissemination plan is submitted to the Policies, Procedures, and Implementation Committee and the Steering Committee for consideration.

Task Forces

Once a written product development and dissemination plan is reviewed by the Policies, Programs, and Implementation Committee to ensure that the objectives relate to the Forum strategic plan and there is no overlap with other Forum committees or task forces, PPI may recommend to the Steering Committee that a working group be made into a Forum task force. The Steering Committee either approves or disapproves the establishment of task forces. Membership on task forces is not limited to members and associates of the Forum. The task force will develop a work plan that includes objectives, deliverables, outcomes, and a timeline for the completion of the work.

Leadership Roles and Responsibilities

At each summer Forum meeting, the Steering Committee nominates a slate of officers to be voted on by the full membership in a Forum election. The slate includes the Forum/Steering Committee chair, the Forum/Steering Committee vice-chair, and the chairs and vice-chairs of the three standing committees. Nominations for Forum officers may also be made from the floor. A quorum (at least half of the members of the Forum) must be present for an election to be held; officers are elected by a majority vote of those present.

Committee Members

Rosters of current committee members may be accessed through the Forum's website at: http://nces.ed.gov/forum/member_state.asp.

Forum and committee officers are elected for a period of one year and take office immediately following the summer Forum meeting at which they are elected. There is no limit to the number of terms an officer may serve.

The Forum Chair

The Forum chair is elected by Forum members for a one-year term and works with the Steering Committee and NCES staff to oversee and coordinate all Forum activities. Responsibilities of the chair include

- serving for one year as the Forum chair and representing the Forum as necessary;
- chairing each Forum meeting;
- chairing Steering Committee meetings;
- developing agendas for the Forum and Steering Committee meetings with NCES staff;
- leading special projects at the request of Forum members; and
- serving on the Steering Committee as the "immediate past chair" in the ensuing year.

The Forum Vice-Chair

The Forum vice-chair is elected by Forum members for a one-year term and works with the Steering Committee and NCES staff to oversee and coordinate all Forum activities. The Forum vice-chair is often nominated and elected to become Forum Chair in the year following the term of office. Responsibilities of the Forum vice-chair include

- assisting the Forum chair in meetings and in representing the Forum;
- assisting the Forum chair in developing agendas for the Forum and Steering Committee meetings;
- leading the editorial board for the *Forum Voice*;
- serving as chair in the absence of the chair;
- leading special projects at the request of the chair; and
- reviewing the Forum Strategic Plan and recommending updates, as necessary.

The Standing Committee Chairs

Standing committee chairs are nominated by their committees and elected by the full Forum. The standing committee chairs work with the Steering Committee and NCES staff to oversee and coordinate the work of their specific standing committee. Responsibilities of standing committee chairs include

- serving for one year as standing committee chair and representing the Forum as necessary;
- chairing standing committee meetings;

reviewing reports or products of the standing committee's task forces and working groups;
forwarding requests for creating working groups and task forces to the Steering Committee;
participating in Steering Committee meetings and representing their committees;
developing agendas for the standing committee meetings in collaboration with the NCES staff;
and
leading special projects at the request of their standing committees and Forum members.

Standing Committee Vice-Chairs

Standing committee vice-chairs are nominated by their standing committees and elected by the full Forum. The vice-chairs work with standing committee chairs and NCES staff to oversee and coordinate the work of their specific standing committees. Responsibilities of standing committee vice-chairs include

assisting the standing committee chairs in meetings and in representing the Forum;
assisting the standing committee chairs in developing agendas for the committee meetings;
serving on the editorial board for the *Forum Voice*;
chairing committee meetings in the absence of the chair;
leading special projects at the request of the chair; and
reviewing reports or products of the standing committee's task forces and working groups.

Subcommittee and Working Group Chairs

Subcommittee and working group chairs are appointed by their committee chairs. Committee chairs may appoint co-chairs or vice-chairs of subcommittees or working groups if they deem it necessary.

Task Force Chairs

A task force chairperson is designated by the standing committee that requests the task force. The chair oversees and coordinates the work of specific topics of interest to Forum members. Responsibilities of standing task force chairs include

leading task force work at the request of the Steering Committee, standing committees, and Forum members;
chairing each task force meeting;
selecting task force members with expertise in specific topics relating to task force work;
identifying resource needs and establishing project timelines;
scheduling and facilitating necessary meetings, phone conferences, and other events required for timely progress toward completion of task(s);
developing agendas for the task force meetings in collaboration with NCES and support staff;
developing products and promotional materials in collaboration with NCES and support staff;
developing a product development and dissemination plan in collaboration with NCES and support staff;
selecting outside reviewers for draft products in collaboration with NCES and support staff; and
presenting the final products to the full Forum.

Forum Meetings

The Forum holds two meetings each year: one in the winter in conjunction with the NCES Management Information Systems (MIS) Conference, and one in the summer in conjunction with the NCES Summer Data Conference. The Steering Committee, standing committees, and active task forces/working groups all meet during this time. Task forces and working groups may also meet at other times as deemed necessary by their chairs and the NCES Project Officer.

Forum meetings include

- a new member orientation session held on the first day of all Forum meetings;
- opening and closing general sessions, usually with speakers from the federal government or national associations who update members on current and changing issues related to education data;
- standing committee meetings, in which the ongoing business of the Forum is conducted, major Forum initiatives are planned, and continuity in Forum activities is fostered; and
- professional development sessions, including seminars on important and current education data and technology issues, held on a periodic basis as determined by the Forum Steering Committee.

Consensus Process

The Forum endeavors to work by consensus decisionmaking in which all individuals party to a decision agree to the outcome before it is considered to be approved. To the extent possible, reports from committees, subcommittees, working groups, and task forces reflect the views of all their members.

When consensus cannot be achieved for decisions of the full Forum, majority rule as determined by a vote is used. Resolutions, reports for distribution to external audiences, and other actions representing the Forum as a whole must be approved by a two-thirds majority vote of members present (a quorum—at least half of all members—must be present at a Forum meeting in order to hold an election or to vote on an amendment to the policies and procedures). Forum voting may also be conducted online via the Forum Voting Tool.

Getting Involved in Forum Activities

Standing committees plan initiatives, task forces develop resources, and Forum members participate in professional development programs—to mention just a few of the many activities that take place at Forum meetings. The best way for members to get immersed in Forum work is to attend both the winter and summer annual meetings where decisions and assignments are made. By attending Forum meetings, members learn who is doing what (and how and when) in the Forum.

The next stage of involvement occurs when the member joins a task force. Because task forces usually meet twice a year for 1-2 days in addition to sessions at Forum meetings, they are excellent opportunities for getting to know the Forum and its members. New members are especially encouraged to get involved in task force work.

Another way to participate in Forum activities is to disseminate the publications produced by the Forum. Meetings and conferences within member states or districts provide excellent opportunities to discuss the work of the Forum with colleagues and to bring ideas back to the Forum standing committees for discussion and possible action. Forum members are encouraged to use the items in the Outreach Toolkit (at <http://nces.ed.gov/forum/outreach.asp>) to assist in this effort.

Member Communications

Forum members communicate in person at the annual winter meeting, the annual summer meeting, and task force meetings. Information is shared with Forum members and the general public via the Forum website (<http://nces.ed.gov/forum>). The Forum website contains a wealth of information including access to Forum publications and meeting notes. The organization's newsletter, the *Forum Voice* (<http://nces.ed.gov/forum/voice.asp>), is published in an electronic format each spring and fall. Email addresses and telephone numbers for current Forum members can be accessed via the membership rosters listed on the website (<http://nces.ed.gov/forum/membership.asp>).

NCES, the Steering Committee, standing committees, and task forces also communicate through teleconferences scheduled on an as-needed basis throughout the year and via email listservs restricted to member use. Using the group's listserv address, members of a task force, committee, or other Forum group can send a message by email, which will be distributed to all members of the group. Only registered members of a listserv (i.e., only members of the group) can send messages via the listserv addresses below.

Group Name	Listserv Address
Crime and Violence Working Group	Crime-Violence@nceslistserv.com
Education Privacy Working Group	EducationPrivacy@nceslistserv.com
El/Sec Steering Committee	ELSEC-Steer@nceslistserv.com
Elementary/Middle School Course Code Classification Working Group	EMSCourseClass@NCESlistserv.com
Forum Members	ForumMembers@nceslistserv.com
Local Education Agency Liaisons (LEAs)	LEA@nceslistserv.com
Longitudinal Data Systems Task Force	LDS@nceslistserv.com
National Education Statistics Agenda Committee (NESAC) Standing Committee	NESAC@nceslistserv.com
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Objectives and Strategies for Meeting the Forum's Goals

Goal I: Develop a comprehensive system of comparable local, state, and federal basic data elements useful for education decisionmaking at all levels of government.

Goal I Objective:

A comprehensive, dynamic set of basic data elements will be developed that adhere to a set of common definitions, are comparable within and across reporting levels, are timely and available on a schedule appropriate for decision making, and provide an accurate and reliable picture of what they measure.

To meet this objective, the Forum endorses the following strategies:

- A. Identify the basic data elements relating to students, staff, finance, facilities, and technology at school, district, state, and national levels.
- B. Disseminate and promote the use of basic data elements.
- C. Review the content and completeness of the system of basic data elements and the procedure for identifying elements on a continuing basis.
- D. Assist with the adoption and use of standards for data collection and reporting.
- E. Support efforts to plan the development and implementation of automated and integrated education data systems.
- F. Identify and seek to remove organizational and technical barriers, problems, and unresolved questions impeding the development, adoption and use of shared data items.

Goal II: Improve coordination, integration, and consolidation of the collection and dissemination of quality education data.

Goal II Objectives:

1. The reporting burden on state and local data providers will be minimized.
2. Communication and coordination among the various data providers and requesters will be improved.
3. Data collectors will employ the most efficient and secure data collection procedures that are technically feasible.
4. Products of the Forum's work (i.e., reports, programs, etc.) will be designed, disseminated and promoted to maximize usefulness.
5. States will implement and share projects that demonstrate the use of technology to improve data collection, access, analysis and reporting.

To meet these objectives, the Forum endorses the following strategies:

- A. Promote ongoing coordinated reviews of education data collection activities.
- B. Support the use of standard definitions in education data collections.
- C. Promote efficiency in data collection and access through the use of new and emerging technologies.
- D. Promote the better integration of education data collections.
- E. Work to improve the dissemination and usefulness of education data and promote its use through Forum products.
- F. Establish linkages with postsecondary education to promote coordination and efficiency in data collection and use.
- G. Promote procedures and practices that ensure data quality at all levels of education.

Goal III: Promote the Forum as a widely recognized cooperative body addressing issues of education data policy and as a leader in setting data standards.

Goal III Objectives:

- 1. Local, state, federal, and other stakeholders will be actively engaged in the development and implementation of education data standards.
- 2. Education data standards will be developed, adopted, and widely disseminated.
- 3. Collaborative partnerships among and between states and the federal government will further the development of education policy.

To meet these objectives, the Forum endorses the following strategies:

- A. Disseminate widely and promote the use of Forum products.
- B. Strengthen coordination by expanding membership as appropriate.
- C. Actively seek collaborative relationships with agencies and groups to work toward common education data issues and goals.
- D. Promote consultation and information sharing with the private research, development, and service sectors.
- E. Establish, review, and disseminate guidelines for policies affecting the production, use, confidentiality, release, and dissemination of education statistics.
- F. Periodically review and update all Forum products as appropriate.

Report every other year on progress toward strategic plan goals.

Part Two: Forum Resources

The Forum web page, located on the NCES website (<http://nces.ed.gov/forum/>), is a rich resource for both Forum members and the larger education community. It provides information about current Forum activities, the *Forum Voice* newsletter, meeting notes, and policies and procedures for conducting Forum meetings and activities, as well as the Forum's strategic plan.

The Forum's many resources can also be accessed at the website, including publications about education data, best practices, and materials for promoting the Forum.

A "Related Resources" page (<http://nces.ed.gov/forum/resources.asp>) provides links to online materials about the *Federal Register*, FERPA resources (Family Educational Rights and Privacy Act), and NCLB resources (the No Child Left Behind Act of 2001) among other information that Forum members and others in the education community may find useful.

Outreach Toolkit

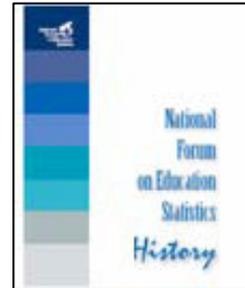
For members who wish to promote the Forum and its resources, the Outreach Toolkit website (<http://nces.ed.gov/forum/outreach.asp>) offers several downloadable promotional tools, including a Forum Overview PowerPoint™ presentation, publication summaries, publication PowerPoint™ presentations, and sample articles and letters. Several of these are described below.

Materials About the Forum

National Forum on Education Statistics History

http://nces.ed.gov/forum/pub_history.asp

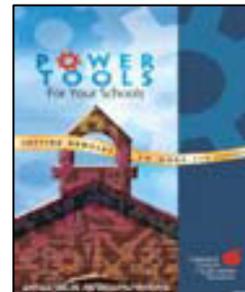
This publication presents an overview of the Forum's history since the legislation was passed in 1988 authorizing a Cooperative System for the collection and sharing of education data. It presents a brief history of the activities and special projects of the Forum from 1989-2004. Members may find it a useful source of information for explaining to others what the Forum is and does.



Power Tools for Your Schools (2003)

http://nces.ed.gov/forum/pub_2003365.asp

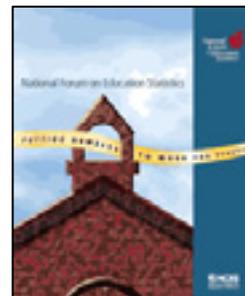
This brochure lists various Forum resources available for free to individuals, schools, and agencies, and provides information on how to order them.



Putting Numbers to Work for Schools (2003)

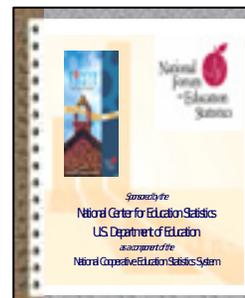
http://nces.ed.gov/forum/pub_2003366.asp

This brochure presents the purpose of the Forum and explains why the data collected and disseminated are important to users.



2008-09 Forum Overview PowerPoint Presentation

<http://nces.ed.gov/forum/outreach.asp>



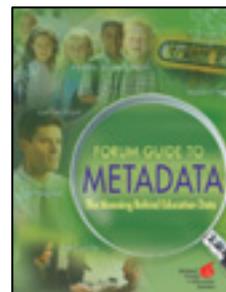
Recent Publications

The publications described below can be accessed at <http://nces.ed.gov/forum/publications.asp>.

Forum Guide to Metadata: The Meaning Behind Education Data (2009)

http://nces.ed.gov/forum/pub_2009805.asp

The purpose of this guide is to empower people to more effectively use data as information. To accomplish this, the publication explains what metadata are; why metadata are critical to the development of sound education data systems; what components comprise a metadata system; what value metadata bring to data management and use; and how to implement and use a metadata system.



Every School Day Counts: The Forum Guide to Collecting and Using Attendance Data (2008)

http://nces.ed.gov/forum/pub_2009804.asp

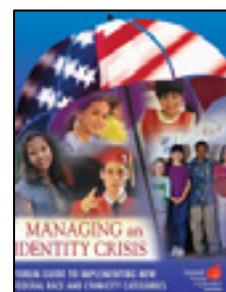
This document includes an exhaustive and mutually-exclusive list of attendance codes to provide the basis for accurate comparisons between districts and states. The product also presents real-life examples of how attendance information has been used by school districts.



Managing an Identity Crisis: Forum Guide to Implementing New Federal Race and Ethnicity Categories (2008)

http://nces.ed.gov/forum/pub_2008802.asp

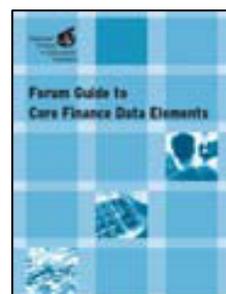
This best-practice guide is developed to assist state and local education agencies in their implementation of the new federal race and ethnicity categories—thereby reducing redundant efforts within and across states, improving data comparability, and minimizing reporting burden. It serves as a toolkit from which users may select and adopt strategies that will help them quickly begin the process of implementation in their agencies.



Forum Guide to Core Finance Data Elements (2007)

http://nces.ed.gov/forum/pub_20078001.asp

This publication establishes current and consistent terms and definitions for maintaining, collecting, reporting, and exchanging comparable information related to education finances. It is designed to accompany *Financial Accounting for Local and State School Systems: 2003 Edition* by identifying common reporting requirements and defining frequently used indicators and calculations that use data elements from accounting and other data systems.



Forum Curriculum for Improving Education Data: A Resource for Local Education Agencies (2007)

http://nces.ed.gov/forum/pub_2007808.asp

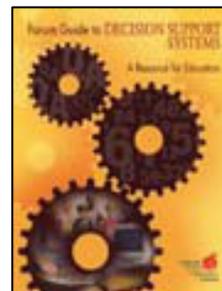
This resource supports efforts to improve the quality of education data by serving as training materials for K-12 school and district staff. It provides lesson plans, instructional handouts, and related resources, and presents concepts necessary to help schools develop a culture for improving data quality.



Forum Guide to Decision Support Systems: A Resource for Educators (2006)

http://nces.ed.gov/forum/pub_2006807.asp

This NCES/Forum guide was developed to help the education community better understand what decision support systems are, how they are configured, how they operate, and how they might be developed and implemented in an education setting.



Forum Guide to Virtual Education (2006)

http://nces.ed.gov/forum/pub_2006803.asp

This publication offers recommendations for collecting accurate, comparable, and useful data about virtual education in the elementary/secondary education setting. It highlights policy questions and data elements that are critical to meeting the information needs of policymakers, administrators, instructors, and parents involved in virtual education.



Forum Guide to the Privacy of Student Information: A Resource for Schools (2006)

http://nces.ed.gov/forum/pub_2006805.asp

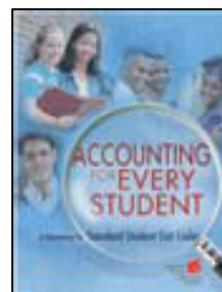
This publication was written to help school and local education agency staff better understand and apply the Family Educational Rights and Privacy Act, a federal law that protects the privacy interests of parents and students with respect to information maintained in student education records. It defines terms such as “education records” and “directory information,” and offers guidance for developing appropriate privacy policies and information disclosure procedures related to military recruiting, parental rights and annual notification, videotaping, online information, media releases, surveillance cameras, and health-related information.



Accounting for Every Student: A Taxonomy for Standard Student Exit Codes (2006)

http://nces.ed.gov/forum/pub_2006804.asp

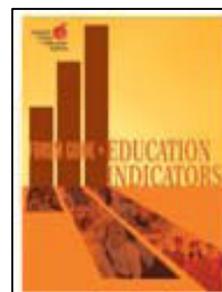
This publication was developed to help education agencies develop effective information systems for tracking the enrollment status of students. It presents a student-level exit code taxonomy for states and districts that accounts for 100 percent (and not 90 percent or 110 percent) of all students. It also offers “best practice” advice regarding effective practices for tracking students, collecting exit codes data, and distinguishing among high school completion credentials.



Forum Guide to Education Indicators (2005)

http://nces.ed.gov/forum/pub_2005802.asp

This publication provides encyclopedia-type entries for 44 commonly used education indicators. Each indicator entry includes a definition, recommended uses, usage caveats and cautions, related policy questions, data element components, a formula, commonly reported subgroups, and display suggestions. The document will help readers better understand how to appropriately develop, apply, and interpret commonly used education indicators.



Forum Guide to Building a Culture of Quality Data (2005)

http://nces.ed.gov/forum/pub_2005801.asp

This publication focuses on data entry—getting things right at the source. As such, it recommends a practical process for developing a “Culture of Quality Data” based around individual “Tip Sheets” for the many people involved in providing quality data, including principals, teachers, office staff, school board members, superintendents, data stewards, and technology staff.



Forum Unified Education Technology Suite (2005)

http://nces.ed.gov/forum/pub_tech_suite.asp

This publication presents a practical, comprehensive, and tested approach to assessing, acquiring, instituting, managing, securing, and using technology in education settings. It is written for individuals who lack extensive experience with technology, but are tasked with leading technology initiatives in a school or district setting.



Forum Guide to Protecting the Privacy of Student Information: State and Local Education Agencies (2004)

http://nces.ed.gov/forum/pub_2004330.asp

This publication presents a general overview of privacy laws and professional practices that apply to information collected for, and maintained in, student records. The document provides an overview of key principles and concepts governing student privacy, summarizes federal privacy laws, identifies issues concerning the release of information to both parents and external organizations, and suggests good data management practices for schools, districts, and state education agencies.



Facilities Information Management: A Guide for State and Local Education Agencies (2003)

http://nces.ed.gov/forum/pub_2003400.asp

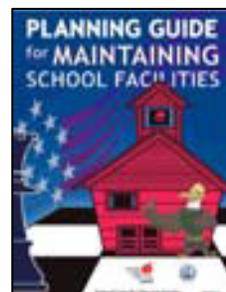
This publication provides a framework for identifying a basic set of school facilities data elements and definitions that will meet the information needs of school and community decision makers, school facility managers, and the general public. It presents recommendations for designing and maintaining an information system that addresses the condition, design, use, management, and financing of elementary/secondary education facilities. It also includes commonly used measures, data elements, and a list of additional resources for the practitioner.



Planning Guide for Maintaining School Facilities (2003)

http://nces.ed.gov/forum/pub_2003347.asp

This publication is intended to help school facilities managers plan for efficient and effective operations. It provides practical advice on a range of topics, including how to conduct a facilities audit, planning for maintenance to ensure smooth operations and avoid costly surprises, managing staff and contractors, and evaluating maintenance efforts.



Appendix A. Useful Acronyms

ED	U.S. Department of Education
EDFacts	EDFacts is a collaborative effort among ED, state educational agencies, and industry partners to establish a process for states to directly submit elementary and secondary education data from the state, district, and school levels to ED by electronic means.
FERPA	Family Educational Rights and Privacy Act FERPA is a federal law that protects the privacy of student education records.
Handbooks	The <i>Student Data Handbook</i>, <i>Staff Data Handbook</i>, etc. This body of data handbooks is collectively referred to as the “Handbooks” or the “NCES Handbooks.” They define standard education terms for students, staff, schools, local education agencies, intermediate education agencies, and state education agencies.
LEA	Local Education Agency (i.e., a school district)
MIS Conference	The NCES Management Information Systems (MIS) Conference The MIS Conference is an annual meeting held in the winter (in conjunction with the Winter Forum Meeting) and is co-hosted by NCES and a different state each year.
NCES	National Center for Education Statistics (U.S. Department of Education) NCES sponsors the National Forum on Education Statistics to foster federal-state-local cooperative efforts to improve the accuracy, timeliness, and utility of education data.
NCLB	No Child Left Behind Act of 2001 The NCLB Act, which reauthorizes the ESEA, incorporates principles and strategies such as increased accountability for states, school districts, and schools; greater choice for parents and students, particularly those attending low-performing schools; more flexibility for states and local educational agencies in the use of federal education dollars; and a stronger emphasis on reading, especially for the youngest children.
NESAC	National Education Statistics Agenda Committee A Forum standing committee that supports the development of a comparable and effective national elementary and secondary education data system.
PPI	Policies, Programs, and Implementation Committee A Forum standing committee that addresses the policy implications of the Forum's work on national education data issues.
SEA	State Education Agency (i.e., a state department of education)
TECH	Technology Committee TECH is a Forum standing committee that considers methods, especially technology-related strategies, for improving data collection and communication within states and between states and the federal government.

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