Slate Summit 2026 Findings Report

Field	Value
Corpus	93 indexed presentations. Counts below are derived from the current corpus index, not an independent recount of source slides.
Prepared for	The Innovation Forge
Citation rule	Body citations use source IDs. The Source Ledger maps each ID to filename, title, presenter, organization, and page references.

Executive Summary

Bottom line

The conference evidence points to a maturing Slate profession: the strongest work is no longer isolated configuration. It is operating-system design: governed data models, role-aware portals, reusable query logic, workflow automation, measurement, and staff enablement. This is across the corpus, not a single presenter claim.

#	Executive finding	Evidence and interpretation
1	Slate is being used as institutional infrastructure.	Sessions repeatedly move whole processes into Slate: transfer credit, non-credit registration, orientation, direct aid, transcript routing, registrar work, and student success. [S12, S84, S30, S85]
2	Portals have become the main interface layer.	Portals are used as staff consoles, student front doors, event schedules, transcript queues, homepage replacements, and campus collaboration hubs. [S56, S39, S59, S57]
3	The backbone is data modeling, not surface design.	The best decks start with datasets, entities, related records, prompts, source formats, and ownership rules before screens or messages. [S23, S34, S17, S47]
4	Query literacy is now a core professional skill.	Configurable Joins, subqueries, dictionaries, materialized views, query views, and reusable query libraries appear throughout the corpus. [S01, S71, S88, S76]
5	AI is present, but the strongest AI message is restraint.	The most useful AI sessions pair AI with governed knowledge, bounded use cases, clear instructions, testing, and human review. [S49, S73, S78, S46]
6	Measurement is advancing, but outcome evidence is uneven.	Analytics sessions show stronger attribution, behavioral signals, engagement measures, and origin-source discipline. Many decks still end with claimed benefits rather than quantified before/after measures. [S04, S32, S33, S51]
7	The most important organizational theme is governance.	Training, security, rule audits, change design, permission reviews, and decentralized support models all point to the same need: named ownership and repeatable operating routines. [S38, S19, S07, S20]

Evidence Tables

Corpus Profile

Primary topic	Session count	Share
Querying and Data Retrieval	8	9% of indexed sessions
Student Success and Retention	8	9% of indexed sessions
Portals and User Experience	9	10% of indexed sessions
Rules and Workflow Automation	6	6% of indexed sessions
Data Architecture and Governance	6	6% of indexed sessions
Events and Scheduling	6	6% of indexed sessions
AI and Intelligent Assistance	6	6% of indexed sessions
Communications and Personalization	6	6% of indexed sessions
Analytics and Reporting	5	5% of indexed sessions
Advancement Operations	5	5% of indexed sessions
Process Redesign and Operations	4	4% of indexed sessions
Training and Change Management	4	4% of indexed sessions
Multi Unit and Global Operations	4	4% of indexed sessions
Financial Aid and Awards	3	3% of indexed sessions
Reader and Review	3	3% of indexed sessions
Security, Permissions, and Fraud	3	3% of indexed sessions
Enrollment Strategy and Yield	2	2% of indexed sessions
Applications and Forms	2	2% of indexed sessions
Orientation and Onboarding	2	2% of indexed sessions
Integrations and Web Services	1	1% of indexed sessions

Slate Capability Frequency

Slate capability or feature	Sessions
Queries	78
Portals	61
Forms	54
Rules	40
Deliver	40
Datasets	27
Permissions and Roles	26
Dashboards	24
Configurable Joins	22
Reports	22
Entities	23
Liquid Markup	21
Source Formats	18
Events	17
Content Blocks	19
Workflows	22
Reader	21
Applications	14
Related Records	13
Person Records	15
Slate AI	14
Interactions	8
Web Services	18
Prompts	10
JavaScript	8

1. Dominant Themes Across the Conference

Theme	Findings	Supporting evidence
Slate as an operating platform	sessions increasingly frame Slate as the system where institutional work happens, not just the CRM that records it.	Transfer credit and non-credit registration are built as end-to-end systems; orientation and direct aid move fragmented services into Slate. [S12, S84, S30, S85]
Data modeling before interface design	the strongest builds use datasets, entities, related records, prompts, and source formats as the first design decision.	Summer Institute, program datasets, department administration, Greek life, and internships all depend on repeatable records rather than one-off fields. [S23, S34, S17, S47, S18]
Portals as work surfaces	portals are used as operational consoles, student service surfaces, and controlled access layers.	Staff portals, homepages, Slate.org portals, transcript portals, event schedules, and recruitment-team portals all follow this pattern. [S56, S39, S11, S59, S24]
Governance and enablement	training, documentation, permissions, rules, and change routines are treated as core architecture.	Certification, rule audits, security controls, change decision records, and weekly activity reviews show this clearly. [S38, S07, S19, S20, S61]
Signals, personalization, and measurement	institutions are moving from broad funnel categories toward behavioral, source, engagement, and affinity signals.	CRO, behavioral targeting, source cleanup, CASE engagement, Giving Tuesday fund scores, and student signals all support this theme. [S04, S32, S33, S51, S63, S68]
Cautious AI adoption	AI is being explored as a helper layer, but the strongest sessions avoid treating AI as a substitute for data quality, expertise, or governance.	AI product spotlights, chatbots, prompt-to-portal builds, and AI assistant case studies all stress instruction, knowledge sources, testing, or human judgment. [S49, S73, S86, S78, S46]

2. Problems Appearing Across Multiple Institutions

Recurring problem	Synthesis	Supporting sessions
Spreadsheet and email dependence	Manual routing, status tracking, reviews, calculations, and handoffs were still common starting points.	Clerkship evaluation, ELP exemption, transcript processing, gift agreements, orientation, and non-credit registration all begin with fragmented external handling. [S35, S37, S59, S67, S30, S84]
Data silos and unclear source truth	Institutions struggled when sources, funds, programs, courses, student services, or engagement data lacked a shared model.	Source-origin cleanup, fund reporting, Giving Tuesday personalization, transfer credit, and student success all required new common data structures. [S33, S31, S63, S12, S81]
Decentralized support at scale	Small central teams are supporting many programs, admins, or campuses with uneven local practice.	MIT, UChicago, multi-campus consolidation, global admissions, and advancement implementation sessions all show this tension. [S17, S40, S53, S62, S44]
Technical debt from one-off objects	Too many rules, templates, portals, forms, applications, or communications create maintenance drag.	Rule audit, flexible event templates, evergreen applications, homepage cleanup, and campaign governance all address object sprawl. [S07, S69, S13, S39, S48]
Security, fraud, and access creep	Access and legitimacy are becoming more difficult as portals, automation, AI, vendors, and high-volume fraud expand the attack surface.	Fraud, identity verification, permissions, realms, user audits, vendor accounts, and form-scope risks repeat across security-focused sessions. [S28, S36, S19]
Weak post-launch measurement	many decks show strong builds but fewer show formal outcome design, baseline measurement, or sustained monitoring.	Some sessions provide better measurement scaffolds, such as CRO, origin-source reports, CASE engagement, event management, and transfer credit results, but this is not yet consistent. [S04, S33, S51, S87, S12]

3. Slate Capabilities Receiving the Most Attention

The indexed module frequency is a useful proxy for attention. It should not be treated as a vote on feature importance, because some sessions use a feature deeply while others mention it as one component. Even so, the distribution is clear: the conference leaned heavily toward query logic, portals, forms, rules, Deliver, datasets, permissions, dashboards, entities, reports, Configurable Joins, Liquid, Reader, Workflows, Content Blocks, Source Formats, Web Services, and Events.

Capability area	Frequency signal	Interpretation
Queries and Configurable Joins	Queries appear in 78 indexed sessions; Configurable Joins in 22; Subqueries in 9.	The dedicated query track plus query-heavy analytics and portal sessions show that query literacy is foundational. [S01, S71, S76, S27]
Portals and Forms	Portals appear in 61 indexed sessions; Forms in 54.	These are no longer only applicant-facing tools. They are the action layer for staff, students, departments, and partners. [S39, S59, S79, S24]
Rules, Workflows, and Deliver	Rules appear in 40 indexed sessions; Workflows in 22; Deliver in 40.	Institutions are using these tools to route work, trigger communications, move reviews, and operationalize policy. [S06, S29, S55, S48]
Datasets, Entities, Related Records	Datasets appear in 27 indexed sessions; Entities in 23; Related Records in 13.	These are the practical route to scaling repeatable data without overloading person or application records. [S23, S34, S47, S18]
AI	Slate AI appears in 14 indexed sessions; AI Chatbots in 4. Categories overlap.	Attention is high, but the strongest decks still route AI through knowledge, instructions, governance, and review. [S49, S73, S42, S86]

4. Emerging Implementation Patterns

Pattern	What it means	Examples
Model first, interface second	Define datasets, entities, prompts, relationships, source formats, permissions, and ownership before building screens.	[S34, S23, S12, S17]
Portal plus method plus form	Use a portal as the visible workspace, methods/views for display, and forms or popups for updates.	[S59, S24, S39, S86]
Query to materialized view to portal/report	Move expensive or reusable logic from live query sprawl into reusable views or materialized structures.	[S51, S70, S88]
Rules and assignment lists as operational queues	Turn abstract workflow needs into role-specific lists, status changes, and recurring cadences.	[S05, S29, S06]
Native replacement of fragmented external systems	Replace or reduce external tools when Slate can handle data, workflow, communication, and evidence more coherently.	[S43, S67, S58, S84]
Grounded AI workflow	Constrain AI with instructions, approved sources, bounded tasks, prompt cycles, testing, and human review.	[S73, S86, S78, S46]

5. Areas Where Institutions Are Becoming More Sophisticated

Maturing area	Synthesis	Supporting sessions
Relational architecture	Institutions are more comfortable with datasets, entities, related records, relations, and scoped updates.	[S12, S47, S18]
Query design and performance	Sessions show more attention to joins, subqueries, dictionaries, materialized views, query views, parameters, and reusable query libraries.	[S01, S76, S51, S70]

Maturing area	Synthesis	Supporting sessions
Behavioral measurement	Some institutions now connect ad clicks, source data, events, portal behavior, community signals, and engagement scores to action.	[S04, S32, S68, S63]
Security and legitimacy operations	Fraud prevention, access audits, vendor account limits, permissions, and identity verification are moving into routine design.	[S28, S36, S19]
Lifecycle expansion	Slate work is extending into advising, registrar work, direct aid, internships, student organizations, global operations, and orientation.	[S81, S60, S85, S83]

6. Areas Where Institutions Remain Stuck

Stuck area	Synthesis	Supporting sessions
Manual process residue	Even sophisticated builds often begin by replacing spreadsheets, email threads, unsupported partner systems, and manual status checks.	[S35, S37, S67, S59]
Outcome measurement gaps	many sessions describe improved experience or efficiency, but fewer define baseline, target, sustained metric, and owner.	[S87, S89, S30, S12]
Documentation and transfer risk	The corpus repeatedly implies that knowledge still lives with a few admins unless training, certification, or review routines are built.	[S38, S61, S44, S17]
Object sprawl	Institutions remain stuck when they solve each local request with another template, rule, population, mailing, or query instead of a reusable pattern.	[S07, S69, S48, S13]
Personalization without governance	Behavioral personalization and signal work are growing faster than the surrounding consent, frequency, source-quality, and fatigue frameworks.	[S68, S32, S65, S64]

7. Repeated Advice That Appears Useful

Advice	Why it appears useful	Supporting sessions
Start with the process, not the tool	Useful because it prevents teams from encoding a broken workflow inside a cleaner interface.	[S66, S84, S12, S20]
Audit the current state before rebuilding	Useful because technical debt is usually hidden in rules, sources, templates, permissions, or local workarounds.	[S07, S33, S13, S19]
Use reusable structures	Useful because content blocks, query libraries, event notes, templates, and datasets reduce future change cost.	[S77, S70, S69, S34]
Define ownership and governance	Useful because many failures are not technical; they are authority, standards, documentation, and support failures.	[S38, S17, S40, S20]
Test with edge cases and real users	Useful because conditional logic, identity workflows, AI outputs, and portal permissions fail in edge cases first.	[S73, S36, S24, S62]

8. Repeated Advice That Appears Weak, Vague, or Unsupported

In most cases, the advice itself is not wrong. The weakness is that the decks often do not define the decision rule, metric, owner, or failure condition needed to make the advice operational.

Advice pattern	Why it is weak without more detail	Evidence
Start small	Weak when the session does not define which pilot is small enough, what success means, or how the pilot becomes a standard.	Appears near AI, campaign, and implementation guidance. Stronger versions define scope and testing.
Get buy-in	Weak when treated as a slogan rather than a governance design with rights, decision owners, and escalation paths.	Strategic panels and decentralized implementation decks imply the need but vary in operating detail.
Use AI to save time	Weak unless paired with quality review, privacy limits, trusted sources, and a definition of acceptable output.	Several AI sessions are stronger because they warn about limits and testing.
Personalize more	Weak unless source validity, consent, channel fatigue, timing, and measurement are built into the model.	Signal and campaign sessions show both promise and risk.
Measure outcomes	Weak when outcome claims do not include a baseline, comparison period, denominator, owner, and ongoing review cadence.	The best counterexamples provide stronger metric scaffolds but this is uneven across the corpus.

9. Ideas Presented Under Different Names That Are Functionally Similar

Functional idea	How it appears under different labels	Supporting sessions
Related record architecture	Entities, datasets, related records, transfer courses, badges, fund maps, direct aid records, internships, and organization membership are all variants of repeatable related-data modeling.	[S23, S34, S45, S63, S85]
Operational cockpit	Portals, homepages, staff workspaces, front porches, transcript queues, and recruitment hubs all create role-aware work surfaces.	[S39, S56, S79, S59, S57]
Work queue	Assignment lists, cadences, alert lists, workflows, review bins, and task portals all route work to the right person at the right time.	[S05, S06, S29, S55]
Signal index	Engagement scores, CASE engagement, fund affinity scores, origin-source analysis, CRO measures, and behavioral targeting all convert evidence into action priority.	[S68, S51, S63, S33, S04]
Reusable knowledge asset	Query libraries, materialized views, Content Blocks, Liquid snippets, event notes, and training certification all make institutional knowledge reusable.	[S70, S77, S69, S38]

10. Tensions or Disagreements Among Sessions

Tension	Synthesis	Supporting sessions
Build natively vs integrate externally	Some sessions argue for native Slate replacement of vendors or fragmented tools; others depend on web services, SFTP, external data, or partner systems.	[S43, S67, S74, S31]
Standardization vs local control	Central teams need common models, but departments and campuses need local flexibility.	[S17, S40, S53, S62]
Automation vs human judgment	Automation improves speed and consistency, but fraud, AI, conduct, and high-stakes reviews keep human review in the loop.	[S41, S28, S46, S55]
Personalization vs privacy and fatigue	Signal-driven outreach can improve relevance, but it increases risk around consent, data provenance, and message volume.	[S68, S32, S19, S48]
Reusable templates vs distinctive experiences	Templates reduce cost and risk; highly tailored portals and campaigns improve fit but increase maintenance burden.	[S69, S13, S56, S25]

Tension	Synthesis	Supporting sessions
Admissions CRM vs lifecycle platform	Many sessions push Slate into student success, registrar, direct aid, and advancement. That expansion creates value but changes governance and support expectations.	[S81, S60, S85, S15]

11. Underrepresented Topics

Underrepresented topic	Why it matters	Evidence basis
Rigorous predictive modeling	Despite strong analytics interest, formal model validation, lift measurement, fairness checks, and predictive model governance were not prominent.	Related but not equivalent evidence appears in CRO, behavioral targeting, and yield volatility sessions. [S04, S32, S03]
Accessibility and usability testing	Portals are everywhere, but accessibility testing, usability research, mobile ergonomics, and student voice receive limited explicit attention.	Portal sessions show design work, but fewer specify formal testing methods. [S11, S10, S79]
Post-launch operating metrics	Many sessions show build success, but fewer define long-term owner, metric cadence, maintenance budget, or failure threshold.	Better examples exist in event management, origin-source analysis, transfer credit, and CRO. [S87, S33, S12, S04]
Equity impact of automation	Sessions discuss personalization, fraud, advising, and support, but equity impact testing and unintended consequence monitoring are thin.	Adjacent sessions include student signals, direct aid, fraud, and student success. [S68, S85, S36, S81]
Sustainable staffing models	Many sessions imply heroic admin capacity. Fewer show staffing ratios, service tiers, intake governance, and maintenance cost models.	Decentralized and training sessions point to the need. [S17, S38, S40, S44]

12. Skills Slate Professionals Will Increasingly Need

Skill area	What it includes	Supporting sessions
Relational data modeling	Datasets, entities, related records, relationships, source formats, prompts, and field governance.	[S34, S23, S12]
Advanced query design	Configurable Joins, subqueries, dictionaries, aggregates, materialized views, query libraries, and performance logic.	[S01, S76, S88]
Portal product design	HTML, CSS, Liquid, methods, views, popups, role-aware surfaces, accessibility, and user testing.	[S56, S39, S86]
Workflow and automation design	Rules, workflows, assignment lists, status models, notifications, QA, and exception handling.	[S06, S07, S35]
Analytics and signal design	Attribution, behavioral signals, source quality, engagement scoring, dashboards, and action thresholds.	[S68, S04, S33]
AI governance and evaluation	System instructions, trusted sources, prompt iteration, output review, privacy, and user education.	[S73, S49, S46]
Security and access design	Permissions, realms, user audit routines, vendor access, identity verification, fraud signals, and privacy boundaries.	[S19, S28, S36]
Training and knowledge transfer	Certification, documentation, guided builds, user guides, office hours, and staff confidence measures.	[S38, S82, S44]

13. Opportunities for Shared Tools, Templates, or Training

Opportunity	What to build	Supporting sessions

Opportunity	What to build	Supporting sessions
Advanced query curriculum	A sequenced training path from relational basics to subqueries, dictionaries, parameters, query views, and materialized views.	[S26, S14, S71, S76]
Portal governance starter kit	Naming, CSS conventions, method/view patterns, role permissions, accessibility checks, and usage metrics.	[S56, S39, S25, S11]
Dataset and entity design checklist	Decision tree for when to use fields, datasets, entities, related records, relations, source formats, or workflows.	[S23, S34, S47, S12]
Rules audit toolkit	Rule inventory query, foldering conventions, exclusivity review, performance flags, and recurring health-check cadence.	[S07, S13, S06]
Signal Indices workbook	Shared framework for source quality, behavioral signals, engagement scoring, campaign triggers, and outcome checks.	[S68, S04, S32, S63]
AI governance template	Prompt pattern, system instruction checklist, knowledge-source inventory, privacy review, testing log, and acceptance criteria.	[S73, S86, S78]
Post-launch measurement template	Baseline, target, owner, frequency, dashboard, and stop/change rules for each major Slate build.	[S87, S33, S51, S12]

14. Implications for Enrollment Strategy and Organizational Design

Implication	Synthesis	Supporting sessions
Enrollment strategy becomes operational design	Strategy is not only segmentation, travel, communications, and aid. It now includes the systems that make those choices visible, timely, and governed.	[S68, S41, S04, S03]
Slate roadmaps need product ownership	A roadmap should define owners, users, source data, decision rights, training, success measures, and maintenance cadence for each build.	[S20, S91, S17, S38]
Cross-functional governance is unavoidable	Admissions, financial aid, registrar, student success, advancement, IT, and departments now share Slate surfaces and data dependencies.	[S12, S60, S85, S31]
Behavioral signals need ethics and operating rules	Signal-driven outreach can improve relevance, but must define consent, source quality, action thresholds, frequency limits, and review routines.	[S68, S32, S19, S48]
Training is infrastructure	Staff capability is a system requirement. Certification, documentation, and guided practice reduce risk and expand what the institution can safely build.	[S38, S82, S44]

15. Implications for the Future of Advanced Slate Work

Advanced Slate work is shifting from clever configuration to institutional architecture. The future practitioner is part data architect, product manager, process designer, trainer, analyst, security partner, and AI evaluator. The strongest sessions already combine those roles in one build. [S12, S20, S17, S68]

Future direction	Meaning	Supporting sessions
Advanced work will look like product management	The unit of work is less likely to be 'build this rule' and more likely to be 'own this process from data model to interface to metric'.	[S84, S81, S12]
Reusable assets will become a community advantage	Shared query patterns, portal starter kits, entity decision trees, rule audits, AI testing sheets, and measurement templates can raise the floor for the whole Slate community.	[S70, S77, S69, S38]

Future direction	Meaning	Supporting sessions
AI will reward clean architecture	AI assistants, chatbots, and query knowledge improve only when instructions, source content, permissions, and review loops are governed.	[S49, S73, S42]
The best institutions will manage technical debt intentionally	Rule audits, application stewardship, source cleanup, weekly change review, and security audits should become recurring operations.	[S07, S13, S33, S61]

Appendix: Source Ledger

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S01	A Join Named Sue	Charles B. Wilson	The University of Chicago	Querying and Data Retrieval	HallD_Thursday_A Join Named Sue_ 1110_may212026.pdf	PDF pages 15 to 17 show the Configurable Joins explorer; PDF pages 22 to 67 explain bases and standard joins; PDF pages 68 to 84 explain subquery exports and filters; PDF pages 89 to 136 build the guest to host self join; PDF pages 142 to 179 build the program dataset join; PDF pages 181 to 211 show reusable rules, logic, checklists, feeds, and portal uses.
S02	A Semester of Success: Course & Campus Engagement, Course Alerts & Performance, Advising & Registration	Jonathan Grossman	Merrimack College Academic Success Center	Student Success and Retention	KarlDeanC_Wednesday _ASemesterofSuccess_3 35PM_518.pdf	PDF pp. 4 to 9, instance and process model; pp. 10 to 17, attendance, alerts, and contact rules; pp. 24 to 30, advising, tutoring, and Readers; pp. 33 to 38, concern score and case management; p. 42, recap.
S03	Adapting to Yield Volatility: Using Data and Technology to Shape the Right Class	Catie Clark; Christie Smith; Olivia Nash; Ally Metcalf	Niche; Alfred University; University of the Pacific; The University of Tulsa	Enrollment Strategy and Yield	DavidsonC_Thursday_A daptingtoYieldVolatility _1005_61.pdf	PDF pages 5 to 10 frame market changes and strategy; PDF pages 12 to 18 show Alfred measures and market targeting; PDF pages 20 to 29 show Pacific reach, signal integrations, AI analysis, portal personalization, and anti melt strategy; PDF pages 31 to 33 show applicant barriers and Tulsa direct admission growth.
S04	All the Small Clicks: Conversion Rate Optimization Lessons from Ads to Applications	Lillie Miller; Michael Doran; Launa Smith	The University of Georgia Undergraduate Admissions; The University of Georgia Undergraduate Admissions; The University of Georgia Undergraduate Admissions	Analytics and Reporting	KarlDeanA2_Thursday_ All the Small Clicks Conversion Rate Optimization Lessons from Ads to Applications.pdf	PDF pages 5 to 12: CRO definition, landing page, calls to action, and form optimization; PDF pages 14 to 19: campaign flow, content, focus group feedback, and testing; PDF pages 21 to 30: pixel setup and landing portal; PDF pages 31 to 34: CRO framework; PDF pages 36 to 39: RFI, application, and email reporting; PDF page 41: future attribution and predictive work.
S05	Assignment Lists & Cadences	Traci Giovinazzo; Colby Vere; Benjamin Szabo	Technolutions	Rules and Workflow Automation	3_35pm- Davidson AB Wednesday_Technoluti ons Training Assignment Lists_335.pdf	PDF page 15 defines durable list design; PDF pages 16 to 39 explain queries, portal layers, AI recommendations, permissions, and cadences; PDF pages 41 to 49 show the admissions build; PDF pages 50 to 54 show student success examples; PDF pages 55 to 70 show gift officer portfolio management; PDF page 71 states the cross lifecycle pattern.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S06	Assignment Lists Unleashed: Optimizing Alert Processing	Tiffany Hedrick; Ryan Maitland; Kathryn Lucas	Augusta University Undergraduate Admissions; Augusta University Undergraduate Admissions; SIG Strata Information Group	Rules and Workflow Automation	KarlDeanC _Thursday_Assignment ListsUnleashed_Optimiz ingAlertProcessing _1325_20260521.pdf	PDF pages 5 to 8: platform transition, process rebuild, and outcomes; PDF pages 9 to 14: discovery, data model, tool comparison, and target process; PDF pages 16 to 20: assignment list configuration, list, summary, and detail; PDF page 21: CRAFT framework; PDF pages 23 to 25: operational tips, direct links, and feature requests.
S07	Behind the Music: The Hidden Rules Powering Your Instance	Nina Lifshey; Darian Quinn; Drew Griffin	Carnegie; Rockhurst University	Rules and Workflow Automation	Room101_Friday_Behin d the Music The Hidden Rules Powering Your Instance_1005_622026. pdf	PDF pp. 4 to 9, rule impact and audit findings; pp. 10 to 16, foldering, exclusivity groups, evergreen criteria, mistakes, and cadence.
S08	Beyond Merge Fields: Building a Custom Financial Offer Workflow	Michelle Carman; TJ Backofen	Princeton University Graduate School; ReWorkflow	Financial Aid and Awards	104_Wednesday_Beyon d Merge Fields_440PM_0520202 6.pdf	PDF pages 1 to 56 show the offer workflow, logic, and output examples.
S09	Beyond Reader: Designing a Flexible, Multi-Scholarship Review Process	Margarita Clarke; Bianca Kunzinger	Solidan Inc.; Hutchinson Community College	Reader and Review	104_Thursday_BeyondR eader_10.05am_5.22.2 6.pdf	PDF pages 1 to 52 show the scholarship process, Reader configuration, and review examples.
S10	Breaking Down Barriers: Redesigning the Student Experience	Morgan Gossett	Western Kentucky University Undergraduate Admissions	Portals and User Experience	KarlDeanA2_Wednesda yJune24_Breaking Down Barriers- Redesigning the Student Experience_230pm_Ma y18.2026.pdf	PDF pages 2 to 9: fragmented experience, silos, and design principles; PDF pages 12 and 13: next steps checklist and technical requirements; PDF pages 14 and 15: housing integration architecture; PDF pages 16 to 20: exports, Liquid, and conditional logic; PDF pages 21 to 24: challenges, before and after model, and advice.
S11	Build Your Own Slate.org Portal	Elsa Evans	University of California, Berkeley Undergraduate Admissions	Portals and User Experience	Room104_06242026_B uildYourOwnSlateorgPo rtal_335pm_May18202 06.pdf	PDF pp. 2 to 6, Slate.org and session assumptions; pp. 10 to 17, institutional examples and resources; pp. 18 to 32, Organization Display build; pp. 37 to 48, Applicant Display build and activation checklist.
S12	Building an End-to-End Transfer Credit Evaluation Workflow	Melanie Egan; Peter Scorcia	Villanova University Undergraduate Admissions; Human Capital Education	Process Redesign and Operations	Room104_Thursday_Bu ilding an End-to-End Transfer Credit Evaluation Workflow_230_632026. pdf	PDF pp. 5 to 9, goals and requirements; pp. 11 to 34, dataset, workflows, relations, delivery, and component counts; pp. 37 to 66, portal and relation design; p. 67, cycle results.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S13	Building Evergreen Applications: A Database Stewardship Approach	Chenetta Mallette; Alana Allekotte; Nikita Milton	Winston-Salem State University; SIG Strata Information Group; Loyola University New Orleans Graduate Admissions	Applications and Forms	DavidsonC_Thursday_Building Evergreen Applications A Database Stewardship Approach_900_VIDEO_AUDIO.pdf	PDF pages 6 to 12 define problems and simplified periods and rounds; PDF pages 14 to 23 show redesigned fields, prompts, datasets, and entities; PDF pages 25 to 48 show evergreen forms, pages, communications, populations, exports, permissions, workflows, integrations, and reports; PDF pages 50 to 56 show internal communication and documentation; PDF page 58 states the reported results.
S14	But Why Subqueries	Jason Davitt	University of Scranton Graduate Admissions	Querying and Data Retrieval	101_Wednesday_ButWhySubqueries_335PM_May18_2026.pdf	PDF pages 8 to 17 establish bases and joins; pages 18 to 59 develop subquery patterns and examples.
S15	Complex Gift Management and Stewardship: Building Scalable Workflows	Amy Lampi; Chrystal Bate; Scott Larner	Bwf; Mercer University Advancement	Advancement Operations	2.KarlDeanA1_Friday_Complex Gift Management and Stewardship Building Scalable WorkflowsY_1005_682026.pdf	PDF pages 10 to 12 cover policy and 48 hour acknowledgment practice; pages 13 to 29 show gift configuration, dashboards, audit portals, and statements; page 30 lists roadblocks.
S16	Creative Portals with Purpose for Advancement	Natalie Mackey; Savannah Marshall; Scott Larner; Becky Kennedy; Amy Lampi	Duquesne University; BWF Zuri	Advancement Operations	5.Creative Portals.pdf	PDF pages 7 to 10 define customers, workflows, and technical decisions; PDF pages 11 to 15 show the data model, fields, and grant form; PDF pages 16 to 22 show task and gift officer portals; PDF pages 23 and 24 show grant reporting; PDF page 25 lists roadblocks to avoid.
S17	Departments and Dragons: Implementing Slate Across the Decentralized Realms	Heather Lefebvre; Ryan Walsh	Massachusetts Institute of Technology, Office of Graduate Education; Carnegie	Data Architecture and Governance	NEWKarlDeanC_Friday_Departments and Dragons Implementing Slate Across the Decentralized Realms_1005_632026.pdf	PDF pp. 4 to 11, context and team; pp. 15 to 26, discovery, permissions, datasets, and support; pp. 29 to 45, dataset planning and connection; pp. 48 to 57, operational controls, wins, and pitfalls.
S18	Designing a Scalable Internship Matching Ecosystem	Emily Milius; Kevin Salkas	Wallin Education Partners	Student Success and Retention	Room104_Thursday_Designing a Scalable Internship Matching Ecosystem_125_5212026.pdf	PDF pp. 3 to 10, context and roadmap; pp. 12 to 21, application, datasets, workflows, and entity; pp. 23 to 31, portal, tabs, and next steps.
S19	Don't Forget to Lock the Doors: Enhancing Security and Data Protection	Nathan Vick; Emma Ortiz; Amy Shaiman; Matthew Haugen	Asbury University; Asbury University; Miami University of Ohio Advancement; Baylor University Undergraduate Admissions	Security, Permissions, and Fraud	HallD_Wednesday_DontForgetToLockTheDoorsEnhancingSecurity_1535_may_19_2026.pdf	PDF page 7: SSO control; PDF page 8: MFA; PDF pages 9 to 14: onboarding, audits, expiration, roles, realms, and multi instance controls; PDF pages 16 to 19: field, tab, dataset, entity, and material permissions; PDF pages 21 to 31: form, GUID, portal API, import, and service account controls; PDF page 32: action checklist.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S20	Durable Change By Design: From Human Insight to Decision Infrastructure	Ben Parsons; Sarah Kotlinski	College of the Holy Cross; Gettysburg College	Training and Change Management	DavidsonC_Thursday_Durable Change By Design From Human Insight to Decision Infrastructure_125_632026.pdf	PDF pages 7 to 17 explain change and the three grief lenses; PDF pages 20 to 23 introduce the Three Gates and blueprint; PDF pages 25 to 33 show vendor, contract, materials, and analysis records; PDF pages 34 and 35 show the leadership dashboard, 90 day query, and annual review.
S21	Enhancing Collaboration without Compromising Structure using Translation Codes	Canaan Perry	Georgia State University Graduate Admissions	Data Architecture and Governance	DavidsonC_Friday_Enhancing Collaboration without Compromising Structure using Translation Codes_1110_5272026.pdf	PDF pages 5 and 6 define the decentralization problem and scale; PDF pages 8 to 10 explain the translation architecture and build process; PDF pages 11 to 17 show form and field configuration; PDF page 18 shows warning and enforcement logic; PDF page 19 extends the pattern to letters, SIS integration, and ratings.
S22	Enrollments in Slate: Organizing Student Experiences Across the Lifecycle	Ken Higgins; Steve Dailey	Technolutions	Student Success and Retention	4_40pm v2-Technolutions Training Enrollments - FINAL.pdf	PDF pages 2 to 5 define Enrollments and distinguish them from Person Records; PDF pages 7 to 10 show four use patterns; PDF pages 11 to 16 show record, dashboard, and checklist examples; PDF pages 17 to 22 give the planning test and structure; PDF pages 23 to 25 show course and section records; PDF page 26 states availability and pricing shown in the deck.
S23	Enti-Tea! How an Entity Transformed our Summer Institute	Isaac Duncan	Covenant College	Data Architecture and Governance	101_Thursday_Enti_tea_How_an_Entity_0900AM_05182026_video.pdf	PDF pages 4 to 15 explain entities and setup; pages 18 to 24 cover row creation and GUID updates; pages 25 to 41 show workflows and portals; page 42 gives planning guidance.
S24	Event Schedules II: Personalized Schedules Without Custom SQL	Nathan Vick	Asbury University	Events and Scheduling	KarlDeanA2_Thursday_EventSchedulesIIPersonalizedSchedules_1110_20260518.pdf	PDF pages 7 and 8: data model and architecture; PDF pages 15 to 21: magic link authentication; PDF pages 23 to 27: form based registration writes; PDF pages 29 to 32: API refresh and submission listener; PDF pages 34 to 36: filtering and accessibility; PDF pages 37 to 40: final product, future work, and suitcase.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S25	FanTABstic Portals: How to Build Them and Ways to Use Them	Sarah Bundschuh; Rachel Haywood	University of Delaware Undergraduate Admissions; University of Delaware Undergraduate Admissions	Portals and User Experience	HallD_Wednesday_FanTABstic_Portals_230_may192026.pdf	PDF pages 5 to 9: event portal problems, consolidation choices, and tab structure; PDF pages 17 and 18: results screens; PDF pages 20 to 24: user scale, inefficiencies, design process, and counselor portal structure; PDF pages 25 to 30: portal examples and element ideas; PDF page 31: consolidation tips.
S26	Fantastic Data & Where to Find It: Demystifying Tables, Joins, and Relationships	Kristie Rickerd; Claire Hirte	Linfield University; enrollmentFUEL	Querying and Data Retrieval	101_Thursday_FantasticData_125_052626.pdf	PDF pages 7 to 16 explain records, tables, bases, joins, and ranking; pages 17 to 21 give query efficiency practices; page 22 is a knowledge check.
S27	Flexing Your Configurable Join Muscles: Working Out CJs	Andrew LaVenia	Columbia University School of Professional Studies	Querying and Data Retrieval	last101_June25_Flexing Your Configurable Join Muscles_ Working Out CJs_02_30PM_051826.pdf	PDF pp. 3 to 25, learning goals, relational model, scope, joins, and outputs; pp. 27 to 39, tips, examples, filter types, and populations; pp. 44 to 45, future practice model.
S28	Fraud Uncovered, Confidence Kept: Operationalizing Applicant Fraud Prevention	Adam Warrington	Community College of Vermont	Security, Permissions, and Fraud	HallD_Thursday_Fraud Uncovered, Confidence Kept Operationalizing Applicant Fraud Prevention_900_632026.pdf	PDF pages 2 to 6 define context, fraud goals, caveats, and history; PDF pages 7 to 15 show tags, assignments, Ping, verification, time zone data, and SIS protocol; PDF pages 16 to 19 define the score and indicators; PDF pages 20 to 27 show indicator analysis, variance conversion, formula, and maintenance; PDF pages 29 and 30 provide reusable resources and overall metrics.
S29	From Chaos to Cadence: Designing Assignment Lists for Daily Use	Jon Rowand; Kaitlyn Campbell	ReWorkflow; Ouachita Baptist University	Rules and Workflow Automation	DavidsonC_Wednesday_FromChaostoCadence DesigningAssignmentListsforDailyUse_2.30pm_5.18.26_video.pdf	PDF pages 7 and 8 define the features and prerequisites; PDF pages 10 to 14 define the process and problem; PDF pages 16 to 25 show the four layer information hierarchy; PDF pages 26 to 46 show query, portal, form, and table configuration; PDF pages 47 to 52 explain cadences and query bases; PDF page 54 lists extensions across campus.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S30	From Fragmented to Fully Integrated: Reimagining New Student Orientation	Mark Ledoux; Corey Stamco; Dylan Schechtel	Kent State University; Kent State University; Carnegie	Orientation and Onboarding	Karl Dean A2_Friday_From Fragmented to Fully Integrated - Reimaging New Student Orientation_1005 AM_05.27.2026.pdf	PDF pages 6 and 7: fragmented systems and challenges; PDF pages 11 to 14: project management, data inventory, and event scope; PDF pages 16 to 27: dynamic forms, related events, and pre advising; PDF pages 30 to 41: payments, checklist, portal logic, and communications; PDF pages 42 to 47: partnership and internal and external portals; PDF page 49: results.
S31	From Gifts to Impact: Integrating Finance Data for Transparent Donor Reporting	Gina Mandros; Elizabeth Hilton	Human Capital Education; Saint Louis University	Advancement Operations	4.KarlDeanA1_FromGiftstoImpact_Thursday_125PM.pdf	PDF page 3 states the disconnected data problem; PDF pages 4 to 6 define the shared view and data boundary; PDF pages 7 to 11 show the reference dataset, daily feed, ledger entity, and source format; PDF page 12 explains reconciliation for split cost center rows; PDF pages 13 and 14 describe the reporting and automation roadmap.
S32	From Insight to Action: Using Behavioral Data to Power Targeted Campaigns	Aimee Celentano; Amanda Marsili; Megan Gabbard	Roger Williams University Undergraduate Admissions; Roger Williams University Undergraduate Admissions; Capture Higher Ed	Analytics and Reporting	KarlDeanA2_Wednesday_From Insight to Action Using Behavioral Data to Power Targeted Campaigns_125_612026.pdf	PDF pages 2 and 3: vendor research and platform claim; PDF page 6: RWU funnel; PDF pages 8 to 18: apply, yield, anti melt, and cross unit use cases; PDF pages 19 to 25: two way data exchange and mappings; PDF pages 26 and 27: record tab and queries; PDF page 28: lessons learned.
S33	From Rough Demo to Data Hit: Telling Your Origin Story	Russell Goff; Ashley Valladares; Kylie Hall	Sherman College of Chiropractic; enrollmentFUEL	Analytics and Reporting	Room 104_From Rough Demo to Data Hit_9AM_63_video.pdf	PDF pp. 7 to 14, problem and five step method; p. 20, audit query; pp. 21 to 32, mapping, source creation, and gap reports; pp. 34 to 39, lessons and recalculation; p. 41, final framework.
S34	From Scratch: Key Ingredients for Mixing Custom Datasets - Southern-Style	Brittany Richardson; Laura Sturgill; Domenick Rozzi	The University of Alabama; West Chester University; Huron Consulting Group	Data Architecture and Governance	101_Thursday_From Scratch_1005_05222026_video.pdf	PDF pages 4 to 20 define the model; pages 21 to 30 show forms and tabs; pages 31 to 33 cover imports and rules; pages 34 to 42 show dashboards, portals, and extensions.
S35	From Spreadsheet Hell to Workflow Heaven: Automating Complex Evaluations and Remediation Processes	Becca Lukowski Stone; Courtney Gradzki; Rob Monk	Hackensack Meridian School of Medicine; Hackensack Meridian School of Medicine; Post Captain Consulting	Rules and Workflow Automation	HallD_Wednesday_FromSpreadsheetHelltoWorkflowHeaven_125_05.16.26.pdf	PDF pages 6 to 17: original process, error risks, and transfer use cases; PDF pages 21 to 25: calculator, writeback, and failure dataset design; PDF pages 27 to 29: notification and user mapping pattern; PDF pages 31 to 40: remediation workflow and tracking; PDF pages 44 and 45: growth areas and summary.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S36	Ghostbusting: Finding Ghosts and Verifying Real Apps	Anthony Ranatza; Ryan Kavanaugh	Southeastern Louisiana University; Post Captain Consulting shown for Ryan Kavanaugh on PDF cover	Security, Permissions, and Fraud	Room104_Thursday_Ghostbusting_1110_June8.pdf	PDF pp. 5 to 9, presenter claims and patterns; pp. 11 to 21, verification, communications, watch flags, and workflow; pp. 24 to 38, queries, cases, and committee; pp. 39 to 41, action steps and resources.
S37	hELP Is on the Way: Streamlining the English Proficiency Exemption Process	Nina Takács; Jessie Runiewicz	Washington University in St. Louis Graduate Admissions	Process Redesign and Operations	101_Friday_hELPisontheWay_1215_05-18-2026_video.pdf	PDF pages 8 to 13 define the old process and design; pages 14 to 46 show workflow, tab, email, Liquid, and portal components; pages 47 to 49 cover time savings and suitcases.
S38	Hitting the Right Notes: Designing a Scalable User Training Program	Brady Alumbaugh	Purdue University Undergraduate Admissions	Training and Change Management	1-101_Wednesday_HittingTheRightNotes0125_20260518.pdf	PDF pages 1 to 32 are image based and require visual review; the agenda supplies the 600 plus user scale and certification framing.
S39	Home Sweet Homepage	Allegra Fass	Pitzer College	Portals and User Experience	Room104_Friday_Home Sweet Homepage_1110_5272026.pdf	PDF pp. 2 to 11, homepage and CSS patterns; pp. 12 to 29, query outputs and staff lists; pp. 30 to 43, homepage reports, permissions, examples, and tips.
S40	In Perfect Harmony: Centering Department Administrators in Decentralized Graduate Admissions	Emily Jiang	Stanford University Graduate Admissions	Multi Unit and Global Operations	In Perfect Harmony Decentralized Graduate Admissions.pdf	PDF pages 2 to 5: scale, user needs, audio mixer framework, and adoption phases; PDF pages 8 and 9: dataset and entity model; PDF pages 16 to 20: cycle prep portal; PDF pages 22 to 29: quick links dashboard; PDF pages 31 to 36: configurable review form; PDF pages 40 to 48: training, resources, consultations, assignments, and satisfaction; PDF page 50: takeaways.
S41	Increasing Yield with Real-Time Award Automation	Mark Belanger	Washington State University	Financial Aid and Awards	DavidsonC_Wednesday_Increasing Yield with Real-Time Award Automation_125_612026.pdf	PDF pages 4 to 9 define award scale, delay, task, and challenges; PDF pages 10 to 19 cover analysis and design; PDF pages 20 to 26 cover rules, web services, and decision review; PDF pages 27 to 45 show audit portals, forms, interactions, and SIS export; PDF pages 46 and 47 state results and planned automation.
S42	Inside Advancement AI: Real-World Use Cases & Insights	Bruno Dupeyron; Nicole Sibley	Northfield Mount Hermon School Advancement	AI and Intelligent Assistance	1.KarlDeanA_Thursday_InsideAdvancementAI_9am_05.13.2026.pdf	PDF pages 5 to 9 cover universal instructions and record summaries; pages 10 to 19 show assistant examples; pages 20 to 29 cover bots, assignments, and portals.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S43	Jazz Up Your Portfolio Process: Cutting Costs Without Cutting Functionality	Joshua Jaquins; Cheryl Tevlin	Drexel University	Applications and Forms	DavidsonC_Friday_JazzUpYourPortfolioProcessCuttingCostsWithoutCuttingFunctionality_1215_5.18_video.pdf	PDF pages 6 to 8 define the old process and transition requirements; PDF pages 11 and 12 inventory the Slate components; PDF pages 18 to 24 show Digital Portfolio constraints and HTML; PDF pages 25 to 32 show the automatic form and portal; PDF pages 33 and 34 state query and test environment cautions; PDF pages 38 to 45 cover outcomes, feedback, metrics, and next changes.
S44	Lessons Learned: Strategies for a Successful Advancement Implementation	Lisa North; Bob Woodside; Masa Yurasko; Natalie Mackey	Duquesne University - Advancement	Training and Change Management	2.KarlDeanA1_Wednesday_LessonsLearned_0230P_051826_audio.pdf	PDF pages 5 to 13 cover planning, architecture, teams, budget, and launch; pages 14 to 22 cover communications lessons and scope; pages 23 to 33 cover guide design, delivery, and takeaways.
S45	Level Up Your Enrollment Cycle: Gamification with Digital Badges	Morgan Meck; Noah Porter	Duquesne University	Enrollment Strategy and Yield	Room104_Wednesday_Level Up Your Enrollment Cycle Gamification with Digital Badges_230p_5-15.pdf	PDF p. 6, 54 badge concept; pp. 8 to 15, peak moments and entity decision; pp. 19 to 35, staff, communication, and portal builds; pp. 37 to 43, framework, outcomes, challenges, and next steps.
S46	Leveraging the Slate AI Assistant: Power, Pitfalls, and Potential	Chris Kizer	Duke University Graduate and Professional Programs	AI and Intelligent Assistance	DavidsonC_Wednesday_Leveraging the Slate AI Assistant Power, Pitfalls, and Potential_335_5192026.pdf	PDF pages 6 to 13 explain generative AI and the case structure; PDF pages 14 to 23 show the successful CSS case and first practice; PDF pages 24 to 34 show an invalid Slate solution; PDF pages 35 to 44 show a missed Configurable Joins solution; PDF pages 45 to 51 show the user prompt error; PDF pages 52 to 54 summarize best uses and weaknesses.
S47	Managing Greek Life at Scale: A New Model for Student Organizations	Betsey Weaver; David Mariott	Solidan Inc.; Oklahoma State University Undergraduate Admissions	Student Success and Retention	KarlDeanC_062526_GreekLifeAtScale_230_051826.pdf	PDF pages 5 to 10: scale, challenges, goals, and architecture; PDF pages 11 and 12: organization and administrator datasets; PDF pages 14 to 26: chapter portal, membership, leadership, FSA portal, and student record; PDF page 27: training model; PDF pages 29 to 44: operational forms, communications, compliance, and attendance; PDF page 47: next steps.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S48	Mastering Flexible Drip Campaigns for Email and Print	Mike Howie; Ross Struss	Hastings College; Hastings College	Communications and Personalization	KarlDeanA_June26_Mastering Flexible Drip Campaigns for Email and Print_440pm_May18.pdf	PDF pages 3 to 5: maturity from 2018 to current state; PDF pages 6 to 10: populations, rules, and campaign plan; PDF pages 12 to 16: timestamp scheduling and print; PDF page 17: template tool choice; PDF pages 18 to 21: one tap survey; PDF page 22: restricted AI chatbot.
S49	New Feature Spotlight: Slate AI	Shawn Kelly	Technolutions	AI and Intelligent Assistance	9am- Summit 2026 - New Feature Spotlight - AI.pdf	PDF page 3 inventories released and announced features; PDF pages 6 to 18 define the thesis and Foundation; PDF pages 19 to 27 cover Workspace; PDF pages 28 to 42 cover Intelligence; PDF pages 43 to 52 cover Operations; PDF pages 53 to 67 cover Engagement; PDF pages 68 to 77 cover Agency; PDF pages 80 to 85 explain the database difference and starting sequence.
S50	New Feature Spotlight: The Person Record, Reimagined	Nick Conte	Technolutions	Portals and User Experience	11_10am- Person Record Presentation - Nick Conte.pdf	PDF pages 1 to 56 present the redesigned person record and staff experience; exact configuration details require visual review.
S51	On the CASE! Creating a CASE Engagement Metrics Report with a Portal and Materialized Views	Rachelle Miclette	Swarthmore College Advancement	Analytics and Reporting	2.KarlDeanA1_June25_ On the CASE! Creating a CASE Engagement Metrics Report with a Portal and Materialized.pdf	PDF pages 4 to 16 define goals and measures; pages 17 to 19 show the performance failure and materialized view solution; pages 20 to 26 cover portal presentation and access; pages 27 to 28 give implementation notes and suitcases.
S52	One Feature, Many Uses: Customizing Assignments for Advancement	Trisha Ayers; Jennifer Pollin; Amy Shaiman; Brianne Berogan; Hanna Kroskie	Bates College Advancement; Miami University of Ohio - Advancement; Post Captain Consulting	Advancement Operations	3.KarlDeanA1_Thursday_OneFeatureManyUses_1110.pdf	PDF pages 8 to 23 show Bates assignment customization; pages 24 to 35 show Miami goals and interface; pages 36 to 47 explain the three portal build; pages 48 to 50 list lessons.
S53	One Slate to Rule Them All: Unifying Admissions and Student Success Across Campuses	David Mariott; Jake Murphy; Erin Toney	Oklahoma State University Undergraduate Admissions; Oklahoma State University Institute of Technology; Oklahoma State University Undergraduate Admissions	Multi Unit and Global Operations	KarlDeanC_Friday_One Instance to Unite Them All A Multi-Campus Consolidation Journey_900_5282026.pdf	PDF pages 2 to 9: ecosystem, silo problems, governance, and discovery; PDF page 11: recruitment standardization; PDF pages 22 to 28: application consolidation, migration, Reader, communications, and launch sequence; PDF pages 29 to 34: integrations and Student Success migration; PDF pages 35 and 36: shared direction, ADKAR, project management, and documentation.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S54	One State, Many Campuses: A Smarter Path from Admissions to Student Success Onboarding	Sony Rodriguez; Erica Machia	Ferrilli; Vermont State University	Orientation and Onboarding	KarlDeanC_Thursday_OneStateManyCampuses_9am_5.13.2026.pdf	PDF pages 4 to 8: institutional and instance scale, merger challenges, and transition; PDF pages 9 to 12: standardization, cycle transition, operational controls, and reactions; PDF pages 13 and 14: registrar and advising workflow evolution; PDF page 15: nine department checklist; PDF pages 16 to 18: current portal, lessons, and impacts.
S55	Oops!...They Did it Again: Improving the Review Process for Conduct Issues	Seth Filkins; Chengyong Jiao; Aaron Bemis	The University of Georgia Undergraduate Admissions	Reader and Review	DavidsonC_Wednesday_OopsTheyDidItAgainImprovingTheReviewProcessForConductIssues_440_05-18-2026.pdf	PDF pages 5 to 8 define reviewers, criteria, and intake; PDF pages 9 to 12 map the workflow; PDF pages 13 to 18 show Reader, Deliver, SMS, and Forms; PDF pages 19 to 23 show the committee portal and outcome letters; PDF pages 24 to 27 show the restricted tab, import, quality checks, and improvement cycle.
S56	Out of the Box and into Our Hearts: Making a Suitcased Portal Your Own	Dom Rozzi; Nicole Howell	Huron; Wellesley College	Portals and User Experience	101_Friday_Out_of_the_Box_and_Into_Our_Hearts_Making_a_Suitcased_Portal_Your_Own_1110_video.pdf	PDF pages 4 to 15 cover sources, styling, and organization; pages 16 to 35 show embeds, loops, tables, and reports; pages 36 to 43 show role specific views and design details.
S57	Portalandia: Turning Your Entire Campus into a Coordinated Recruitment Team	Thea Clarkberg	Earlham College	Portals and User Experience	HallD_June25_Portalandia_230PM_5.21.2026.pdf	PDF pages 7 to 18 show the athletics problem, custom dataset, portal, and AI table prompt; PDF pages 19 to 27 show alumni card workflows and hidden form prompt; PDF pages 28 to 36 show advising workflows and interface prompt; PDF pages 37 and 38 show the broader ecosystem and inventory portal; PDF page 39 states results.
S58	Reconstructing Financial Aid: A Master Builder's Adventure	Joshua Frankenfield	Shippensburg University of Pennsylvania	Financial Aid and Awards	HallD_Thursday_Reconstructing Financial Aid A Master Builder's Adventure_125_632026.pdf	PDF pages 4 to 11 define the goal, objects, requirements, and data model; PDF pages 15 to 17 show Banner input; PDF pages 18 to 27 show tall to wide transformation with Slate Loops, JSON, and source formats; PDF pages 29 to 39 show portal queries and Liquid; PDF pages 40 to 45 show notification and permissions; PDF page 47 lists defects, concerns, and future work.
S59	Reimagining Transcript Processing with Custom Portals	Patrick Sullivan; Morgan Donovan-Hall; Pedro Ondrush	University of Massachusetts Amherst; Solidan Inc.	Process Redesign and Operations	Room104_Friday_Reimagining Transcript Processing with Custom Portals_1215PM_20260518.pdf	PDF pp. 7 to 11, old and new process; pp. 13 to 27, portal, query, modal, and export design; p. 29, reported outcomes.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S60	Slate and the Registrar: A Powerful Partnership for Student Success	Emily Toops	Stevenson School	Student Success and Retention	KarlDeanC_Thursday_Slate and the Registrar A Powerful Partnership for Student Success_1005_5212026.pdf	PDF p. 12, migration goals; p. 16, phased timeline; p. 20, impact and effort matrix; pp. 21 to 28, interfaces and workflows; p. 29, data model; p. 30, module counts; p. 33, change model.
S61	Slate Knows What You Did Last Week	Alice Byrd; Katie Jordan	Brown University - Graduate School; The Parish Group	Analytics and Reporting	2-101_624_SlateKnowsWhatYouDidLastWeek_230_52126.pdf	PDF pages 1 to 61 explain the weekly activity review and examples.
S62	Slate Without Borders: Rethinking Admissions for a Global Context	Nidal Nassar; Mariam Lachin	Northwestern University in Qatar; Georgetown University in Qatar	Multi Unit and Global Operations	Davidson C_Friday_Slate without borders_1005AM_17MAY2026.pdf	PDF pages 6 to 11 identify four categories of United States assumptions; PDF pages 15 and 16 show the population mapping and tagging architecture; PDF pages 17 to 20 show holistic transcript review and the Schooling Guide; PDF pages 21 to 23 show global data validation; PDF pages 24 and 25 cover asynchronous work and implementation; PDF pages 27 and 28 summarize the redesign and stress test.
S63	Slate-Powered Giving Tuesday: Multi-Channel Personalization for Annual Giving	Danielle Hupp; Daniel Porter	Kent State University, Philanthropy and Alumni Engagement	Communications and Personalization	SlatePoweredGivingTuesday_v3.pdf	PDF p. 14, four step build; pp. 15 to 18, fund map and scoring; pp. 19 to 22, person results, email, portal, and caller view; p. 24, crowdfunding datasets; p. 25, campaign total.
S64	So You Want To Be A Rock & Roll Star?	Matthew Schieren	The University of Chicago	Communications and Personalization	DavidsonC_Thursday_So You Want To Be A Rock & Roll Star_1110_5222026.pdf	PDF page 8 defines five themes; PDF pages 11 to 22 cover source quality and data handling; PDF pages 24 to 29 cover campaigns and channel choice; PDF pages 31 to 37 give portal decision questions; PDF pages 40 to 47 explain Sources, Origin Sources, UTM, Referrer, and return analysis; PDF pages 50 and 51 emphasize patience and team learning.
S65	Solo Captain, Big Impact: Building Multi-Phase Campaigns	Joshua Frankenfield	Shippensburg University of Pennsylvania	Communications and Personalization	KarlDeanA2_Wednesday_SoloCaptainBigImpact_335PM.pdf	PDF pages 6 to 9: campaign stages, value, maturity, and start small advice; PDF pages 13 to 20: populations, rules, timestamp logic, and query templates; PDF pages 23 to 37: MJML, templates, Liquid, and query library; PDF pages 39 and 40: content and sample cadence; PDF pages 41 to 43: AI guidance and examples.
S66	Start with Strategy: Decisions That Make or Break Your Student Success Build	Audra Taylor; Allison Beebie; Rusty Martel; Carrie Stockton; Sam Klaskow; Hannah Tolliver; Jessica Bittner	Georgia Southern University Student Success; Carnegie; Mount Royal University; Kettering University Student Success	Student Success and Retention	Start with Strategy Make or Break Slate Student Success.pdf	PDF pp. 4 to 7, panelist and institution profiles; pp. 9 to 15, seven strategic questions.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S67	Stop Chasing External Documents: Creating Signed Gift Agreements Natively	Laura Hinkley; Hanna Kroskie	Earlham College Advancement; Post Captain Consulting	Advancement Operations	KarlDeanA1_Wednesday_Stop Chasing External Documents Creating Signed Gift Agreements Natively_440_6102026.pdf	PDF pages 6 to 10: previous process, requirements, and native feature set; PDF pages 12 to 22: fields, tab form, Liquid, signatures, and fund scoped form; PDF pages 23 to 26: PDF storage and standard process; PDF pages 27 to 30: complex agreement path; PDF pages 31 and 32: unresolved needs and tracking experiment.
S68	Student Signals, Stranger Things, and the Path to Personalized Outreach	Moni Nann; Ben Parsons; Courtney Buckner; Katy Remich	College of the Holy Cross; College of the Holy Cross; ZeeMee; ZeeMee	Communications and Personalization	KarlDeanA2_Thursday_Student Signals, Stranger Things, and the Path to Personalized Outreach_900_632026.pdf	PDF pages 6 to 13: personalization evolution, signal foundation, ZeeMee fields, and student expectations; PDF pages 16 to 20: three layer signal framework; PDF pages 22 and 23: define, structure, and activate process; PDF pages 24 to 28: Holy Cross portal, email, scoring, and notification examples; PDF pages 29 to 33: cross team use, outcomes, and implementation advice.
S69	Take Note: Making Flexible Event Templates Using Event Notes	Mara Marzocchi	Suffolk University Graduate Admissions	Events and Scheduling	KarlDeanA2_Friday_Take Note Making Flexible Event Templates Using Event Notes_1110_52820267.pdf	PDF pages 5 to 15: template problem, before and after counts, and benefits; PDF pages 17 to 26: note design, export keys, conditional logic, and joins; PDF pages 33 to 40: communication use case; PDF pages 43 to 46: limitations and QA query; PDF pages 47 and 48: suitcase and note naming pitfall.
S70	Technolutions Talks: Advancement Edition	Nora Kaszubowski; Traci Giovinazzo; Shawn Kelly; Keith McCants; Stephen Nickel	Technolutions	Data Architecture and Governance	3.Karl Dean A1_Friday_Technolutions Talks_1110AM.pdf	PDF pages 2 to 18 define data independence and pathway; pages 19 to 24 cover query libraries; pages 25 to 44 cover materialized views; pages 45 to 48 connect governed logic to AI.
S71	Technolutions Training Querying 101: Practical Tips for Embracing Configurable Joins	Leigh-Ann Crivella; Kate Guy	Technolutions	Querying and Data Retrieval	Technolutions Training Querying 101 Practical Tips for Embracing Configurable Joins.pdf	PDF pp. 2 to 23, query history and relational model; pp. 25 to 31, base join example; pp. 32 to 41, subquery filter example; pp. 42 to 54, subquery base join example; p. 55, resources.
S72	Technolutions Training Reader 201: Unlocking Advanced Reader Tools	Terran Williams; Amanda Holder	Technolutions	Reader and Review	12_15pm-DavidsonAB_Friday_Technolutions Training Reader 201 Unlocking Advanced Reader Tools__1215_6162026.pdf	PDF pages 1 to 61 cover advanced Reader tools and configuration examples.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S73	Technolutions Training: AI Chatbots	Joe Flynn	Technolutions	AI and Intelligent Assistance	2_30pm V2- Davidson AB_Wednesday_Technolutions Training AI Chatbots_230pm_June 24th V2.pdf	PDF pages 4 to 10 define the problem and bot types; pages 11 to 21 cover construction and channels; pages 22 to 32 cover sources, instructions, and testing; pages 33 to 38 give use cases and practices.
S74	Technolutions Training: Bridging the Gap - Web Services for Slate Integrations	Brandon El Haj; Johnny Grimmer; Karin Ente	Technolutions	Integrations and Web Services	2_30pm- Davidson AB_Thursday_Bridging the Gap - Web Services for Slate Integrations_230_6162026.pdf	PDF pages 3 to 9 define services, formats, methods, and authentication; pages 11 to 21 show POST; pages 22 to 27 show GET; page 28 shows Integration Center.
S75	Technolutions Training: Building a Keystone Event	Robin Lancaster; Ben Willner	Technolutions	Events and Scheduling	10_05am- Davidson AB_Friday_Technolutions Training - Building a Keystone Event_1005_6162026.pdf	PDF pages 1 to 54 cover the event build and configuration sequence.
S76	Technolutions Training: Query Grab Bag - An Assortment of Next-Level Querying Techniques	Louise Karnéus; Max Zeryck	Technolutions	Querying and Data Retrieval	Query Grab Bag - An Assortment of Next-Level Querying Techniques.pdf	PDF pp. 5 to 25, independent subqueries; pp. 27 to 40, dictionaries and XML; pp. 42 to 48, reporting with queries; pp. 50 to 64, parameters and reusable query examples.
S77	Technolutions Training: The Hitchhiker's Guide to Content Blocks & Liquid Markup	Christopher Kwan; Karin Ente	Technolutions	Communications and Personalization	Technolutions Training The Hitchhiker's Guide to Content Blocks & Liquid Markup.pdf	PDF pp. 3 to 16, Content Block types and examples; pp. 17 to 45, Liquid objects, tags, filters, and loops; pp. 46 to 59, lifecycle, multi interest example, skills, debugging, and practices.
S78	The Captain and the Sidekick: Using Slate AI Without Losing Your Superpowers	Tommy Kroll	Columbia College Chicago	AI and Intelligent Assistance	101_Wednesday_TheCaptainandTheSidekick_440_05182026.pdf	PDF pages 1 to 26 develop the captain and sidekick model and practical examples.
S79	The Friendly Front Porch: Creating a Seamless Student Support Experience	Julian Capel; Nick Cheng	Ed Advancement	Portals and User Experience	KarlDeanC_Thursday_The Friendly Front Porch Creating a Seamless Student Support Experience_1110_6152026.pdf	PDF p. 13, page anatomy; pp. 17 to 20, partnership, design principles, architecture, and implementation; p. 22, outcomes; p. 25, recap.
S80	The Great Falcon Migration: Scaling a Global Applicant Experience	Sager Al Mannai; Ian Crovisier	NYU Abu Dhabi; NYU New York University Undergraduate Admissions	Events and Scheduling	KarlDeanA2_Thursday_2.30_2026-05-22.pdf	PDF pages 5 to 9: funnel, event design, global needs, and stakeholders; PDF pages 11 to 16: candidate portal, checklist, events, Deliver, and deadlines; PDF pages 18 to 23: evaluator scale, dataset access, forms, and timer; PDF pages 25 to 31: Reader, reporting, project tools, and limits of Slate; PDF pages 33 to 38: virtual and emergency adaptations; PDF pages 41 and 42: final principles.
S81	The Moonshot: An Academic Advising and Enrollment Management System That Drives Retention and Serves Everyone	Laura MacBride; Dan Hamrin; Nicolle Skoien	Marquette University	Student Success and Retention	The Moonshot That Drives Retention and Serves Everyone.pdf	PDF pp. 4 to 12, goals, problem, governance, requirements, and temporality; pp. 13 to 31, prep form, advising, and enrollment management; p. 35, lessons and next steps.

ID	Session title	Presenters	Organizations	Topic	Filename	Page references
S82	This Is Not a Side Quest: Gamifying Training Using Interactive Forms	Katie Jordan; Tommy Kennedy	The Parish Group; Villanova University Graduate Admissions	Training and Change Management	Room101_Friday_This Is Not a Side Quest Gamifying Training Using Interactive Forms_900_.pdf	PDF pp. 11 to 29, three quiz builds and calculations; pp. 31 to 38, levels, missions, milestones, and points; pp. 40 to 49, user dataset, portal, and resources.
S83	To Infinity and Abroad: Beyond Admissions to a Global Operations Engine	Brook Blahnik; Meredith Hansen; Chris Reeder	University of Minnesota, Education Abroad Centers; New York University, Office of Global Programs; University of California, Davis Global Learning Hub	Multi Unit and Global Operations	KarlDeanC_Wednesday_ToInfinityandAbroadBeyondAdmissionstoaGlobalOperationsEngine_440_05152026.pdf	PDF pp. 5 to 14, Minnesota instance and portal examples; pp. 16 to 22, NYU scale and datasets; pp. 29 to 39, Davis emergency portal, traveler details, and architecture.
S84	Unicorns Do Exist: Our Ongoing Quest for the Perfect Non-Credit Registration System	Tara Gallo; Sharon Roth-DeFulvio; Todd McClincey	Villanova University	Process Redesign and Operations	DavidsonC_Thurs_UnicornsDoExist_230_05182026.pdf	PDF pages 3 to 7 define the target, pillars, constraints, and eight week build; PDF pages 8 to 15 show the portal and dataset architecture; PDF pages 16 to 24 identify five operational trials and the integration workflow; PDF pages 25 to 31 show benefits, discounts, checkout, dashboards, and scholarships; PDF pages 33 to 35 state results, next tools, and scaling cautions.
S85	Uplifting Students: Direct Aid Made Easy and Trackable	Vanessa Ayala; Amy Severns; Mlou del Rosario; Brian Regan	Coast Community College District; Coast Community College District; Coast Community College District; SIG+RHB	Student Success and Retention	KarlDeanC_Friday_Uplifting Students Direct Aid Made Easy and trackable!_1215_.pdf	PDF pages 8 to 16: district data model and Vision Aligned Reporting; PDF pages 19 to 22: DAP purpose, evolution, application, and portal requirements; PDF pages 23 to 30: portal, communications, and extension to other programs; PDF pages 31 and 32: benefits and remaining issues; PDF pages 34 to 40: pantry check in, eligibility, history, portal, and ID lookup.
S86	Vibing with Slate AI: From Prompts to Production-Ready Portals	Michael Anzalone	Brown University Graduate School	AI and Intelligent Assistance	Room104_Wednesday_Vibing with Slate AI From Prompts to Production-Ready Portals_125_06152026.pdf	PDF pp. 2 to 11, context and prompt workflows; pp. 12 to 17, simple navigation build; pp. 19 to 34, three loop dropdown and results build; pp. 35 to 37, recap and extensions.
S87	We Walk the Line: Cutting Costs and Complexity in Event Management	Taylor Frechette; Michael Doran; Kelly Coffman	The University of Georgia Undergraduate Admissions; The University of Georgia Undergraduate Admissions; The University of Georgia Undergraduate Admissions	Events and Scheduling	KarlDeanA2_Thursday_We Walk the Line Cutting Costs and Complexity in Event Management_125_may212026.pdf	PDF pages 5 to 12: event volume, operating process, and QA checks; PDF pages 13 to 16: incorrect folder alert and translation map; PDF pages 17 to 26: digital agenda architecture; PDF pages 27 to 34: agenda communication, QR, and excuse letter; PDF pages 35 to 38: materials workflow and savings.

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S88	What a View! Querybase Views for Quick Wins	Mara Marzocchi	Suffolk University Graduate Admissions	Querying and Data Retrieval	DavidsonC_Friday_What a View! Querybase Views for Quick Wins_900_632026.pdf	PDF pages 5 to 15 explain creation, exports, filters, translations, privacy, and filter limits; PDF pages 17 to 28 show the funnel improvement; PDF pages 29 to 32 show population guardrails; PDF pages 33 to 41 show Ping and Voyager reporting; PDF pages 43 to 51 show field value and original table patterns; PDF page 53 gives architecture decision criteria.
S89	Where's My Camper: A Real-Time Attendance Tracking Solution	Caleb Whitman; Ryan Herman	Southern Adventist University Undergraduate Admissions; Southern Adventist University Graduate Admissions	Events and Scheduling	KarlDeanA2_Friday_Where's My Camper A Real-Time Attendance Tracking Solution_900_6102026.pdf	PDF pages 3 to 7: scale, original problems, requirements, and redesigned solution; PDF pages 8 to 10: entity fields, data population, and portal structure; PDF pages 12 to 24: check in, transit, checkout, QR, and roll call; PDF pages 25 to 31: lookup, schedule, outcomes, changes, and takeaways.
S90	Workflows: From Legacy to Universal	Ken Higgins	Technolutions	Rules and Workflow Automation	9am V2- Workflows Training - FINAL.pdf	PDF pages 2 to 8 explain the reason for unification and the new interface; PDF pages 9 to 15 define migration and compatibility; PDF pages 16 to 24 show the universal object model and form response workflows; PDF page 25 points to showcase examples; PDF page 26 summarizes the migration pattern.
S91	Written in Slate (Not Stone): Excavating Legacy Decisions and Building for Scale	Raissa Diamante; Erin Gore	Harvey Mudd College; Huron	Data Architecture and Governance	101_Thursday_Written in Slate Not Stone_1110AM_05182026.pdf	PDF pages 9 to 18 frame scaling challenges and assessment; pages 19 to 22 show monitoring and roadmap tools; pages 23 to 28 cover AI and governance; page 29 summarizes the operating model.
S92	"Yes, You Need to Know Configurable Joins": A Beginner's Guide to Configurable Joins	Danielle Buczek; Laura Sturgill; Paula Schaefer-Riley	Post Captain Consulting; West Chester University Graduate Admissions; Post Captain Consulting	Querying and Data Retrieval	HallD_Wednesday_"Yes, You Need to Know Configurable Joins" A Beginners Guide to Configurable Joins__6152026.pdf	PDF pages 5 to 17: terminology, relational model, query interface, and join types; PDF pages 21 to 27: one to one and rank examples; PDF pages 30 to 37: main level versus subquery joins and all address examples; PDF pages 38 and 39: configurable joins across Slate; PDF page 40: companion portal.
S93	Creating Accessible Application Dashboards	Jon Thorton	Oregon State University	Portals and User Experience	4.KarlDeanA1_June26th_Creating_Accessible_Application_Dashboards_1215pm_05272026.pdf	PDF pages 2-3 define dashboards and audience/task needs; pages 4-13 cover emotional, interaction, and cognitive friction plus original dashboard challenges; pages 14-18 show tools in play, laptop scrolling, consistent layout, and whitespace

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						reduction; pages 19-24 show reworked defaults, status history, Preview Actions modal, identifiers, and Banner links; pages 25-29 show supporting user portal, AJAX calls, dashboard HTML, Preview Rules, and status-history modal; pages 31-33 cover theme/CSS handling, buttons, badges, headers, and cards; page 34 gives start-small implementation guidance; page 35 provides suitcase/Get Inspired reference.