Welcome to the 1st Annual Conference on Technology and Standards! Data management, access, usage, and exchange are critical for the success of all organizations supporting higher education. Approaching these issues with a common methodology and on common ground provides a level of efficiency and cooperation that is necessary in today’s world of information overload.

Higher education is complex. There are a myriad of rules, regulations, and policies, all of which serve specific needs. But once agreement is reached on overall policy, implementation should occur in a timely, efficient, and cost-effective manner.

CBA, EFC, NCHELP, and PESC understand this need; and working together for the betterment of college and university performance is what brought all four associations together—to bring technology issues important to all facets of higher education under one venue.

Our roster of prominent keynote speakers includes Terri Shaw, COO of the U.S. Department of Education’s FSA Office, who continues to improve the delivery and performance of federal programs. Dr. Brian Fitzgerald, Staff Director to the Advisory Committee, brings years of knowledge, expertise, and a direct connection to the U.S. Congress. John Wookey, Senior Vice President of Applications Development at Oracle, brings a global perspective on what drives technology decisions.

Our concurrent sessions bring the hottest topics in higher education to light—from E-Sign to Data Quality and Enrollment Reporting; to technical training on Common Record, CommonLine, XML, Meteor, and the Academic Transcript; to Free Software and the Open Source Movement to Security and Privacy; and a unique session that addresses the Future Impact of Technology on the Delivery of Financial Aid.

We’ve worked together to bring our collective membership together to unify behind technology and standards. We hope that you find the sessions and speakers valuable. In an ever changing environment, working together is more important than ever.

Sincerely,

Joe Belew
President
CBA

Mark Powden
President
EFC

Brett Lief
President
NCHELP

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

- **Brian Allison**  
  Manager of Technology Initiatives, USA Funds

- **Terri Amatuzzi**  
  Associate Registrar  
  Community College of the Air Force

- **Steve Biklen**  
  Board of Directors, ASA

- **Jerry Bracken**  
  Software Engineer, Brigham Young University

- **Dave Hawn**  
  CIO, Wells Fargo Educational Funding Services

- **Paul Hill**  
  Senior Technical Advisor, FSA  
  U. S. Department of Education

- **Bob King**  
  Director of Strategic Development  
  Citibank Student Loan Corp.

- **JC Lin**  
  Chief Technical Architect  
  Iowa Student Loan Liquidity Corp.

- **Adele Marsh**  
  Vice President, eCommerce Initiatives, AES

- **Judy Martin**  
  Asst. Vice President, Technology Operations & Federal Relations, NCHELP

- **Jim Olick**  
  Director of e-Commerce, Rhode Island Student Loan Authority

- **Mark Putman**  
  Assistant Vice President, Technology Relations, NCHELP
## Program At A Glance

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<td>10:45 am – noon</td>
<td><strong>Concurrent Session— Data Matching and Student Identifiers</strong></td>
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**Wednesday May 5**

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<td>9:15 – 10:00 am</td>
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MONDAY MAY 3, 2004

7:30 – 11:30am  **Registration**  
**Crystal Forum Foyer**

7:30 – 8:30am  **Continental Breakfast**  
*Sponsored by The College Board*  
**Crystal Forum Foyer**

8:30 – 9:00am  **General Session**  
**Welcome and Opening Remarks**  
*Speaker:* Michael Sessa, Executive Director, PESC  
**Crystal Forum**

9:00 – 9:15am  **General Session**  
**Best Practices and Distinguished Service Awards**  
*Speaker:* Keith Riccitelli, Director of Global Sourcing, Sallie Mae; Chair PESC Board of Directors  
**Crystal Forum**

9:15 – 10:30am  **General Session**  
**Keynote Address—FSA**  
*Moderator:* Brett Lief, President, NCHELP  
*Speaker:* Terri Shaw, COO, FSA, U.S. Department of Education  
**Crystal Forum**

In this session, FSA’s COO Terry Shaw will give a high level overview of the FSA Data Strategy Initiative. In addition, accomplishments FSA hopes to gain from the Data Strategy Initiative will be outlined.

10:30 – 10:45am  **Break**  
*Sponsored by Datatel*  
**Crystal Forum Foyer**

10:45 – 11:30am  **General Session**  
**E-Sign**  
*Moderator:* Dave Hawn, CIO, Wells Fargo Educational Financial Services  
*Speakers:* Matt Sessa, Vice President of Internet Technology, AES/PHEAA  
Jon Kroehler, Senior Vice President, Sallie Mae  
Brenda Palermo-Seidl, Systems Manager, Financial Aid, Michigan State University  
**Crystal Forum**

Through the National Commerce Act of 2000, the U.S. Congress authorized the use of electronic signatures. Since then, businesses, institutions of higher education, and governmental agencies across the country have been grappling with how best to implement secure, reliable, yet customer-friendly electronic signature solutions: STAN, PIN-less through credit vendors (straight data match and out-of-wallet questions), and leveraging the process of channel partners (schools and lenders) are all in use today. In this session, we will hear from several entities who have implemented very different solutions for their particular e-signature needs. We will also explore higher education’s possible uses of e-sign outside of the financial aid office.

Noon – 1:30pm  **Lunch**  
*Sponsored by NASLA*  
**Monticello Ballroom**

**Keynote Address—Simplification**  
*Moderator:* Judith Flink, Director of Student Financial Services, University of Illinois at Chicago; Vice Chair, Advisory Committee on Student Financial Assistance; PESC Board of Directors  
*Speaker:* Dr. Brian Fitzgerald, Staff Director, Advisory Committee on Student Financial Assistance  

Several months ago, the United States Congress directed the Advisory Committee on Student Financial Assistance to conduct a thorough study of the feasibility of simplifying the needs analysis methodology for all federal student financial assistance programs and the process of applying for such assistance. Brian Fitzgerald, the Staff Director of the Committee, will discuss this study particularly as it relates to the establishment of common data standards and business processes.
1:30 – 2:45pm  Concurrent Sessions

**Future Impact of Technology on the Delivery of Student Aid**  
**Salon D**

*Moderator:* Steve Biklen, ASA Board of Directors; PESC Board of Directors  
*Speakers:* Steven McCullough, Executive Director, Iowa Student Loan Liquidity Corp; Chair EFC Board of Directors  
Jerry Schubert, CIO, FSA, U.S. Department of Education  
Diane Stemper, President and CEO, ELM Resources

In the last few years higher education has witnessed many incremental improvements in the delivery of aid that have resulted from new technology. The question is what can we expect in the future? Will we continue to see incremental change, or will we see major breakthroughs? This distinguished panel, representing several different sectors within the financial aid delivery arena, will discuss these issues and how technology might affect the delivery of aid in the future.

**Security and Privacy Policy Issues**  
**Salon E**

*Moderator:* Bob Morley, Associate Registrar, University of Southern California; V.P. of Technology, AACRAO Board of Directors; PESC Board of Directors  
*Speakers:* Rick Skeel, Registrar, University of Oklahoma; AACRAO SPEEDE Committee  
Doug Holmes, Programmer/Analyst, Ontario Universities’ Application Centre; AACRAO SPEEDE Committee

The advent of and increase in electronic exchanges certainly does not do away with the security and privacy risks that an institution will face. It does, however, require that the policies aimed at insuring and protecting that privacy are in line with this new technology. This session will look at some of the issues involved in this process and how an institution may want to adjust their policies to meet this new challenge.

**XML Technical Training**  
**Salon F**

*Moderator:* George Hudachek, Senior Associate Director of Admissions, University of Minnesota; AACRAO SPEEDE Committee  
*Speaker:* Jerry Bracken, Software Engineer, Brigham-Young University; AACRAO SPEEDE Committee  
Bruce Marton, Senior Systems Analyst for Admissions, University of Texas at Austin; AACRAO SPEEDE Committee; PESC Standards Forum for Education Steering Committee

This session will explore intermediate and advanced aspects of the XML schema language. It will also delve into the issues involved in XML schema development, the approaches that PESC has used to deal with those issues, the role and power of name spaces, and the role of XML schemas in Web Services.
Parallel Sessions

**Web Services: Are We There Yet?**

**Moderator:** Terri Amatuzzi, Associate Registrar, Community College of the Air Force

**Speaker:** Jim Farmer, Sakai Community Liaison

As colleges and universities begin to integrate their major information systems—library, eLearning, and administration—Web Services is emerging as the preferred architecture. As colleges and universities begin to exchange data in real time with banks, job placement, federal and state agencies, and each other, Web Services is now the preferred architecture. But will Web Services seize market share and become a “standard” or will some other architecture, such as SCT/OpenEAI’s Java Messaging Services or IBM’s MQ series, used by the U.S. Department of Education, become the preferred deployment? This presentation reviews implementations in higher education and current collaborative projects, such as the Sakai project, to predict the future architectures for integration and data exchange.

**Data Quality**

**Moderator:** Holly Hyland, Management Analyst, FSA, U.S. Department of Education

**Speakers:**
- Jane Holman, Acting Director of Title IV Delivery, FSA, US Department of Education
- Brad Burnett, Director of Financial Aid Services, University of Oklahoma
- Rick Skeel, Registrar, University of Oklahoma; AACRAO SPEEDE Committee

Billions of bytes of data are exchanged in the higher education industry. Academic Transcripts, CommonLine, Enrollment Information—are all exchanged electronically. But, how “good” is this data? Hear representatives from Admissions, Financial Aid and the U.S. Department of Education discuss some of these issues. Suggestions for improving data quality will also be discussed. (This session is associated with the Data Ownership session).

**Common Record: CommonLine Technical Training**

**Moderator:** Bob King, Director of Strategic Development, Citibank; Co-Chair of NCHelp’s Electronic Standards Committee; PESC Standards Forum for Education Steering Committee

**Speakers:**
- Kristi Blabaum, Assistant Vice President, Technical Development, Educaid; NCHelp’s Electronic Standards Committee
- Lisa Oldre, Systems Analyst, Great Lakes Educational Loan Services, Inc.; NCHelp’s Electronic Standards Committee

This session will provide an overview of Common Record: CommonLine, its purpose and its structure. Attention will be given to the information contained, how it is grouped, the various document types, and how the data will travel between schools, guarantors, lenders and servicers. Key differences between CommonLine and Common Record: CommonLine will be reviewed.
Tuesday May 4, 2004

7:30 – 11:00am  Registration  Crystal Forum Foyer

7:30 – 8:30am  Continental Breakfast  Crystal Forum Foyer
Sponsored by Sallie Mae

8:30 – 9:30am  General Session  Crystal Forum
Standards Forum for Education
Moderator: Mark Jones, Vice President of Marketing and Business Development, National Student Clearinghouse; PESC Board of Directors
Speakers: Ed Hauser, General Manager, SCT; Chair PESC Standards Forum for Education Steering Committee
Adele Marsh, Vice President of e-Commerce Initiatives, AES; PESC Standards Forum for Education Steering Committee
Bruce Marton, Senior Systems Analyst for Admissions, University of Texas at Austin; AACRAO SPEEDE Committee; PESC Standards Forum for Education Steering Committee
Jason Elwood, Director of DARS, Miami University-DARS

Inaugurated in August of 2000, the Standards Forum includes all stakeholders in XML standardization and focuses on the XML needs of the higher education community, development of XML products needed by the community, and evaluation of other XML initiatives and their impacts on the community. Leaders of the Standards Forum will discuss what has been accomplished to date, how the Forum has restructured to accommodate community needs, and what to expect in the future.

9:30 – 10:30am  General Session  Crystal Forum
SIS Software Providers Roundtable Discussion
Moderator: Bob King, Director of Strategic Development, Citibank; Co-Chair of NCHelp’s Electronic Standards Committee; PESC Standards Forum for Education Steering Committee
Speakers: Dave Moldoff, Senior Vice President of Solutions Architecture and Infrastructure, SCT; PESC Board of Directors
Graham Tracey, Product Manager of Academic & Student Services, Datatel

Student Information System (SIS) providers look to the future and describe the direction that college and university processing will take over the next several years. What will it take for SIS providers to compete effectively through this decade and what are the primary capability and enhancement themes that the providers are hearing from their clients? Where are they focusing their efforts? Will the trend toward consolidation among SIS software providers continue? Audience members are encouraged to come prepared to bring their ideas and needs to the discussion.

10:30 – 10:45am  Break  Potomac Foyer
Sponsored by Nelnet

10:45 – 12:00pm  Concurrent Sessions
Data Matching and Student Identifiers  Salon D
Moderator: Paul Hill, Senior Technical Advisor, FSA, U.S. Department of Education
Speakers: Barmak Nassirian, Associate Executive Director, AACRAO

Today we are in an era where identity theft is the #1 consumer crime. The biggest threat is Social Security Number (SSN) usage. Protection of one’s identity must be understood as a major privacy issue. A significant number of colleges and universities currently use SSN’s as primary identifiers for faculty, staff, and students. Using SSN’s exposes institutions to risk because of the changing

(continued next page)
legal and security environments to help protect the consumer. Therefore, many institutions are planning for a migration away from SSN use as a primary identifier. Abandoning SSN usage completely however, will probably be impossible. Even if an institution adopts an internal ID system for students, it will always need to provide some way of identifying individuals to other institutions. In this session we will discuss the issues surrounding SSN’s as student identifiers.

**Applications of Leading Edge Technologies**

**Salon E**

_Moderator:_ Adele Marsh, Vice President of e-Commerce Initiatives, AES; PESC Standards Forum for Education Steering Committee

**Speakers:** Renee Shuey, Emerging Technologies Team Leader, Pennsylvania State University

Larry Fruth, Executive Director, Schools Interoperability Framework (SIF)

New technologies and standards are interesting to learn about and fun to investigate. But, how are organizations benefiting from these leading edge technologies and using them to solve existing problems? In this session you will learn how organizations are using new technologies and standards. We’ve all heard of Napster. Hear how Penn State is using the Shibboleth standard to allow Penn State students to legally download music. Then hear how the Schools Interoperability Framework (SIF) is using standards to improve interoperability in the K–12 arena and under No Child Left Behind.

**NSLDS**

**Salon F**

_Moderator:_ Judy Martin, Assistant Vice President of Technology Operations and Federal Relations, NCHELP

**Speakers:** Pam Eliadis, Acting Director of NSLDS, FSA, U.S. Department of Education

Ron Bennett, Program Analyst, FSA, U.S. Department of Education

This session will cover changes currently under way in NSLDS, as well as, possible changes in the near future. These changes will include Aggregate Calculations, Permanent and Temporary Disability Reporting, and Forms 2000 Reasonability. NSLDS will also highlight some new uses of its data, such as tracking Exceptional Performers.

**12:15 – 1:45pm Lunch**

_Monticello Ballroom_

_Sponsored by CBA, EFC, NCHELP, and PESC_

**Keynote Address—Global Change in Technology and Standards**

_Moderator:_ Bill Hollowsky, Senior Director of Applications Development, Oracle Corporation; PESC Board of Directors

**Speaker:** John Wookey, Senior Vice President, Oracle Corporation

The last five years has seen acceleration in the interaction of change between business models and technology. More than at any other time, technology is driving business process change, which is driving more demands on technology. Industries that have often responded or reacted to information technology, including public services, healthcare, and education have been among those most affected by this change. Information technology and industry standards are becoming imperative in allowing institutions to effectively and affordably adopt and manage this change. This session will explore some of the background of this pan-industry change and where it might be leading us in the future.
1:45 – 3:00pm  Concurrent Sessions

**Web Service and E-Authentication:**
*The Meteor Implementation*

**Salon D**

**Moderator:** Judy Martin, Assistant Vice President of Technology Operations and Federal Relations, NCHELP

**Speakers:**
- Charlie Miller, CIO, Rhode Island Higher Education Assistance Authority
- Tim Bornholtz, Senior Systems Integration Architect, FSA, U.S. Department of Education

This session will describe the standards and technologies used in a web services environment including a SAML-based process for e-authentication. The process developed includes business, technical, and policy aspects as applied to the transitive trust model for securing web services. Come see how the Meteor Advisory Team has successfully implemented a web services based transitive trust model for e-authentication.

**Registry and Repository**

**Salon E**

**Moderator:** Ane Johnson, Membership Coordinator, PESC

**Speakers:**
- Holly Hyland, Management Analyst, FSA, U.S. Department of Education
- Adele Marsh, Vice President for e-Commerce Initiatives, AES; PESC Standards Forum for Education Steering Committee

In an effort of collaboration, FSA has developed and donated to the standards community an XML Registry and Repository. This registry and repository will be used to store standards that the community can access and download for free. Come see the unveiling and premier of the XML Registry and Repository for the Education Community.

**FSA Data Strategy**

**Salon F**

**Moderator:** Brad Burnett, Director of Financial Aid Services, University of Oklahoma

**Speakers:**
- Paul Hill, Senior Technical Advisor, FSA, U.S. Department of Education; PESC Standards Forum for Education Steering Committee
- Keith Wilson, Project Manager for FSA Data Strategy, FSA, U.S. Department of Education

The Department of Education’s Office of Federal Student Aid (FSA) seeks improvements to data quality and data consistency. FSA is examining its overall approach to data to ensure accurate and consistent data exchange between customers, trading partners, and compliance and oversight organizations. FSA will also leverage a targeted data strategy to support program-wide goals of maintaining a clean audit and removing FSA from the GAO high-risk list.

3:00 – 3:15pm  Break

**Potomac Foyer**

Sponsored by The College Board

3:15 – 4:30pm  Concurrent Sessions

**Security and Privacy Technical Issues**

**Salon D**

**Moderator:** Conway Casillas, Director of Communications, Technology, and Membership Services, EFC

**Speakers:**
- Renee Shuey, Emerging Technologies Team Leader, Pennsylvania State University
- Tim Bornholtz, Senior Systems Integration Architect, FSA, U.S. Department of Education
- JC Lin, Chief Technical Architect, Iowa Student Loan Liquidity Corp.

This session covers the technical issues on security and privacy of information access and exchange. Subjects to be explored include identity federation, SAML standard, Shibboleth protocol implementation, the specification from Liberty Alliance, open source and commercial implementation of Liberty Alliance, and the interoperability among various implementations.
GovLoans.gov and E-Authentication: A Federal Perspective

Salon E

Moderator: Michael Sessa, Executive Director, PESC

Speakers: Charlie Coleman, eLoans Program Manager, FSA, U.S. Department of Education.
Neil Sattler, Manager of E-Commerce, FSA, U.S. Department of Education

eLoans and E-Authentication are two of the President Management Council’s 24 E-Government initiatives. Under eLoans, five of the major federal credit agencies (U.S. Department of Education, U.S. Small Business Administration, U.S. Department of Agriculture, U.S. Department of Housing and Urban Development, and the U.S. Department of Veterans Affairs) are working together to create GovLoans.gov—a single point of access for federal loan program information on the web. Scheduled for release on April 29, 2004, GovLoans.gov will be a “plain speak” website that educates citizens on federal loan programs, including student loans, and helps them identify the loan programs that best fit their needs. Officials leading the eLoans initiative will present the newly released GovLoans.gov site, and discuss the scope and vision of the project.

In addition, an overview will be provided on the Federal Government’s E-Authentication initiative and how its vision to provide citizens and businesses with a secure, easy-to-use and consistent method of proving identity to the government might impact student financial aid partners.

Data Ownership

Salon F

Moderator: Brian Lecher, Executive Vice President of e-Commerce, AES

Speakers: Karl Ross, CIO, AES
Jeanne Saunders, Director of Application Processing, FSA, U.S. Department of Education

Who “owns” financial aid data? What can be done to allow authorized users to access the right data at the right time from the right source? Or is “stale” data sufficient for some business processes? What technologies and standards would support accessing data from the “system of record” to improve data quality? Representatives from the U.S. Department of Education and the FFELP industry will discuss their ideas, issues, and suggestions for moving to a “system of record” environment. (This session is a follow-up to the Data Quality session).

5:30pm – 7:00pm Reception
Monticello Ballroom
Sponsored by SCT

WEDNESDAY MAY 5, 2004

7:30am – 8:30am Continental Breakfast
Crystal Forum Foyer
Sponsored by Sallie Mae

8:30am – 9:15am General Session
Enrollment Reporting
Crystal Forum

Moderator: Kevin Woods, Director of Federal Reporting, Sallie Mae

Speakers: Pam Eliadis, Acting Director of NSLDS, FSA, U.S. Department of Education
Judy Martin, Assistant Vice President of Technology Operations and Federal Relations, NCHelp

Enrollment data is critical information for students receiving Title IV loans. FSA is examining its overall approach to enrollment data to ensure accurate and timely data exchange. This session will be a discussion on where enrollment reporting fits in the overall FSA data strategy and technology considerations.
9:15 – 10:00am  General Session  
**Data Transport**  
*Crystal Forum*

**Moderator:**  
Brian Allison, Manager, USA Funds; Co-Chair NCHELP’s Electronic Standards Committee

**Speakers:**  
Nathan Chitty, Software Engineer, Nelnet  
Denise Hill, Chief Enterprise Architect, FSA, U.S. Department of Education  
Kim Shiflette, Industry Research and Development Analyst, USA Funds  
Tim Bornholtz, Senior Systems Integration Architect, FSA, U.S. Department of Education

As the higher education industry forges ahead into the world of XML, are our existing transport protocols adequate? XML lays the groundwork for real-time exchange of data, but e-mail and FTP are not conducive to the real-time exchange of data. A group of representatives from across higher education are proposing a data transport standard for higher education. Imagine having the ability to use the same transport for batch and real-time, for data exchanges with schools, lenders, guarantors AND the U.S. Department of Education. The presenters in this session will discuss some of the issues with the transport protocols used today and will unveil the transport protocol of the very near future.

10:00 – 10:15am  Break  
*Potomac Foyer*

Sponsored by Nelnet

10:15 – 11:30am  Concurrent Sessions

**Free Software and Open Source Movement**  
*Salon D*

**Moderator:**  
Conwey Casillas, Director of Communications, Technology, and Membership Services, EFC

**Speakers:**  
Justin Tilton, President, im+m  
JC Lin, Chief Technical Architect, Iowa Student Loan Liquidity Corp

This session will discuss the movement of Free Software and Open Source Software, the advocating organizations, various licensing practices, and the current status. The panel discussion will focus on clarification of common misunderstanding, the future development and best practices. The related issues and the question of whether the open source movement will succeed, and the future impacts will also be included in the open exchange and discussions.

**ISIR and Common Record**  
*Salon E*

**Moderator:**  
Paul Hill, Senior Technical Advisor, FSA, U.S. Department of Education; PESC Standards Forum for Education Steering Committee

**Speakers:**  
Ida Mondragon, CPS Mainframe Development Manager, FSA, U.S. Department of Education  
Holly Hyland, Management Analyst, FSA, U.S. Department of Education

The Common Record: ISIR is one of the schemas developed using the XML community standard. Participants will receive a high-level overview of the ISIR business process, schema content and future plans for new CPS development.

**XML Postsecondary Transcript Standard**  
*Salon F*

**Moderator:**  
Clare Smith-Larson, Systems Support Specialist, Iowa State University; AACRAO SPEEDE Committee

**Speakers:**  
Jennifer James, Programmer Analyst, University of California-Santa Barbara; AACRO SPEEDE Committee  
Jacqueline Nottingham, Associate Director of Undergraduate Admissions, Virginia Polytechnic Institute and State University; Chair AACRAO SPEEDE Committee

The XML Standard for postsecondary student transcripts is complete and has been approved. It is now ready for use. This session will show how this new standard could be used. It will also describe what the next steps are need for general implementation.
**Terri Shaw**  
Chief Operating Officer (COO), Federal Student Aid (FSA),  
U.S. Department of Education

Theresa S. ("Terri") Shaw assumed leadership of Federal Student Aid (FSA) in the U.S. Department of Education on September 16, 2002. Shaw is FSA's second chief operating officer since the office was designated the federal government's first Performance-Based Organization (PBO) in the Higher Education Amendments of 1998. The PBO's mission, as outlined in the legislation, is to improve service, reduce costs, and modernize and integrate the information and delivery systems. FSA administers Title IV federal student loans and grants totaling about $61 billion a year to about 8.7 million people.

Before entering federal service, Shaw served as executive vice president and chief operating officer of eNumerate Solutions, Inc., a start-up technology firm in McLean, Virginia, from 2000-2002. Prior to that, she worked for SLM Corporation (Sallie Mae) of Reston, Virginia, one of the largest private student loan providers in the country. Shaw started at Sallie Mae in 1980, advancing to the position of senior vice president and chief information officer in 1999.

She brings to FSA more than 22 years of experience in student aid, strong leadership skills, and solid technical expertise. Her results-oriented style has proven successful for creating and implementing effective systems solutions, and building strong alliances among diverse business and technical constituencies.

Shaw earned a Bachelor of Science degree from George Mason University in 1980 and completed the Executive Development Series at The George Washington University in 1991.

She and her husband and two children live in Oak Hill, Virginia.
Dr. Brian Fitzgerald
Staff Director, Advisory Committee on Student Financial Assistance

Dr. Brian Fitzgerald has served as staff director of the Advisory Committee on Student Financial Assistance since March 1988. The Committee advises Congress and the Secretary of Education on higher education and student aid policy. He also serves as associate professor of public policy (adjunct) at American University in Washington, D.C., where he teaches courses in the politics of public policy and education. He has been involved in policy development, research and redesign of student aid programs for many years, serving as senior research analyst with Pelavin Associates, Inc. and as project manager and principal investigator for a variety of national student aid policy and program redesign studies at Advanced Technology, Inc. He also served as a research assistant at Harvard Graduate School of Education, an assistant dean and lecturer in education at Bates College, a special assistant to the executive deputy commissioner at the Massachusetts Department of Education, and as a member of the Massachusetts State College Board of Trustees.

He received his Ed.D (1990), in policy research and his Ed.M (1976), with a concentration in higher education policy and administration from the Harvard Graduate School of Education. He received his A.B. in literature from the Massachusetts College of Liberal Arts (1975). Dr. Fitzgerald is the author of numerous publications involving a range of issues related to public policy, higher education financing, and student financial assistance. He is married and a native of New York City, New York.

John Wookey
Senior Vice President, Oracle Applications, Oracle Corporation

John Wookey is Senior Vice President of Oracle Applications, responsible for the development of Oracle’s Healthcare, Student System, and CRM Sales and Marketing product offerings. He has been with Oracle Applications since 1995 and has been responsible for developing Oracle’s financial applications, project management systems, globalization processes, and Oracle’s financial services offering.

Prior to Oracle, Mr. Wookey was vice president of Development for Ross Systems, responsible for the development of their ERP applications including financial systems and processing manufacturing applications. Ross Systems’ targeted industries included process manufacturing, public sector, and healthcare. Previously, Mr. Wookey held management positions with Andersen Consulting and Williams & Burrows, Inc. He has a Masters of Science degree in Engineering Sciences and Bachelors of Science degree in Economics and Mathematics, both from the University of California at Berkeley.
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Upcoming Events

**CBA**

**Student Lending Conference**
November 7 – 9, 2004
Arlington, VA
Marriott Crystal Gateway

**EFC**

**Mid-Year Meeting**
July 14 – 16, 2004
Arlington, VA
Ritz Carlton

**EFC/NCHELP Student Loan Finance & Legal Issues Meeting**
August 2 – 3, 2004 (tentative)
New York, NY

**Annual Meeting**
March 8 – 11, 2005
Palm Springs, CA
Westin Mission Hills

**NCHELP**

**Spring Convention**
May 23 – 26, 2004
San Diego, CA
Hilton San Diego Resort

**Legislative Workshop**
September 22 – 23, 2004
Washington, DC
Wyndham City Center

**Fall Training Conference**
November 14 – 17, 2004
Baltimore, MD
Wyndham Baltimore Inner Harbor

**PESC**

**Fall Workgroup Summit**
October 5 – 6, 2004
Newport Beach, CA
Newport Beach Marriott

**Membership Meeting**
October 5, 2004
Newport Beach, CA
Newport Beach Marriott

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**The 2nd Annual Conference on Technology & Standards**
will be held May 2 – 4, 2005
at the
Wyndham Washington, DC
1400 M Street, NW
Washington, DC 20005
About Our Organizers

About CBA
Contact: Harrison Wadsworth, HWadsworth@WPLLC.net, www.CBA.net

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

About EFC
Contact: Conway Casillas, ConweyC@EFC.org, www.EFC.org

The Education Finance Council (EFC) is a non-profit trade association that represents state-based student loan secondary market organizations including scholarship funding corporations throughout the country. These public purpose organizations are dedicated to the single purpose of making sure students can get the money they need to go to college. Secondary markets expand access to higher education in two main ways: by ensuring the availability of funding for student loans and by making it easier and less expensive to pay for college. Secondary markets, along with lenders, guaranty agencies and other service providers are participants in the Federal Family Education Loan Program. This landmark federal program has been opening the doors of higher education for over 35 years.

About NCHELP
Contact: Mark Putman, MPutman@NCHELP.org, www.NCHELP.org

Based in Washington, DC, the National Council of Higher Education Loan Programs, Inc. (NCHELP) represents a nationwide network of guaranty agencies, secondary markets, lenders, loan servicers, collectors, schools and other organizations involved in the administration of the Federal Family Education Loan Program (FFELP). Since its founding, NCHELP has represented its members on public policy and regulatory issues with the legislative and executive branches of the federal government. NCHELP members promote student access and choice for postsecondary education and training. A key objective is to keep the public informed about the availability of FFELP loans as a method to ensure open access to a postsecondary education. NCHELP’s members provide guaranteed loan assistance under the Federal Family Education Loan Program, which consists of four different loan programs: subsidized and unsubsidized Federal Stafford Loans, Federal PLUS Program and Federal Consolidation Loan Program.

About PESC
Contact: Ane Johnson, Johnson@PESC.org, www.PESC.org

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

Standard communication between data systems
Make it easy to pull data from any system into our applications with XML and SOAP technology.

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Local software functionality without the maintenance and support of a local server, plus “no-touch deployment.”

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1965
Data Processing
First student loan agency to be fully computerized, implementing data processing techniques

1983
Automated Loan Process
First agency to guarantee loan applications online

1986
Zero Guaranty Fee
First guarantor to lower the cost of student aid by waiving the guaranty fee

1986
Unsubsidized Stafford Loans
First to offer unsubsidized Stafford loans, creating a new loan program for the financial aid community

2002
AES Upromise Program
AES & Upromise relationship allows borrowers to apply their rebates directly to outstanding principal on loans

Single Application Form
Initiated the state/federal application form, combining college, state and federal applications into one

Unsubsidized Stafford Loans
First to offer unsubsidized Stafford loans, creating a new loan program for the financial aid community

e-Signatures
First major student agency to accept & process a valid electronically signed Stafford Loan Master Promissory Note (MPN) from a borrower

EducationPlanner.com
Partnering with Peterson’s to develop and launch a comprehensive online college planning and financing resource


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