CONFERENCE PROGRAM

4TH ANNUAL CONFERENCE ON TECHNOLOGY & STANDARDS 2007

Wyndham Washington Hotel
Washington, DC • April 23–25, 2007
Our virtual know-it-all Alec, is a cache of powerful technology tools that set new standards in our industry. From file management to origination and servicing to innovative tools and programs for serving financial aid, Alec connects lenders, schools and students. Because together we guarantee the next generation of leaders, thinkers and doers.

Visit the Financial Aid Products & Tools for Schools section of aesSuccess.org.
Welcome to the 4th Annual Conference on Technology and Standards!

We are very pleased and excited that you have joined us for a conference that showcases leaders and experts who will discuss current trends and realistic implementations of technology and standards.

It’s always been, and will continue to be, about interoperability. True interoperability requires buy-in and participation from the entire eco-system though and takes significant time, resources, and effort to reach. Interoperability is proven to bring with it lower costs, enhanced customer service, improved data integrity, and with an ability to “plug and play”, a return on investment. Yet, a focus on technical interoperability will only get us so far.

Conversations about interoperability today do not solely revolve around technology. Some would argue they don’t revolve around technology at all. Many of the technologies being used and implemented have existed for a while, like XML which is approaching its 10th year anniversary. Now more than ever before in higher education, many entities are not only looking to ensure results with accountability and success, but to measure them as well. The path to these policy and business results is only achievable through data-driven decision-making. Exchanging good data or the right data between trading partners and creating a safe, reliable, and trusted network between business and trading partners is now being encompassed in policy-making discussions at all levels. This “business interoperability” coupled with technical interoperability is the missing link.

Our prominent line-up of featured speakers will illustrate how bridging business sectors and business processes is moving education to a level of interoperability never before seen. Whether between pK–12 and higher education, or between state and federal governments, or across administrative and learning campus systems, or between various agencies within the U.S. Department of Education, interoperability is being achieved. Our concurrent sessions feature experts and leaders on specific technologies and real implementations.

We’ve worked to bring our collective memberships together to unify behind technology and standards — to foster interoperability. We thank everyone involved with production of the conference and encourage you to engage with the speakers and with each other. Enjoy the conference!

Joe Belew  
President, CBA

Kathleen Smith  
President, EFC

Brett Lief  
President, NCHELP

Michael Sessa  
Executive Director, PESC
About the Conference Partners

The Consumer Bankers Association (CBA)

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

Education Finance Council (EFC)

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

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

Postsecondary Electronic Standards Council (PESC)

Established in 1997 and located in Washington, D.C., the Postsecondary Electronic Standards Council (PESC) is a non-profit, community-based, umbrella association of colleges and universities; professional and commercial organizations; data, software and service providers; and state and federal government agencies. PESC’s mission is to lead the establishment and adoption of data exchange standards in education. The goals of the mission are to enable the improvement of institutional performance and foster collaboration across educational communities in order to lower costs, improve service, and attain system interoperability.
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<thead>
<tr>
<th>Time</th>
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<tr>
<td>7:30–8:30 a.m.</td>
<td>Continental Breakfast</td>
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<td>Lunch</td>
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<td>Concurrent Session — Web Tools to Improve Customer Service</td>
<td>Vista Ballroom A</td>
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<td>Concurrent Session — National Standards in Development</td>
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<td>Concurrent Session — Internet Server at the University of Texas – Austin</td>
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<td>2:15–2:30 p.m.</td>
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<td>3:45–4:45 p.m.</td>
<td>Concurrent Session — Privacy and Security</td>
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<td>Concurrent Session — Standards Make the World Go Round: PESC 101</td>
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<td>Concurrent Session — SPEEDE Update</td>
<td>Vista Ballroom C</td>
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<tr>
<td>5:00–6:00 p.m.</td>
<td>PESC 9th Annual Membership Meeting</td>
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<td><strong>Tuesday</strong></td>
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<td>7:30–8:30 a.m.</td>
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<td>9:00–10:15 a.m.</td>
<td>Standards within the U.S. Department of Education</td>
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<td>Data as a Resource — State Policymaker’s Perspectives</td>
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<td>1:15–2:25 p.m.</td>
<td>Concurrent Session — Data Transport Standard</td>
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<td>Concurrent Session — E-Document Requirements for Storage, Reproduction and Security</td>
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<td>Concurrent Session — Integrated Postsecondary Education Data System (IPEDS)</td>
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<td>2:15–2:30 p.m.</td>
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<td>2:30–3:30 p.m.</td>
<td>Concurrent Session — Electronic Authentication, Authorization and ID Management</td>
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<td>Concurrent Session — National Student Loan Data System (NSLDS)</td>
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<td>Concurrent Session — Data Exchange along the Student Lifecycle</td>
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<td>Break</td>
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<td>Concurrent Session — Legislative and Regulatory Impacts on Technology and Standards</td>
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<td>Concurrent Session — Scalable PESC Transaction -Handling Using OASIS CAM Technology</td>
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<td>Concurrent Session — Student Loan Pod Casts</td>
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<tr>
<td>6:00–7:00 p.m.</td>
<td>Conference Reception</td>
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<td><strong>April 25</strong></td>
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<td>Continental Breakfast</td>
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<td>9:00–10:15 a.m.</td>
<td>Bridging the Cultural Divide in Higher Education</td>
<td>Vista Ballroom</td>
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<td>10:15–10:30 a.m.</td>
<td>Break</td>
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<td>10:30–11:45 a.m.</td>
<td>The e-Learning Environment</td>
<td>Vista Ballroom A</td>
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<td>11:45 a.m.</td>
<td>Adjourn</td>
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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!

**Mike Balogh**  
Federal Relations and Industry Officer  
NCHELP

**Barry Billing**  
Business Analyst  
Ontario College Application Services (OCAS)

**Kristi Blabaum**  
Systems Integration Analyst  
Great Lakes Educational Loan Services, Inc.

**Robert King**  
Director of Industry Initiatives  
Citibank

**Adele Marsh**  
VP of Industry Initiatives  
AES

**Ruth Odom**  
Manager, Business Technology  
NJHESAA

**Pam Roda-Kline**  
Vice President Loan Operations  
AES

**Kathleen Smith**  
President  
EFC

**Harrison Wadsworth**  
Washington Partners

**Erin Rose**  
Vice President of Channel and Guarantor Management  
Key Bank
Upcoming Partner Events

**CBA**

**Student Lending Conference**  
December 5–7, 2007  
Arlington, VA  
Ritz Carlton Pentagon City  
1-800-241-3333

**EFC**

**2007 EFC Mid-Year Membership Meeting**  
July 12–13, 2007  
Arlington, VA  
Ritz-Carlton, Pentagon City  
1-800-241-3333  
Group Name: “Education Finance Council”  
Hotel Cut-Off: June 26, 2007

**2007 EFC/NCHELP Student Loan Finance & Legal Meeting**  
August 6–7, 2007  
New York, NY  
Grand Hyatt New York  
212-883-1234  
Hotel Cut-Off: July 21, 2007

**NCHELP**

**Spring Convention**  
June 11–13, 2007  
Naples, FL  
Naples Grande Resort & Club  
239-597-3232  
Group Name: “National Council of Higher Education Loan Programs”  
Hotel Cut-Off: May 19, 2007

**Legislative Conference**  
September 27–28, 2007  
Washington, DC  
Omni Shoreham Hotel  
202-234-0700  
Group Name: “National Council of Higher Education Loan Programs”  
Hotel Cut-Off: September 4, 2007

**Training Conference**  
November 4–7, 2007  
Atlanta, GA 30303  
Omni Hotel at CNN Center  
404-659-0000  
Group Name: “National Council of Higher Education Loan Programs”  
Hotel Cut-Off: October 12, 2007

**PESC**

**Fall 2007 Workgroup Summit**  
October 15–16, 2007  
Montreal, Canada  
Ritz Montreal  
1-800-363-0366  
Group Name: “PESC Fall 2007 Workgroup Summit”  
Hotel Cut-Off: September 12, 2007

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**SAVE THE DATE!**

**5th Annual Conference on Technology and Standards**  
April 28 – 30, 2008  
Hyatt Regency on Capital Hill

**6th Annual Conference on Technology and Standards**  
April 6 – 8, 2009  
Hyatt Regency on Capital Hill
## Program

### MONDAY, APRIL 23

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<td><strong>Speaker:</strong> Michael Sessa, <strong>Executive Director</strong>, PESC</td>
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<td>9:00–10:15 a.m.</td>
<td><strong>Using Data to Improve Student Achievement</strong></td>
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<td><strong>Featured Speaker:</strong> Aimee Guidera, <strong>Director</strong>, Data Quality Campaign</td>
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<td>A consistent refrain is heard in state houses, in district offices and in school staff meetings: “We need quality education data to do our jobs.” Good information is critical to both the process and the outcomes of a high-performing education system, and increasing numbers of voices—inside and outside the system—are calling for this issue to be a national priority. In this session, reflect on the power of longitudinal data to our efforts to improve student achievement and hear how a group of national organizations is leading a campaign to improve the collection, availability and use of high quality education data. Find out how you can support the Data Quality Campaign’s goal to have a longitudinal data system in place in every state by 2009 as well as to change the culture surrounding data use in education.</td>
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<td><strong>Featured Speaker:</strong> Michael Feldstein, <strong>Author</strong>, e-Literate weblog</td>
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<td>On June 26, 2006, Firestar Software filed suit claiming the open source Hibernate software infringes on their patent. Hibernate—a leader in the field of object/relational mapping software—is used in many applications such as Sakai and uPortal 3. Exactly one month after Firestar filed suit, Blackboard Inc. announced their own suit against Desire2Learn for allegedly infringing on their patent on “Internet Based Education Support Systems and Method.” As open source guru Bruce Perens has said, “The monster has arrived.” Mr. Feldstein will share his views on what impact the &quot;patent war&quot; will have on open source software and, more specifically, the e-learning software that is increasingly becoming mission-critical for colleges and universities. His e-Literate weblog has become one of the central sources for information, analysis, commentary, and often strong opinion on the Blackboard patent and broader patent issues that could potentially impact the field of educational technology. From this perspective, he will comment on the current issues and suggest possible futures of open source software in colleges and universities in this brave new world.</td>
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1:15–2:15 p.m.

CONCURRENT SESSIONS

**Web Tools to Improve Customer Service**

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

**Moderator:** Ruth Odom, Manager, Business Technology, New Jersey Higher Education Student Assistance Authority

Blogs and wikis, flickr, facebook, RSS and syndicated feeds. Students expect to be provided with these services, but do you know what they are? Explore some of the current trends in the online world and learn how they can be used to improve your business and provide better services to help schools and students.

**National Standards in Development**

**Speakers:** Larry Fruth, Executive Director, Schools Interoperability Framework Association (SIFA)

Robert King, Director of Industry Initiatives, Citibank—The Student Loan Corporation; Co-Chair of NCHelp ESC; Vice Chair of Steering Committee of Standards Forum for Education

Rick Skeel, Director of Academic Records, University of Oklahoma; AACRAO SPEEDE Committee; PESC Board of Directors

**Moderator:** Tom Stewart, AACRAO SPEEDE Committee

This session will provide an overview on the standards currently under development across education: Data Transport, Admission Application, Student Aid Inquiry, Education Test Score, Course Inventory, Taxonomy, and CommonLine just to name a few. An update from the pK–12 sector will also be included. Come hear the latest updates and information on these and other standards. Also, find out which organizations have implemented standards and which are in the process of implementing them.

**Internet Server at the University of Texas – Austin**

**Speaker:** Bruce Marton, Associate Director of Student Information Systems, University of Texas – Austin; AACRAO SPEEDE Committee; Steering Committee of Standards Forum for Education

**Moderator:** Barry Billing, Business Analyst, Ontario College Application Services (OCAS)

Hundreds of postsecondary schools in the U.S. and Canada use the UT Server for free delivery of electronic transcripts and other educational documents in both EDI and XML format. Many schools also use various software tools UT has provided. We will show how the server acts as a federation maintaining authentication and encryption keys for the community and talk about how we are extending our reach into the Secondary schools community. Also we will discuss the coming enhancements to the server tools including an XML to EDI conversion service and support for the PESC Data Transport Standard.
2:30–3:30 p.m. | CONCURRENT SESSIONS

**Advanced XML Validation with Schematron**
**Speaker:** Tim Bornholtz, President, The Bornholtz Group  
**Moderator:** Adele Marsh, Vice President, Industry Initiatives, AES; Chair of Steering Committee of Standards Forum for Education

Have you hit the wall with your XML Schema (XSD) development? Schematron is a rule-based XML Schema language which uses XPath expressions to describe validation rules. This allows many kinds of structures to be represented which are inconvenient and difficult to describe in XML Schemas (XSD). Schematron can be used in conjunction with XML Schemas to allow more complete validation of your XML documents. This session will explain all this and will also explore when Schematron is appropriate to use.

**Standards-Based Electronic Transcripts for the University of Michigan**
**Speaker:** Jeffrey Alderson, Director, Strategic Partnerships, ConnectEdu, Inc.  
**Moderator:** Bruce Marton, Associate Director of Student Information Systems, University of Texas at Austin; AACRAO SPEEDE Committee: Steering Committee of Standards Forum for Education

The University of Michigan processes 27,000 applications per year using Oracle’s Peoplesoft for high school transcript management. Until recently, the Office of Undergraduate Admissions (OUA) at Michigan manually entered the data from high school transcripts, and then transformed the grade information using a translation table for each high school, resulting in a recalculated GPA for presentation to admissions officers in their standard workflow. Employing a PESC-compatible architecture, ConnectEdu implemented their transcript integration bridge that delivers TS130 EDI via secure FTP for importing into Oracle/PeopleSoft. The system is designed to be equally capable of producing PESC XML and delivering it via web service. This session will cover the valuable lessons learned from the professionals at the University of Michigan OUA concerning the process of automated transcript evaluation, including those that have a direct bearing on the development of future PESC standards. Next steps include the integration of future PESC standards for all elements of application submission.
Business Intelligence as a Strategic Competitive Advantage

Speakers: Christopher Chapman, President and CEO, ALL Student Loan
Steve Galfano, Technical Project Manager, JustIQ

Moderator: Jennifer Kim, Membership Services Manager, PESC

Business intelligence technologies are revolutionizing the student loan industry. These technologies enable lenders to provide better service to customers, streamline operations and increase the value of loan portfolios. The use of these technologies also hardens data security while providing more transparency into the lending process to schools, guarantors, banks and financial aid offices. Successful implementation of a business intelligence solution requires the integration of disparate data sources from all phases of the loan lifecycle. Collecting, normalizing and relating these data sets is a complex and difficult task as servicers, guarantors and originators often use different formats and conventions, both standardized and proprietary. The first part of the session, lead by Mr. Chapman, will discuss how implementing a business intelligence solution transformed his organization by integrating departments, increasing staff productivity, and most importantly, enabling executives to make better, more informed decisions. The second part of the session, lead by Mr. Galfano, will discuss the importance and challenges of relating data sources and some of the technical tricks his team deployed to deliver a functional system.

3:30–3:45 p.m. Break Vista Ballroom Foyer

3:45–4:45 p.m.

CONCURRENT SESSIONS

Privacy and Security

Speakers: Jody Angelini, Vice President, Enterprise Security Office, AES
Yvonne Geibel, Assistant Vice President of Human Resources, AES
Tera Kolvenbach, Vice President, Compliance Wachovia Education Finance

Moderator: Tuan An Do, San Francisco State University; AACRAO SPEEDE Committee

E-Mail, internet, intranet, blogs, wikis. The Internet factors heavily into an employee’s workday, but how can you protect your company and employees? Panelists will discuss how employers can develop policies to protect the company and the employee when it comes to the Internet and other types of workplace privacy. Panelists include an Enterprise Security Officer, a Human Resources professional, and a compliance professional. This session will also provide the latest information on complying with the FFIEC rules on multi-factor authentication.
Standards Make the World Go Round: PESC 101

Speaker: Michael Sessa, Executive Director, PESC
Moderator: Erin Rose, Vice President of Channel and Guarantor Management, Key Bank

How do standards impact our every day life? How do standards affect our students, our programs, our services? What if standards are not in place? This session will review the history of standards, discuss hidden expectations, provide an update on where the education community stands with relation to standardization of data exchange, and provide an overview of the process by which national, education community-based standards are developed and released.

SPEEDE Update

Speaker: Clare Smith-Larson, Systems Support Specialist, Iowa State University; AACRAO SPEEDE Committee
Moderator: Mark Simpson, Brigham Young University; AACRAO SPEEDE Committee

This session will focus on updating attendees on activities and development efforts from the Standardization of Postsecondary Education Electronic Data Exchange (SPEEDE) Committee of the American Association of Collegiate Registrars and Admissions Officers (AACRAO) including current implementation efforts of XML based transactions. Topics include an overview of PESC workgroups that SPEEDE is actively involved in including Admission Application, Course Inventory and XML Request and Response among others; the interaction between SPEEDE and PESC to create postsecondary data exchange standards; and an overview of who serves on the committee and how the committee operates.

5:00–6:00 p.m. PESC 9th Annual Meeting
### Standards within the U.S. Department of Education

**Featured Speakers:**

- **Katie Blot**, Chief Information Officer, Chief Information Office
  Federal Student Aid, U.S. Department of Education
- **Lee Hoffman**, National Center for Education Statistics, U.S.
  Department of Education
- **Ross Santy**, Deputy Assistant Secretary for Data and
  Information, Office of Planning, Evaluation & Policy
  Development, U.S. Department of Education

Representatives from the U.S. Department of Education will address data standards from three perspectives: standards in postsecondary programs; a new approach to elementary/secondary data reporting; and support for state and local education agency data systems.

Katie Blot, Federal Student Aid, will describe how her program is formalizing the standards work they have been piloting over the past few years and institutionalizing this standards development process into Federal Student Aid’s development cycles. She will also discuss recent work with PESC’s Taxonomy Workgroup and updates to the XML Registry and Repository.

Ross Santy, EdFacts/EDEN, will focus on the relationship of horizontal data movement to vertical data reporting. He will give a brief overview of EdFacts/EDEN’s history, some of the challenges to maintaining high data quality in a collection that satisfies many program needs and draws on many disparate state data systems, and the effect of growing interest in—and creation of—statewide longitudinal data systems.

Lee Hoffman, IES/NCES, will summarize work to establish national voluntary data standards for elementary and secondary education data systems. Some of the projects are development of a generic school and district data model; the NCES data handbooks series; and grants to states for the development of statewide longitudinal data systems.
Data as a Resource — State Policymaker’s Perspectives

**Featured Speaker:** Hans P. L’Orange, Director, SHEEO/NCES Network & Director of Data & Information Mgmt, State Higher Education Executive Officers (SHEEO)

Deliberate decision makers use data to inform their decisions. The process of using data and information to affect policy is a process of moving from data to information and knowledge. Good policymaking requires shared information that is both accurate and relevant to the decision-making process.

This session will focus on the value of data to policymakers and the process of moving from data to information. The following questions and concerns will be addressed:

- What constitutes “good” data?
- How does data become information and knowledge?
- What communication techniques are helpful to inform policymakers and other decision-makers?
- What specific data sources are available and are of specific value to state-level postsecondary policymakers?
- What issues are currently of interest to state postsecondary policymakers?

11:45 a.m.–1:15 p.m.  
**Lunch**

1:15–2:15 p.m.  
**CONCURRENT SESSIONS**

Data Transport Standard

**Speaker:** Nathan Chitty, Software Architect, Nelnet  
**Moderator:** Kristi Blabaum, Systems Integration Analyst, Great Lakes Educational Loan Services, Inc.

The Data Transport Workgroup of the Postsecondary Electronics Standards Council has been working on a transport standard to move education-related data packets between trading partners. The Data Transport Standard (DTS), approved by PESC in May of 2006, is a comprehensive standard for the efficient and secure exchange of data between entities over the Internet via Web Services. The standard is based on Web Services standards and specifications (WS-*”) as well as practical experience in applying those standards through the use of a set of Application Programming Interfaces (APIs) that are available in Java, .Net and other computer language libraries. Additionally, a set of data elements has been defined that allows the sender and the receiver to communicate without ambiguity. This session will cover a brief history of the project including original justification, interoperability issues, X.509 PKI issues, and the current state of the standard. The session will then focus on technical details including the expected business flow implementations and suggested technical architectures for deriving the most benefit from implementing DTS.
E-Document Requirements for Storage, Reproduction and Security

Integrated Postsecondary Education Data System (IPEDS)

Speakers: Janice Plotczyk, Team Leader, IPEDS Data Collection, National Center for Education Statistics (NCES), U.S. Department of Education
Mohamad Sakr, Chief Architect, IT Innovative Solutions, IT Innovative Solutions

Moderator: Holly Hyland, Management Analyst, Integration Team, Federal Student Aid, U.S. Department of Education

This session will describe the work that the National Center for Education Statistics is about to launch with PESC on developing standards for XML uploads of IPEDS data for the 2007–08 data collection year. In addition, a general update on IPEDS reporting and web-based data use tools will be presented.

Break

CONCURRENT SESSIONS

Electronic Authentication, Authorization, and ID Management

Speakers: Adele Marsh, Vice President, Industry Initiatives, AES; Chair of Steering Committee of Standards Forum for Education
Charles Leonhardt, Principal Technologist, Georgetown University; Chair PESC EA2 Task Force

Moderator: Jim Farmer, Coordinator, Sun Center for Excellence in Scholarly Information Architecture, University Information Services, Georgetown University

Over the past few years the technology for exchanging data among colleges and universities and with their suppliers has matured. Web services technology provides industry standard Internet-based communications based on XML messages. Security is available through PKI, SAML, and, for colleges and universities’ unique requirements, Shibboleth technology. As an “industry”, however, postsecondary education has not yet achieved the improvements in service and lower costs that other industries have. With currently available technology, the opportunity now exists to “put the pieces together” to attain the commonality that would drive implementations beyond the “tipping point.” Many believe that reaching “network economies” would benefit colleges and universities and their consumers and suppliers. This session will highlight how a new PESC Initiative—the Electronic Authentication/Electronic Authorization (EA2) Task Force is working toward increasing the collaboration and implementations of existing federations to achieve those goals. We’ll also hear about how the Meteor Project, which is participating with EA2, has built and implemented a solid, reliable, and trustworthy federation.
The National Student Loan Data System (NSLDS) has grown over the past 10+ years into a critical resource and management tool for the Student Aid community. The success of this system and process has relied on a consistent collaboration between the Department of Education and Student Aid community. This panel will provide highlights of the current and potential future status of NSLDS from the perspective of an Institution of Higher Education, The Department of Education and the Guarantor/Lender/Servicer. The focus will be on how best to work together to implement these changes, with an emphasis on the use/impact for technology and systems.

Data Exchange Along the Student Lifecycle

This session will be an interactive brainstorming session to identify data exchange points along the lifecycle of a student and develop a roadmap for PESC development. We will begin by mapping the entire student lifecycle — starting with early awareness through alumni relations and loan repayment. The next step will be to identify all of the data exchanges along the way. Come help PESC determine our roadmap for the future.
Legislative and Regulatory Impacts on Technology and Standards

Speakers:  
- Kathleen Smith, President, Education Finance Council  
- Wanda Hall, Vice President and Director of Compliance and Quality Assurance – Edfinancial Services  
- Lee Woods, Vice President and Assistant General Counsel, Industry Relations – Chase Education Finance

Moderator: Harrison Wadsworth, Washington Partners

The recent release of interim and final regulations along with the process of negotiated rulemaking for loans and other student aid programs, as well as several pieces of higher education legislation being introduced and reauthorization still on the calendar, has left some to wonder what is next. Schools, lenders and guarantors and their servicers may need to implement fairly complex changes within a limited timeframe. This panel will provide a highlight of upcoming changes based on negotiated rulemaking as well as what may be coming within Higher Education Act reauthorization. The focus will be on how best to work together to implement these changes, with an emphasis on the use/impact to technology and systems.

Scalable PESC Transaction – Handling Using OASIS CAM Technology

Speaker:  
- David RR Webber, Chair, OASIS CAM TC

Moderator: Michael Sessa, Executive Director, PESC

PESC has defined XSD schema for loan, transcript and a number of other transactions. Wide scale adoption brings with it challenges of versioning, consistency, rules, codelists, guidelines and contextual use patterns. How does the OASIS CAM technology augment XSD structure definitions to provide scalable collaborative deployment support and smooth out potential disruptive adoption impacts? How can a community of practice create a shared resource center to facilitate content interoperability? David Webber, chair of the OASIS CAM TC work will discuss the current PESC transactions and show how the open source CAM toolset can be applied to their use.
Student Loan Podcasts

Speaker: Christopher Penn, Chief Technology Officer, Student Loan Network and Edvisors Network

Moderator: Robin Greene, Associate Director, Technology and Internet Services, The College Foundation of North Carolina; AACRAO SPEEDE Committee

By now we’ve all heard of iPods and we’re sure that students have as well. Podcasts, web-based audio broadcasts, are sweeping the nation especially within the younger generations and have created a new method of communicating and reaching target audiences. Want to add podcasts to your web site or add them to your MySpace account? Learn how podcasts are now being used in the financial aid community and how you can develop them.

Vista Ballroom C

6:00–7:00 p.m Conference Reception

Vista Ballroom Foyer
### Wednesday, April 25

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<tr>
<th>Time</th>
<th>Event</th>
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<tr>
<td>7:30–8:30 a.m</td>
<td><strong>Continental Breakfast</strong></td>
<td>Vista Ballroom Foyer</td>
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<tr>
<td>9:00–10:15 a.m</td>
<td><strong>Bridging the Cultural Divide in Higher Education</strong></td>
<td>Vista Ballroom</td>
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<td>*Featured Speaker: Dr. Michael Zastrocky, Managing Vice President</td>
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<td>&amp; Research Director for Academic Strategies, Gartner, Inc.*</td>
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<td>Digital Natives present a variety of new challenges to Higher education leaders. They embrace technology as their means of communication and collaboration both socially and educationally. How they operate in their academic environment and how the higher education institutions adapt to their consumer technology driven expectations is much different from prior generations of students. In this session we will explore how higher education institutions should plan for, manage and support the complex needs of digital native students while providing support for faculty, staff and others in the community who may have radically different needs and expectations.</td>
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<td>10:15–10:30 a.m</td>
<td><strong>Break</strong></td>
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<td>10:30–11:45 a.m</td>
<td><strong>The e-Learning Environment</strong></td>
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<td>*Featured Speaker: Rob Abel, Chief Executive Officer, IMS Global</td>
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<td>Learning Consortium*</td>
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<td>It has been ten years since the blossoming of the idea of a “learning object”. What have we learned in those ten years? Have learning objects been a success, a failure, an obscure footnote in the history of learning technology, or an idea whose time is yet to come? In a short ten years, the Internet may not have “changed everything” as was predicted, but it certainly has impacted approaches to learning and learning facilitation. In this talk, educational researcher and CEO of the IMS Global Learning Consortium (IMS GLC), Rob Abel, who was involved heavily in the learning object birth ten years ago, provides some guesses at what we may have learned from the last ten years and what it may mean for the next ten years of learning technology and learning technology standards. Discussion topics will include IMS GLC’s new focus on innovation, adoption, and, most importantly, learning impact. This talk will draw from the latest IMS GLC research in the satisfaction and use of learning technology in the U.S. higher education segment, indicating trends in digital content and learning platforms.</td>
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<td>11:45 a.m.</td>
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Rob Abel, Chief Executive Officer of IMS, an education industry researcher, author, and analyst focused on transformation, innovation, and effectiveness in higher education. He founded the Alliance for Higher Education Competitiveness (A-HEC) 2004 for the purpose of performing research to uncover and disseminate best practices that enable transformation.

Prior to founding A-HEC, Abel was the Senior Vice President of Client Services Collegis (now SunGard Collegis) where he was responsible for services delivered to more than 60 higher education institutions. Abel also served as General Manager of Collegis’ Online and Academic Services business unit (formerly known as Eduprise), Chief Marketing Officer, and Senior Vice President of Business Development. Abel has over 25 years experience in high tech general management, business development, marketing, and product development.

Katie Blot is Chief Information Officer (CIO) for Federal Student Aid at the U.S. Department of Education. As Chief Information Officer, she is responsible for promoting the effective use of technology to achieve Federal Student Aid’s strategic objectives through sound technology planning and investments, integrated technology architecture and standards, effective systems development, and production support.

Prior to becoming CIO, Katie was the Deputy General Manager for Application, School Eligibility and Delivery Services which is responsible for processing over 1.4 million student applications for federal student aid and delivering over $60 billion in Title IV grant and loan programs to over 10 million recipients through approximately 6,200 postsecondary institutions. In this position, she was responsible for the development, implementation, and operations of the systems and processes that support the application processing and delivery of funds to postsecondary schools.

Prior to joining the Department of Education, Katie worked for 10 years as a consultant for BearingPoint (formerly KPMG Consulting) in its higher education group. In this time, she worked with hundreds of schools advising on student services, in particular administration of the Title IV delivery process. Katie has Bachelors of Art in Economics from The Johns Hopkins University.

Michael Feldstein is the author of the e-Literate instructional technology weblog and a member of e-Learn Magazine’s Editorial Advisory Board. Michael was an Assistant Director at the SUNY Learning Network, where he oversaw blended learning faculty development and was part of the leadership team for the LMS platform migration efforts of this 40-campus program. Prior to that, he was co-founder and CIO of MindWires, a company that provided e-learning and knowledge management products and services to Fortune 500 corporations, with a special emphasis on software simulations. He is frequently interviewed on e-learning-related topics and has recently been quoted in publications including The Chronicle of Higher Education, U.S. News and World Report, and The Boston Globe.

Aimee R. Guidera is the Director of the Data Quality Campaign where she manages a growing partnership among national organizations collaborating to improve the quality, accessibility and use of education data. Guidera joined the National Center for Educational Accountability as Director of the Washington, D.C. office in 2003 to promote the vital role Just For The Kids School Reports can play in current education reform efforts of national education, business, and government organizations.

During her eight previous years in various roles at the National Alliance of Business, Guidera supported the corporate community’s efforts to increase achievement at all levels of learning. During her tenure with the Alliance as Vice President of Programs, she managed the Business Coalition Network, comprised of over 1,000 business led coalitions focused on improving education in communities across the country. Prior to joining the Alliance, Guidera worked at the National Governor’s Association. There she analyzed and monitored state and national education policies, provided technical assistance to improve family-focused services, and worked with a task force of CEOs and governors on school readiness.

Early in her career, Guidera taught for the Japanese Ministry of Education in five Hiroshima high schools where she interviewed educators and studied the Japanese education system. Guidera received her AB from Princeton University’s Woodrow Wilson School of Public & International Affairs, and her Masters in Public Policy
from Harvard University’s John F. Kennedy School of Government. At Princeton, Guidera’s thesis was titled, “The Evolution of the Role of Business in Public Education.”

Lee Hoffman is a Program Director with the U.S. Department of Education’s National Center for Education Statistics (NCES). She is responsible for the Common Core of Data, an annual collection of basic data from states about public schools, school districts, students, education staff, and revenues and expenditures for public education. The NCES Handbooks Online, another CCD product, provide voluntary standards for defining elementary/secondary education data items.

Hoffman also works with NCES’s National Forum on Education Statistics. Over the past 18 years this group of representatives from state and local education agencies and federal agencies with an interest in education data has produced a host of products and guides to improve the quality and standardization of education data. One of the Forum’s first accomplishments were the SPEEDE/ExPRESS electronic transcript standards developed in collaboration with the American Association of Collegiate Registrars and Admissions Officers.

Before joining NCES, Hoffman had a wide range of experience in education. She organized and managed adult literacy programs in rural South Carolina and in New York City; taught graduate courses in adult education and program evaluation at North Carolina State University, the University of Southern Mississippi, and the University of British Columbia; and managed the program evaluation bureau for the Louisiana Department of Education.

Her undergraduate work was at Newcomb College (now part of Tulane University) and her doctorate in adult and community college education was awarded by N.C. State University.

Hans P. L’Orange is Director of Data and Information Management and Director of the SHEEO/NCES Network for the State Higher Education Executive Officers (SHEEO). SHEEO was created in 1954 as a membership association to help its members and the states develop and sustain excellent systems of higher education. The boards, served by the members of SHEEO, are responsible for advising governors and legislatures on policies to strengthen higher education’s contributions to the states and for performing the governance and coordinating functions assigned to them by law. The Network is a collaborative project administered by SHEEO and funded by the National Center for Education Statistics (NCES) at the U.S. Department of Education.

L’Orange serves as a liaison to foster communication, cooperation, and collaboration between the federal government, state higher education agencies, and national associations on issues related to data collection, data management, and information dissemination. His primary areas of interest and responsibility are developing effective strategies for data management; the relationships between data, information, and knowledge; and using knowledge resources effectively to impact public postsecondary education policy.

Director of the Network since 1998, L’Orange was previously the Associate Director for Institutional Analysis at the University of Colorado at Boulder. He received his M.S. degree in business information systems with a minor in organizational development from the University of Colorado and a B.A. degree from Colorado State University.
Ross Santy serves in the Office of Planning, Evaluation and Policy Development and leads the Department’s EDFacts initiative. He comes to the Department after serving four years as the co-founder and head of information and operations at Just for the Kids - California, a non-profit organization that maintains and hosts a set of online reports and tools to help school leaders make sense of educational performance data. While at Just for the Kids—California, Santy designed and built the largest data repository of longitudinally linked student level academic performance information in the state.

Santy has also served as Director, Resources and Development Office at the Los Angeles County Office of Education; Director, Instructional Technology at the Browning School in New York and as a high school history teacher in New Jersey.

Santy earned a Master’s in Educational Technology from the Harvard Graduate School of Education, and an undergraduate degree in Educational Psychology from Princeton University. He is also proficient in computer systems networking and data storage.

Dr. Michael Zastrocky is Vice President and Research Director for Academic Strategies at Gartner Inc, the world’s largest information technology research and advisory services company. Dr. Zastrocky is responsible for examining and analyzing emerging higher education IT trends and assessing the implications of those trends on colleges and universities globally. Before joining Gartner, he was a faculty member at several universities, assistant dean, a chief information officer, vice president of CAUSE (the international association for managing and using information resources in higher education, now EDUCAUSE), and vice president of the Kaludis Consulting Group. He has delivered many keynote addresses around the globe and has served as a faculty member for numerous institutes and seminars. He has written or co-authored numerous books, modules, research notes, and articles on computing, mathematics, and management issues. He has served as a university trustee, school board member and a board member for both non-profit and for-profit higher education organizations around the globe.
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