



ANNUAL REPORT

THE HIGHER EDUCATION USER GROUP

CONTACT INFO

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2020



WELCOME TO THE HEUG

The Higher Education User Group is the leading global user community in higher education, collaborating to realize the maximum value from investment in people, business processes and technologies.

<https://www.heug.org/>

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HELLO!



“

2020 ALSO BROUGHT TO THE HEUG BOARD A DIFFICULT DECISION ABOUT THE OVERALL FUTURE OF THE ORGANIZATION.

Originally focused on one vendor and one product, the HEUG has heard repeatedly that our member organizations are living in a heterogeneous technology landscape. Gone are the days of an organization relying solely on a “center of the universe” ERP system. Rather we now find ourselves trying to implement and maintain a variety of “best of breed” systems for business specific tasks.

JASON WENRICK

HEUG President

California State University
Chancellor's Office

LETTER FROM THE PRESIDENT

UNPRECEDENTED is probably the most appropriate word I can think of to describe 2020, not only for the HEUG, but also for the institutions of higher education across the planet. It is now, as we cautiously emerge out of the most difficult times, that I would like to present the Higher Education User Group Annual Report for 2020.

Another critical word representing 2020 is **CHANGE**, and the HEUG was as susceptible to that reality as was every other organization in the world. The year saw us shift from our annual in-person Alliance conference, ready to kick off in beautiful Philadelphia, Pennsylvania, to a virtual conference held just a few months after the original Alliance date. A virtual conference was something never before attempted by the HEUG and certainly not expected to occur within such a short timeframe.

The year saw us cancel all of our global regional conferences and realign our online platforms to help our members maintain connections and collaborate on urgent COVID-19 related business process changes. The year also marked our first-ever International Virtual Week, a free-to-member conference that was hosted in all time zones across the world to connect not only regional members, but also the entire global community - all at no fee for our paid members.

2020 also brought to the HEUG Board a difficult decision about the overall future of the organization. Originally focused on one vendor and one product, the HEUG has heard repeatedly that our member organizations are living in a heterogeneous technology landscape. Gone are the days of an organization relying solely on a "center of the universe" ERP system. Rather we now find ourselves trying to implement and maintain a variety of "best of breed" systems for business specific tasks.

Our membership asked questions like: how should we coordinate implementations and integrations with a myriad of disparate systems, how can we coordinate standardized data elements across the systems and ensure organization integrity, how do we collaborate with other institutions of higher education to learn the workarounds and pitfalls they have managed to develop and avoid, how can we aid each other in addressing campus priorities with reduced resources and increased responsibilities?

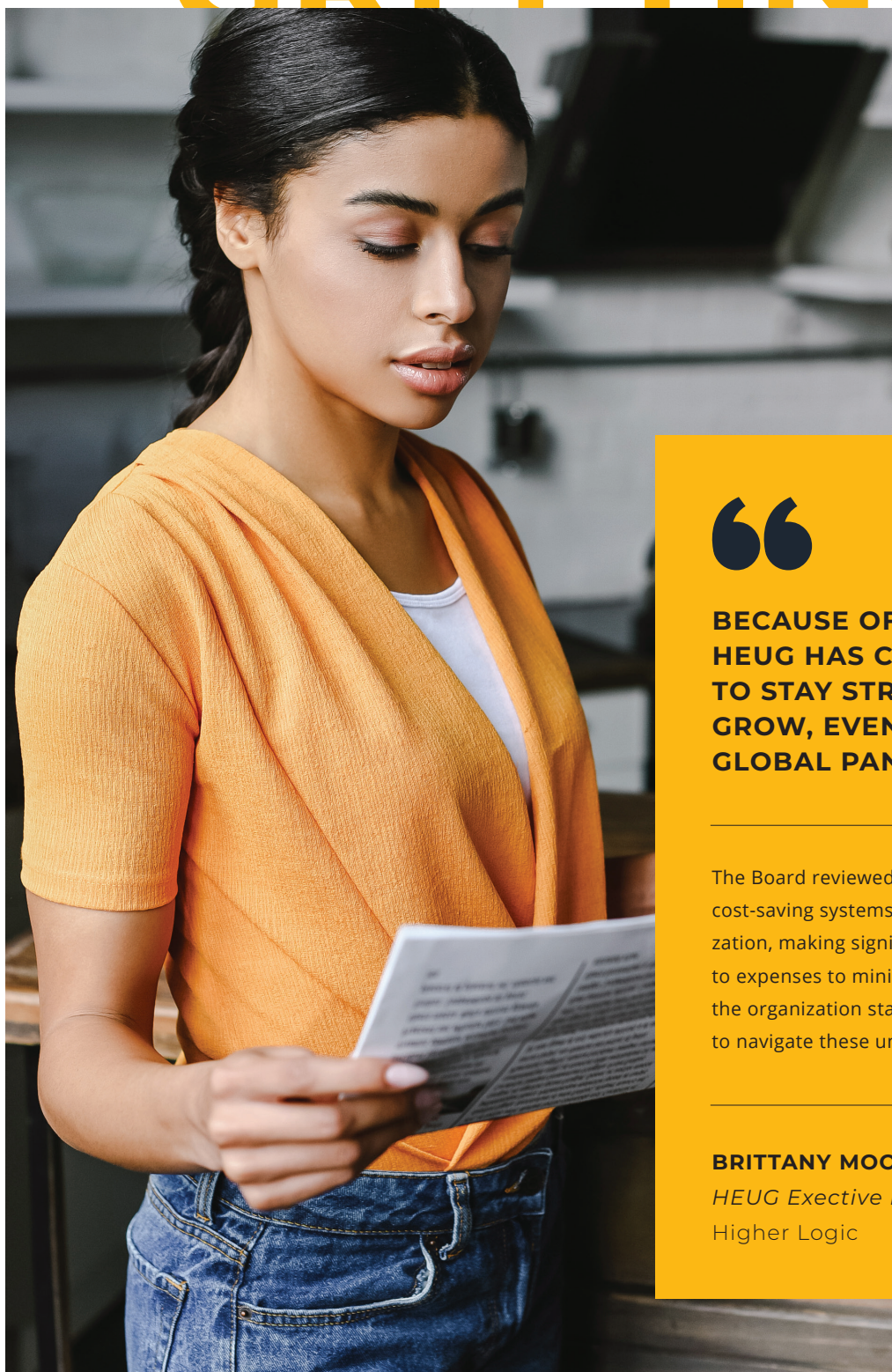
After much discussion and consultation, the HEUG Board decided to open up our vendor engagement to additional technology vendors beyond Oracle. With this change we will continue to reinforce our strong relationship and engagement with Oracle while adding new partners to help our members understand, collaborate and advocate in support of their day-to-day jobs.

Looking forward, 2021 will be a year of growth and change, but first I want to acknowledge the amazing staff and volunteers that have helped shepherd the HEUG organization forward through 2020, and to our entire membership who has helped guide us through these turbulent times to what I hope will be calmer waters and a brighter future ahead.

Thank you for the opportunity to serve and support you over the last two years. I look forward to working with you all in whatever the future may have in store for us.

JASON WENRICK

GREETINGS!



“

**BECAUSE OF YOU, THE
HEUG HAS CONTINUED
TO STAY STRONG AND
GROW, EVEN AMID A
GLOBAL PANDEMIC.**

The Board reviewed and implemented cost-saving systems across the organization, making significant reductions to expenses to minimize loss and keep the organization stable as we continue to navigate these uncertain times.

BRITTANY MOON

HEUG Exective Director
Higher Logic

LETTER FROM THE EXECUTIVE DIRECTOR

GREETINGS, HEUG COMMUNITY!

As we prepare to say goodbye to another year, we would like to take a moment to celebrate the dedicated community that lifted us up through 2020. The HEUG is a community that inspires, encourages and supports each other, and during this challenging year I have been inspired watching the community do just that. Because of you, the HEUG has continued to stay strong and grow, even amid a global pandemic.

Despite 2020 being a most challenging year we were still able to accomplish much. Below are just some of the highlights made possible by our committed HEUG Board, HEUG Team, Advisory Groups, Alliance and Regional Conference Planning Committees and all of our Volunteers:



ALLIANCE

With an in-person Alliance Conference being impossible to host the team moved into action, quickly shifting our largest in-person global event into the first ever Alliance Virtual Conference. The more than 1,500 attendees enjoyed access to 250+ sessions, community discussion topics about challenges they were facing with COVID-19, and new virtual networking opportunities.



REGIONAL EVENTS

Having to cancel all our 2020 regional events, we again took advantage of the remote options and found ourselves rolling out our first ever US Regional Networking Day and our inaugural International Virtual Week. The two events were free to our paid membership and provided opportunities to connect and collaborate even while apart. The US Regional Networking day had 244 attendees across 37 states representing 125 institutions. International Virtual Week saw 1,221 attendees across 19 countries, with 184 institutions represented.



MEMBERSHIP

We continued to streamline membership benefits and renewals. Maintaining a 99 percent retention rate during this unprecedented time speaks volumes to the value our members receive.

LETTER FROM THE EXECUTIVE DIRECTOR



SOFTWARE

In July 2020 the HEUG Team started the difficult transformation of moving the HEUG community to a new platform, bringing our members new features and benefits they had been requesting, while making it easier for them to connect and share with colleagues from around the world. One part of this transformation brought a redesign to the website at the beginning of 2021.

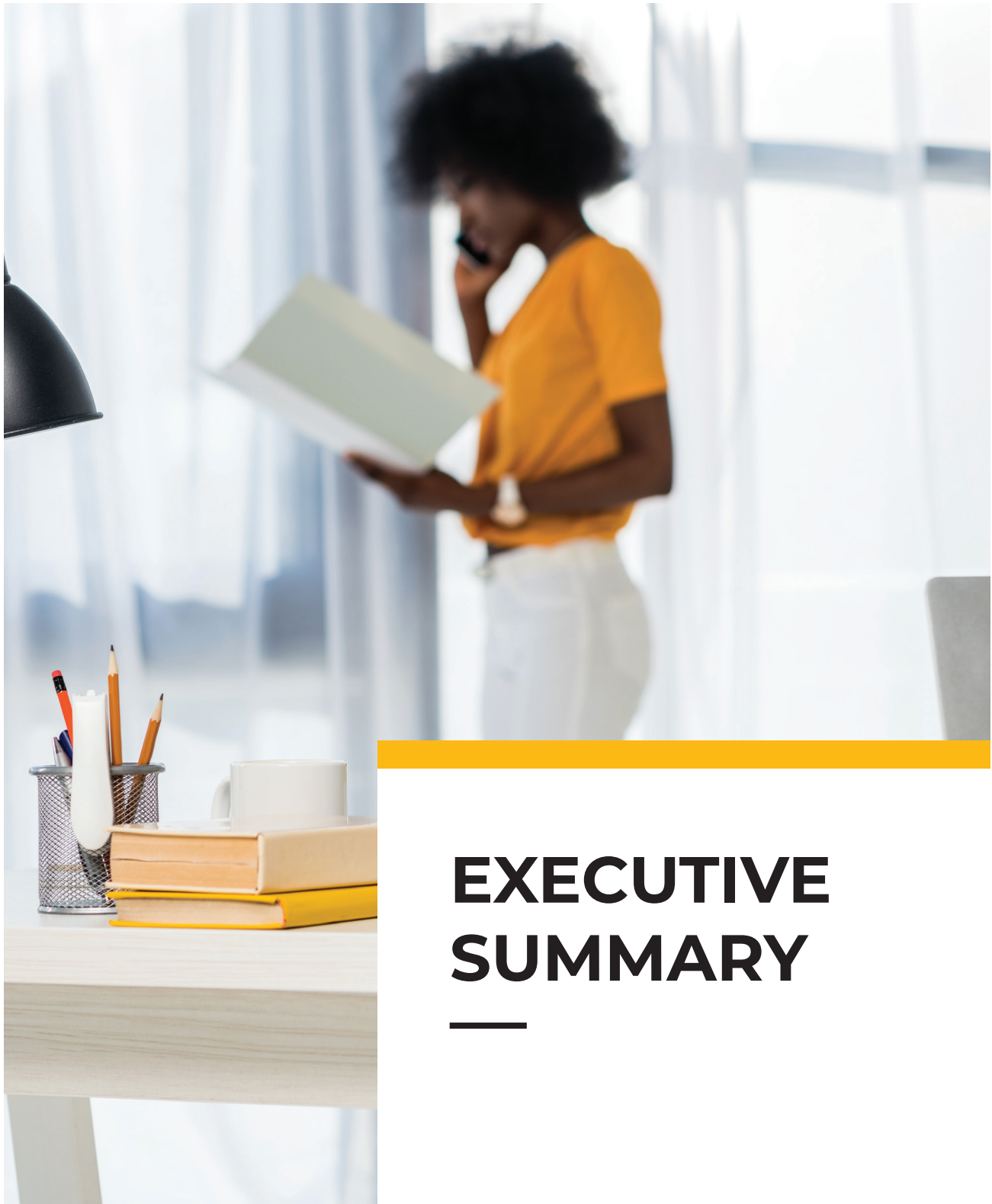


EXPENSES

Lastly, the Board reviewed and implemented cost-saving systems across the organization, making significant reductions to expenses to minimize loss and keep the organization stable as we continue to navigate these uncertain times.

We know that 2021 will also provide us challenges with hurdles to overcome. As I write this, COVID-19 cases continue to rise, and we are preparing another year of virtual events for our members. I know that we will persevere just as we did in 2020, due to the dedication of our great volunteers and members that make the HEUG organization strong. We have missed you this year and will be so glad to see all your smiling faces again! We look forward to the day when we can safely host in-person events and bring this amazing community back together again, face-to-face.

BRITTANY MOON



EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

2020 brought the Higher Education User Group a number of challenges. By meeting each one, we recognized the need for change and were able to quickly pivot in order to serve our membership.



2020 OVERVIEW

While COVID-19 created several obstacles for the organization, we were able to quickly adapt and provide our members very successful virtual options. We were also able to assist our community in collaborating and working together on the changing business processes within their institutions that were brought on by the virus.

In addition, the HEUG Board prioritized the vision of the HEUG as we move into the future. Listening to member feedback and understanding the changing ecosystems our institutions are facing, the HEUG set forth to make our organization truly vendor inclusive. This allows us to support our members, no matter what system or technology they are using. The move also makes the HEUG and our conferences the premier, one-stop shop for all the information, education and networking opportunities our members could need.

MOVING FORWARD

In determining the vision for the HEUG as we move into the future, the board set the following priorities:



STREAMLINE

Reorganize the Advisory Groups for better collaboration and information sharing



NETWORKING

Increase global engagement to support the unique needs and systems of all members



TRAINING

Create an Education and Training task force to make sure we are adapting our educational offerings to best meet member needs



EVENTS

Create more virtual and hybrid events just as the circumstances of 2020 pushed us hard to move in this direction



TECHNOLOGY

Launch a new and intuitive community platform to ensure our members can easily access the information they need

The HEUG will continue to grow as the number-one knowledge sharing source and remain dedicated to bringing its members together while forging strong partnerships to empower this great organization. We continue to focus on approaching change to help our members implement the numerous drivers, barriers, and best practices in sustainability in our ever-changing world.

GOVERNING UPDATE

The Higher Education User Group is governed by a Board of Directors elected by the HEUG membership to assure the viability and integrity of the organization and provide leadership that inspires.

After two terms as President, Jason Wenrick will transition to his new role as Past President and Michael Russell will take over to serve the next two years as the President of the HEUG. Mr. Russell is currently the Chief Information Officer at the Virginia Community College System.

The HEUG Board understands the monumental shift that is happening in our industry and continues to adapt and try to find new ways to deliver value and meet the needs of our member institutions. The President of the HEUG is elected by the Board of Directors for a two-year term and may serve one term as President. The remaining Officers of the Board are nominated by the President and approved by the Board.



MICHEAL RUSSEL

HEUG President

Virginia Community College System



JASON WENRICK

HEUG Past President

California State University Chancellor's Office



GLOBAL COUNCIL UPDATE

The Global Council was formed in 2019 to assist its member institutions around the world through education and advocacy.



In a phrase we hear almost everywhere are the words ‘global’ and ‘engagement.’ The Global Council continues efforts to make our international connections a priority. We provide a platform for HEUG members to share perspectives, ideas, regional opportunities, issues, and concerns, as we value global knowledge, understanding, and engagement. 2020 brought us many challenges around COVID-19 and the fact that we had to cancel all of our in-person international events. Through these challenges the Global Council brought our members the inaugural International Virtual Week (IVW).

This first-ever virtual global event hosted October 19-22 was an enormous success. IVW was a free event to our paid members, drawing in over 1200 attendees, offering them access to 172 sessions in their local time zone, across five international regions (Africa, Asia, Australia & New Zealand, Canada, Europe, Latin America and Middle East). Thank you to the International Executive Committees, Regional Planning Committees, and HEUG Team for making this successful event possible. In the coming year, the Global Council will continue to foster meaningful interaction, diversity, and inclusivity as we expand our education offerings, advocacy and strive to better serve our global regions.



ADVISORY GROUP UPDATE

Reorganization Phase Two - Student Information System Consolidation



ADVISORY GROUPS ARE A FUNDAMENTAL ELEMENT OF THE HEUG ORGANIZATION

They are critical for informing the Board about the needs of the HEUG community, both in terms of their business challenges and their future direction in the use of enterprise information systems solutions to support their activities.

In 2016 the Board signaled the need to rethink our existing advocacy structures to better position the organization. A resizing of the existing advisory groups was adopted during the 2016 Advisory Group Summit as a precursor for potentially recasting the advisory group structure. Later that year, the HEUG Board assembled the Advisory Group Reorganization Work Group to review the advisory group structure.

The HEUG Board reviewed the work group's recommendations during the July 2017 board meeting and approved changes to the advisory group framework. The new framework continues to serve the needs of the HEUG community and meet its core objectives of advocacy and education across a broad range of technology and business areas. The framework is designed to balance our commitment for continued representation across existing product solutions used by HEUG members, while preparing the organization to be able to engage on future challenges and solutions.

ADVISORY GROUP UPDATE

Reorganization Phase Two - Key Drivers for Reorganization



01. NEW PRODUCTS

There is a critical need to transition the HEUG's advocacy structures and build organizational capacity to allow the HEUG to engage with Oracle on new product solutions. During Alliance 2017, Oracle stated an acceleration in its cloud strategy to be delivered in 2018. This announcement demanded greater urgency from the HEUG to determine its future direction and advisory group structure.



02. ARCHITECTURE

The current advisory group architecture, which has served the HEUG well in the past, has a diverse range of compositions and focus. Groups are assembled around a very specific modular functionality within Campus Solutions and Finance, or entire product suites such as E-Business and Constituent Experience & Outreach. This design leads to inconsistent levels of engagement with Oracle. Changes in the architecture will help to ensure a more focused engagement with Oracle at a strategic level.



03. ENHANCEMENTS

Some Oracle applications are very mature and stable, leading to a plateau in Oracle enhancements for member institutions. This change causes difficulty in filling roles and identifying priorities for many of the advisory groups.



04. PROCESSES

There is a growing need, and expectation from, our institutions to focus on business processes and end-to-end solutions for challenges that often require solutions crossing over functional modules. New structure of the groups will facilitate the needs and expectations of our members.

ADVISORY GROUP UPDATE

Reorganization Phase Two - Revising the Framework

ADVISORY GROUPS ARE A FUNDAMENTAL ELEMENT OF THE HEUG ORGANIZATION

A revised advisory group framework continues our design to balance the commitment for sustained representation across existing product solutions used by HEUG members through 2020, while preparing the organization to engage on future challenges and solutions. It also provides an opportunity for the HEUG to open a new avenue of community engagement by allowing members to define and drive what is important to them while HEUG support is calibrated according to community interests and needs.

As part of this new framework, the HEUG Board approved the reorganization of our advisory groups to consolidate the Campus Solutions advisory groups from the current six individual teams into two teams. Admissions, Academic Advising, Campus Community and Student Records Advisory Groups will consolidate into one team of 20 members, and Financial Aid and Student Financials advisory groups will move to one team consisting of 12 members.



Campus Academic & Records Support

Admissions, Academic Advising, Campus Community and Student Records Advisory Groups will consolidate into one team of 20 members.



Campus Student Financial Support

Financial Aid and Student Financials advisory groups will move to one team consisting of 12 members.

The new advisory group names will be Campus Academic & Records Support, and Campus Student Financial Support. Consolidation of the groups will begin in April 2021 at which time the HEUG will create a new listserv for each group and add the current teams. In order to maintain continuity for our members, we will maintain all current member listservs.

A revised election process for the new advisory group members requires a balance of individuals for each detailed module within Campus Solutions. Each group will be required to identify the skillsets of members rolling off the team, allowing a detailed set of requirements to be advertised each election cycle.

EDUCATION TASK FORCE UPDATE

The Education Task Force was formed in 2020 to evaluate the structure of the HEUG Academy training and education offerings

The group was tasked with developing a strategic plan on how to better meet member expectations and grow our offerings to provide education requested by our membership. Based on member feedback, the group determined the need for several focus areas including:



101 SERIES

Provide steppingstones for members, new to the industry or to their department, so they can easily adapt and grow.



CLOUD

Provide members with training needed for a successful transition to Cloud.



CPE'S

Provide a year-round opportunity for the granting of Continuing Professional Education Credits (CPEs) credits so members no longer have to wait for the Alliance Conference to receive CPEs.



PROFESSIONAL DEVELOPMENT

HEUG members at all career levels have shown a great deal of interest in a variety of growth opportunities, from soft skills to leadership.



NON-USA SOLUTIONS

International institutions are unique and need customized support outside of the basic US training options.



OUR SOLUTION

In addition to the focus areas, 2021 will bring an expansion of the popular E-Academy program with some great presentations from our members, strategic partners, EDUCAUSE, Tambellini and Beyond Academics.

The Education Task Force encourages member feedback on the educational offerings they are seeking. The HEUG's focus is to keep our members engaged, and increase knowledge sharing and innovation. Our focus is to continue building on the HEUG education program and making it better with each year.

VENDOR INCLUSION

The Higher Education User Group (HEUG), the largest international user group of its kind, announced a business model shift designed to increase and improve the services and information provided to its members while continuing to focus on education and advocacy.



Based on the feedback from its higher education and public sector members, the HEUG will now expand its portfolio of vendor partners, creating additional access to current information on technologies, services, and strategies that better align with what is happening at

their institutions. This new approach will allow members to participate in a unified conference and organization, where business owners and users can meet and collaborate with technology and solutions partners across platforms, merging strategy with innovation and maintenance.

VENDOR INCLUSION

This decision now allows HEUG to expand its education and advocacy services to cover multiple vendors. HEUG Vice President of Technology, Terence Houser (University of Virginia) said, "Leaders need the perspective of multiple solutions, strategies, and lessons learned as they seek to solve issues in support of their mission."

Michael Busges, Sr. Director, Enterprise Projects at Pennsylvania State University agrees, "Because Penn State is a university that utilizes products from multiple vendors, we are very pleased with this new HEUG model! Being able to have one organization that we can align with regardless of the product will be much more efficient."

The annual Alliance conference will now include additional sessions from a wider vendor base in addition to augmenting more member sessions on topics such as cross-application support and integrations. Jason Koziara, Vice President of Alliance (DePaul University) stated, "Vendor inclusivity positions the Alliance conference as the premier global event where higher education and public sector professionals can network, share practical knowledge and get the crucial full breadth of multi-vendor information that they will need to navigate the challenging road ahead."

Matthew Sherman, General Manager – Workday Student added, "Workday is thrilled to support and partner with the HEUG community. The Workday Student team is excited to add yet another opportunity to hear from our customers, educate subject matter experts on the value the Workday platform delivers to campuses, and connect with the greater higher education community."

Vicki Tambellini, President, and CEO of a leading independent industry analyst firm, also noted, "The HEUG's response to their members' changing needs allows them to remain relevant to constituents as they evaluate and expand technology portfolios. Tambellini's research confirms that institutions seek to maximize investments in existing solutions while improving student outcomes and access to reliable information for decision-making, among other priorities. We are excited for the HEUG and its members who can access and share information across a diverse group of users and vendor solutions."

The HEUG will continue to partner with their longtime sponsor Oracle. "Oracle is deeply committed to its long-standing relationship with the HEUG. Over the last three decades, our customers have found the opportunities it affords them for community building and knowledge sharing to be invaluable. We support the HEUG's endeavor to transform itself into an industry association as it will bring more resources to help member institutions collaborate on the industry's most pressing issues," said Nicole Engelbert, Oracle, Vice President, Higher Education Development.

Huron also supports the HEUG's continued partnership with Oracle, "The HEUG has built a thriving member community, of which Huron is proud to have been part of since the organization's inception. We look forward to continuing that collaboration as we educate members about technology solutions and services that foster organizational resilience and agility in higher education," commented Ryan McDaniel, managing director of Huron's Oracle business.

"Our first priority has been and will continue to be supporting our customers. The next decade will bring tremendous change to higher education, making institutional agility and resiliency vital to long-term success. Consequently, effective product support must include deeper and richer education about technology strategies and building sustainable capacity for innovation," said Nicole Engelbert, Oracle.

Robert Steele, Workday, Vice President – Higher Education said, "Workday is excited to support the reimagined mission of the HEUG and its vibrant community of member institutions. We look forward to bringing awareness to the members by demonstrating how Workday's Finance, HCM and Student applications deliver value to institutions in times of change."

VENDOR INCLUSION

Jason Moebius, managing director of Huron's Workday business added, "Our Workday team is excited to become an integral part of the distinguished HEUG community. We are committed to sharing our deep Workday and higher education expertise and build on the collective knowledge of the community to help institutions grow and thrive in the future."

HEUG President Jason Wenrick (California State University) added, "We believe this will provide future opportunities to support and engage with our global communities and look forward to adding additional strategic partners. Currently, we are in active conversations with Salesforce, Unit 4, Ellucian, Anthology, and Accenture as well as others, and look forward to bringing them into the HEUG community soon. Our intent is to continue to grow the support community to make the value proposition for our members even greater; and as our membership continues to grow and change, so too shall the HEUG evolve to meet those needs."



ABOUT THE HEUG

The Higher Education User Group™ (HEUG™) is a Non-Profit, international organization consisting of Higher Education institutions and Public Sector Organizations. HEUG's mission is to educate and advocate by facilitating the sharing of ideas, information, and experiences among its members, and to provide a unified and effective independent voice to our system partners. The HEUG represents over 32,000 members across 900 campuses in 37 countries across the globe. It includes a wide range of institutions, from community colleges, to small liberal arts colleges, to large research universities and state university systems.

“ QUOTES FROM



TERENCE HOUSER

HEUG Vice President of Technology
University of Virginia



MICHAEL BUSGES

Sr. Director, Enterprise Projects
Pennsylvania State University



JASON KOZIARA

Vice President of Alliance
DePaul University



MATTHEW SHERMAN

General Manager
Workday Student



VICKI TAMBELLINI

President, and CEO
The Tambellini Group



NICOLE ENGELBERT

Vice President,
Higher Education Development
Oracle



RYAN MCDANIEL

Managing Director
Huron Consulting Group



ROBERT STEELE

Vice President
Higher Education - Workday



JASON MOEBIUS

Managing Director
Huron Consulting Group



JASON WENRICK

HEUG President
California State University



2020 CONFERENCES

Alliance 2020

COLLABORATION + INNOVATION + INSPIRATION

March 29 - April 1, 2020 | Philadelphia, Pennsylvania

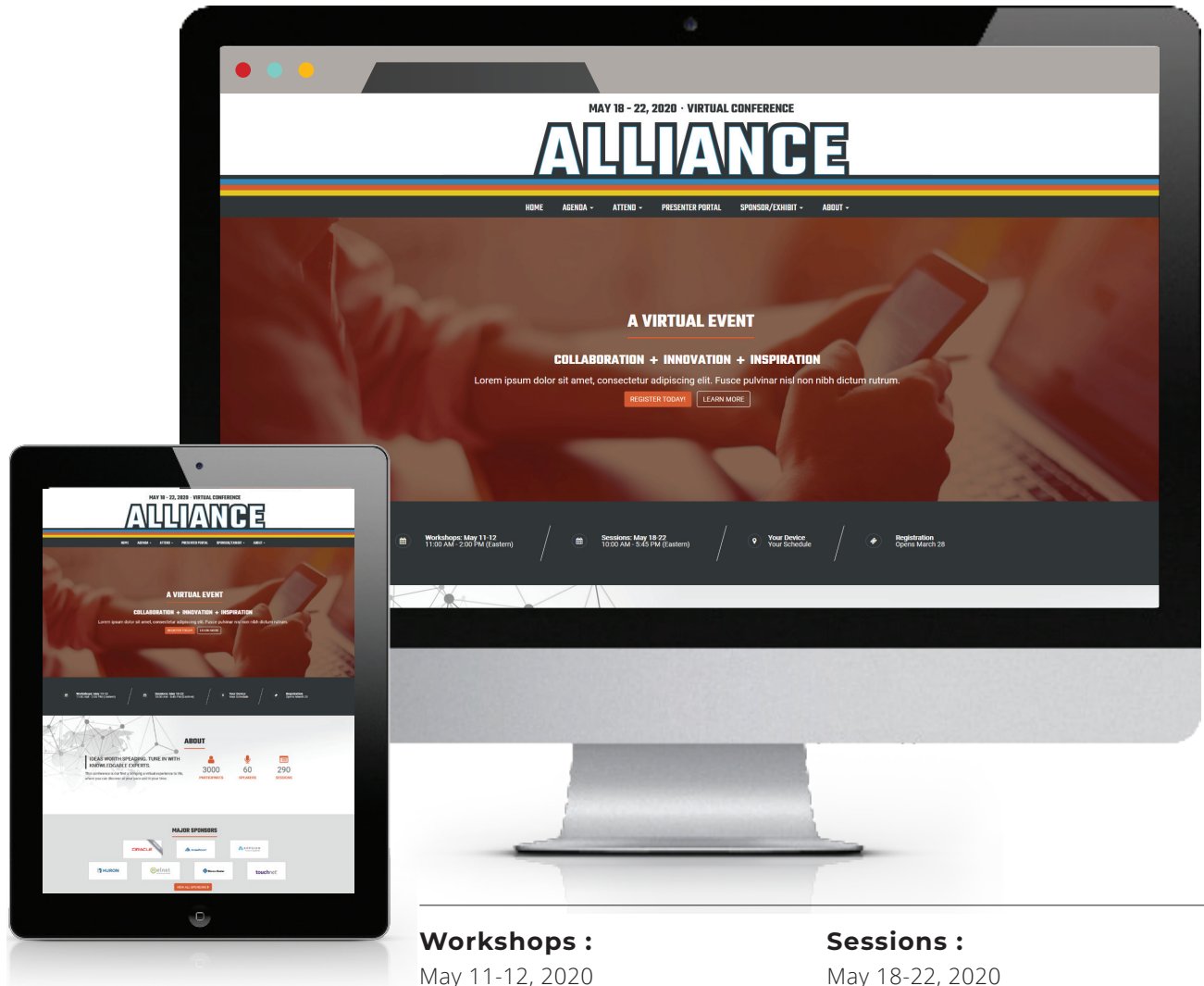


ALLIANCE 2020

The Alliance conference team began the 2020 calendar year diligently planning for the annual conference, scheduled to take place in March in Philadelphia, while also casting a wary eye on news reports of a novel coronavirus that had been identified and begun to spread. As events unfolded around the world through the winter months, the team prepared for multiple contingencies that would be activated based on consultation with, and guidance from, local government and health experts.

On Friday, March 6, the state of Pennsylvania issued a state of emergency related to the coronavirus outbreak. On March 9, the HEUG Board, upon recommendation of the conference team, voted to cancel the in-person conference. Immediately, the entire team began the daunting tasks of unwinding the contracts, logistics and plans for the in-person event while simultaneously creating the framework for an entirely online conference experience - something that the HEUG had never attempted before.

ALLIANCE VIRTUAL 2020



Workshops :
May 11-12, 2020

Sessions :
May 18-22, 2020

66
COLLABORATION
+
INNOVATION
+
INSPIRATION

PROJECT MANAGEMENT

With the rapidly changing and uncertain work landscape, the importance of networking and professional development remains as critical as ever. While nothing will ever replace face-to-face interactions, new technologies are now available that allow us to overcome distance and other restrictions placed upon us in order to allow the HEUG membership to attend sessions and engage in meaningful dialogs.

ALLIANCE VIRTUAL 2020

Thanks to the amazing work of a dedicated team, just 10 weeks later Alliance Virtual 2020 was a resounding success. Featuring over 250 online sessions, more than 1,500 attendees from around the world met virtually from May 18-22 to inspire, innovate, and collaborate in what had become the “new normal.” In addition to the customary excellent knowledge sharing provided in the breakout sessions, one highlight from attendee feedback was the many extremely well-attended “hot topic” open-format sessions, most of which centered on the challenges brought about by COVID and the related move to fully remote work. Attendees also praised the opportunity to make connections via advisory group led “morning coffees”, lunches and end-of-day happy hours. Although they can never replace the networking opportunities of an in-person event, the opportunities were a welcome chance to meet informally with new and old acquaintance, at a time when many were still in or just ending the most difficult challenges of the spring lockdown.

While it wasn't easy to plan an entirely new conference format in such a short timeframe, the team learned a great deal about how to effectively create an online event and how to help make the experience as enjoyable and as immersive as possible for the remote attendees. As member institutions' budgetary constraints and new travel and work realities, shape Alliance moving forward, these lessons will prove to be invaluable as we strive to meet the needs of our attendees and determine how to best organize and host a modern hybrid conference experience.



ATTENDEES

1,598



COUNTRIES

13



INSTITUTIONS

312



PRESENTATIONS

249



WORKSHOPS

5

EXPERT TEAM

Alliance 2020 & Alliance Virtual 2020 Conference Team

Jason Koziara

Conference Chair, DePaul University

Cheri McEntee

Program Chair, Syracuse University

Cathy Thompson

Past Conference Chair, University of Florida

Stu Churchill-Hoyer

Cloud, University of Wisconsin – Madison

Sandy Blackwell

CPE Coordinator, State of Tennessee

Jason Wenrick

HEUG Board President, California State University Chancellor's Office

Lisa Skinner

HEUG Board VP of Finance, Sandford University

Buddy Combs

AG Summit/ HEUG Board VP of Product, Kentucky Comm. & Tech. College Sys

Brittany Moon

Executive Director, Higher Logic

Sarah Bryan

Membership Services Manager, Higher Logic

Lisa McNeil

Membership Services Coordinator, Higher Logic

Erica Allen

Director of Meetings and Events, Higher Logic

Carol Valora

Meetings Manager, Higher Logic

Michelle Goytia

Meetings Manager, Higher Logic

Hillary Chambers

Meetings Coordinator, Higher Logic

Paige Ellis

Meetings Coordinator, Higher Logic

Amy Ewing

Creative Designer/Developer, Higher Logic

Tom Chambers

Events Sponsorship & Partner Program, Higher Logic

US VIRTUAL NETWORKING DAY 2020



Sessions :
October 8, 2020

“
**ONE DAY DEDICATED
TO NETWORKING
FROM THE
CONVENIENCE OF
ANY LOCATION**

ABOUT

Offering valuable networking opportunities such as community discussions, kick off coffees, networking lunch and happy hours. Topics include current events, challenges and opportunities that we are all facing in these unprecedented times. Such as managing change, thriving in telework, etc.

US VIRTUAL NETWORKING DAY 2020



ATTENDEES

244



STATES

37



INSTITUTIONS

125



PRESENTATIONS

18



WORKSHOPS

N/A

EXPERT TEAM

US Virtual Networking Day 2020 Conference Team

Brian Bernoussi

South Central, University of Texas at Dallas

Carla Boyd

Midwest, University of Minnesota

William Culey

Northwest, Washington State University

Pam Kenyon

Northeast, University of Massachusetts Office of the President

Tom Johnson

Southeast, Duke University

Carl Larson

Southwest, University of Utah

Nanci Regehr

HEUG Regional Conference Board Chair, Rio Salado College

Lisa Skinner

HEUG Board VP of Finance, Sandford University

Brittany Moon

Executive Director, Higher Logic

Sarah Bryan

Membership Services Manager, Higher Logic

Lisa McNeil

Membership Services Coordinator, Higher Logic

Erica Allen

Director of Meetings and Events, Higher Logic

Carol Valora

Meetings Manager, Higher Logic

Michelle Goytia

Meetings Manager, Higher Logic

Hillary Chambers

Meetings Coordinator, Higher Logic

Paige Ellis

Meetings Coordinator, Higher Logic

Amy Ewing

Creative Designer/Developer, Higher Logic

Tom Chambers

Events Sponsorship & Partner Program, Higher Logic

INTERNATIONAL VIRTUAL WEEK 2020



Sessions :

October 19-22, 2020

“
**A GLOBAL
 CONFERENCE IN A
 NEW SETTING**

ABOUT

The International Virtual Week is one week dedicated to the continued education of our international communities. Registered attendees will have the ability to join any sessions in any region during this week, though we have split out each region into their own tracks for your convenience.

INTERNATIONAL VIRTUAL WEEK 2020



ATTENDEES

1,221

COUNTRIES

19

INSTITUTIONS

184

PRESENTATIONS

172

WORKSHOPS

N/A

EXPERT TEAM

International Virtual Week 2020 Conference Team

ASIA COMMITTEE MEMBERS

Derry Fong

The Hong Kong University of Science and Technology

Arokianathan Antonisamy

Singapore Institute of Management

John Hui

The Education University of Hong Kong

Yen Teck Kong

National University of Singapore

Anthony Lam

The Hong Kong University of Science and Technology

Waqar Naqvi

Habib University

AUSTRALIA & NEW ZEALAND COMMITTEE MEMBERS

John Reed

University of New South Wales

Linda Cecere

The University of Adelaide

Adam Childs

The University of Adelaide

Jason Dolan

University of New South Wales

Mark Erickson

University of Queensland

Nikki Gaertner Eaton

Eaton, University of South Australia

Umesh Gupta

Deakin University

James Imgraben

University of South Australia

Dave Lamb

The University of Adelaide

Clinton Lamont

Griffith University

Julie Lehmann

University of South Australia

Máirtín Mag Uidhir

University of Newcastle

Cathy McGrath

Griffith University

Linda Ngu

University of Queensland

Lauren Shield

University of Newcastle

Leah Vaz

University of Southern Queensland

EXPERT TEAM

International Virtual Week 2020 Conference Team

CANADA COMMITTEE MEMBERS

Jane Baratta

Western University

Emma Dickson

Sheridan College Institute of Technology
and Advanced Learning

Lee Dreger

MacEwan University

Stacey Farkas

McMaster University

Genevieve Gelinas

HEC Montreal

Annik Gelineau

Universite de Montreal

Sophia Holness

Universite de Montreal

Nicole Languerand

McMaster University

Doris McGuire

Nova Scotia Community College

Adam O'Connor

University of Calgary

Louise Percy

University of Waterloo

EUROPE, MIDDLE EAST & AFRICA COMMITTEE MEMBERS

Carolien ten Oever

University of Amsterdam

Roelof Conijn

Leiden University

Barry Hudson

University of Pretoria

Denise Kelly

Queen's University Belfast

Kristy McConn-Palfreyman

University of Glasgow

Nimrod Noruwana

University of Cape Town

Tracy Robey

University of Derby

Steve Smith

University of Cambridge

Phil Sugden

University of Derby

Jasper Faber

University of Amsterdam

EXPERT TEAM

International Virtual Week 2020 Conference Team

LATIN AMERICA COMMITTEE MEMBERS

Pedro Creuheras

Universidad Panamericana

Zulma Aguirre

Universidad Del Istmo

Iara Alcauter

Universidad Panamericana

Luis Martinez

Pontificia Universidad Javeriana

Carlos Mateos Martinez

Universidad Panamericana

Jose Murillo Zuluaga

Pontificia Universidad Javeriana

Juan Carlos Ruiz Cruz

Universidad Panamericana

Jorge Villalon

Universidad de Santiago de Chile

Michele Volpi

Universidad Catolica del Uruguay

HEUG BOARD

Jason Wenrick

HEUG Board President, California State University Chancellor's Office

Lisa Skinner

HEUG Board VP of Finance, Sandford University

HIGHER LOGIC

Brittany Moon

Executive Director

Sarah Bryan

Membership Services Manager

Lisa McNeil

Membership Services Coordinator

Erica Allen

Director of Meetings and Events

Carol Valora

Meetings Manager

Michelle Goytia

Meetings Manager

Hillary Chambers

Meetings Coordinator

Paige Ellis

Meetings Coordinator

Amy Ewing

Creative Designer/Developer

Tom Chambers

Events Sponsorship & Partner Program



MEMBERSHIP UPDATE

OUR MEMBERSHIP

A global community of higher education & public sector software users, the Higher Education User Group consists of over 32,000 members across 37 countries.



OUR BACKGROUND

The HEUG serves as a central hub, allowing members to connect and build relationships, both virtually and in-person. These connections allow members to explore a variety of approaches and best practices for designing, configuring and deploying software to better serve their constituents.



WHAT WE DO

The HEUG supports members by giving access to the expertise, resources, and solutions they are seeking. While our core mission of providing connections, educational opportunities and advocacy for our members has not changed in our 24 year existence, the HEUG is constantly evolving to meet the ever-changing needs of our membership.





MEMBER ACCESS

01

PROFESSIONAL

Unmatched expertise with over 20 years of knowledge and experience on a platform with the latest tools and features.

02

PASSIONATE PEOPLE

Continued commitment to member achievements through year-round training and networking opportunities.

03

KNOWLEDGABLE

Unlimited resources through discussion forums, job postings and file libraries to share and collaborate as a community of users, for users.

MEMBERSHIP OVERVIEW

Institutional member fees are tiered, based on the Student Full-Time Equivalent (FTE) count for the school. A membership offers benefits to all institution employees.



REVENUE

In preparation for the 2020-21 membership year, the HEUG Board spent time evaluating membership dues. Based on the cost of living increases for services, a minimal fee increase was approved. Even considering the slight increase, comparisons to other user groups showed the HEUG remains competitive in membership costs. While comparisons are good, the knowledge did not make the decision any easier for the HEUG Board. As members themselves, they fully understood that even in the early stages of a global pandemic, institutional budgets could be affected greatly.

INSTITUTIONAL MEMBERSHIP	2019	2020
10,000 FTE Students	\$ 800	\$ 1,000
10,000-29,999 FTE Students	\$ 1,600	\$ 2,000
30,000-59,999 FTE Students	\$ 2,400	\$ 3,000
60,000 or More FTE Students	\$ 4,800	\$ 6,000
Allied Group	\$ 400	\$ 400



COUNTS

The priority of the HEUG is member satisfaction. Each year, the HEUG Board pays close attention to membership renewals and views our member's continued support as proof of their satisfaction. Though members were faced with some severe budget cuts, the HEUG maintained a retention rate of 99 percent.

We will continue to ask for member feedback and make improvements to provide the best collaborative community for our membership. For example, in 2020 we created a work group to focus on our year-round training efforts. With their help we have already seen an uptake in varied offerings and registrations. The new community platform will allow for even more areas of growth like forum engagement, file sharing, dynamic content and much more in 2021.

GROUP MEMBERSHIP	2019	2020
Institutional Members	238	230
System Members	41	37
Allied Members	49	48
TOTALS	328	326

2020 HALL OF FAME

The Higher Education User Group recognizes members who demonstrate leadership in important initiatives that advance the HEUG, outstanding service to HEUG Membership, are respected as a professional by those inside the higher education industry and have a sustained contribution to the HEUG



MARK ERICKSON

“

Our first new inductee has been actively engaging with the HEUG for almost 20 years. Mark Erickson, Academic Registrar at the University of Queensland has made a large impact in the Australian & New Zealand region as well as the HUEG community with his time spent on the Board. Within the ANZ community, Mark is well known and highly respected for his professionalism, intellect and understanding of the strategic value of systems and his personable nature such that, “everyone loves Mark.” His opinion and advice are sought in relation to higher education, having led major projects at the Australian National University in system initiatives, strategic policy and governance improvements as well as education industry initiatives.

During his time on the HEUG Board, Mark led the governance reorganization work group, that made significant changes in the governance structure of the organization updating our articles of incorporation, bylaws and standing orders. The focus of these changes is around the size and composition of the HEUG board, skillsets and recruitment through the Nominations and Elections Committee and finally the creation of the Global Council. This was no small task and we couldn't have asked for a better person to lead this reorganization effort.

We all have benefited from knowing Mark, his leadership and engagement in this organization.

- BRITTANY MOON

2020 HALL OF FAME

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MAUREEN KNIGHT-BURRELL

“

Our second inductee is one close to my heart, she took me under her wing when I started working for the HEUG and for that I will forever be grateful. Maureen Knight-Burrell, Application Systems Manager at Northwestern University has been a member of the HEUG since 2003 and this marks her 15th Alliance Conference. Maureen has served in various capacities in the HEUG going back to almost the very beginning. She is well known throughout the higher education industry through her volunteerism on the HEUG Board, Student Financials Advisory Group, participation in the Midwest Alliance, and Southern African Alliance Conferences. Maureen has connected with countless members, always willing to share with other institutions and has encouraged her own staff to participate in and present every year.

While VP of Membership and Communication for the board, Maureen led several projects to improve the member experience on HEUG.Online. Under her leadership we made significant improvements to the website and annual report, updated our membership dues operations, and revamped the Product Enhancement tracker.

Maureen is selfless in all that she does, she brings enthusiasm and energy to every project and encourages others to do the same. It is my great honor to present Maureen this induction into the HEUG Hall of fame.

- BRITTANY MOON

2020 HALL OF FAME

The Higher Education User Group recognizes members who demonstrate leadership in important initiatives that advance the HEUG, outstanding service to HEUG Membership, are respected as a professional by those inside the higher education industry and have a sustained contribution to the HEUG



BONNIE RAPER

“

When Hall of Fame nominations pour in from multiple members it is easy to recognize that Bonnie Raper, Director of On-Premise Systems from Boise State University has gone above and beyond. Being a member since 2003, she has given back to the HEUG and our community for 17 years. Bonnie's commitment to the organization is best demonstrated through her knowledge sharing. She has presented at Alliance on ten occasions, as well HEUG Education Series Webinars, frequent contributions to HEUG.Online, earning herself the title of HEUG Power User as well as master badges for her engagement on the listservs, blog post and best practice sharing in the file libraries.

Bonnie was part of the force that began the Northwest Alliance Conference, chairing the inaugural event in June of 2017. She has also greatly contributed to the Student Financials Advisory Group from 2013-2017, serving as the communications coordinator for three of those years. Bonnie's commitment to understanding and using PeopleSoft in the most efficient manner possible is unrivaled and she is always willing to share her skills and mindset with others.

As this is Bonnie's final year at Boise State University, I would like to personally thank her for her dedication and contributions to the HEUG community that will continue to serve our membership for years to come.

- BRITTANY MOON



FINANCIAL STATUS

FINANCIAL STATUS

At the end of the fiscal year there was no change in the investment portfolio; however, an increase has been seen since the end of the year.



THE EFFECTS OF THE COVID-19 PANDEMIC WERE FELT BY THE HEUG JUST AS THE ALLIANCE 2020 CONFERENCE IN PHILADELPHIA WAS GEARING UP.

The next few months were challenging as the team navigated last minute cancellations and refunds for the in-person conference. Approximately 60 percent of registrations were refunded, resulting in a reduction in revenue and additional expenses to process the over 1,600 refunds. Overall net assets decreased by \$318,706 for FY20 due to unrecoverable expenses and loss of revenue. Despite this loss, the financial position of the organization remains stable. Providing virtual offerings such as Virtual Alliance 2020 helped to mitigate the financial impact of the pandemic, while allowing us to connect with our members and meet our Alliance goals.

At the end of the fiscal year there was no change in the investment portfolio; however, an increase has been seen since the end of the year. The investment strategy continues to be low risk.

Anticipating that in-person activities would continue to be limited for FY21, the decision was made in March 2020 to cancel Alliance 2021 in Phoenix in order to mitigate potential losses. Planning for Virtual Alliance 2021 began in early FY21.

In January 2020 the HEUG's accounting firm, Tate & Tryon, merged with RSM US LLP. Closely monitoring budgets and spending will continue to be a priority utilizing the services and reporting platform that RSM offers. The Board is happy to report the annual audit was performed by Gelman, Rosenberg and Freedman (GRF) with no management comments. Despite the challenges faced in FY20, the HEUG was able to weather the storm and is looking forward to new endeavors in FY21 and beyond.

LISA SKINNER

STATEMENT OF FINANCIAL POSITION

AS OF JUNE 30, 2020

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2019

ASSETS

2020

2019

● CURRENT ASSETS

Cash and equivalents	\$ 2,358,995	\$ 2,131,649
Investments	919,504	877,879
Accounts receivable	11,000	26,730
Prepaid expenses	104,505	184,354
TOTAL ASSETS	<u>\$ 3,394,004</u>	<u>\$ 3,22,612</u>

LIABILITIES AND NET ASSETS

2020

2019

● CURRENT LIABILITIES

Accounts payable and accrued liabilities	\$ 228,991	\$ 38,534
Deferred revenue	680,421	378,780
TOTAL LIABILITIES	<u>909,412</u>	<u>417,314</u>

● NET ASSETS

Accounts payable and accrued liabilities	2,484,592	2,803,298
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 3,394,004</u>	<u>\$ 3,22,612</u>

STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED JUNE 30, 2020

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2019

CASH FLOWS FROM OPERATING ACTIVITIES

	2020	2019
Change in net assets	\$ (318,706)	\$ (93,541)
Adjustments to reconcile change in net assets to net cash provided (used) by operating expenses		
Unrealized gain	(27,749)	(2,760)
Decrease (increase) in:		
Accounts receivable	15,730	54,222
Prepaid Expenses	79,849	(10,969)
Increase (decrease) in:		
Accounts payable and accrued liabilities	190,457	(16,745)
Deferred revenue	301,641	(59,675)
Net cash provided (used) by operating activities	241,222	(129,468)

CASH FLOWS FROM INVESTING ACTIVITIES

	2020	2019
Purchase of investments, net of fees	(13,876)	(875,119)
Net cash used by investing activities	(13,876)	(875,119)
Net increase (decrease) in cash and cash equivalents	227,346	(1,004,587)
Cash and cash equivalents at beginning of year	2,131,649	3,136,236
CASH AND CASH EQUIVILANTS AT END OF YEAR	\$ 2,358,995	\$ 2,131,649

STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2020

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2019

REVENUE

	2020	2019
Conference revenue	\$ 1,171,117	\$ 4,595,957
Membership dues	590,800	569,125
Interest and dividends	18,775	25,100
Investment income, net	41,625	2,879
Partner sales	227,013	158,425
Total revenue	2,049,330	5,351,486

STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2020

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2019

EXPENSES	2020	2019
Program Services:		
Communications and Membership	\$ 245,278	\$ 293,810
Community Development	43,287	152,715
Alliance Conference	723,981	2,931,238
US Regional Conferences	301,822	274,646
Cloud Symposium	26,258	-
International Conferences	124,356	421,655
Products (PAG)	1,705	237,177
Technology (TAG)	14,838	22,219
Total program services	1,481,525	4,333,460
Supporting Services:		
Management and General	881,193	1,105,000
Total expenses	2,362,718	5,438,460
Change in net assets from operating activities	(313,388)	(86,974)
Foreign currency translation	(5,318)	(6,567)
Change in net assets	(318,706)	(93,541)
Net assets at beginning of year	2,803,298	2,896,839
NET ASSETS AT END OF YEAR	\$ 2,484,592	\$ 2,803,298



HEUG PARTNERS

SPONSORSHIP MODEL

To deliver a best-in-class experience to our membership, the HEUG has updated the way it interacts with corporations.



**THIS GREAT ORGANIZATION
WOULD NOT EXIST WITHOUT THE
SUPPORT OF OUR PARTNERS THAT
FUEL INNOVATION IN THE HIGHER
EDUCATION SPACE.**

CORPORATE MEMBERS

After careful consideration and thought, the HEUG decided to add a new membership type to the list, Corporate Members.

In the past, the Partner Program model consisted of a tiered sponsorship level system. These packages could include community access and marketing opportunities. With the new model, Corporate Members receive access to the HEUG community with similar benefits as an Institutional Member. Marketing opportunities such as marketing emails, webinars, and website ads can be purchased as an add-on package.

Without the tiered sponsorship levels, the HEUG had to update how a partner level is determined. Moving forward, each Corporate Member's engagement from the previous year will be used to determine their partner level for the following year. Certain partner levels can unlock additional benefits. This change will provide more transparency in the HEUG Partner Program.

2020 SPONSORS

● Huron Consulting Group	Premier
● Oracle	Premier
● Appspan	Platinum
● Sierra Cedar	Platinum
● Transact	Platinum
● Deloitte	Gold
● ERPA	Gold
● HighStreet IT	Gold
● Inflight	Gold
● Nelnet	Gold
● Phytotion	Gold
● TouchNet	Gold
● Campuslogic	Silver
● HighPoint Consulting	Silver
● Insightsoftware	Silver
● Mutara	Silver
● Spear MC	Silver
● Softdocs	Silver

The Deloitte logo is displayed in white text on a black rectangular background. The word "Deloitte" is in a bold, sans-serif font, followed by a green circular dot.

HEUG 2020 PARTNER OF THE YEAR

The HEUG has an amazing network of valued partners who support our members and organization each year.

Members were invited to nominate a partner that went above and beyond during the course of the past year. We asked these members to share stories of how their nominee impacted their institution in a positive way, and how that nominee represented the HEUG's Mission.

The HEUG Nominations & Elections Committee scored all the partners against a rubric that includes total number of nominations, overall participation in 2019 for Alliance, US/International regionals, HEUG.Online and qualitative member submission.

After reviewing all of the submissions, it was clear that we had one winner this year, Deloitte!



THANK YOU
**FOR BEING A
MEMBER**

SEE YOU

