The Higher Education User Group
2014 Annual Report

HEUG
HIGHER EDUCATION USER GROUP

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Letter from the President

Greetings to our members! It is my pleasure to present this 2015 Annual Report of the Higher Education User Group.
For my past two messages written in the annual report I focused on the enormous amount of global growth that the HEUG has experienced recently. This growth continued into 2014 as well with a new event in Latin America and the organization of an event in the Arab world.   Members from Colombia, Peru, Mexico, Chile and Brazil have connected to form the Latin America Community with its first official event held this last May. Institutions from Qatar, United Arab Emirates, Lebanon and Saudi Arabia have worked together to form the Arab HEUG which will hold its first official HEUG event at Qatar University in Doha on May 24, 2015.   Finally, the Brazil HEUG held a planning meeting in February 2015 to begin to organize.

When considering a theme of 'New Directions' the HEUG has had several opportunities this year to blaze new trails. As the industry evolves and the Oracle product mix evolves, we want to be sure we provide HEUG members with the correct level of advocacy moving forward. The 2013 HEUG Upgrade Workgroup evolved in 2014 to form 4 specific work groups which will help lead the direction of the HEUG in the coming years. The Cloud Monitoring, PAG/TAG Elections, Reorganization and Global Integration Working Groups spent time organizing and meeting throughout 2014. The work done and the decision made by the board based on input from these groups will help the HEUG stay current into the future.

In 2015, under the watchful leadership of my successor Mario Berry (Lonestar College) I believe the HEUG will continue to move forward globally and forward in new directions through the work of the aforementioned groups. The results will be an increase in the ability and level of advocacy we can offer for HEUG members, and the opportunity to continue to educate HEUG members as new products and new technologies come to be.

As I move into my new role as Past President I'd like to take one final moment to thank the many HEUG member that I have crossed paths with over the course of my term as HEUG President. The new contacts I have made, the collegial relationships that have formed and the many friendships that are now with me have made this a tremendously valuable and memorable experience.

Good Luck Mario! I hope your experience will be as great as mine!

Steve Hahn
HEUG President
University of Wisconsin-Madison

Letter from the Executive Director

HEUG Members and Friends,

Where is the HEUG headed? This seems to be the question that should be asked when a group is exploring new directions! Fortunately during 2014 a very passionate HEUG Board of Directors (BOD) asked that question and began to work on that direction.

While the fundamental mission (Education and Advocacy) for the HEUG will remain, the means to fulfilling that mission can change. We continue to see the HEUG's global growth to be a solid direction. The new communities that have formed in the last year and those just beginning to organize will offer new opportunities for the HEUG. During 2014 we began to meet with these new communities to see what avenues we should explore to serve them best. 34% of the HEUG membership comes from outside of the United States. That number grew in 2014 and will continue to grow in the coming years.

During 2014 we also began to acknowledge that products are changing. The BOD wrestled with how best to advocate for the members moving forward as on premise products dominate, but opportunities for Cloud-based products and what began to be called that mysterious middle layer needs began to surface. The BOD advocated working groups be created to begin to organize direction for these areas to enable the HEUG to stay on course and on track with their ability to serve the membership.

Also, in 2014 new relationships with our higher education industry colleagues began to form. Over the past few years we have formed a strong bond with industry analyst Ovum and in particular with their representative Nicole Engelbert. This relationship continued during the 2014 Executive Forum as well as at other venues. Gartner added a very compelling presentation at HEUG EMEA as well. And finally we were very excited to have Susan Grajek, Vice President at EDUCAUSE present at Alliance Down Under and at the Asia HEUG event. We are pleased that we will continue dialogue with Susan and EDUCAUSE including her involvement at the 2015 Executive Forum and look forward to developing new synergy working together in the future.

2014 brought many opportunities to explore new directions. Though these new paths often times come with new challenges, I continue to be encouraged that the challenges always create positive opportunities for the HEUG to grow!

I am looking forward to another exciting year working with new President Mario Berry and the rest of this passionate group of volunteers forming the HEUG Board of Directors.

Best Regards,

Lew Conner
Executive Director, Higher Education User Group

2014 IN REVIEW

Executive Summary

The Higher Education User Group (HEUG) is the largest independent, self-organized industry-specific Oracle User Group in the world. HEUG represents more than 27,000 users from over 900 campuses in 37 countries. The Group includes a wide range of institutions, from community colleges and small liberal arts colleges to large research universities and entire university systems. It includes public and private institutions, as well as for-profit institutions.

HEUG continues to provide strategic feedback and industry priorities on Oracle applications and middleware, supporting our members as Oracle Higher Education products mature, and to offer a single point of contact for the Higher Education and Public Sector industries. Having established a long history of value-added services to both our members and to Oracle, HEUG can provide strategic feedback to the future of Oracle products.

2014 was an exciting year for the HEUG; our members have made significant contributions to the growth, education, and advocacy of the membership as you will find highlighted throughout this report.

HEUG maintains strategic partnerships with other members of Oracle's user community including the Public Sector User Group (PSUG), thereby extending HEUG's influence into other industries. HEUG is one of six members of the International Oracle User Community (IOUC). HEUG also has members on the IOUC Product Development Committee who provide expertise on both E-Business Suite and PeopleSoft Enterprise applications. To expand its influence beyond North America, HEUG regularly sends representatives to affiliated user group events around the world.

HEUG members participate in PeopleSoft Customer Advisory Boards (CAB) and Oracle customer testing initiatives. We have numerous internal advisory groups- among them, PeopleSoft and E-Business Suite, functional and technical, traditional and emerging product areas.

HEUG's business model (an annual institutional membership fee based on student FTE), provides the organization with financial stability ensuring continued service to its membership for years to come. HEUG's Vendor Council promotes mutually beneficial relationships between HEUG and its largest sponsoring vendors by:
- Promoting and facilitating dialogue between HEUG and the vendors
- Providing a forum for discussion on topics that enhance member/Vendor benefits and Vendor participation through complimentary HEUG programs

A Global Community of Practice

The HEUG and the industry it serves are well-known for their willingness to actively participate in collaborative communities. Whether through formal working agreements, less formal cooperative relationships, or even casual conversations, the time honored and fundamental activities of teaching and learning are the cornerstone of our industry. As the HEUG membership continues to grow around the globe, these activities are propagated to support an energetic global community.

Over the years, HEUG membership has expanded to include regional communities on six continents. An ever growing percentage of our member institutions are being added from outside of North America. We now support communities and events in Europe, Australia/ New Zealand, Asia and Latin America. While our international regions continue to grow as multi-country regions we are also seeing an increasing number of communities developing at the local country level. Communities within the broader regions are growing and providing solutions for our members. In EMEA (Europe, Middle East, and Africa) these include the Senior User Group (SnUG) in the UK, the Dutch Education User Group (DEUG), the South Africa HEUG, and the Arab HEUG. In Latin America groups in both Colombia and Peru have formed to assist in the development of the Latin America region. In Asia adding to the foundation group in Singapore are groups being formed in the Philippines, Hong Kong, India, China and Pakistan. The HEUG recognizes the need to support these communities, many facing similar challenges as institutions in the United States, as well as some additional issues posed by differences in educational systems, functional requirements, culture, language, and time zones.

Community Growth

As these new communities flourish and the HEUG looks for the best way to support them, we remain focused on serving the global community. What can universities in North America and Europe learn from the experiences of universities in Asia and Latin America? How can we ensure that our international members have the ability to attend our premier Alliance conference? How can we integrate and streamline our advocacy efforts to support our entire community and continue to speak with one coherent voice? These are among the challenges that face the HEUG over the next few years. While we may not have all of the answers, we know we will meet these challenges with the same creative and sustainable solutions that have made us the organization we are today.

We have seen these creative solutions in many of the global events we have participated in over the past year. Our Alliance Down Under conference continues to serve the needs of our community in Australia and New Zealand. In October 2014, our third official EMEA Community Conference was held Utrecht, The Netherlands. In November 2014 our Asia members held their third annual event in Singapore. And in North America, the New England Regional User Group had their first annual meeting. The other US Regionals include the Midwest HEUG, the Southeast Atlantic Regional Higher Education User Group (SEARUG), the South Central Regional User Group (SCHRUG) and the Mid- Atlantic. No matter the event, the theme remains the same: creating educational experiences for our global community of practice and engaging in advocacy efforts on their behalf. As we ended our year at our annual Board of Directors meeting in Phoenix, we could continue to say that we had circled the globe to connect our members and we speak with one voice for all of them.

The Future

Looking toward the future, we continue to anticipate changes in Higher Education. We communicate our vision extensively with Oracle as a means of sustaining viable applications. Universities are exploring opportunities for providing a global offering to large cohorts of students. Universities in North America and Europe must seek ways to manage their expanding enterprises more efficiently with fewer resources. Technology companies continue to innovate and provide new software and services, hopefully capable of keeping pace with the rapid changes in the higher education and research industry. As the global industry and the applications and technology it uses continue to expand and evolve, HEUG will continue to work with its members to expand to meet their needs. Growing globally and educating globally continues to be a focus for HEUG.

2014 News & Noteworthy Events

- Alliance 2014 Video
- Oracle Announcement at Alliance 2014
- First Latin America HEUG Conference
- New Elections Process for Advisory Group Members

Cloud Monitoring Working Group

The Cloud Monitoring Working Group was formed at the Board's request after the 2014 Alliance Conference. The group's charge from the HEUG Board was to help keep the Board and the membership apprised of Oracle's efforts to bring cloud-based (ie, hosted) applications and services to the Higher Ed marketplace.

Oracle currently has cloud applications available for human resource management, financial management, financial planning and customer relationship management. In 2014 they announced plans to build a Student Cloud product and have since partnered with a number of institutions to help develop the design. The initial focus has been on capabilities to support non-traditional educational offerings and on providing a flexible user interface that works well with any device.

The working group's eight members were recruited from the HEUG Board and from the Product Advisory Groups to ensure representation from a broad set of product areas.

To date, the working group has begun monthly conference calls to share our knowledge; talked with Oracle sales engineers to learn more about the Cloud product suite; researched what information is available on the internet about these products (see the December 2014 blog post Head for the clouds! Information about Oracle's Cloud Applications) and most recently surveyed the HEUG community to gauge the level of awareness of Oracle's cloud applications and gather questions and opinions. Next steps include analyzing and publishing survey results and then using them to guide future education and advocacy efforts.

VIEW MEMBERS

Communication Committee

The HEUG Communication Committee has representatives from the TAG, Young Professionals, the Volunteer committee, Socious, the BOD, and other members' at large.

The HEUG Communication Committee continues to look for new and innovative ways to inform the HEUG membership, whether it's through social media, blogs, newsletters, or events. Here are some of the committee's initiatives:

Promoting social media
• Publishing monthly blogs
• Tweeting and re-tweeting important communications from other members
• Streaming tweets live on HEUG.Online
• Increasing our social media following:
    • Facebook – 375 new likes
    • Twitter – 215 new followers
• Encouraging PAGs to setup twitter accounts for use at the Alliance conferences

Membership news
• Revamping the look and feel of the membership monthly newsletter to be more colorful and interesting to read
• Sending more communications more frequently
• Improving the annual membership survey and sharing more results with the membership
• Publishing an online version of the annual report, no longer paper based; and currently in progress with a HTML based version for 2015.

HEUG.Online
• Upgrading the membership instructional profile page to make it easier to use, and to capture more pertinent information about the member institution that could help the HEUG provide better service and communications to the membership.
• Gathering more statistics about the webinar attendance and quality so that we can continue to improve our services. We have set a goal to provide at least six webinars per month.
• Forming a HEUG.Online working group to look at improving the HEUG.Online experience for the membership
• Developing a combination post-Alliance justification letter and professional development/takeaway form to promote value-tracking from, and participation in, the annual conference and other professional events

Future initiatives
• Creating a page on HEUG.Online to present a monthly spotlight feature from a member college or university.
• Updating the charter for the Communications Committee, which will include succession planning for the group

VIEW MEMBERS

Global Integration Working Group

The Global Integration workgroup was formed at the Board's request after the 2014 Alliance Conference.   During this first year, the Vice President for Community Development gathered initial observations at the Latin American HEUG conference in May, the EMEA conference in October, and the APAC conference in November.

The workgroup itself will hold its first meeting face-to-face at the 2015 Alliance conference.

The charge to the group is as follows:
- Engage the global Board members to determine the best methods for recruiting global members to serve on PAGs or other volunteer opportunities.
- Enhance the effectiveness of our PAGs in advocating for global functionality.
- Implement a HEUG Board and PAG/TAG model that increases global participation.
- Advocate more strongly with Oracle to allocate product strategists that are focused on global localizations.
- Review our financial status to determine if more global investments are feasible (travel budgets, subsidies, translation services, etc.)
- Make investments that reduce the impact of language barriers and limit travel costs, and thereby stimulate positive growth in the global arena.
- Provide services to our member institutions that allow them to connect with Subject Matter Experts around the globe.

In addition, input obtained through the annual survey of the membership has been reviewed to glean insight into global issues.   That information will be considered by the working group.

VIEW MEMBERS

Committees and Working Groups

PAG Elections Group

We kicked off the PAG Elections Process workgroup in March 2014. The group consisted of 7 PAG members, as well as others from the board and HEUG membership community. We held several conference calls throughout the year and received input (solicited and unsolicited) from numerous PAG members to help finalize the PAG/TAG Elections Process document proposal for the board. We had strong consensus as to the general concepts of how the elections would be organized.

In July and as part of the agenda which included discussion, review and approval of the proposal. The most immediate need at that point was to work with Socious (our administrative support company) to program a report that would handle this very complicated ballot. Therefore discussion began keeping in mind the following: Elections were to be held similar to our annual Board of Director Elections; Institutional Membership status needed to be considered; The weighted vote system needed to be included; Each PAG could have a widely varied number of open seat; Eligible voters for each PAG needed to be associated with the appropriate forum.

In August we began a communication program that included blogs, emails, videos, and other messages regarding the election process. Per board direction the HEUG Nominations and Elections (N&E) Committee continued to work with Socious on finalizing the voting logistics.

The nominations committee consists of the Past–President as chair (per HEUG By-laws), the President, the Executive Director and several board members including past active PAG members. Because this took place late in July and with the knowledge that the report programming would take time to develop, it was important for the N&E to quickly make decisions since the nomination process had to begin in August. There was discussion in late July regarding the specific process of either allowing multiple selection or one vote per ballot.

Committees and Working Groups

The committee felt the most practical approach considering the varied number of seats open per PAG and the complex nature of the weighted voting process was to allow one vote for each PAG ballot with the top weighted vote getters winning the election for the number of seats open.

We have used a variety of approaches (including this one) when faced with multiple open seats for the Board of Directors elections. A significant degree of thought went into this decision with a review of the various options, and while reasonable individuals can argue for other options, the committee made a sound decision based on reviewing the information in front of them.

After the election process completed in October the HEUG Nominations and Elections (N&E) Committee requested recommendations on improvements to the new nomination and elections process from the PAGs/TAG's and began to incorporate these recommendations for the next round of elections.

The recommendations received:
• The ability to vote for more than one person in each advisory group;
• Membership qualification for members to vote (deadline for membership due to be paid);
• Membership qualification for individuals to become candidates for the election process;
• Qualification for members to vote for specific advisory groups (deadline for enrollment to list serve);
• Guidelines for setting recommend qualification for nominees (not established to one person or organization);
• Communications for the overall process (both by HEUG and each advisory group);
• Communications to candidates to update their bio on HEUG;
• Clarification on the event of a tie;
• Clarification on the event an advisory group does not have enough candidates to fill all vacant seats;
• Clarification on the event a candidate is elected to multiple PAG/TAG.

VIEW MEMBERS

Committees and Working Groups

PAG Reorganization Working Group

The HEUG has evolved over time to become an organization of many dimensions and diverse functions, but the very heart and soul remains anchored in our beloved PAGs & TAG. They serve as the primary channel for advocacy with Oracle, and they are the engine that drives the educational content delivered at the Alliance conference. In a nutshell, they are fundamental to the HEUG's ability to carry out its mission.

One of the key characteristics of a successful organization is its ability to adapt to change. With Oracle now supporting 3 major product lines (Peoplesoft, EBS, and Fusion/Cloud), and kicking-off an initiative to build a new Student Cloud application, it will be important for the HEUG to review and revise how we will engage with Oracle in the future.

The HEUG Board has commissioned several working groups to help develop strategies for moving our organization forward. One of these groups, the

Re-Organization Working Group, has focused on assessing the current health of our PAGs & TAG, solicited feedback on how they can be improved, and also given thought to what changes may be needed to our overall organizational structure.

To support this work, we gathered a variety of demographic and activity-related statistics that help to provide a profile of our PAG/TAGs. We also undertook a comprehensive survey of current and former PAG/TAG members, to get their perspective on the current state of the HEUG, our relationship with Oracle, and their view on potential future directions.

The team is currently in the process of putting together a set of recommendations that addresses both short-term and long-term objectives. Once these are reviewed by the PAG/TAGs and approved by the Board, they will be implemented over a time period that will ensure a smooth, well-organized transition.

VIEW MEMBERS

Security Working Group

The HEUG is the leader in engaging Oracle and higher education user groups in initiatives to advance the overall security of Oracle enterprise applications, products and services. Leveraging HEUG's strong relationship with Oracle's application and product teams, the VP of Technology maintains a partnership between Oracle and several different higher education organizations. The mission of this security working group is to improve the overall security experience and posture of the higher education community concerning Oracle products.

The goal of this collaboration is to achieve security improvements through strategic and operational collaboration among Oracle product and security teams, the Higher Education User Group (HEUG), the EDUCAUSE and Internet2 Higher Education Information Security Council (HEISC), and the Research and Education Networking Information Sharing and Analysis Center (REN-ISAC).

The areas of focus include:
- "Security by default" initiative where new customers would receive secure applications rather than open ones that they must learn to secure.
- Improve Oracle CPU (Critical Patch Update) clarity so that Oracle documentation might be easier for customers to digest and adopt in a timely manner.
- Security awareness campaign to support lowering risk by addressing issues across the entire PeopleSoft Application technology stack.
- Oracle security documentation portal. We've asked for Oracle to consolidate their security documentation so that system administrators, security professionals, or CIOs might find relevant security information.

Volunteer Committee

In 2014, the Volunteer Committee was reestablished. The group began participating in regular conference calls in October, 2014. The mission of the HEUG Volunteer Committee is to encourage a sustainable flow of high-quality, diverse, and dedicated volunteers to support the overall mission of the HEUG. The committee is focusing their objectives within three categories: Recruitment, Recognition, and Resources.

Some of the strategies of the Volunteer Committee are to
- Oversee the HEUG Hall of Fame induction
- Recognize current and retiring members of PAGs/TAG, Board, workgroups, and conference planners and presenters
- Develop a volunteer database within HEUG online to identify volunteers and maintain job descriptions
- Provide tools and resources to volunteers through mentorship and training
- Provide recruitment efforts for various HEUG positions
- Communication regularly to the HEUG community on ways to volunteer and current opportunities

VIEW MEMBERS

Young Professional Group

The purpose of the YPG is to better connect, empower, and prepare young professionals for leadership in the HEUG and at their own institutions. To support this objective, YPG's goal is to support members and assist them in developing confidence and comfort participating in the greater HEUG community as well as encourage them to accept roles that will help the organization and their own institutions moving forward.

The primary focus this year for the YPG was to be more visible within the greater HEUG community. Due to the increase in regional conference attendance and especially by young professionals who may not have the opportunity to attend Alliance, we decided to target that visibility to the regional conferences. There was an YPG presence at each US regional with various levels of participation including presentations, lunch roundtables, informational handouts, and formal and informal gatherings. This visibility helped strengthen the position and purpose the YPG has in the HEUG.

The following members rolled off during 2014:
- Sara Brennan, Volunteer Committee Liaison (DePaul University, former employer)
- Greg Stanis, Social Media (University of Missouri System)
- Annie Riedinger, Secretary (Boise State University, former employer)

VIEW MEMBERS

LEADERSHIP

Board of Directors

The HEUG is governed by a Board of Directors. The Board consists of the President, the Past-President, twenty two Directors elected by the HEUG membership, 3 Conference planning team members and up to 4 additional Directors appointed by the HEUG President with the approval of the Board, and the Past President. Elected Directors serve for a term of three years and may serve no more than two consecutive terms. Appointed Directors serve for a term on one year and may be reappointed. The Alliance Conference Planning appointees serve a 1 year appointment.

The President of the HEUG is elected by the Board of Directors for a one-year term, and may serve at most two terms as President. The remaining Officers of the Board are nominated by the President and approved by the Board, and consist of the following:
• Vice President of Administration
• Vice President for Communications
• Vice President for Community Development
• Vice President for Products
• Vice President for Technology
• Vice President of Finance/Treasurer
• Secretary

The President also designates one of the five Vice Presidents to serve as the Executive Vice President, who will complete the President's term if the President is unable to and will preside over meetings in the President's absence.

HEUG Board of Directors

The Board is responsible for overseeing and approving nominations of members to the various Product Advisory Groups (PAGs) and the Technical Advisory Group (TAG). Those groups are responsible for working with the HEUG membership and Oracle on issues relevant to the appropriate areas within specific products or the technological infrastructure. Those groups do much of the detailed work of the HEUG and are instrumental to the HEUG's effectiveness. Each Advisory Group is assigned a Board member as a liaison.

The Board also establishes a number of committees and working groups to assist in the governance and administration of the HEUG, and to address specific issues that do not fall within the purview of a particular PAG or TAG. These committees and working groups usually include a mixture of Board members and others.

As Oracle continues to expand its product line via acquisitions and development, and as the community of Higher Education users of Oracle application software expands and evolves, the Board continues to review the scope of the HEUG and to propose changes in structure and governance that reflect the changing nature of the products and the organization.

VIEW 2014 BOARD MEMBERS

Past Presidents & Chairs of the HEUG

NAME	INSTITUTION	TERM
Clyde Morrell	Brigham Young University	1996 – 1998
Helen Mohrmann	Cornell University	1998 – 1999
Dave Edmondson	Texas Christian University	1999 – 2000, 2000 – 2001
John Gohsman	University of Michigan	2001 – 2002
Paul Martin	University of Western Ontario	2002 – 2003
Ola Faucher	University of Kansas	2003 – 2004
Mike Ten Eyck	Texas Christian University	2004 – 2005 (March – August)
Joe Moreau	Mira Costa College	2005 – 2006 (August – March)
Tom Scott	University of Wisconsin, Madison	2006 – 2008
Stan Jakubik	University System of Maryland	2008 – 2010
Kari Branjord	University of Colorado	2010 (March to December)
Ted Simpson	Maryland Institute College of Art (MICA)	2008 -2013
Steve Hahn	University of Wisconsin, Madison	2013 – Present
Mario Berry	Lone Star College System	2015 President Elect

Tara O'Niel & Debbie Littlefield

Marquette University must be one of the luckiest HEUG institutional members of all time.

Combined, Debbie Littlefield and Tara O'Neil have nearly 20 years of service to the HEUG. What is impressive are their similarities in terms of the way they serve their constituents. Their commitment goes beyond the many thousands of forum posts helping others, but also to their follow up with HEUG members, engaging them to be sure their needs have been met.

Tara's combined technical and functional expertise has allowed her to be a unique resource for the Financial Aid community.

With over 30 years of higher education experience Debbie is an industry wide resource within the Admissions world.

Not only do these two Golden Eagles have the ability to focus on complex items such as implementing AAWS Online Application or teaching other schools the details of SULA regulations, they also engage HEUG members creatively through the Admissions and Campus Community Jeopardy game or by posting 'how to' cookbooks for members online.

Jeff Robbins

Since 2006, Oracle's Jeff Robbins has been the primary Tools and Technology resource for the HEUG.

Jeff's commitment to the HEUG has been demonstrated through the countless numbers of presentations he has made at Alliance Conferences, at regional events and globally in Africa, Australia, Asia and EMEA. He is a strong resource to the Technical Advisory Group, the Reporting and BI PAG, and engages regularly with the HEUG Board of Directors. Most importantly, he encourages the HEUG and the TAG in particular to think about best practices for successfully managing a complex technical environment.

Bob Blackburn

Nearly 19 years ago Bob Blackburn, then from the University of Waterloo raised his hand and offered to volunteer to serve on the first organizing committee of the Higher Education SIG, known of course now as the HEUG.

Bob served through 2007, as a member of the Board of Directors, the Alliance Conference Program Chair, Vendor chair, as well as the chair of the Alliance Conference in Nashville in 2006. Shortly thereafter Bob left the University of Waterloo, to commit his services full time as the HEUG event planner through 2010.

For the past 5 years Bob's focus has moved to working with HEUG sponsors and vendors around the world. The HEUG's many vendors have grown to respect Bob, knowing he does all he can to make their support of the HEUG valuable to each company.

VIEW PAST HALL OF FAME MEMBERS

COMING FULL CIRCLE

Described in detail in the History section of the HEUG 2009 Annual Report, the organization we now know as HEUG traces its origins to the grass roots efforts of several dedicated individuals at the handful of higher education institutions that were the early adopters, beta partners, and charter institutions for PeopleSoft's applications in the mid to late 1990s. The organization was originally known as HESIG (Higher Education Special Interest Group) and held three conferences under that name in Dallas, Texas from 1998 to 2000. The HEUG was legally incorporated as a 501(c) (3) organization in 2001, firmly establishing itself as the official, independent voice for PeopleSoft's higher education customers. One of the greatest values provided by this organization has been the opportunity to work collegially alongside other application users to share best practices in using and maintaining each institution's systems.

The scope of the HEUG has expanded considerably in the past ten years, both geographically and in terms of the range of software products it encompasses. One of the most significant events in the HEUG's history was the acquisition of PeopleSoft by Oracle Corporation in late 2004. The HEUG established the same type of strong, independent and productive relationship with Oracle as it had with PeopleSoft. Higher education institutions running Oracle's E-Business Suite (EBS) were welcomed into the HEUG community, and representatives from those institutions were added to the HEUG Board and Product Advisory Groups (PAGs). The geographical scope of the HEUG has grown both because of the inclusion of EBS institutions and because of the increasing adoption of PeopleSoft products, especially Campus Solutions, throughout the world.

The mission of the HEUG continues to be to educate and to advocate—that is, to promote and facilitate education of and communication among its members regarding the most effective and efficient use of the software, and to advocate with the vendor on behalf of its members, on issues such as new feature development, software quality, training, support, security, licensing, etc.

Origin & Recent Evolution of HEUG

Each year the Alliance conference is the flagship educational event of the HEUG, and includes HEUG's allied user group the PSUG (Public Sector Users Group).

The HEUG continued to grow and develop regional conferences in 2014. HEUG brought engagement, learning, and networking opportunities to members this year by providing five United States-based regional conference as well as conferences that were held in Utrecht, Netherlands on behalf of HEUG EMEA. In addition, Singapore hosted a HEUG Asia conference, Bogota, Colombia held the first Latin America HEUG Conference, and the 2014 Alliance Down Under conference was held in Gold Coast, Queensland, Australia. The smaller number of attendees at the regional conferences encourages networking among nearby peer institutions, provides the opportunity to learn to individuals who are unable to attend Alliance, and connects local organizations that may have similar goals.

HEUG Board members also attended meetings and conferences in Brazil, South Africa, the Philippines, Saudi Arabia and Qatar, further addressing expanding global membership and demands.

New Committees which started in 2013 continued to grow and organize themselves during 2014. Both the Volunteer Committee and Young Professionals Group were created in 2012. These exciting new groups bring greater opportunities for members to be engaged in the shape and direction of the HEUG as well as helping HEUG stay connected to the needs of the membership.

In terms of advocacy, the HEUG Board and the various PAGs enjoy a truly remarkable degree of access to key players on the Oracle management and product strategy teams. This close relationship allows candid discussions of issues, opportunities and challenges, and has allowed the HEUG to have a direct and tangible influence on the direction of many Oracle product lines. The Product Enhancement Tracker feature of the HEUG.Online, which underwent a makeover in 2012, allows all HEUG members to provide input on enhancements they would like to see in the products, and that input is taken seriously by both the PAGs and Oracle strategists. Oracle supports and participates in the Alliance conference, as well as the regional conferences. Finally, the Board, the PAGs and the membership at large continued dialogue with Oracle on a number of important issues such as the CS/HCM split and integration options, support policies, PeopleTools requirements, reporting/BI strategy, security, and various tactical issues throughout all products.

Membership

The HEUG prospective member program allows those institutions who are seriously considering the purchase of Oracle application software but have not yet signed a contract the opportunity to experience the benefits of HEUG.Online, the Alliance conference and regional conferences. Being able to participate firsthand in the types of educational and networking events the HEUG provides for its membership is a great way to showcase what we offer and the strength of the organization.

Executive Summary

The Higher Education User Group (HEUG) is a non-profit, global organization consisting of higher education institutions that use application software, services and support from the Oracle Corporation. The Higher Education User Group (HEUG) is the largest independent, self-organized industry-specific Oracle User Group in the world. Our members include a wide range of institutions, from community colleges and small liberal arts colleges to huge research universities and entire university systems. It includes public and private institutions and (as Associate Members) for-profit institutions.

The HEUG's business model and its sustainability are contingent upon the organization's financial stability and relevance it offers to its members, vendors and partners by dutifully providing strategic input and feedback on higher education industry priorities on Oracle applications and middleware now and in the future. Our long history of value-added support services to members, partners, vendors and to Oracle will only strengthen as we focus our resources, talents and energy toward the simplification of strategies and outcomes that demonstrate our flexibility and agility.

Vision

To be a valued partner of institutions of higher learning in realizing the greatest value from Oracle products and services through education and advocacy.

Mission

The HEUG helps its member institutions around the world realize value through education and through advocacy. Specifically, the HEUG serves as a mechanism for assisting its members with the selection, implementation and cost-effective use of Oracle and related software and services in support of higher education. The HEUG also listens carefully to the needs of its members and advocates to Oracle on their behalf on matters of current interests, future initiatives and investments. The HEUG helps its members learn about Oracle technology, software and services by working closely with Oracle product strategists and encouraging the sharing of information within the HEUG community through online communications and conferences.

Core Objectives: Education and Advocacy

These two core objectives are supported by four foundational core values that drive the annual strategies for the organization:

1. **Leadership:** Constantly work to create, establish, organize or have influence on events, initiatives and programs to enhance or maximize the HEUG's mission.

2. **Partnership:** Create, maintain and strengthen partnerships with organizations and individuals in the higher education community and those who provide products and services in support of the HEUG mission.

3. **Building Community by Networking & Sharing:** Through an open exchange of information, ideas and learned experiences, strive to gather as a community in support of education, which supports and strengthens our individual and collective organizations locally, nationally and globally.

4. **Communication:** We are afforded the opportunity to be transparent and disseminate information. Through our collective experiences and partnerships we are able to identify and strengthen our products, processes and organizations by being aware and making use of a set of constantly evolving communication methods.
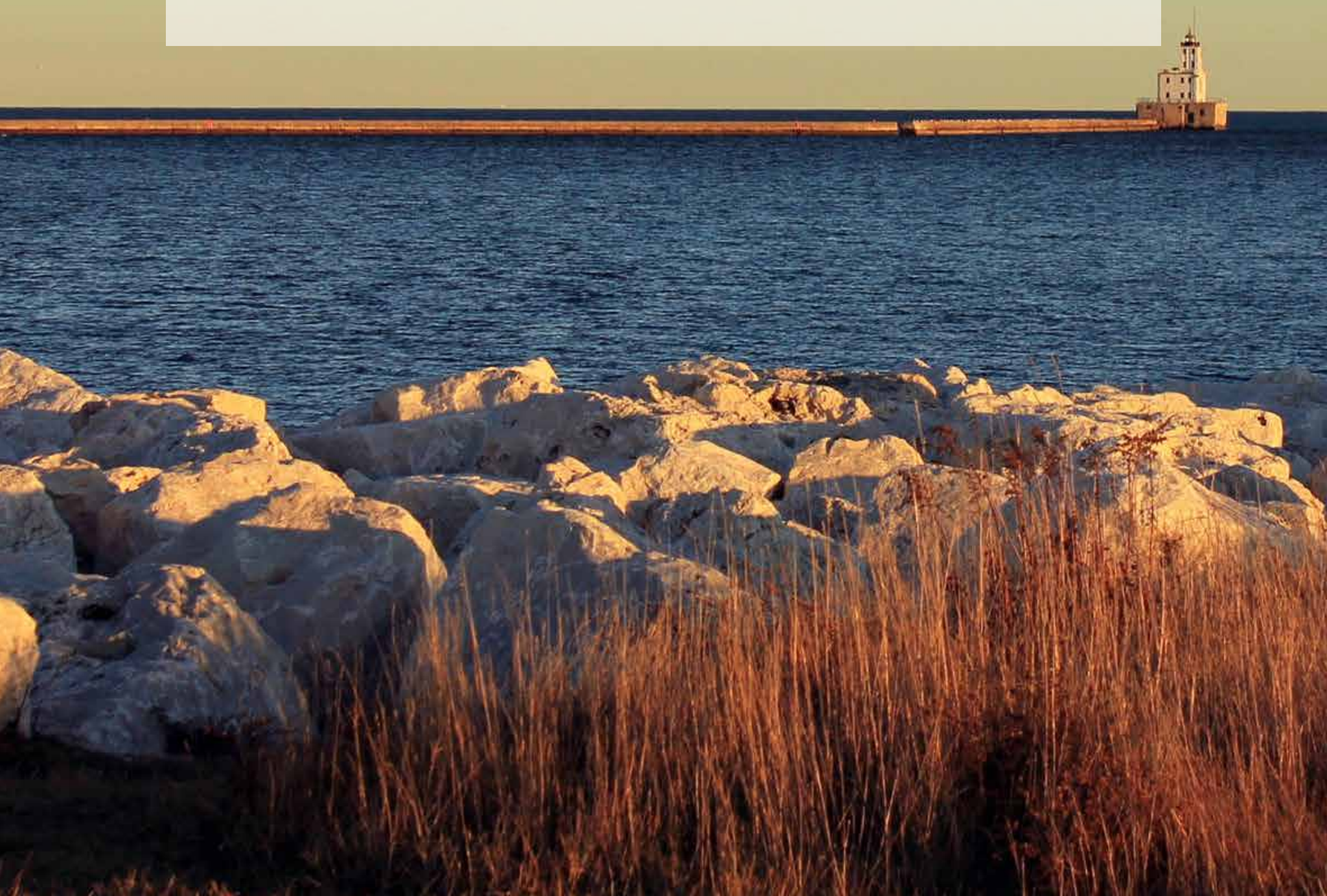
HEUG's Annual Goals

The HEUG and the industry it serves are well-known for our willingness to actively participate in collaborative communities. Whether through formal working agreements, less formal cooperative relationships, or even casual conversations, the time honored and fundamental activities of teaching and learning are the cornerstone of our industry.

As the HEUG membership continues to grow, and more global communities are added, the challenges we face require activities that support and guide processes and practices that are standardized and simple. The solutions and product offerings from technology vendors and partners will continue to evolve and expand to address a global community of change, thus the HEUG's annual goals, strategies and measure outcomes must be agile and flexible.

GOALS:
1. Enhance the HEUG's support for communication, collaboration and education across the entire HEUG ecosystem
2. Strengthen the HEUG's effectiveness in its advocacy role
3. Increase HEUG member engagement and satisfaction
4. Ensure HEUG's continued organizational and financial health

In order to achieve these goals, each year the efforts of the Board of Directors, standing committees, ad hoc committees, work groups and sub-groups, , product advisory groups (PAGs) and technology advisory groups (TAGs) will support and facilitate the HEUG's two core objectives (education and advocacy) and develop annual strategies that provide measured outcomes in alignment with the four foundational core values (Leadership, Partnership, Building Community by Networking and Sharing, and Communication).

TECHNOLOGY PARTNERSHIPS

The HEUG works with Oracle strategists on product-related issues that will benefit our members. We are organized into 16 Advisory Groups who meet regularly throughout the year. Most advisory groups range from six to nine members. Members serve for three-year terms and may serve at most two consecutive terms. We strive to attract an appropriate cross-section of the community including diverse set of institutions across the globe: large and small; public and private; two-year, four-year and graduate.

Each year, the kickoff event is the PAG/TAG Summit, held just prior to the Alliance Conference. Each advisory group is responsible for a particular product, module, or area of Oracle products and each acts as a unified voice for HEUG members to Oracle for that area. The Technical Advisory Group advises on the technical infrastructure and security aspects of the application and technology stacks.

The Advisory Groups also have an education role; collecting and sharing information with Oracle and the user community through white papers & blogs and by coordinating the session tracks at the Alliance conference for their subject area.

The current Advisory Groups include:

- Academic Advising
- Admissions
- Budgeting and Planning
- Campus Community
- Contributor Relations
- Constituent Relationship Management (CRM)
- E-Business Suite (EBS)
- Financial Aid
- General Ledger
- Grants, Billing, and Contracts
- HRMS
- Procure to Pay
- Reporting and Business Intelligence
- Student Financials
- Student Records
- Technical Advisory Group (TAG)

VIEW ADVISORY GROUP MEMBERS

In addition to advisory groups, there are typically several workgroups in progress at any given time. Workgroups are short-term groups created to improve a particular process or area. Working groups of note this year were the HEUG Reorganization workgroup, the Advisory Group Elections Workgroup, the HCM/CS Split workgroup, Enterprise Application Security workgroup, Data Integrity workgroup and Grants/HRMS workgroup.

Some highlights from 2014:

- One of the outcomes of the PAG/TAG summit is for the advisory groups to agree on a set of goals for the upcoming year. The Board has requested that these goals be aligned to the overall HEUG Strategic Plan. A summary of 5 high level goals and associate strategies were provided to the advisory group chairs. The chairs were advised to work with their board liaisons to clearly map goals, indicating how each goal will help the HEUG achieve its objectives, and to submit the results.
- The advisory groups participated in hosting 10 education series webinars in 2014, further aligning themselves with the HEUG's educational mission.
- The advisory groups continued to support the advocacy mission of the HEUG by regular engagement with Oracle strategists, use of the HEUG's Product Enhancement Tracker, discussion forums, and the use of surveys which includes 14 surveys put out to the HEUG's community in 2014.
- The new elections process kicked off the 2014 elections for the advisory groups (PAG charter link). A successful election was held in October 2014 with 76 new members elected to advisory groups with 12 being International (non-US) members.
- The Technical Advisory group advocated for increased functionality in mobile and analytics specific to the higher education community.

CONNECTING MEMBERS

Conference and Events

HEUG provides a unique and growing opportunity for communities across the world to connect through regional conferences. In 2014, these events included Alliance Down Under conference on the Australian Gold Coast; the EMEA conference in Utrecht, the Netherlands; Asia HEUG in Singapore; the first ever Latin American HEUG in Bogotá, Colombia and five regional conferences in the United States including the MidAtlantic Regional (MidAtlantic HEUG); the Midwest Regional (MIDHEUG); the inaugural New England HEUG Regional (NEWHEUG); the Southeast Area Regional (SEARUG), and the South Central Regional (SCHRUG). These conferences had a combined attendance of more than 2,100 attendees.

Although built on the Alliance model, these conferences have proved to be more than just "mini-Alliances". As a regional program, they allow regional communities to connect and include opportunities to talk with vendors that provide services in their region. The smaller and more informal venue has allowed regional members to get to know each other and share more openly than a large conference may allow. These events also allow members who would not normally have the budget to attend Alliance, such as mid-level managers and central office users, to attend a conference. High-level administrators, such as Presidents and Provosts, also attend and hear about the issues and successes of their systems. Frequently, these individuals do not have the time to travel and attend Alliance and so the regional events allow them to better connect with the HEUG community.

Each of the regional conferences is produced by a regional conference committee made up of HEUG members from within the region and includes support from the HEUG Board and Socious staff. US Regional Conference Chairs meet regularly by conference call and have one in-person meeting each year, either at Alliance or in conjunction with a HEUG Board meeting. The calls provide an opportunity throughout the year to coordinate dates of conferences, venues and requests to Oracle and other vendors for participants and support. They also provide time to share best practices in running these types of conferences, assist with overall planning and provide ideas for developing a compelling conference program.

Vendors

Vendors provide support for all of the regional conferences. Given the current and future growth of the regional conferences and the number of vendors who are supporting multiple conferences, the HEUG Board initiated coordinated vendor relations this year so that vendors have a consistent experience regardless of the conference they are supporting. The HEUG also decided to reward vendors who support multiple events. Two programs were initiated in 2014 that reward vendors who attend multiple events, both in terms of support across the world and also support outside of the US. Both programs were successful as a number of vendors were eligible to participate in both programs.

Alliance Conference 2014
March 9-12, 2014
Las Vegas, Nevada, United States

Over 4,200 of your colleagues traveled to Las Vegas, Nevada for the Alliance 2014 Conference. The conference drew attendees and vendors from over 23 countries from the Higher Education and Public sector. This 4-day event included workshops, executive forum and participant sessions, Oracle product new strategic directions, vendor exhibits, opportunities to "stop and share" sessions, longer sessions for deep dives and smaller ones to quickly get to the point. Many extra activities utilizing new social media, networking, "running with Elvis" and supporting various community charities helping them get a new start in the world. There were over 100 vendors in the Exhibit Hall to talk about new products and services. The Alliance event was highlighted by keynote speaker Shawn Achor educating, enlightening and entertaining us all on the Happiness Advantage.

Thanks to all for a very successful Alliance 2014 conference and we hope to see you back at Alliance 2015 in Nashville, Tennessee.
Past Conference Chair Alliance 2015, Don Barker

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United States

The HEUG's US Regional Conference initiative started in 2011. This year saw five successful conferences including the first New England regional event (NEWHEUG). One conference, the North East regional, was canceled. The total number of attendees at the US Regionals was 1,738, a 33% increase over 2013. Several of the conferences were held in new venues as the planning committees continued to look for better opportunities to help their communities connect.

One of the primary goals of the regional conferences is to enhance the Alliance experience, not to compete with it. They continue to support that goal by attracting attendees who might not typically attend the larger Alliance conferences. These attendees include central office staff, mid-level managers, and even some higher-level administrators. Regional conferences also capitalize on their unique environment that facilitates peer conversation and interaction. They also give younger or inexperienced staff the opportunity to present in a professional setting. The smaller venue and smaller number of attendees make this a natural fit and provide a very 'personal' feeling for the regional conferences.

Conference and Events

Each of the conferences has a planning committee. The chairs of all committees participate in a monthly call and regularly share thoughts and ideas. These conversations and experiences have been consolidated into a "Guidelines and Best Practices" document that was first created in 2013 and will be updated over time. This document includes a description of possible session types including Birds of a Feather sessions, guided discussions groups that concentrate on a specific topic of interest, participant led training and workshops and sessions presented jointly by two schools with differing approaches to a problem.

Regional Conferences continue to receive high ratings by attendees and the planning committees continue to look for ways to improve the attendee experience. These efforts include more coordination with Alliance in terms of seeking sessions and presenters, more conversations with the PAGs about program content, and new types of session formats that both increase the depth of some sessions and increase opportunities for the community to network and connect.

The 2014 US Regional Conferences
- Mid-Atlantic Regional Higher Education User Group (Mid-Atlantic) – Serving the greater Washington DC metropolitan area including Maryland, Virginia, Delaware and Pennsylvania. More than 180 attended this June 6 event at Coppin State University in Baltimore.

- South Central HEUG Regional User Group (SCHRUG) – Serving Texas, Louisiana, Arkansas, Oklahoma and Mississippi. The July 23 event at University of Texas, Arlington was attended by over 325 HEUG members.

- New England Regional Higher Education User Group (NEWHEUG) – Serving the New England states: Maine, New Hampshire, Vermont, Massachusetts, Connecticut and Rhode Island. The first-ever event took place on August 11 in Sturbridge Village, Massachusetts and attracted 172 attendees.

- Midwest Regional Higher Education User Group (MIDHEUG) - Serving Wisconsin, Iowa, Illinois, North Dakota, Colorado, Michigan, Minnesota, South Dakota and Indiana. The event was held on October 13-14 at the Madison Marriott West in Madison, Wisconsin, and over 360 HEUG members attended.

- Southeast Atlantic Regional User Group (SEARUG) – Serving Virginia, West Virginia, North Carolina, Georgia, South Carolina, Florida, Tennessee, Alabama, Mississippi, and Kentucky. Held at the Sheraton Chapel Hill on October 20-21, over 165 members attended.

- The Northeast Regional Higher Education User Group (NERHEUG) serves the greater New York metropolitan area including New Jersey, New York, Pennsylvania, and Delaware. The 2014 event was canceled due to a lack of program content. After consulting with the planning committee, the HEUG Board decided to cancel the 2015 event and use the time to reassess the long-term viability of the event.

United States Regional Conference Chairs

- Mid-Atlantic Chair – Stan Jakubik
- South Central HEUG Regional User Group Chair – Jean Grove
- New England Regional Higher Education User Group Chair- Pam Kenyon & Mary Gagliastro
- Midwest Regional Higher Education User Group - Scott Johnson
- Southeast Atlantic Regional User Group - Tom Johnson
- The Northeast Regional Higher Education User Group - Joanne Steele & Sharon Hardy

Alliance Down Under 2014 Conference
5 - 7 November 2014
RACV Royal Pines Resort, Benowa Gold Coast, Queensland, Australia

A hard working Planning Committee delivered a successful conference with overwhelmingly positive feedback from delegates on the venue, food, conference program, vendors and overall experience. The event was held at a new venue this year which provided much better space for all, especially vendors. Many remarked on the quality of the food and service from staff.

The planning and execution of the conference were greatly enhanced as always by the guidance and expertise provided by Cathy Clifton in the planning and execution. Delegates benefited from the attendance of Brittany Sarvis from Socious who assisted with use of the mobile app and HEUG Online. Dave Baugh provided valuable advice to the planning committee from the perspective of vendor's sales. President Steve Hahn and Board members Stan Jakubik , Tina Thorstensen, Buddy Coombs and Don Barker provided great support and presented a very well received commentary to the Academic Registrars Forum on their home institutions and related higher education issues.

Conference and Events

The success of the conference was also enhanced by the very strong support of Oracle personnel, with a number of their senior US-based staff joining us including Cole Clark and Keith Rajecki.

The CRM market in Australia has matured and a full set of well attended sessions were offered and it is clear that the CRM special interest group has a robust foundation to build upon.

The conference was provided with rich content both in industry analysis and entertainment by two excellent keynote speakers. Susan Grajek from Educause gave an excellent presentation on recent research which had wide appeal and application. Jane Caro, a media and communications personality, well known to many provided a humorous but pithy insight into the lessons she's learned in life. Her style and language was slightly shocking to American sensibilities but Australians are like that!

This year's Executive Forum was a great success as a new format was adopted. We had several strong presentations which generated good discussion and provided valuable content. Susan Grajek provided one of these presentations, followed by Steven Hodgkinson from Ovum, who spoke about their Cloud Fit Framework and Cole Clark was able to respond to many matters raised by the first two speakers in his response and presentation.

The 2015 Alliance Down Under Conference has been confirmed for 4 – 6 November at the same venue, Royal Pines Resort, Surfers Paradise, Gold Coast, Queensland Australia. Oracle workshops will again be offered prior to the conference, dates and venues yet to be confirmed.

EMEA 2014 Conference
15-16 October 2014
Postillion Hotel, Bunnik, NL

The 2014 EMEA Conference was a very successful event with positive feedback from attendees and sponsors on the program, the venue, the food, the overall organization and the delegate experience.

The Finance Track this year again focused on EBS content in support of our goal to reach existing EBS users in Higher Education across the region. Our efforts to reach out to this new potential membership base need to be refocused and more structured, aligning with the efforts of the EBS PAG as they expand their conference offering at Alliance 2015. Particular thanks are owed to Rom Dube (Imperial College London) who helped to coordinate activities for the track onsite alongside Track Chair Matt Blandford. Special thanks also to Todd Langille for his support during the planning process and at the conference for the Finance Track – the strong EBS presence and conference content was remarked upon by a number of sponsors and provides a strong platform upon which to build for future events.

Conference and Events

The Student Track, organised by Carolien ten Oever, was very well received by delegates with an excellent mix of content from Oracle and other sponsors and from institutions but again very much focused on new and emerging functionality. Delegates have fed back that the EMEA conference is excellent value for money as every session is relevant, and they are hard-pressed to choose what to attend in each timeslot.

The Postillion Hotel was an excellent venue. The conference facilities, food and customer service were first-rate and have all received very positive feedback. The hotel setting enabled us to host a full evening reception, with a meal and entertainment. All delegates and sponsors have fed back that this was a great success and that they very much appreciated the additional networking and social time.

Executive Forum took place during the morning of day one. Particular thanks go to the Co-Chairs for their vision and organisational skills in respect of this part of the conference. The EMEA Forum continues to attract staff from a range of executive and non-executive roles but the content this year engaged all attendees. The addition of speakers from Gartner was particularly well received and we would look to continue using speakers from an external (non-HEUG, non-Oracle) organisation in future years.

Social Media played a more prominent role in the build up to the conference and in providing a commentary on the conference to a wider audience beyond the attendees. A rafflecopter proved popular from the start, encouraging HEUG members and conference delegates to follow the conference preparations on Facebook and Twitter. Lucky winners enjoyed prizes ranging from free registrations for Alliance, free registration for EMEA 15 and a basket of traditional Dutch treats! 58 original tweets were sent using the #heugemea14 providing brief glimpses into the content of the Exec Forum and conference sessions. @HEUG_EMEA now has 111 followers including 30 who followed during the conference.

Asia HEUG 2014 Conference
10-12 November 2014
Suntec Singapore Convention & Exhibition Centre

Asia HEUG Conference continues to attract interests and participation from institutions in 2014. Close to 200 delegates from a record number of 25 institutions attended the conference in Singapore last November.

Susan Grajek, Vice President for Data, Research, and Analytics of EDUCAUSE kicked off the conference with a keynote, giving delegates a glimpse of the top 10 IT issues and top 10 strategic technologies for 2015. Member institutions and vendors contributed another 22 informative and valuable sessions. A workshop was introduced for the first time in this conference, providing delegates an opportunity to attend a deep dive session. Apart from the main conference program on 11 & 12 November, Senior Executives from participating institutions also attended an Executive Forum held at the National University of Singapore on 10 November.

The closing of the conference also marks the start of a new leadership team in Asia. Jaime Caro, Assistant Vice President for Development from the University of the Philippines took over as the Chair of the Asia HEUG Executive Committee from Tommy Hor. We would like to thank the Asia HEUG founding Executive Committee members for their dedication and effort in establishing this user group in Asia.

LATIN AMERICA HEUG 2014 CONFERENCE
29-30 October 2014
AR Centro de Convenciones, Bogotá, Colombia

After several years of work spent establishing a community of Higher Education users of Oracle products in our region, and as a result of our participation and interest gradually built at Alliance's Conference and other meetings, HEUG decided to create the LA HEUG Chapter delegating its leadership to Pontificia Universidad Javeriana in Bogotá, Colombia, represented by Mr. Roberto Enrique Montoya Villa, Administrative and Finance Vice-President of the Pontificia Universidad Javeriana.

The first challenge was to structure the LA HEUG first Conference in our region. The planning for this event, together with the HEUG Board, began at Alliance 2013, where the planning committee was defined. This committee was formed by some HEUG Board members and representatives of Universities of Mexico, Peru and Colombia.

Conference and Events

The Conference was held in Bogota, the Colombian capital, on 29 and 30 May 2014. AR Conference Center was the selected venue for the event. The conference was supported by a group of 12 sponsors, local and global. Sponsor management was performed by the HEUG in conjunction with the Javeriana University. The space provided at the Convention Center and the activities programed allowed a large number of opportunities for interaction between vendors and attendees.

The LA-HEUG conference had 144 attendees, including sponsors and conference committee, from 8 countries, representing 22 universities in the region. This group include executives of universities and academic and administrative representatives, who form a broad, diverse and active group of participants.

The academic component of the conference was supported by a diverse agenda, guided by an expert international consultant and two Global Vice Presidents of Oracle and a total of 18 sessions across 3 tracks of interest: Experiences of universities in the region, presentations of trends around Oracle products, and presentations of experiences by sponsors about the implementations & solutions.

These thematic lines allowed great flexibility in content presentation, which was very well received by the attendees. The conference featured presentations from 7 countries, in different fields and with different levels of progress in the implementation process.

The closing of the event was done with a panel of experts, formed by the HEUG President and executives of universities from Mexico, Peru and Brazil, who spoke openly about what is expected to be the HEUG community in our region.

The event was held successfullyand exceeded expectations of both attendees and sponsors. The LA HEUG Chapter consists of a diverse community with a tremendous growth in number and installed products, generating high demand for support and consultants that support local requirements, industry dynamics, and language and product diversity. The HEUG is called strongly to support the consolidation and development of this community. The 2015 LA HEUG Conference will be in Lima, Peru; Universidad Católica de Perú will host the event.

MEMBERSHIP & FINANCE

Membership Outlook

The membership program established during 2010 continued with much success through 2014. A renewal rate of 94% and a member institution increase of over 5% is a testament to both the benefits of the program and the diligence of the membership committee. The Higher Education User Group is made up of 69% US Memberships and 31% International Memberships. With the total membershipfrom 2013 to 2014 being:

- March 2013 – 24301 users
- March 2014 – 25555 users

HEUG MEMBERSHIP
$443,183

PSUG MEMBERSHIP
$10,800

The HEUG membership program consists of two types of membership: Institutional/Institutional System membership and Subscriber membership. Subscriber members enjoy basic access to the HEUG.Online. These members have access to all forums, blogs, and many files on the HEUG website. Upgrading to Institutional or Institutional System membership gives user access to additional services and files on the website. Institutional members enjoy access to all Education Series webinars and recordings free of charge, a discount on Alliance conference registration and access to Alliance file presentations. Institutional members are also eligible to serve as PAG/TAG members and on the Board of Directors and are the only membership classification with voting privileges.

Membership dues are based on the Student Full-Time Equivalent (FTE) count for your institution or institutional system. Both institutional and system membership benefits all users at your college or university.

FTE GUIDELINES FOR MEMBERSHIP

HEUG Education Webinar Series

The HEUG Education Webinar Series continued to grow in 2014 offering more educational webinars to more people. Education Series webinars bring members hot topics, relevant training and demonstrations. This program is designed to help our HEUG members grow their knowledge of PeopleSoft/Oracle products and is a great opportunity to learn all year and helps those who are not able to attend HEUG conferences. The HEUG Education Series brings together leaders from within our membership, Oracle, vendor partners and HEUG management to provide useful webinars that will help members with implementing, maintaining or upgrading their PeopleSoft/Oracle solutions. 2014 saw a partnership with the Product and Technical Advisory Groups to share their knowledge and expertise with the broader HEUG audience. Oracle applications team members also created more of a presence in 2014 as part of the Education Series, bringing members the most up-to-date information on new product releases and advancements.

This program offers three types of webinars:

1. HEUG Education Series Events. These sessions are presented by members and experts on topics that are relevant and timely. Some of these will be done by top Alliance and regional conference session performers, allowing you to ask questions and interact directly with the presenter. They also include new presentations that were not part of a conference, including Oracle Roadmap style sessions. There is a $59 per person fee to access these sessions both live and recorded for Subscriber members. HEUG Institutional and System members can attend these sessions free of charge.
2. Sponsored Webinars. These sessions are presented and are sponsored by our vendor partners. In some cases they are presented in conjunction with a customer. They are not sales-oriented, but rather sessions for the sharing of valuable information. Since they are sponsored, access is free of charge.
3. HEUG Webinars. These sessions provide training on HEUG programs, tools, and initiatives. These training and educational webinars are occasionally available in multiple languages. They are free of charge.

All webinars are recorded and the recordings are made available. This allows us to bring educational opportunities to users around the world regardless of time zones, since they can be accessed at the users' convenience. In 2014 the HEUG offered 62 webinars, attended live by 6,290 people. The session recordings were downloaded 4,893 times.

Financial Position

During the 2013-14 fiscal year, net assets increased by $35,039. The net increase was significantly less than the previous year due to the costs associated with the Alliance 14 conference in Las Vegas. Although Las Vegas continues to be one of the more popular conference destinations, the costs are extraordinary. There is currently one year remaining on the Las Vegas site contract (Alliance 2017).

Statement of Activities
Years Ended June 30, 2014 and 2013

	2014	2013
Revenues		
Conference Revenue	$4,491,784	$3,829,687
Membership Dues	408,665	420,758
Revenue sharing income	64,899	65,488
Interest Income	19,889	19,647
Total Revenue	$4,985,237	$4,335,580
Operating Expenses		
Program Expenses	$4,510,268	$3,605,214
Administrative Expenses	404,952	407,636
Total Operating Expenses	$4,912,220	$4,012,850
Change in Net Assets from Operating Activities	70,017	322,730
Non-Operating Income (Expense)		
Foreign currency translation	(34,978)	(20,789)
Change in Net Assets	$35,039	$301,941

Source: HEUG Audited Financial Statement

Statement of Financial Position
Years Ended June 30, 2014 and 2013

	2014	2013
Assets		
Current Assets		
Cash and Cash Equivalents	$2,614,696	$2,439,701
Certificates of Deposit	-	441,744
Accounts Receivable	49,350	38,167
Prepaid Expense	111,595	107,754
Total Current Assets	$2,775,641	$3,027,366
Certificate of Deposit, Long-Term	616,071	163,395
Total Assets	3,391,712	3,190,761
Liabilities and Net Assets		
Current Liabilities		
Accounts Payable	$61,100	$44,473
Deferred Revenue	586,625	437,340
Total Current Liabilities	$647,725	$481,813
Net Assets – Unrestricted	2,743,987	2,708,948
Total Liabilities and Net Assets	$3,391,712	$3,190,761

Source: HEUG Audited Financial Statement