HEUG
Higher Education User Group

2 0 1 7
ANNUAL REPORT

INTRODUCTION

LETTER FROM THE PRESIDENT

"IT IS MY PLEASURE TO PRESENT YOUR 2017 ANNUAL REPORT OF THE HIGHER EDUCATION USER GROUP! THE PAST YEAR HAS BEEN AN EXCITING, CHALLENGING AND REWARDING YEAR FOR THE HEUG."

- JANE BROAD, PRESIDENT

A personal highlight of the year for me has been the opportunity to take the Executive Team 'on the road' – connecting directly with our members and adding additional value to our in-person meetings. My sincere thanks go to our host institutions during 2017 – Oregon Health & Science University in beautiful Portland, Maricopa Community College – Rio Salado, and Arizona State University both in balmy Phoenix. The visits gave us true insight into the strategic and technology plans and challenges of some of our members and also provided valuable feedback on the purpose and benefits of the HEUG for those members, all of which is helping to inform our own planning and areas of focus for the future.

This focus on our members, improving our understanding of their challenges and priorities, through these visits, through discussions at conferences and through a number of surveys this year, has helped the Board to proactively engage with our primary information systems partner, Oracle, in respect of their Cloud and on-premise development roadmaps helping to ensure that the solutions, and the HEUG, continue to support

INTRODUCTION

LETTER FROM THE PRESIDENT

our members now and in the future.

Another highlight for me has been the focus on our solution partners through our Vendor Relations Workgroup.

These partners are critical and highly valued members of the community – the services and solutions they provide to our institutions, the advice and guidance they can provide given their experience of working with many different institutions, the content they deliver through conference sessions and workshops, and their sponsorship of our events.I am so pleased to see recognition of this through the introduction of a new 'Partner/Sponsor of the year' award which will be presented at Alliance 2018 in Salt Lake City!

This Annual Report will highlight our other significant initiatives and achievements of 2017 – I would ask that whilst you read through the report please remember that the HEUG is a volunteer organisation. Considerable time and energy is expended across the organisation – our Advisory Groups, our many conference planning

teams (our global and international Alliance conferences, and our US regionals), our Young Professional Group, our Volunteer Committee, our workgroups (Cloud, Integrations, and many more), our Board of Directors and the Finance and Audit Committees – many passionate individuals giving their time, skills and expertise to help the community – helping us learn and connecting us with each other and with partners who can help us further. As the higher education and technology landscapes shift around us I never cease to be amazed at our ability to adapt and at the intellect, skills, vision and leadership of all our volunteers. The HEUG is a truly remarkable community that as President I am honoured to lead into 2018.

INTRODUCTION

LETTER FROM THE EXECUTIVE DIRECTOR

BEGINS TO DISCUSS HOW IT NEEDS TO EVOLVE TO MEET THE NEEDS OF ITS MEMBERS.

- LEW CONNER, EXECUTIVE DIRECTOR

2017 BROUGHT A NEW PRESIDENT TO THE HEUG AND NEW DISCUSSION REGARDING DIRECTION. JANE BROAD HAS DONE AN EXEMPLARY JOB GUIDING THAT DISCUSSION THROUGHOUT THE YEAR. AS HIGHER EDUCATION INSTITUTIONS BEGIN TO THINK STRATEGICALLY ABOUT THE DIRECTION THEY WILL HEAD REGARDING ADMINISTRATIVE APPLICATIONS, THE HEUG NOW

In a recent presentation I attended at the 2017 HEUG EMEA event in Barcelona, Ernst La Haye of CY2 proposed that campus focus has shifted in terms of where they see ERP applications. Once considered to be at the center of strategic discussion on a campus, the ERP application discussion has been replaced at the middle by integration discussion. While still, a major part of the discussion ERP is no longer the focus. The HEUG discussion for 2017 has mirrored LaHaye's thoughts and continue to focus on how the HEUG needs to evolve to serve its members by focusing on that integration rather than solely on one ERP vendor.

I am sure 2018 will be a year of continued

INTRODUCTION

LETTER FROM THE EXECUTIVE DIRECTOR

discussion on the above direction and will include some gradual change in focus and services to the members. It will be a challenging year for HEUG leadership, but I suspect it will be a very interesting and exciting year as well.

As I complete my tenure as Executive Director, I would like to take a moment in this letter to the Annual Report to acknowledge the many volunteers who have shaped this organization over the past 22 years.

Volunteers who were members of the Board of Directors, Conference Team members who spent countless hours of personal time traveling to venues, planning events and ensuring a successful conference, Advisory Group members who worked closely to represent their constituents with Oracle Strategists and so many committee members and general HEUG members whose passion and commitment made the HEUG thrive, these are the individuals who laid the foundation of an organization that is unlike any other group within higher education. The HEUG remains the ONLY independent user group of its kind in the world. I have been very fortunate to have spent the last 22 years working with these volunteers to help grow this organization.

While I will be stepping away from this position and the 2018 challenges, I welcome the opportunities that may lie ahead to become one of those volunteers who work to help the HEUG evolve in the future.

2017

EXECUTIVE SUMMARY

INSTITUTIONS STRUGGLE TO KEEP UP.

- BRAD FINLEY, VICE PRESIDENT OF MEMBERSHIP & COMMUNICATIONS

AT THE INCEPTION OF THE HIGHER EDUCATION USER GROUP, THE ENGAGEMENT MODEL WAS BUILT AROUND AN EXISTING PEOPLESOFT PRODUCT AND THE NEED FOR MODIFICATION AND ENHANCEMENTS TO THAT PLATFORM. TODAY THE APPLICATIONS THE HEUG WAS FORMED AROUND HAVE MATURED AND WE NOW ARE FACED WITH UNPRECEDENTED CHANGE AT SUCH A RAPID PACE THAT OUR MEMBER

We find ourselves looking to the future where our members are engaged on different platforms, some on different on-premise versions, some hosted in the cloud and some on the forefront of deploying new cloud applications. Our new engagement model finds us trying to remain relevant and provide value to each of these constituent groups. This year our strategic work groups were focused on re-inventing the HEUG to meet these challenges.

Our Alliance Conference Review group is evaluating our annual conference and looking at ways to make the annual conference more valuable in this time of change. The Advisory Group Re-organization team continues to evaluate the structure of groups so that we can better represent some of the new constituencies.

2017

EXECUTIVE SUMMARY

The Contract Review workgroup is evaluating the large contracts the HEUG signs to provide the services of the organization. Our Partner relations group is looking at ways to improve value to our vendor partners. The Education Strategy workgroup is an expanded version of the Oracle University group designed to expand educational opportunities to our members through numerous providers.

The Business Review workgroup is reviewing the HEUG's foundational documents and recommending changes so that we are prepared for the future that will include cloud applications. A new Integration Strategy workgroup was formed to look into the numerous methods and technologies to available to integrate the variety of on-premise applications and cloud applications.

In 2016 a Cloud Strategy workgroup was formed to look into the current state of cloud applications. In 2017 that group became the Cloud Applications workgroup and became very active. The group put on the first HEUG Cloud Symposium in February where attendees learned from Oracle and early adopter institutions. The group also administered the 3rd annual cloud applications survey to our members.

Our international focus continues to grow. This year the new Canadian Alliance was hosted at the University of Waterloo. 15 international members were elected to the various advisory groups in the recent election cycle. This year Jane Broad took over as HEUG President becoming the first from an institution outside the U.S. The Young Professionals Group continues to grow and extend their outreach. The YPG 101 series of education webinars has expanded and become a popular way for new users to become familiar with various focused areas. The Emerging Leadership Program was launched and saw 10 mentor/mentee pairs engage in professional development.

The many initiatives listed above and the focus on meeting our member institutions needs shapes our focus for 2018. The HEUG Board recognizes we are in a time of tremendous change and is committed to adapting our organization to meet the challenges ahead of us.

2017

OUR ORGANIZATION: YEAR IN REVIEW

THE YEAR BEGAN AND WILL END WITH A TRANSITION.

Previous HEUG President Mario Berry worked with new HEUG President Jane Broad to 'pass the gavel' at the end of the Alliance 2017 event. In June, Executive Director, Lew Conner announced an upcoming retirement date. Work was done by Higher Logic spending the year transferring knowledge and administrative duties from Lew to Scott Balthazor the incoming Executive Director and to Brittany Moon who became the Deputy Executive Director. All transitions have gone very smoothly.

Not surprisingly much of the busy work for the HEUG Board of Directors centered around how the organization should evolve to provide education and advocacy to members beyond Oracle applications. As we continue to determine the impact of the Cloud on our campuses one change comes into focus more and more. No longer are ERP applications such as our Oracle applications the center of the universe for technology on campus. Moving to the center is a focus integration of various technology used on a campus. With that in mind, the HEUG Board

members spent their efforts in various work groups that begin to address this shift, but that also focuses on the services that continue to be important to campuses who will gradually shift over the next 5-10 years.

New work groups focusing on Integrations, HEUG Business Review, Oracle Strategy, Education Strategy and Strategic Partners were added to groups who have spent a few years working on Alliance Conference Review, Advisory Group Review and Partner relations. The work of these groups will culminate with new ideas, directions, strategy and services benefitting all members.

Even with the above dialogue, the work that has been a part of the HEUG for years continued during 2017. Our US-based regional conferences continued as did our events internationally. We added the Canadian Higher Education User Group (CHEUG) event to the mix, and the Alliance 2017 event in Las Vegas was again successful!

AS WE ENTER 2018 THE EVOLUTION OF THE HEUG WILL CONTINUE AND MEMBERS WILL LEARN MORE AND MORE ABOUT WHAT NEW STRATEGIES AND PROGRAMS THAT WILL EMERGE.

ADVISORY GROUP REORGANIZATION WORK

2017 brought a new President to the HEUG and new discussion regarding direction. Jane Broad has done an exemplary job guiding that discussion throughout the year. As higher education institutions begin to think strategically about the direction they will head regarding administrative applications, the HEUG now begins to discuss how it needs to evolve to meet the needs of its members.

BACKGROUND AND DRIVERS

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 Advisory Group Summit as a precursor for potentially recasting the advisory group structure. In 2016, the HEUG Board assembled an Advisory Group Reorganization work group to review the current advisory group structure.

The HEUG Board reviewed these recommendations during the July 2017 board meeting. The Board approved changes to the advisory group framework, which continues to serve the needs of the HEUG community, and meet its core objectives of advocacy and education across a board range of technology and business areas it represents. This framework will 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.

CHANGES FOR THESE ADVISORY GROUPS BEGIN WITH SUMMIT 2018

- Budgeting; General Ledger; Grants, Contracts and Billing; and Procure to Pay will be consolidated into a single advisory group with a membership of 15
- Constituent Experience and Outreach and Contributor Relations will be consolidated into a single advisory group with a membership of 10
- Reporting and Business Intelligence will be consolidated with the Technical Advisory Group and have a membership of 18
- New advisory groups will be established in the near future to ensure the HEUG keeps pace with the changing landscape and continues to meet the needs of member institutions

TRANSITIONS FROM 2017 TO SUMMIT 2018

- Members of the impacted advisory groups whose terms continue beyond Summit 2018 are not impacted.
- The upcoming advisory group elections and the available positions will reflect the new advisory group compositions.
- There are no changes to Alliance 2018 in terms of track organization for the impacted advisory groups, however cross-referencing across tracks is strongly encouraged.
- There are no changes to product enhancement trackers and community listservs in 2017 so changes are communicated and understood by the HEUG membership during the transition period.
- An updated Advisory Group Charter reflects the changes.
- A new Advisory Group Member Expectations statement will help potential nominees understand the contribution they need to make as advisory group members.

The Board will work with the current advisory group membership on transitioning to the new structure over the coming weeks and months to ensure the work of the impacted advisory groups is progressed into the new arrangements with minimal disruption. The Board appreciates that these changes may be challenging for some but believes they are necessary in order for the HEUG to continue to evolve and meet the needs of its members. The Board wants to work with the advisory groups to make this a successful transition. We also want to hear your feedback about the proposed changes so please contact your Board liaison directly or discuss the changes with them on your regular conference calls. An announcement about the changes will be sent out to the HEUG community later this week.

The Board wishes to thank all current and previous advisory group members for their contributions under the current structure and looks forward to working with continuing and new members under the new arrangements. We also look forward to providing the HEUG community with new opportunities to broaden our advocacy efforts with Oracle.

ADVISORY GROUP REORGANIZATION WORK

2017 brought a new President to the HEUG and new discussion regarding direction. Jane Broad has done an exemplary job guiding that discussion throughout the year. As higher education institutions begin to think strategically about the direction they will head regarding administrative applications, the HEUG now begins to discuss how it needs to evolve to meet the needs of its members.

THE WORK GROUP IDENTIFIED SEVERAL KEY DRIVERS FOR THE REORGANIZATION

- 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 demands greater urgency from the HEUG to determine its future direction and Advisory Group structures.
- The current advisory group architecture, which has served well in the past, has a diverse range of compositions and focus. They range from groupings around very specific modular functionality within Campus Solutions and Finance, to entire product suites such as E-Business and Constituent Experience & Outreach. This leads to inconsistent levels of engagement with Oracle. These changes will help to ensure engagement with Oracle at a strategic level.
- Some Oracle applications are very mature and stable. This has led to a plateau in enhancements from Oracle amongst member institutions, and difficulty in filling roles and identifying priorities in many of the Advisory Groups identified in the Change Proposal.
- There is a growing need and expectation from our institutions to focus on business processes and end-to-end solutions to challenges, which often requires solutions that cross over functional modules. These groupings will facilitate these needs and expectations.

WORKGROUP MEMBERS

Buddy Combs	Kentucky Community & Tech College System	Jason Wenrick	California State University Chancellor's Office
Mark Erickson	University of Queensland	Lisa Skinner	Stanford University
Ashley Kennedy	Staff Supporting the HEUG	Michelle Lin	California Institute of Technology
Brittany Moon	Deputy Executive Director	Scott Balthazor	Staff Supporting the HEUG
Jaime Caro	University of the Philippines	Terence Houser	University of Virginiat
Jane Broad	University of Glasgow		

ALLIANCE CONFERENCE REVIEW WORK

The Alliance conference is the HEUG's peak conference event and critical to its financial viability as a volunteer organization. The Board has commenced review activities into the business of the HEUG, and the structures of the Board Advisory Groups which have played a critical role in developing and coordinating Alliance conference content.

BACKGROUND AND DRIVERS

As the HEUG continues to grow and mature as a user group organization it is critical that its key activities are reviewed routinely to ensure they remain relevant and continue to meet the needs of the ever-evolving membership. The Alliance conference is the HEUG's peak conference event and critical to its financial viability as a volunteer organization. The Board has commenced review activities into the business of the HEUG, and the structures of the Board Advisory Groups which have played a critical role in developing and coordinating Alliance conference content. The Board has therefore commenced a wide-ranging review of the Alliance conference to assess its success as a showcase for HEUG members, and supports its objectives of advocacy, education and global connectedness.

PROGRESS

SOME KEY QUESTIONS THE WORKING GROUP HAVE BEEN DISCUSSING ARE:

- Whether the HEUG Board has complete awareness of issues being raised with members and/or vendors? Do we have full knowledge of the challenges and opportunities? Do we leverage attendance data to improve conference format and content?

- Are attendees connecting to the right people, identifying the right sessions in the existing format? Does the conference format properly address the different needs of the membership eg: first time attendees, leadership?

CHANGES FOR THESE ADVISORY GROUPS BEGIN WITH SUMMIT 2018

TO REVIEW CHARACTERISTICS OF THE ALLIANCE CONFERENCE TO ENSURE IT CONTINUES TO:

- Provide value to HEUG membership by retaining its currency with technology and business change, and as an opportunity to connect with other members of the community;
- Showcases the contribution of members and vendors, and educates our members in higher education and public sector;
- Continues to retain existing and attract new membership to ensure the sustainability of HEUG
- Provides the opportunity for the HEUG organization, Board, Advisory Group members, and members to discuss the HEUG: its operations, challenges and opportunities

FACETS FOR REVIEW WILL INCLUDE, BUT NOT LIMITED TO:

- Timing and duration
- Content types
- Presentation content and compositions
- Session organization/categorization
- Other activities schedule within and around the Alliance conference
- Resourcing and planning
- Vendor participation
- Current attendance demographics

WORKGROUP MEMBERS

Mark Erickson	University of Queensland
Steve Hahn	University of Wisconsin - Madison
Erica Allen	Staff Supporting the HEUG
Ashley Kennedy	Staff Supporting the HEUG
Brittany Moon	Deputy Executive Director
Chuck Stubbs	Florida State University
Jason Koziara	DePaul University
Jennifer Tucker	Staff Supporting the HEUG

Lew Conner Staff	Supporting the HEUG
Marco Paludo	Pontifícia Universidade Católica do Paraná
Michael Russell	Virginia Community College System
Michele Thibodeau	Butler University
Samuel Shunk	University of Miami
Scott Balthazor	Staff Supporting the HEUG
Tom Chambers	Staff Supporting the HEUG

BUSINESS REVIEW WORK GROUP

The HEUG Business Review Work Group (BRWG) was formed in 2016 to consider the effect of recent industry shifts on the core mission and vision of the HEUG. This year, the BRWG began work on the initial drafts of a new, comprehensive strategic vision.

VISION

Briefly, the vision illustrates the HEUG as a "platform" or an industry beacon providing means for connecting individuals, institutions, entities, and corporation in higher education. By setting these means of connection paramount, and mindful of our core values of Education and Advocacy, the BRWG believes that the HEUG can be positioned to quickly, intelligently, and intentionally adapt to meet the needs and values of our constituent members in the future.

The draft vision develops four strategic ways in which the HEUG connects our global community:

- Connecting Members to Members - to share best practices, solutions and tactics with thousands of users worldwide.
- Connecting Members with our Primary Information System Partners - to provide a unified voice on business requirements with our primary information system partners.
- Connecting Members to Solution Partners - to help solve problems that require resources beyond the ability of our constituent institutions.
- Connecting Members to Strategic Partners - to connect and share with leading strategic organizations that provide networking and tools to meet the diverse needs of our membership.

WORKGROUP MEMBERS

Scott Balthazor	Higher Education User Group		Brittany Moon	Higher Education User Group
Jane Broad	University of Glasgow		Michael Russell	Virginia Community College System
Lew Conner	Higher Education User Group		Samuel Shunk	University of Miami
Steve Hahn	University of Wisconsin - Madison		Dan Youngblood	Indiana University
Ashley Kennedy	Higher Education User Group			

CLOUD APPLICATIONS WORK GROUP

During the past year, the Cloud Applications Work Group engaged in ongoing discussions about challenges and opportunities related to cloud applications, and undertook several initiatives.

HEUG CLOUD SYMPOSIUM

The HEUG Cloud Symposium took place on February 3rd, 2017, in Phoenix, Arizona. The goal of the HEUG Cloud Symposium was to provide a forum to learn from each other, from Oracle and from partners about Oracle Cloud applications and the implementation process. Presenters included Oracle Cloud product strategists, project managers charged with implementing cloud applications, and vendor partners. Attendees learned from experiences at Boise State University, the University of Birmingham in the United Kingdom, and the University of Wyoming. The following points were raised during an open discussion:

- Making a compelling business case for going to the cloud
- How to pay for a cloud migration?
- Raise awareness of role changes on campus for IT and functional people
- Help with the training and planning processes
- HEUG-sponsored cloud transition workshops
- A HEUG workshop on getting rid of customizations
- Getting a handle on and rationalizing integrations
- Organizing HEUG conference content by goal, rather than by product
- Restructuring the HEUG advisory groups to support HEUG members as they transition

TERMS OF REFERENCE

TO REVIEW CHARACTERISTICS OF THE ALLIANCE CONFERENCE TO ENSURE IT CONTINUES TO:

- Provide value to HEUG membership by retaining its currency with technology and business change, and as an opportunity to connect with other members of the community;
- Showcases the contribution of members and vendors, and educates our members in higher education and public sector;
- Continues to retain existing and attract new membership to ensure the sustainability of HEUG
- Provides the opportunity for the HEUG organization, Board, Advisory Group members, and members to discuss the HEUG: its operations, challenges and opportunities

FACETS FOR REVIEW WILL INCLUDE, BUT NOT LIMITED TO:

- Timing and duration
- Content types
- Presentation content and compositions
- Session organization/categorization
- Other activities schedule within and around the Alliance conference
- Resourcing and planning
- Vendor participation
- Current attendance demographics

3RD ANNUAL CLOUD APPLICATION SURVEY

For the third year in a row, the CAWG administered a survey to collect information from HEUG institutions on current applications and plans for migration to cloud applications, specifically financial management, human capital management, student management and customer relationship management. 134 responses were received from 106 distinct institutions. As of May, 2017, three institutions of those responding have implemented/are implementing Oracle Cloud Financials, four have implemented/are implementing Oracle Cloud HCM and eleven have implemented/are implementing at least one CRM application. More institutions have adopted cloud applications since then.

OTHER ACTIVITIES

The CAWG have sponsored several webinars, most recently an update from Susan Beidler on the Student Management module and more are planned. CAWG members have also been closely involved in planning for cloud application-related content at Alliance 2018.

CLOUD APPLICATIONS WORK GROUP

During the past year, the Cloud Applications Work Group engaged in ongoing discussions about challenges and opportunities related to cloud applications, and undertook several initiatives.

WORKGROUP MEMBERS

Criss Laidlaw	Williams College	Nadeem Zaidi	University of Michigan
Ashley Kennedy	Staff Supporting the HEUG	Randy Durante	Stanford University
Brittany Moon	Deputy Executive Director	Stuart Churchill-Hoyer	University of Wisconsin - Madison
Cindy Martin	Stanford University	Terence Houser	University of Virginia
Marty Mag Uidhir	University of Newcastle	Tina Thorstenson	Arizona State University
Michele Thibodeau	Butler University		

COMMUNICATION COMMITTEE

The Communication Committee meets to share and assist with the dissemination of information broadly across the HEUG organization.

ABOUT

The Communication Committee is comprised of one representative from each of the standing advisory groups, volunteer committee and YPG committee. The group joins on a monthly call to share out information from their group or committee so that others may pass it along as needed. The group also uses this time to learn of overall HEUG happenings so that they may share that information out via their own lists and communication channels.

WORKGROUP MEMBERS

Sherry Adams	University of Florida	Carole Laplante	Northern Alberta Institute of Technology
Judy Bauman	University of Wisconsin - Madison	Paula Leadon	Queen's University Belfast
Stephen Brawn	Northwestern University	Kathleen Masé	Syracuse University
Sarah Bryan	Higher Education User Group	Brittany Moon	Higher Education User Group
Sashni Chetty	University of Cape Town	Agustin Ruiz	Santa Clara University
Brad Finley	Illinois Central College	Chuck Stubbs	Florida State University
Tamara Foster	Northwestern University	Arun Subramanian	Southern Illinois University
Levita Goodwin	University of Chicago	Karen Tallett	University of Glasgow
Pauline Haughey	Queen's University Belfast	Deanne Wright	Ryerson University
Jessica Holler	DePaul University	Elisabetta Zodeiko	Princeton University

CONTRACT REVIEW WORK GROUP

The Contract Review Work Group was begun in December, 2016, and is charged with providing a contract review process for products and/or services needed by the organization. The committee will provide a framework of best practices surrounding the receiving of bids and contract approval for repetitive buying. The group is comprised of representatives from the Board of Directors, Alliance Conference Planning Committee and the Audit and Finance Committee.

OVERVIEW

The charge of the work group is to establish a regular cycle for Requests for Proposals and/or Requests for Information for material dollar value contracts to insure competitive pricing. Initially, these reviews will focus on commitments of $50k or more, multi-year arrangements and any other financial obligation brought to the committee by Board members, conference chairs or others with budget approval responsibility.

During 2016-17, the work group focused efforts on the Alliance Conference and completed reviews of contracts for American Sign Language ('ASL') Interpreters, badge printing and lead retrievals. In addition to validating the current request for proposal process in use by the conference planning contractors, Higher Logic (aka Socious, LLC), the work group also affirmed the practice of using local talent from the conference venue city for ASL contracts and recommended a multi-year contract for badge printing and lead retrievals to lower costs.

The work plan for 2017-18 includes developing and issuing a request for proposals for audiovisual services for the Alliance Conference, possibly using templates acquired through the Meeting Planners International association. The request for proposals is planned to include unit costs for meeting spaces, as well as opening and closing events for a typical conference. Additional contracts for work group discussion include requests for proposals for exposition/exhibition services and conference entertainment services. It should be noted that the review of the administrative and conference planning services contract with Higher Logic is outside the scope of this work group and will be reviewed and negotiated by a committee appointed by the president of the organization, specifically for this purpose.

WORKGROUP MEMBERS

Brad Finley	Illinois Central College	Scott Munson	University of Colorado
Maureen Knight-Burrell	Northwestern University	Michele Thibodeau	Butler University
Deborah Mero	University of Michigan	Cathy Thompson	University of Florida
Brittany Moon	Deputy Executive Director	Dan Youngblood	Indiana University

EDUCATION STRATEGY WORK GROUP

The HEUG Education Strategy workgroup evolved this year from the previous Oracle University workgroup. The Oracle University strategy was to leverage more of the Oracle University offerings to give more value to HEUG members. The group realized that there were several other vendors and consultants that could also offer value in the same way so the focus of the group was expanded to Education Strategy in general.

ABOUT

The group this year was first tasked with identifying and advertising topics to be presented as pre-conference workshops at Alliance. The team identified about ten different topics that were current and of significant interest to various membership groups. A specific conference web page was developed sharing the topics and asking for proposals to present. Based upon submissions, 5 were chosen to be submitted as pre-conference workshops.

The group will now begin to identify other possible vendors that could provide tutorials, webinars, or training information to be shared with the HEUG membership.

WORKGROUP MEMBERS

Brad Finley	Illinois Central College	Robert Lawson	Lone Star College
Ashley Kennedy	HigherLogic	Samuel Shunk	University of Miami
Brittany Moon	Deputy Executive Director	Scott Balthazor	HigherLogic
Dan Youngblood	Indiana University	Stacy Mitchell	Case Western Reserve University
Rahul Nori	Capella University	Stu Churchill-Hoyer	University of Wisconsin - Madison
Renato Cayuela	University of Colorado		

INTEGRATIONS WORK GROUP

The HEUG Board recognized the rapidly growing number of applications that its member institutions must contend with and moreover, the critical importance of developing a solid integration strategy to address the need to manage and govern data and application integrations between them. To that end, the Board established the Integrations Work Group to shed light on some of the issues.

ARTICLE PUBLISHING

This year the Integrations Work Group published a series of blog entries that included the following topics:

- Inventorying integrations at your institution.
- Considering the importance of business process redesign
- Developing an understanding of possible integration architectures within the context of a technical ecosystem
- Considering data governance and stewardship as a precursor to integration strategy

In the next year, the integration work group expects to continue this important body of work – expanding upon some of the concepts identified over the last few months and introducing new concepts and models to consider as member institutions move closer to the cloud.

WORKGROUP MEMBERS

Terence Houser	University of Virginia	Maureen Knight-Burrell	Northwestern University
Barry Hudson	University of Pretoria	Michele Thibodeau	Butler University
Brittany Moon	Deputy Executive Director	Nanci Regehr	Rio Salado College
Criss Laidlaw	Williams College		
Mark Erickson	University of Queensland		

PARTNER RELATIONS WORK GROUP

The HEUG Board recognized the rapidly growing number of applications that its member institutions must contend with and moreover, the critical importance of developing a solid integration strategy to address the need to manage and govern data and application integrations between them. To that end, the Board established the Integrations Work Group to shed light on some of the issues.

NAMING CONVENTION CHANGE

The HEUG website has been updated to reflect "partner" as opposed to vendor. This terminology will be used moving forward. In addition, the name of the vendor hall will be changing to "Solutions Center at HEUG conferences. This is more collaborative and fits industry standard terminology.

UPDATED TERMS AND CONDITIONS FOR PARTNERS

Update Terms and Conditions for Partners in Regards to Payments:
- Payment for all events must be received no later than 45 days prior to the first day of the event.

Update Terms and Conditions for Partners on Cancellation of Sponsorship:
- Cancellation of sponsorship must occur no later than 60 days prior to the first day of the event. Any cancellations after this point in time will result in no refunds. If no payment has been received at the time the partner cancels, the partner is considered to have a debt with the HEUG organization in the amount of the sponsorship(s) agreed upon in their original application. Until this debt is paid in full, that partner is unable to participate in any subsequent events with the HEUG.

DEVELOPED AN APPEAL PROCESS FOR REFUND REQUESTS

If a partner wishes to pursue the no refund for cancellation in the terms and condition (this is assuming this is approved in the prior action item), the Account Executive with Higher Logic for the HEUG Board (currently Tom Chambers), HEUG Board Vice President of Finance (currently Dan Youngblood), and the HEUG Board Partner Relations representative (currently Nanci Regehr) will receive the partner appeal in writing and make the determination. This decision will be final and upheld by HEUG Board.

IMPLEMENTED PARTNER/SPONSOR RECOGNITION

Alliance 2018 will be the first year for recognizing a partner/sponsor that the HEUG community has nominated as Partner/Sponsor of the year. The winner will be provided the opportunity to have a webinar on HEUG.Online at no cost and be recognized at the Alliance Conference.

WORKGROUP MEMBERS

Terence Houser	University of Virginia
Barry Hudson	University of Pretoria
Brittany Moon	Deputy Executive Director
Criss Laidlaw	Williams College
Mark Erickson	University of Queensland

Maureen Knight-Burrell	Northwestern University
Michele Thibodeau	Butler University
Nanci Regehr	Rio Salado College

VOLUNTEER COMMITTEE

Mission Statement: "The mission of the Volunteer Committee is to Recruit, Retain and Connect HEUG volunteers to serve the organization in a variety of capacities.

INITIATIVES

In 2017, the Volunteer Committee was able to create value to the HEUG by taking the following initiatives: Attended Latin America Alliance where our chair Renato Cayuela presented session HEUG 101 and connected about 5 young professionals from the region to Young Professionals Group; Attended MIDHEUG where our YPG liaison, Jason Hartigan, presented a Birds of a Feather session (6 attendees met with Jason) and our secretary, Carolee Cohen, included information on volunteerism and the YPG session in the SF Track Community Session, and the conference committee advertised volunteer opportunities for the MIDHEUG conference to all attendees;

PROGRESS

Most importantly, the Volunteer Committee has made significant progress on connecting members to volunteering opportunities. In our current volunteer form database, we have over 85 online members' inquiries to colunteer in the following capacities:

- 15 Members interested in serving the Young Professionals;
- 24 Members interested in serving the Volunteer Committee;
- 14 Members interested in serving the Communications Committee;
- 19 Members interested in serving the Regional Conference Planning Team;
- 18 Members interested in serving in Any Volunteering Opportunity.
- *some members elected multiple choices of groups to volunteer.

In addition, the Volunteer Committee revisited their Mission Statement to better reflect the current leadership vision in alignment with HEUG Board of Directors.

INCREASED PRESENCE

Increased our prescence at Alliance Conference by:

- Speaking at the AG Summit - We got really good feedback from people of all different backgrounds. Overall the positive comments were related to the AG community having a better understanding of what the Volunteer Committee has been doing and how we can improve collaboration;
- Joining forces with YPG - Renato Cayuela was invited to the YPG panel and at different moments he had the opportunity to put emphasis on how the work of the two groups are connected and the great potential the Volunteer Committee has to be a stepping stone for Young Professional to expand on their volunteering;
- Interacting with international members in the International reception – Renato Cayuela attended the international reception and introduced the volunteer committee to several members who were not aware of the group, therefore we are hoping out of that face-to-face interaction we might be able to recruit additional international volunteers.

VOLUNTEER COMMITTEE

Mission Statement: "The mission of the Volunteer Committee is to Recruit, Retain and Connect HEUG volunteers to serve the organization in a variety of capacities.

SUPPORTING THE MISSION

After all, some of the strategies of the Volunteer Committee to support their mission are to:

- Recognize current and retiring members of the Advisory Groups, Board, work groups, and conference planners and presenters;
- Explore ways to recognize our HEUG volunteers, advisory group appreciation letter;
- Increase our presence at future Alliance and Regional conferences by presenting sessions which gives us an opportunity for face-to-face interaction with the HEUG community, especially international members;
- Engage members by keeping Social Media and HEUG.Online Volunteer Committee pages up-to-date with the latest discussions and volunteers' testimonies from different areas;
- Communicate regularly to the HEUG community on ways to volunteer and current opportunities;
- Some work on establishing a Social Media presence for the Volunteer Committee;
- Volunteer Committee reviewed HEUG Hall Of Fame nominations;
- Reviewed the Volunteer Appreciation Letter, reviewed Justification letter;
- Investigated ways to support a Volunteer Committee presence at regional conferences;

WORKGROUP MEMBERS

Renato Cayuela	University of Colorado	John Jeunnette	Dartmouth College
Ashley Kennedy	Staff Supporting the HEUG	Maureen Knight-Burrell	Northwestern University
Brad Finley	Illinois Central College	Michele Thibodeau	Butler University
Carolee Cohen	University of Minnesota	Stacy Mitchell	Case Western Reserve University
Chuck Stubbs	Florida State University	Stu Churchill-Hoyer	University of Wisconsin - Madison
Jason Hartigan	Bowling Green State University		

YOUNG PROFESSIONALS WORK GROUP

The fundamental purpose of the YPG is to connect, empower, and prepare young and new professionals to cultivate the highest class of future leaders both in the HEUG and at member institutions.

ABOUT

To support this purpose, the YPG develops initiatives and work efforts around our 3 primary goals: Promote Awareness, Build and Share Resources, and Foster Member Development.

2017 saw the continuation of the YPG's substantial momentum from 2016. Key initiatives such as the YPG 101 series webinars, and building the YPG member's section continued with the same energy and vitality that brought them both to prominence. The 101 series Webinars, now a staple of the HEUG's Education Series webinars, are held nearly every month. The 101 series has covered nearly each of the functional areas of Campus Solutions, and is now looking to expand in to technical areas, such as integration broker and application designer, and topics related to Project and Change Management. The YPG continues to offer in person 101 sessions as part of the yearly global Alliance sessions offerings.

The YPG member's area of HEUG.online continues to grow as we work on developing new functionalities to benefit the Young and new membership of the HEUG. This year, the YPG Committee's online curator will work to ensure that all of the YPG initiatives have corresponding general information and Frequently Asked Questions sections.

YPG EMERGING LEADER PROGRAM

The Inaugural session of the YPG Emerging Leadership program was a success, pairing 10 mentors and mentees for a series of career and organizational development phone calls. The program culminated in a reception at Alliance 2017, where mentors and mentees were able to meet and mingle. This year will see the 2nd annual cohort of the program. To better facilitate the program, the YPG has appointed an Emerging Leadership Program Coordinator, who will be responsible disseminating topics of interest, and for working with Mentors and Mentees to ensure that mentor/mentee pairs meet program goals.

CONFERENCE PRESENCE

This year, the YPG is looking to expand our membership through creating YPG satellite "regional" committees through each of the regional conferences. This will establish a network of young professionals, and help bring more interested professionals in to the fold. These regional satellite committees will be responsible for promoting awareness and fostering member development in regional areas both in the North American, and in the global regions of the HEUG. If you're interested in getting involved. Contact us at ypg@heug.org today!

DIGITAL PRESENCE

We are expanding our digital presence through new social media initiatives. Now you can look for us on Twitter, as well as Facebook and LinkedIn. Keep an eye out for the YPG on new platforms as we continue to grow! As always, our social media efforts will be directed at bringing users together to share ideas, network, and learn from each other in the HEUG.Online Young Professional Group forum.

WORKGROUP MEMBERS

Sam Shunk	University of Miami	Jennifer Stokes	Clarkson University
Jane Wilson	George Fox University	Karen Tallett	University of Glasgow
Jason Hartigan	Bowling Green State University	Rahul Nori	Capella University

LEADERSHIP

HEUG BOARD OF DIRECTORS

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.

The HEUG is governed by a Board of Directors. The Board consists of the President, the Past-President, 22 Directors elected by the HEUG membership, three Conference planning team members and up to four additional Directors appointed by the HEUG President with the approval of the Board and 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 and may be reappointed. The Alliance Conference Planning appointees serve a one year appointment. The President of the HEUG is elected by the Board of Directors for a two-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. They consist of the following:

- President Elect
- 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

The Board is responsible for overseeing and approving nominations of members to the various Advisory Groups. 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 several committees and work groups to assist in the governance and administration of the HEUG, as well as address specific issues that do not fall within the preview of an Advisory Group. These committees and work 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.

LEADERSHIP

HEUG BOARD OF DIRECTORS

NAME	INSTITUTION	TITLE
Jane Broad	University of Glasgow	President
Steve Hahn	University of Wisconsin - Madison	Vice President of Administration
Buddy Combs	Kentucky Community & Technical College System	Vice President of Product
Brad Finley	Illinois Central College	Vice President of Membership & Communications
Jason Wenrick	California State University Chancellor's Office	Executive Vice President of Community Development
Terence Houser	University of Virginia	Vice President of Technology
Dan Youngblood	Indiana University	Vice President of Finance/Treasurer
Mark Erickson	University of Queensland	Secretary
Cathy Thompson	University of Florida	Alliance 2018 Conference Chair
Jamie Caro	University of Philippines	Board Member - Asia HEUG REP
Barry Hudson	University of Pretoria	Board Member - EMEA Rep
Maureen Knight-Burrell	Northwestern University	Baccalaureate Granting Colleges and Universities (4yr and above)
Criss Laidlaw	Williams College	Board Member - Appointed
Marco Paludo	Pontifícia Universidade Católica do Paraná	Latin America Representative - Appointed
Nanci Regehr	Rio Salado College	2-year Community, Technical and equivalent international colleges
Samuel Shunk	University of Miami	Young Professional Group Representative – Appointed
Lisa Skinner	Stanford University	EBS Representative
Michele Thibodeau	Butler University	Small College Representative
Michael Russell	Virginia Community College System	2-year Community, Technical and equivalent international colleges
Michelle Lin	California Institute of Technology	E-Business Suites Representative
Kelly Wilker-Draves	University of Waterloo	Canada Representative - Appointed
Deborah Mero	University of Michigan	Assistant Treasurer
Lew Conner	Higher Logic	Executive Director

HEUG BOARD OF DIRECTORS

PAST PRESIDENTS

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 to August)**
Joe Moreau	**Mira Costa College**	**2005-2006 (August to 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**
Steven Hahn	**University of Wisconsin, Madison**	**2013-2015**

LEADERSHIP

2018 HALL OF FAME

RITA FREIBURGER
UNIVERSITY OF WISCONSIN, MILWAUKEE

ABOUT RITA

Participating in 17 of the last 18 Alliance Conferences shows a determined level of commitment. Rita Freiburger, from the University of Wisconsin, Milwaukee has been committed to the HEUG for over 20 years.

Rita's name was synonymous with Campus Solutions as a long-time active member of the HEUG. She served numerous terms on the various Campus Solutions Advisory Groups (student records, campus community, and academic advising) and was an advocate for enhancing the system for ALL institutions. She has always taken initiative in making sure various areas were well represented throughout the PAG structure.

Rita was constantly on the listservs helping to answer or connect those who had questions. During Birds of a Feather, you knew that if Rita was giving an example, you could count on its accuracy and you listened.

Although Rita is retiring this year, her legacy as an advocate and a mentor to many young professionals are evident by those who have had the privilege to work alongside her.

ELLEN RAUE
MADISON AREA TECHNICAL COLLEGE

ABOUT ELLEN

Easily considered one of the favorite board members and conference chairs to work with, Ellen Raue spent nearly 8 years in support of the HEUG.

Ellen grew tremendously in her role as a member of the HEUG board. Her early concerns with the ability of new board members to integrate into the board prompted a review of the mechanisms used by the board to welcome new members and orient them to their roles as leaders of the HEUG. Ellen helped to design a new orientation program that helped first year board members deal with all the new complexities they faced. She then progressed to membership in the conference team and ultimately to the chair's role in a very successful Alliance conference. Membership in these teams requires years of commitment and sustained involvement.

Many board members benefitted not only from her commitment to the HEUG but from the profound sense of humor that Ellen brought to meetings, in particular with her support of her Green Bay Packers.

LEADERSHIP

2018 HALL OF FAME

MYRNA FITZPATRICK

ORACLE

ABOUT MYRNA

When Hall of Fame nominations pour in from multiple member institutions and multiple countries it is easy to recognize that an Oracle staff member has gone above and beyond. Myrna Fitzpatrick of Oracle has been a contributor to Alliance Conferences and the SF Community for many years in providing not only an understanding of the functionality but also tips to use the product more effectively and how to prevent 'gotchas' which could diminish usability. She has provided clear leadership through her understanding of this specialized field across multiple legislative landscapes and with her ability to transfer knowledge to HEUG members.

For more than 10 years she has worked tirelessly on support cases to resolve issues, improving the business process for many members. She has taken the time to understand global requirements and ensure these are met. She regularly works extra hours to assist members in different time zones.

Myrna has been a frequent presenter at Alliance and all her sessions are overflowing with attendees because everyone knows that they will learn alot from Myrna. Whether you have been using the product for 20 days or 20 years, there is something you will be able to take back to your school and improve.

LEADERSHIP

LIFETIME ACHIEVE-MENT AWARD

WHAT CREATES AND SUSTAINS SUCCESSFUL ORGANIZATIONS? IS IT FUNDING? STRUCTURE? MISSION? YOU CAN ARGUE FOR ALL OF THESE, BUT THE MOST IMPORTANT FACTOR, ESPECIALLY IN VOLUNTEER ORGANIZATIONS, IS ITS PEOPLE – PEOPLE WHO PROVIDE THEIR COMMITMENT, DRIVE, AND JUST PLAIN HARD WORK.

All successful volunteer organizations can point to widespread involvement by many members who share the organization's goals. However, there is also a need for key leaders to form and direct that involvement; leaders who can channel those disparate efforts into actions. HEUG has seen many leaders over time but since the very early days, there has been one consistent presence whose efforts have driven HEUG from a small group of passionate players to a major international association envied by many for its ability to represent its members throughout the world.

Lew Conner, HEUG's first Executive Director, brought our associate a range of skills and personal talents that clearly have helped to form the basis of much of what is today's HEUG. Lew became involved in HEUG at its outset when he was a PeopleSoft employee charged with coordinating the company's involvement with a nascent Higher Ed Special Interest Group. Lew was in a unique position to help form our organization, having had strong higher ed experience before coming to Peoplesoft. He clearly was "one of us", understanding our needs and recognizing the value of strong student services. He was instrumental in moving a small startup group of institutions through the process of becoming, at first, a small association of members with like needs. When he accepted the role of Executive Director, he moved HEUG through an adolescent period of small steps toward progressively greater organizational sophistication, to the mature HEUG we see today.

Lew is known for his stability and consistency regardless of the circumstances. In good times and difficult times, his guidance has helped the HEUG Board make the right moves at the right time. He has provided long-term continuity, critical to a large Board with yearly changes in its membership. He is a mentor to many, counselor when needed. He played a particularly critical role during the Great Recession when HEUG had to make major adjustments to its financial relationship with its member institutions, a potentially controversial change that he stewarded through with sensitivity and creativity. He led HEUG through its complex move to an international presence, helping the Board to understand both the differences and the similarities among more than 35 countries that form the HEUG. He provided leadership and guidance in moving HEUG toward a stronger organizational structure, allowing the HEUG to staff up to operate as 24/7/365 service.

Ellen Raue, a past HEUG Conference Chair, observes that "Lew is a great example of someone who could negotiate difficult discussions and decisions with finesse and never seemed to be ruffled". Joe Moreau, a Past President of HEUG, put it well: "Lew's leadership at critical points in HEUG's history has helped the organization be stronger and more impactful than any of us could have predicted".

In recognition of his exceptional contribution to the HEUG over two decades, HEUG awards to Lew Conner, with our thanks, its Lifetime Achievement Award..

COMING FULL CIRCLE

ORIGIN & RECENT EVOLUTION OF HEUG

MID TO LATE 90'S
BEGINNINGS OF HEUG

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.

1998-2000
FIRST CONFERENCES (HESIG)

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.

PRODUCT AND TECHNICAL ADVISORY GROUPS

The Product Advisory Group (PAG) structure (along with various other committees, focus groups, and work groups) is another essential and extremely effective feature of the HEUG. In the words of former HEUG President Joe Moreau, "without the PAGs, the HEUG is just a handshake." The number and composition of the PAGs and the TAG (Technical Advisory Group) have evolved over the years to reflect the changing landscape of products and technology. What has remained constant is the unparalleled effectiveness and dedication of the PAGs and TAG in advocating for the user community and in facilitating the sharing of information and advice among the membership.

COMING FULL CIRCLE

ORIGIN & RECENT EVOLUTION OF

2001
HEUG INCORPORATION

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.

2003
HEUG.ONLINE

The HEUG contracted with a startup company called Socious for the design, implementation and maintenance of HEUG Online. This change consolidated the listserves (which were renamed Forums) into a single, homogeneous environment and provided archiving, search, and other useful features. To this day the Forums remain a central and very heavily used service of the HEUG, sharing a vast wealth of member knowledge and experience.

2004
ORACLE'S ACQUISITION OF PEOPLESOFT

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.

COMING FULL CIRCLE

ORIGIN & RECENT EVOLUTION OF

● **2006-2010**

GLOBAL EXPANSION

As Oracle's North America market began to become somewhat saturated, they moved into selling their products more and more internationally. With this came the expansion of HEUG membership to include these international regions. The HEUG also began investing in regional conferences both in the US and internationally, eventually adding conferences in EMEA, Latin America, and Asia. The previously well organized Australia/New Zealand event became branded as the Alliance Down Under as well.

PRODUCT AND TECHNICAL ADVISORY GROUPS

Another significant event in the evolution of the HEUG was the decision to establish institutional membership fees. This decision was not undertaken lightly by the Board. Rather, it was deemed necessary in order to diversify the revenue base needed to support the organization. Until now, the HEUG has been funded almost entirely by revenue from the Alliance conference. The goal of the new business model is not only to ensure that the HEUG remains able to provide its members with the same high level of service, education, and advocacy that it has since its incorporation in 2001—but also to create the ability to provide many new services that were impeded by our dependence on conference revenue.

COMING FULL CIRCLE

ORIGIN & RECENT EVOLUTION OF

2011-2016

NEW OPPORTUNITIES FOR VOLUNTEERS

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 brought 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.

EVOLVING ADVOCACY

Another significant event in the evolution of the HEUG was the decision to establish institutional membership fees. This decision was not undertaken lightly by the Board. Rather, it was deemed necessary in order to diversify the revenue base needed to support the organization. Until now, the HEUG has been funded almost entirely by revenue from the Alliance conference. The goal of the new business model is not only to ensure that the HEUG remains able to provide its members with the same high level of service, education, and advocacy that it has since its incorporation in 2001—but also to create the ability to provide many new services that were impeded by our dependence on conference revenue.

COMING FULL CIRCLE

STRATEGIC PLAN

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 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.

OUR MISSION

The HEUG helps its member institutions around the world realize value through education and 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 interest, 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.

2017 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.

COMING FULL CIRCLE

STRATEGIC PLAN

CORE OBJECTIVES: EDUCATION & 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.

CORE OBJECTIVES: ANNUAL GOALS

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 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 solution and product offerings from technology vendors and partners will continue to evolve and expand to address a global community of change, thusly the HEUG's annual goals, strategies and measured outcomes must be agile and flexible.

GOALS

• Enhance the HEUG's support for communication, collaboration and education across the entire HEUG ecosystem
• Strengthen the HEUG's effectiveness in its advocacy role
• Increase HEUG member engagement and satisfaction
• Ensure HEUG's continued organizational and financial health

In order to achieve these goals, each year the Board of Directors, all committees, adhoc committees, work groups/sub-groups, work teams, product advisory groups (PAGs) and technology advisory groups (TAGs) efforts will support and facilitate the HEUG's two core objectives (Education and Advocacy), Annual strategies development will provide measured outcomes that are in alignment with the four foundational core values:
1. Leadership
2. Partnership
3. Building Community by Networking and Sharing
4. Communication

COMING FULL CIRCLE

VISION 2017

The goal is to set forth a plan to communicate the specific areas of work the HEUG Board will be engaged in for the next 6-18 months. The items presented here come from work done by the HEUG Board and the HEUG Executive committee over the last 5 months. In order to maintain consistency, and ensure it stays at the forefront of our work, portions of the HEUG Strategic Plan are included in this document. An attempt is made to offer detailed notes in the appendices, an overall value statement regarding the HEUG, individual value statements for this year's areas of focus, 'elevator pitches' and an overall plan for communicating the work of the Board to various constituencies.

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 is a global organization and includes members with many varieties of administrative, funding, legislative and accreditation structures, offering degrees or coursework with varying and innovative modes of instruction.

The HEUG's business model and its sustainability are contingent upon the organization's financial stability and relevance to its members, vendors and partners by dutifully providing strategic input and feedback on Higher Education industry priorities as they relate to Oracle applications and middleware now and in the future. We have a long history of providing value added support services to members, partners, vendors, and to Oracle: we believe our support will be strengthened and kept agile by a timely and rigorous review of our strategies and processes.
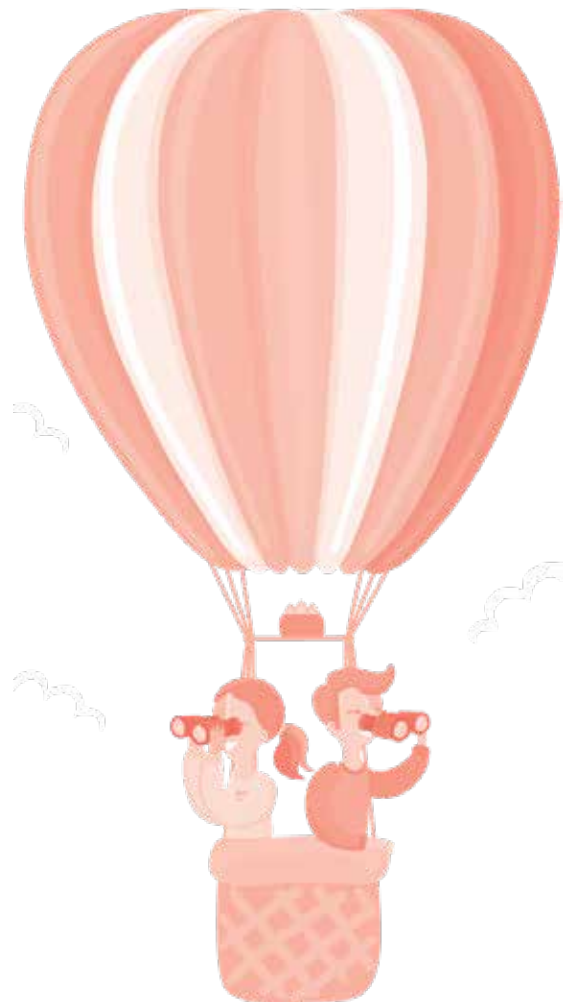
As the largest industry specific user group, representing over 900 campuses globally, the HEUG is a powerful tool for its members and for Oracle. Because of this, it is critical for the HEUG to maintain its relevance by continuing to provide the level of education and advocacy required by its members.

COMMUNICATIONS

Through feedback from the annual membership survey it was realized that there is a need for change to the HEUG.Online website. HEUG.Online users expressed five major issues with the site: navigation, search functionality, forums, conference registration, and information sharing. How did the HEUG resolve the current issues with HEUG.Online?

The Socious Tools work group revamped HEUG.Online and provided HEUG members with a platform where they can communicate, problem solve, and access information easily and efficiently. The website also provides a useful educational experience through webinars, regional & international conferences, as well as the Alliance Conference.

VALUE TO HEUG MEMBERS :
Updating the HEUG website ensured that the HEUG members will continue to communicate with each other and their representatives. An active, involved community is one that is kept up to date and has a clear way to make themselves heard and ask questions.

VALUE TO ORACLE :
Having a more efficient tool for HEUG members to use made it easier for them to find solutions to their problems. We can also work with Oracle to get more relevant content added to the HEUG website. It would be beneficial to create a file library with all of this information, such as solution – and cloud-based content. Information would be updated annually.

CORE VALUES :
Building Community, Networking, Sharing, Partnership, Communication

ADVOCACY

With Oracle's application and product direction continuing to evolve, their need for advocacy has shifted from tactical to strategic. How can the HEUG continue its strong voice for its members to Oracle?

The HEUG Organizational work group will work with the advisory groups to implement a new model for advocacy that will continue to offer input for on premise applications, while creating new opportunities to advocate as new products are developed.

VALUE TO HEUG MEMBERS :
The HEUG membership requires a flexible and forward-thinking advocacy model to actively support current products as well as guide the development of new offers.

VALUE TO ORACLE :
Redefining this process will demonstrate to Oracle that the HEUG is willing to listen to their needs, adjust advocacy tools when necessary, and is ready to implement services for new HEUG members (new Oracle customers) who are using products outside the product mix of current HEUG members.

CORE VALUES :
Leadership, Building Community, Networking, Sharing, Partnership

EDUCATION

The demand for education and the use of on premise applications will continue in the near future while the demand for education for emerging applications (such as cloud based) rapidly increases. The HEUG's core objective of education requires us to stay current in our understanding of the ever-changing nature of higher education product demand and development. What can be done to ensure a relevant educational experience for HEUG members? The Alliance Conference work group will develop an event valuable to both HEUG members and Oracle by focusing on the changing needs of the members, researching better means for presentation delivery, and hosting a conference that is fluid and flexible into the future.

VALUE TO HEUG MEMBERS :
As new members adopt Oracle product(s) it is important for the community to share best practices and lessons learned about implementations, set up and maintenance issues. It is also critical that members are kept up to speed on Oracle's future development efforts and how that impacts our institutions' planning efforts. Education between members as well as between members and Oracle will continue to bring core value to the HEUG organization.

VALUE TO ORACLE :
Enhancing the opportunities for Oracle to be involved with the event beyond presentations about on premise applications will allow members who are considering emerging product and new members who have already purchased emerging products the opportunity to stay current on technology and learn about products they may wish to move to in the future.

CORE VALUES :
Building Community, Networking, Sharing, Partnership, Communication

GLOBALIZATION

With the growth of international Oracle higher education clients and the corresponding HEUG membership, the demand for global services has increased significantly. The HEUG needs to ensure that we are providing all our members with the tools to be successful. What will the HEUG need to do to support our international members? The HEUG has insisted that Advisory Group membership be reflective of a global community and to promote, where appropriate, the development of Oracle application functionality useful to the international communities. Beyond that, the HEUG Global Integration work group is developing a plan to advance HEUG offerings to our international members through improved translation services at our conferences and, online events, promoting intercultural knowledge, and understanding through education, and focus on growing our international communities and advocating for our members.

VALUE TO HEUG MEMBERS :
The international initiatives benefit all members. As we expand our vision of how education is offered, including the boundaries of the classroom and the institution, how our global partners operate and organize themselves administratively and systematically becomes critical to our effectiveness. Expanding the conversation ensures that HEUG members are making forward-thinking decisions about their use of software.

VALUE TO ORACLE :
By providing additional services to our international members we will draw more people to our conferences, in turn helping Oracle communicate with these members.

CORE VALUES :
Building Community, Networking, Sharing, Communication

ADMINISTRATION

With the growth of the HEUG globally, the complexity of the organization has increased significantly. Because of this many HEUG procedures are outdated. How can the HEUG increase transparency to members and promote intentional decision-making?

The Business Plan & Services Work group will address these items as well as provide increased financial accountability and work to provide plans and procedures to allow for agility in handling changes in strategic focus and organizational needs.

VALUE TO HEUG MEMBERS :
Improved transparency and communication of decision making provides increased opportunities for better engagement with the HEUG community.

VALUE TO ORACLE :
A well-organized corporation with defined business processes will maximize the life of the organization, thereby allowing Oracle to utilize the HEUG as a tool for education, advocacy and prospective customers into the distant future.

CORE VALUES :
Leadership, Partnership

TARGETED ENGAGEMENT

The HEUG membership is composed of university administrators of varying ages who hold a wide array of positions – CEOs, central office administrators, and student services staff. Therefore, an increasing number of strategies must be deployed in order to remain engaged with members and to solicit the textured feedback the HEUG and Oracle requires. How best can the HEUG identify what communication media and organizational structure should be used?

By targeting three primary areas, the strategic or executive, directors (referred to as 'agents of change') and the Young Professionals, we believe a new level of membership experience will be reached.

VALUE TO HEUG MEMBERS :
Targeted engagement with all levels of staff allows the HEUG to better support member institutions in developing consistent strategies and messaging throughout their organizations in respect of Oracle products and development.

VALUE TO ORACLE :
By focusing on three unique target groups, establishing communication lines, and providing the tools to obtain input, Oracle will have better access to the type of strategic input they desire, as well as having specific targets they can communicate with for information, education and marketing.

CORE VALUES :
Leadership, Building Community, Networking, Sharing, Communication, Partnership

TECHNOLOGY PARTNERS

IMPROVING HIGHER EDUCATION

ADVISORY GROUPS ARE A FUNDAMENTAL ELEMENT OF THE HEUG ORGANIZATION, CRITICAL TO INFORMING THE BOARD ABOUT THE NEEDS OF THE HEUG COMMUNITY AND MEMBERS. ADVISORY GROUPS PROVIDE THE BUSINESS CHALLENGES OF THE MEMBERSHIP AND THEIR FUTURE DIRECTION IN THE USE OF ORACLE SOLUTIONS IN ORDER TO SUPPORT THEIR ACTIVITIES. DURING 2016, THE

BOARD SIGNALED THE NEED TO RETHINK OUR EXISTING ADVOCACY STRUCTURES TO REALIGN THE ORGANIZATION. DURING THE ADVISORY GROUP SUMMIT 2017, AN ADOPTION TO RESIZE EXISTING ADVISORY GROUPS BEGAN AND AN ADVISORY GROUP REORGANIZATION WORK GROUP WAS FORM TO REVIEW THE CURRENT STRUCTURE.

- BUDDY COMBS , VICE PRESIDENT OF PRODUCT

In July 2017, the Advisory Group Reorganization work group presented their recommendations to the Board. The framework of this reorganization provides the balance of our commitment for continued representation across existing product solutions used by HEUG members, while preparing the organization with the ability to engage on future challenges and solutions. The reorganization will continue to serve the needs of the HEUG community and meet its core objectives of education and advocacy across a board range of technology and business areas.

TECHNOLOGY PARTNERS

IMPROVING HIGHER EDUCATION

Advisory Groups will continue to set goals each year by working with the members, their Board Liaison and Oracle strategists while thinking about subject areas or focusing on themes. Goals continue to align with the HEUG objectives of Education and Advocacy; in addition with the four core values: Leadership, Partnership, Building Community by Networking and Sharing, or Communication.

Advisory Groups are encouraged to submit feedback on their goals progress during their Community Session at the annual Alliance Conference.

- The advisory groups participated or hosted 10 education series webinars in 2017 with a total attendance of 1,442 HEUG members, continuing aligning themselves with the HEUG's educational missions.
- 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.
- In 2017, the election process started a re-sizing exercise that will reshape the HEUG organizational landscape of the next few years. A successful Advisory Group election of 106 members on the ballot in October 2017, resulted in 50 new members elected, fourteen were international (non-US) members.

CONNECTING MEMBERS

# 2017 US REGIONAL & GLOBAL CONFERENCE

HEUG PROVIDES AN EXTRAORDINARY OPPORTUNITY FOR HIGHER EDUCATION COMMUNITIES ACROSS THE WORLD TO CONNECT THROUGH REGIONAL CONFERENCES.

Conferences in 2017 included the South Africa HEUG conference in Pretoria; Alliance Down Under in Brisbane; the Asia HEUG in Singapore; the Latin America Alliance Conference in Curitiba; the EMEA conference in Barcelona; the Canada Alliance in Waterloo; the Mid-Atlantic HEUG in Newark; the Midwest HEUG in St. Charles; the New England HEUG in Springfield; the South Central region (SCHRUG) in Houston; the Southeast HEUG in Tallahassee; the Southwest HEUG in Costa Mesa; and the Northwest HEUG in Tacoma. We have added one new international conference (Canada) and one new regional conference (NWHEUG) this year. There was a combined attendance of more than 2300 attendees!

Although smaller in scale than the flagship Alliance conference, these conferences allow regional communities to connect with each other and interact with vendors providing 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, have also attended and heard 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 Higher

Logic 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 opportunities 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 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. In recent years, the HEUG has instituted programs that reward vendors who attend multiple events. There were a record number of sponsors at the Southwest HEUG and Midwest HEUG in 2017!!
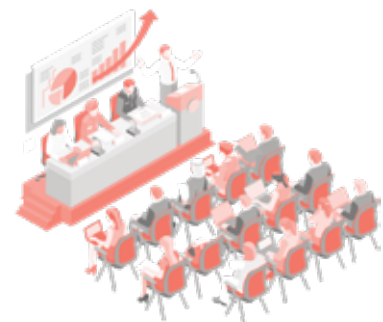
ALLIANCE 2017

While the overall revenue was down (see VP Finance report for details), by all other measures, Alliance 2017 was a great success. Attendees and vendors were happy overall. Attendance was below expected and this was likely due to being at a familiar location and being sandwiched between conferences at new locations.
Jane Baratta, Conference Chair

Alliance 2017 was held in Las Vegas, NV, February 27 to March 2, 2017, with the Advisory Group Summit on February 25 and 26. Las Vegas is an hive of activity and is easily accessible by air which made it a great location for a global conference with participants from 21 countries and 49 states.

Over the last few years there have been many changes in higher education and in technology. The way in which our vendor partners, such as Oracle, are providing services is evolving. Our institutions are reacting to the many changes from so many directions; the HEUG is also reacting and working on the best ways to assist our members. Alliance is uniquely suited to be the setting for an enormous amount of information sharing and assistance. It is an outstanding user conference that addresses questions on day to day activities but also provides guidance and strategy about the much bigger picture. Alliance brings the membership together to discuss the latest information and give feedback to the Board to assist it in forming policies regarding the HEUG's direction.

Oracle's statements regarding the future of PeopleSoft 9.0 and 9.2 and the evolving cloud products generated much conversation during the summit. The Advisory Groups also spent time reviewing their Product Enhancement Trackers and the Oracle Ideation requests. The Product Council is looking at these two vehicles to determine the best way forward when communicating requests to Oracle for development and enhancements.

The HEUG held a Cloud Symposium in 2017 and it was decided that the Executive Forum would not be held at Alliance this year and consideration to include the Cloud Symposium in future conferences would be considered.

The HEUG Hall of Fame welcomed an outstanding individual – Todd Langille.

While the basic framework of the conference itself remained the same, a number of modifications were made to support the initiatives of the HEUG Board of Directors and the Product Council, and to respond to the requests from Oracle Strategists. A Cloud Track was formally introduced and a group was formed to review and support submissions from presenters outside the US. In order to remove any confusion around terms used the group worked diligently to review all sessions submitted by non-US presenters to ensure that they were clear and contained enough information for a fair consideration by the track chairs and their advisory groups. There are plans to release a guide to submitting a good presentation before next year's conference. This will be of value to all attendees.

Following the success of last year's Student Panel session, Perspective on What Students Expect from Today's Technology, another Student Panel session was held, This is What I Need to Succeed. Attendees were able to address specific questions and concerns from their own institutions and to hear the concerns from others. The live streaming of the roadmap sessions was reviewed and eliminated as it had not proved to be a significant value for HEUG members.

A new mobile app was introduced and it had few issues compared to those from the last two years. The lack of syncing capability between the app and HEUG online continues to cause issues for the attendees and the conference team. Attendees also asked to have the session ID available in the app. The 2018 Conference team will seek solutions to these concerns.

ALLIANCE 2017

EVALUATION RESULTS
- **Feedback on the lack of breakfast was mixed, main suggestion was to substitute the morning snack items for breakfast.**
- **Overlap of similar session topics a concern. This can only be mitigated through good descriptions by speakers and proper scheduling by track chairs.**

ISSUES, OBSERVATIONS
- **Las Vegas was less popular with attendees than on previous occasions**
- **Smoke in the casino area was a negative**

THE RECOMMENDATIONS
- **Consider a welcome from the PSUG President in the Opening Session**
- **Review the timing of the Cloud Symposium for 2018 to see if it can be scheduled to not conflict with the Oracle roadmap. Is Sunday (Opening Day) for the Cloud Symposium/Exec Forum an option?**
- **Continue with student panel session, encourage panel sessions for other topics**
- **Consider not including Las Vegas as a venue for future conferences. Costs are high. The increased attendance that HEUG has previously enjoyed can no longer be expected.**
- **Select items from the suggestions/criticisms (from attendees and the Conference team) to focus on and incorporate regular reviews into the Conference planning process to ensure that follow up has been done. e.g. formalize the budget process with a team consisting of the Past Conference Chair, Conference Chair, Assistant Conference Chair, VP and assistant VP of Finance to create following year's budget. Other items will be catalogued and those selected to be worked on for the following year will be monitored.**

CONCLUSION
- **While the overall revenue was down (see VP Finance report for details), by all other measures, Alliance 2017 was a great success. Attendees and vendors were happy overall.**
- **Attendance was below expected and this was likely due to being at a familiar location and being sandwiched between conferences at new locations.**

REGISTRATION
- **3871 (budgeted for 4,300)**
- **432 Institutions (including vendors)**
- **1 one day pass sold**
- **21 countries represented**

SESSIONS
- **24 Deep Dive sessions**
- **67 Mini sessions**
- **263 Regular sessions**
- **3 Workshops**

MOBILE APP

3,115 attendees logged into the app – 81% of registered attendees.

SOCIAL MEDIA

Facebook
- **44 link clicks**
- **1032 other clicks**
- **167 photo views**
- **280 video plays**

Twitter
- **42 posts**
- **86 retweets**
- **235 likes**

VENDORS

Collected $961,500
96 vendors

NORTH AMERICA 2017

The HEUG's US Regional Conference initiative started in 2011. In 2017 there were six conferences, with a total of 1,614 attendees. Several of the conferences were held in new venues within the region to encourage attendance from a varied set of institutions.

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. Additionally, they give younger or inexperienced staff the opportunity to present in a professional setting. The Young Professionals Group (YPG) has been active at several of the conferences this year and has generated a lot of interest with new

professionals. The smaller venue and smaller number of attendees make this a natural fit and provide a very 'personal' feeling for the regional conferences.

Each of the conferences has a planning committee. The chairs of each committee 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 to 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/workshops and sessions presented jointly by two or more schools with differing approaches to a problem.

The inaugural Northwest regional conference was held in June

2017 US REGIONAL CONFERENCES

MID-ATLANTIC REGIONAL HIGHER EDUCATION USER GROUP (MID-ATLANTIC)

Serving the greater Washington DC metropolitan area including District of Columbia, Delaware, Maryland, Pennsylvania, and Virginia. There were 145 attendees for the June 21st event at the University of Delaware in Newark, Delaware.

The Mid-Atlantic Alliance 2017 Conference was held on Wednesday, June 21, 2017 at the Clayton Hall Conference Center at the University of Delaware in Newark, DE. The agenda for the conference consisted of 30 sessions. The conference included 15 vendors and approximately 160 attendees. Special thanks to our sponsors Oracle, SkyBridge Global (lunch and badges), and Sierra-Cedar (breaks).

Chris Kennedy
Conference Chair, Mid-Atlantic Alliance 2017 Conference

MIDWEST REGIONAL HIGHER EDUCATION USER GROUP (MIDHEUG)

Midwest Regional Higher Education User Group (MIDHEUG) – Serving Kansas, Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin. The event was held on October 12-13th at the Pheasant Run in St. Charles, Illinois and 390 attended. MIDHEUG 2017 was October 12-13, 2017 at Pheasant Run Resort in St. Charles, IL. This regional conference had outstanding vendor support from Oracle, 5 National Partners, and 19 Exhibitors. Their attendance and contributions along with the efforts of the conference planning committee afforded 390 attendees the opportunity to interact and learn from colleagues in 75 sessions. HEUG members from over 60 different colleges, universities and systems attended from Iowa, Illinois, Kansas, Michigan, Minnesota, Missouri, Nebraska, Ohio, Oregon, Pennsylvania, and Wisconsin.

Katrina Hrivnak
Conference Chair, MIDHEUG Alliance 2018

NEW ENGLAND REGIONAL HIGHER EDUCATION USER GROUP (NEWHEUG)

Serving the New England states: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Rhode Island, and Vermont. The event took place on August 14-15th at Sheraton Monarch Place in Springfield, Massachusetts and attracted 138 attendees.
The New England Regional Higher Education Group Alliance Conference was presented on August 14 and 15 at the Sheraton Monarch Place in Springfield, Massachusetts. Day one featured workshops, an Oracle Focus Group and a networking social event, while day two included a full day conference with more than 40 sessions offered.

Over 140 attendees from 30 member institutions joined the conference and were able to receive updates from Oracle, meet with vendors and colleagues, participate in "Birds of a Feather" discussions and listen to a well-received student panel.

Pam Kenyon & Mary Gagliastro
Conference Chairs, New England Regional 2017 Conference

2017 US REGIONAL CONFERENCES

SOUTH CENTRAL HEUG REGIONAL USER GROUP (SCHRUG)

Serving Arkansas, Louisiana, Mississippi, Oklahoma and Texas. The July 24-25th event was held at the University of Houston in Texas and was attended by over 334 people.

SOUTHEAST ATLANTIC REGIONAL USER GROUP (SEARUG)

Serving Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, and West Virginia. Held at Florida State University in Tallahassee, Florida on September 18-19th, over 198 attendees.

The 2017 SEARUG Conference was held in Tallahassee on the campus of Florida State University. Previous SEARUG Conferences were in the Research Triangle area of North Carolina, and the move to Florida this year was a new and a bit of a nerve-wracking experience – Hurricane Maria visited the Tallahassee area one week before our conference began. Fortunately, Maria did not damage the conference center, and the SEARUG was able to proceed as planned with a minimum number of cancellations.

Even though our attendance was down this year, I felt the

conference was well attended with a nice mix of attendees and vendors. We had 198 total attendees, over 60 presentations, and we came within a few hundred dollars of meeting our budget.

Moving our venue to Florida forced us to change things up a little, and we had the opportunity to see what things work well in other venues. As in the past, networking events rated highly with attendees. BOFs were well attended, and workshops still seem to be popular. We will be returning to the Raleigh-Durham area again next year, and plan to take what we have learned to make the 2018 SEARUG Conference even better.

Tom Johnson
Conference Chair, SEHEUG

SOUTHWEST REGIONAL USER GROUP (SWHEUG)

Serving Arizona, California, Colorado, Nevada, New Mexico, and Utah. In its second year, the event took place on July 11-12th at the Hilton in Costa Mesa, CA and attracted 212 attendees.

The SWHEUG Regional Conference is now in its third year! The SWHEUG Regional Conference has enjoyed strong support from vendor sponsors in the last two years, with 22 exhibitors in attendance at the 2017 conference. 2017 highlights included over 50 sessions, 2 workshops, and a sponsored Community Round Table lunch, where attendees from across the region had the opportunity to network and collaborate with others in their areas

of interest over lunch.

After two very successful events in Orange County, the planning committee is pleased to announce that the 2018 SWHEUG Regional Conference will be held July 16-17, 2018 in San Diego, CA at the DoubleTree San Diego. The team is also pleased to welcome a number of new committee members this year, who are already hard at work preparing to make 2018 the best conference event yet!

Mark Stramaglia

NORTHWEST REGIONAL USER GROUP

NORTHWEST REGIONAL USER GROUP (NWHEUG)

Serving Idaho, Montana, Oregon, Washington and Wyoming. In its first year, the conference was held at Hotel Murano in Tacoma, Washington and attended by 195 attendees

Evolving from a conceptualization chat at a Student Financial PAG meeting in 2014 to actualization in 2017, the first Pacific Northwest Higher Education Users Group (NWHEUG) Conference was held June 5-6 in Tacoma, Washington. The dedicated and enthusiastic new 9-member planning committee surveyed the regional population to discover support for 6 content tracks, and a total of 44 sessions were offered in tracks of Admissions-Student Records, Student Financials-Financials, Financial Aid, Technology, Reporting/Business Intelligence and General Interest, including four pre-conference workshops and three Oracle sessions. Sessions on implementation/best practices and Data Reporting/Query tips were hot topics and best received/attended.

Jane Broad provided a motivational welcome to the roughly

200 conference attendees, and supplied an overwhelmingly congratulatory review to conference chair Bonnie Raper after the final session. Fourteen Vendors provided support and content to make the conference possible, and the Higher Logic Team of Jennifer Tucker and Erica Allen were magnificent at identifying issues quickly and resolving them before anyone even noticed. Their planning and experience were invaluable to the overwhelming success of this new conference. Verbal and submitted attendee evaluations were predominantly favorable, offering support for continued conference attendance and requests for more sessions in additional tracks. This region has clearly and quickly recognized the value of a local conference and has indicated its support for ongoing success.

Colleen Johnson
Conference Chair, NWHEUG

ALLIANCE DOWN UNDER 2017

A special thank you to both Gail White (Newcastle), Past President, and Allan Tabor (UniSA), Trusted Advisor, who will be both retiring from their respective institutions and so will be stepping down from their roles on the Executive Committee. I want to thank them for their fantastic contribution over the years.
Mark Erickson, Conference Chair

To report to the HEUG Board on the Alliance Down Under 2017 conference, held 8-10 November at the Brisbane Convention & Exhibition Centre, Southbank, Brisbane, Queensland, Australia.

REPORT FROM PRESIDENT, ANZ HEUG
This is my second annual report as President of the ANZ HEUG, Alliance Down Under Conference Chair, and member of the HEUG Board. I would like to thank everyone in the ANZ HEUG Community for their support and their selfless contributions to ANZ HEUG activities, notably the ADU Conference.

EXECUTIVE COMMITTEE COMPOSITION
I am currently half way through my term as ANZ HEUG President. This year required nominations and elections to the positions of Deputy, Secretary and Elected Member. John Reed (UNSW), Deputy, and Cathy McGrath (Griffith), Secretary, were both elected unopposed to their positions, and Dave Lamb (Adelaide) joined as Elected Member. Congratulations to all. A special thank you to both Gail White (Newcastle), Past President, and Allan Tabor (UniSA), Trusted Advisor, who will be both retiring from their respective institutions and so will be stepping down from their roles on the Executive Committee. I want to thank them for their fantastic contribution over the years.

ADU CONFERENCE
ADU saw some significant changes this year which, while exciting, were not without their challenges. The Planning Committee were able to step up to meet these challenges and also continue to deliver a highly relevant, content-rich program. I want to thank all Committee members, particularly the Track Chairs and Deputy Chairs, ably led by our Program Chair for the last two years, Shayne Simpson (SCU).

HIGHLIGHTS OF THE CONFERENCE INCLUDED:
ADU moved back to Brisbane this year and a fantastic new venue – the Brisbane Convention & Exhibition Centre! The BCEC is in the heart of Brisbane close to cultural and social hubs which brought a great energy to the conference. We took advantage of this proximity by having our opening reception at the Gallery of Modern Art. Overall the move has been extremely well received by delegates.
Two new tracks were introduced to ADU this year with ANZ embracing Project & Change Management which was well attended, and an Oracle Futures track showcasing new technologies from Oracle.

ADU launched a global exchange scholarship to help members participate in international HEUG conference events and the first recipients were announced at the conference! We also recognized the contributions of two longstanding members with Stuart Kendall (ANU) and Allan Tabor (UniSA) inducted into our Hall of Fame.
Keynote speaker Jamila Gordon, was moving, thought-provoking and ultimately inspirational as she retraced her story as a refugee fleeing civil war in Somalia, to reaching Australia where the transformative power of education catapulted her into a global career with has included leading roles with some of the world's biggest brands including Qantas, CIMC and IBM Europe.

Virtual presentations from a key Oracle staff member were once again used by the Financials Track to ensure their constituents got great content coverage.

ALLIANCE DOWN UNDER 2017

Virtual presentations from a key Oracle staff member were once again used by the Financials Track to ensure their constituents got great content coverage.

The Program was jam-packed with 85+ individual sessions across Financials, HR, CRM, Technical, Project & Change Management, Students, and Futures, as well as pre-conference workshops.

34 Organizations were represented at ADU including our first public sector agency. We had 282 delegates from 4 countries, over 80 of which were first time attendees!

An increase in the number of vendors to 14 participating and adding great value to conference attendance. Thanks to all of our sponsors, in particular our Premium Sponsor Oracle, and all of our Gold, Silver and Bronze sponsors.

This year saw a continuation in the program schedule to commence on Wednesday afternoon and finish Friday afternoon lunchtime, in response to delegate feedback to facilitate travel. This year we introduced a Lunchtime Welcome Mixer as a result of feedback from last year's conference which appears to have been well received. Oracle continues to show strong support for the local event through Chanaka Kanagara, and we were fortunate to have had Vivian Wong, Keith Rajecki, Susan Beidler, Gary Allen, and several other local and international representatives, in attendance.

This year's Executive and Academic Registrar & Heads of Student Administration (ARHOSA) Forums continued to see key sector issues presented and discussed, with Oracle providing insights into the evolution of their solutions including chat-bots and analytics.

The Alliance Down Under Conference will be at this same venue in 2018. A survey of ANZ members will be taken next year to see if the timing of the conference during the year is the best time to meet the needs of the community.

REGISTRATION

- **261 attendees**

CANADA 2017

The inaugural Canada Alliance 2017 Conference was a HUGE success, and we have feedback and lessons learned to help improve next conference.
Kelly Wilker-Draves, Conference Chair

The University of Waterloo – in Waterloo, Ontario Canada – hosted the inaugural Canada Alliance Conference from November 5th to 7th, 2017.

OVERALL

The inaugural Canada Alliance 2017 Conference was a HUGE success, and we have feedback and lessons learned to help improve next conference. One of the original guiding principles for this conference was to ensure it moves between Eastern and Western Canada, providing repeat attending institutions a break on travel costs. Because of the majority of Canadian HEUG institutions are in Ontario, the intent is to have the conference return to Ontario every other year, hosted by a different Institution. Aligning with this idea, the next conference will be in Western Canada – hosted by MacEwan University in Edmonton, Alberta!

SESSIONS

Conference sessions were primarily in the areas of PeopleSoft Campus Solutions, covering modules such as Academic Advisement, Admissions, Campus Community, Student Financials, Student Records, and Financial Aid.

There was also a General track and tracks for HRMS, Finance, and Technical and Security. The General track included sessions in the areas of BI/reporting, budgeting, cloud computing, CRM, project management, and end-user support.

Attendees heard presentations from various Universities and Colleges about Oracle/PeopleSoft products, user experiences, and had the opportunity to discuss common issues facing Canadian customers. Some sessions related to Canadian needs were the OUAC XML Panel Discussion, Seneca's Approach to T4/T4A Self-Service for Students, Ontario Net Billing, and a BOF regarding Canadian Tax Reporting Limitations & Issues.

STRUCTURE

The structure of Canada Alliance replicated the Alliance Conference on a smaller scale. We had 45 sessions and 2 pre-conference workshops. Workshops were on Sunday, prior to the Welcome Reception. Both workshops were well received and attended with 14 attendees in the morning and 21 in the afternoon.

OPENING

At the Monday morning Opening, I welcomed Scott Balthazor, the incoming Executive Director and the following HEUG Board members:

- **Dan Youngblood (VP Finance)**
- **Buddy Combs (VP Product)**
- **Nanci Regehr (Technical and Equivalent International Colleges)**
- **Michele Thibodeau (Small College Representative)**

Dan gave a HEUG update on behalf of the Board, encouraging attendees to approach all board members to share implementation successes and challenges.

Instead of a keynote speaker, the opening session focused on Campus Solutions, with Lee Ann Wentzell, Principal Sales Consultant from Oracle Canada, providing a 3-year product roadmap – affirming Oracle's continued support and development effort. Even though it was Campus Solutions focused, most found the opening beneficial.

Our Conference Committee had representation by Universities and Colleges from across Canada as well as the from HEUG Board and Higher Logic Staff members. The Conference Committee was introduced as follows:

- **Kelly Wilker-Draves (Chair)**
- **Jane Baratta (Assistant Conference Chair)**
- **Adam Wlad (Track Chair)**
- **Lee Dreger (Track Co-Chair)**

CANADA 2017

- **Michelle Fraser**
- **Charmaine Hack**

ATTENDANCE

Attendance was originally projected at 150, but registration was closed on October 20th, capping registration at 350+ attendees. Due to unanticipated numbers, the conference center was unable to accommodate any further attendees. This attendance makes CHEUG the greatest International Conference attended and the greatest Regional Conference ever attended in its first year!

Attendees represented provinces from Nova Scotia, New Brunswick, Quebec, Ontario, Alberta, and British Columbia and from countries including the United States and Pakiston!

Attendees were impressed that session topics covered a broad spectrum. This conference was also a "first-time" conference for many attendees, speaking to the continued need for an accessible and affordable regional Canadian conference. All attendees were impressed with the breakout sessions/workshops and the time allowed to network and meet other colleagues from various institutions.

MOBILE APP, MEALS, AND REGISTRATION

The Higher Logic Mobile App was also well received, complimented for its "ease of use" and immediate notifications. Registration, handled by Lizda and Sarah, was easy and quick, and we had an IT person at Registration to help with WiFi connectivity. Breakfast and lunch were provided, and for the Welcome and Closing Receptions, finger type foods were served. There were many compliments on the food choices.

WELCOME AND CLOSING RECEPTIONS

The Welcome and Closing Receptions were at the Delta Hotel.

The Welcome was on Sunday night and provided time to mingle and chat with colleagues from other institutions. The Closing Night was on Monday and consisted of an "Oktoberfest" themed party with a "keg tapping" and a live band. Attendees had a super time dancing and showing their Gemutlichkeit by wearing their Tracht (dirndls, lederhosen, etc.). There vendor gifts were also raffled.

The Closing Remarks for the reception also consisted of a raffle. Many gifts were donated by institutions from the Conference Committee! The location of the next conference was also announced.

REGISTRATION

- **347 attendees**

EMEA 2017

The EMEA Alliance event continues to be a popular and successful event that is valued and embraced by the Community and 2017 proves that it does not need to rely on the UK and Netherlands for a home.
Phil Sugden, Conference Chair

This was the 6th annual EMEA Conference but notably the first to be held outside the UK and Netherlands. This was a decision that was taken to ensure that the conference was seen as an event for the whole of the region rather than just ring-fenced to those two countries. Although this was an important change there was inevitably a concern about that the impact that this may have on attendance.

REPORT FROM EMEA CONFERENCE CHAIR
This concern appeared to be borne out during the initial registration period but a late influx meant that attendance figures were not significantly reduced from previous years, and came well within expectations which was pleasing to see and a testament to the way in which the EMEA community now embraces this event.

Recent events in Catalonia had led to some concerns from attendees prior to the event, however we were able to liaise with the hotel and local tourist office to help assess the situation and reassure attendees in advance. As far as we are aware no registered attendees stayed away from the event and there were no issues reported during the conference.

As a result of the attendance figures, and the continued support from EMEA vendors, the conference is on track to make a small surplus based on current projections.

There was positive feedback from attendees on the conference venue, particularly for the open networking space that allowed attendees and vendors to mix freely and comfortably. The hotel itself was also praised, with the only negative point raised by attendees being that meals and drinks in the hotel were relatively expensive and there were no alternative places to eat or drink in the local area.

Carolien ten Oever took over the role of Programme Chair for this conference, supported by Roelof Conijn, Paul Matthews and Tracey Robey. The programme was slightly reconfigured with CRM being refocussed as 'Customer Experience' and the addition of a track for 'Finance, Planning and Budgeting' as an attempt to attract users of Oracle Cloud products in particular.

The team was able to provide an attractive programme with a range of topics in all tracks. Unsurprisingly there was a significant focus on the development and use of Fluid functionality and institutional case studies from 9.2 upgrades, but there were sessions covering a range of business and process change projects and common issues faced by all institutions (e.g. GDPR).

The Executive Forum was organised by Barry Hudson, representative for EMEA on the HEUG Board of Directors. Vivian Wong, Group Vice President (Higher Education Development), Susan Beidler (Sr. Director, Product Strategy) and Lucas Heymans (Applications Strategy DIrector for EMEA) presented an overview of Oracle strategy in relation to higher education in response to the challenges faced by the sector. Representatives from the EMEA Executive Committee and from key vendor partners, CY2 and Accenture, then put this into the context of EMEA by highlighting some of the specific challenges experienced, strategies employed and the vision for the future of many institutions across our region.

EMEA 2017

The Executive Forum was organised by Barry Hudson, representative for EMEA on the HEUG Board of Directors. Vivian Wong, Group Vice President (Higher Education Development), Susan Beidler (Sr. Director, Product Strategy) and Lucas Heymans (Applications Strategy DIrector for EMEA) presented an overview of Oracle strategy in relation to higher education in response to the challenges faced by the sector. Representatives from the EMEA Executive Committee and from key vendor partners, CY2 and Accenture, then put this into the context of EMEA by highlighting some of the specific challenges experienced, strategies employed and the vision for the future of many institutions across our region.

A glimpse into the art of the possible was also provided by a fascinating presentation from Oracle's Elias Gargallo Monllau (Mobile & Chatbots PaaS Business Development Manger) about the role of Artificial Intelligence in our technology solutions. The event was well attended enabling valuable discussion and providing positive feedback.

The main social event took place on Monday night at Txapela Restaurant in the centre of Barcelona. This location was selected as it gave attendees an opportunity to visit the city centre, and transport was provided both ways to make this as easy as possible (which was also reassuring for attendees unsure of visiting the city due to the current security concerns). This event was very well attended and the nature of the venue encouraged networking and most attendees appeared to stay in the venue for the entire evening rather than move elsewhere.

The EMEA Alliance event continues to be a popular and successful event that is valued and embraced by the Community and 2017 proves that it does not need to rely on the UK and Netherlands for a home.

REGISTRATION

- **181 attendees**

LATIN AMERICA 2017

In 2017 it was the first time that the Latin America HEUG community met in Brazil, and the LA Alliance took place in Curitiba on August 22nd and 23rd. Around 60 IT professionals from 20 different Higher Education Institutions and Companies have shared important information and lessons learned concerning Oracle PeopleSoft implementations projects, as well as other related products, techniques and processes.

Marco Paludo, Conference Chair

OVERVIEW

This was a great opportunity for the Latin America community to get together and to integrate with the Brazilian HEUG members to discuss the main concerns and issues that the Portuguese speaking institutions share with the sisters' institutions from Latin America. Some of the hot topics discussed were products translations and localizations, data governance, consulting ecosystem, and on-premise x cloud solutions.

From the HEUG Board of Directors, it was a privilege to have the presence of Jane Broad, Lew Conner, Jason Wenrick, Michael Russel, Scott Balthazor, Brittany Moon, and other HEUG members and staff, and all attendees had the opportunity to interact with them during the whole event, sharing their worries and discussing the next steps for international institutions.

During this time, other meetings took place at PUCPR's facilities and the HEUG Board could discuss with Oracle's representatives some strategic approaches for Latin America region, and also have a meeting with the Latin America committee to discuss the LA Heug constitution and future events. Just after the event, the Brasil HEUG had an ordinary meeting with Oracle, also to leverage the relationship of the local ecosystem.

The sponsors of the event had the opportunity to expose their services and solutions to all attendees, especially because the exposition area was located at the same space of the breaks and session rooms. Vendors have also attended all lunch and dinner activities. They were: Oracle (Premier sponsor), Onbase by Hyland and Touchnet (Gold Sponsors), and HQS Plus and DIGISYSTEM (Silver Sponsors).

LOCAL CULTURE

Attendees had a little contact with the local culture during the lunch, at L'Hermitage space, where the Gastronomy graduation program students had prepared some regional food, and also at night, where it was possible to taste the most traditional food from Brazil, and to see a presentation of a Samba School

CLOSING NIGHT

The closing activities included the final remarks from the President of HEUG, Jane Broad, and a 3D Full Dome Film session in the FTD Digital Arena, where the attendees could get the opportunity to network with Board members and strengthen the relationship with Latin America Community.

REGISTRATION

- **56 attendees**

SOUTHERN AFRICAN 2017

This year the Southern African Higher Education User Group (Alliance 2017) conference was successfully hosted at the University of Pretoria's beautiful Groenkloof ("Green Valley") campus. The conference took place over two days during the University of Pretoria's mid-year academic recess period, viz. Tuesday 4th and Wednesday 5th of July.
Barry Hudson, Conference Chair

OVERVIEW
Approximately 60 conference sessions were presented over these 2 days to approximately 200 delegates. There were 6 tracks on Day 1 – reducing to 4 tracks on Day 2. Two tracks were devoted to Campus Solutions "academic" modules; one focusing on PeopleTools; one shared between Financial Aid and PeopleSoft FSCM suite; a track for BI-related topics and a track for General interest sessions.

REPORT FROM CONFERENCE CHAIR BARRY HUDSON
Approximately 60 conference sessions were presented over these 2 days to approximately 200 delegates. There were 6 tracks on Day 1 – reducing to 4 tracks on Day 2. Two tracks were devoted to Campus Solutions "academic" modules; one focusing on PeopleTools; one shared between Financial Aid and PeopleSoft FSCM suite; a track for BI-related topics and a track for General interest sessions.

Two keynote sessions were presented by Oracle – one focusing on "Oracle's Strategy: Supporting Higher Education – Today and Tomorrow" presented by Ronnie Toerien from Oracle's SA operations; and the other on "Oracle's Student System strategy" presented by Oracle's Gary Allen and Lucas Heymans.

Oracle's David Ebert kindly coordinated the contributed a further 6 Oracle-led sessions. These other sessions focused on a variety of topics ranging from Oracle BI, Oracle's Cloud Applications including Cloud Financials; Oracle's Cloud middleware technologies, Oracle JET and a session on the potential impact of European GDPR

(General Data Protection Regulation) on Southern African Higher Education sessions.

An interesting innovation at this year's conference was the delivery of 6 or so sessions remotely via Skype – enabling presenters from an institution in Australia; an Oracle presenter holidaying in Ireland (!) and a number of CY2 presenters out of the Netherlands - to present on various topics without incurring the cost and time implications of physically travelling to the conference location. The content delivered via these remote sessions undoubtedly added to the richness of the conference experience – and this practice will probably be repeated at future SA conferences, perhaps through the medium of a dedicated tele-conference facilitating organization (rather than Skype).

REGISTRATION

- **187 attendees**

ORACLE OPEN WORLD 2017

OVERVIEW

In October 2017 several 3 HEUG Board members and the Deputy Executive Director of the HEUG attended Oracle OpenWorld in San Francisco, California. Each year, the Board uses this incredible opportunity to develop and strengthen relationships with key industry leaders, develop business relationships with current and potential vendors, meet with key Oracle leaders and strategists to plan for future HEUG partnerships, and learn about about key industry trends that will shape HEUG's work with its member institutions.

This year Oracle OpenWorld hosted over 62,000 professionals from the world over and to no surprise, the messaging was all about the cloud. Here some key takeaways from the conference that are likely to be of some interest to our membership.

The introduction of the Autonomous Database Cloud.
Advancements in Integration Cloud Service offerings.
Credits offered to move your on-premise database license to Oracle's Platform as a Service (PaaS) Cloud.
The next year promises to continue the pace of change we're already seeing in the industry, with a continued emphasis on integrations and cloud services of all types (SaaS, IaaS and PaaS). The HEUG will of course continue to monitor these trends and bring information to you on these and more.

CONNECTING MEMBERS

COMMUNITY DEVELOP-MENT

UNIVERSITIES IN THE REGION, ESPECIALLY IN MAINLAND CHINA AS WELL AS INDIA.

JASON WENRICK , EXECUTIVE VICE PRESIDENT OF COMMUNITY DEVELOPMENT

2017 WAS A YEAR OF FOCUSING ON THE BASICS FOR OUR HEUG INTERNATIONAL COMMUNITY. WE TOOK A SKIP YEAR FOR OUR ASIA ALLIANCE CONFERENCE AND ARE IN THE PROCESS OF EXPANDING AND STRENGTHENING THE ASIA HEUG EXECUTIVE TEAM. THE 2018 ASIA ALLIANCE IS NOW SET TO HAPPEN IN EARLY MAY AND WILL BE LOCATED IN HONG KONG. OUR GOAL IS TO CONTINUE TO EXPAND THE NUMBER OF MEMBER

Our Arab Alliance Conference also took a skip year allowing us to focus on the Executive Committee and to strengthen the community. The Board will be looking to assist the Arab Executive Committee in expanding membership in the region and to help build out a robust Arab Alliance Conference when it returns in 2018.

Brazil was the host of the 2017 Latin America Alliance Conference for the first time ever. Representatives from several Latin American countries attended to present their cases to Oracle and ensure their voices were heard. Planning has begun to bring the conference back to Bogota, Columbia in 2018.

Our EMEA region had the first ever EMEA

COMMUNITY DEVELOP-MENT

Alliance Conference outside of the United Kingdom and the Netherlands. This year Barcelona, Spain was the host of a very successful conference and we hope to continue to expand our membership to other European regions moving forward. Currently, the 2018 conference appears to moving back to the Netherlands and will possibly be in Amsterdam.

Australia/New Zealand (ANZ) Alliance took place in Brisbane, Australia in an exciting new venue. ANZ has also started a scholarship program that the Board will be observing closely, which will grant up to two individuals funds to help defray travel costs to the International Alliance Conference in the US. Based on this pilot program, the Board will review the possibility of expanding this program to other international regions.

The University of Pretoria hosted the 2017 Southern African (SA) Alliance Conference. A couple of new countries had members attend this year, and an investigation of possibly hosting the 2018 SA Alliance Conference in Botswana for the first time ever is currently underway.

Following up on discussions starting last year, 2017 saw the first official Canadian Alliance Conference hosted at the University of Waterloo. This became the largest regional conference ever held outside of the International Alliance Conference. The location and dates for next year's conference are already being finalized and the Board will be moving towards officially recognizing the Canadian Higher Education User Group as an officially chartered global region in 2018.

The Board continues to work with the Alliance Planning Team on increasing the number of international presentations and is also investigating US-based presentations that may be of interest to global Alliance conferences and seeing what options may exist to bring some of those presentations to a wider audience as well.
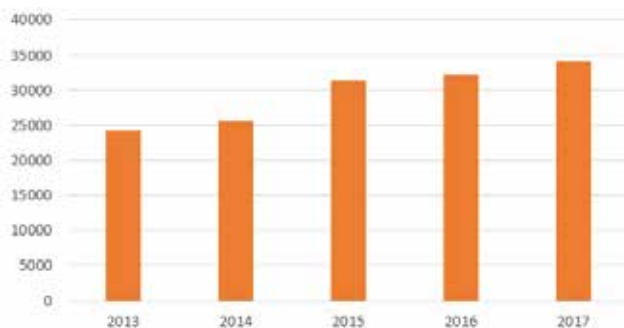
We are happy to announce that 15 international members were elected to various Advisory Groups in 2017 and we are committed to making sure that a diverse and broad representation is always present at all levels of the HEUG organization.

MEMBERSHIP & FINANCE

MEMBERSHIP INFORMATION
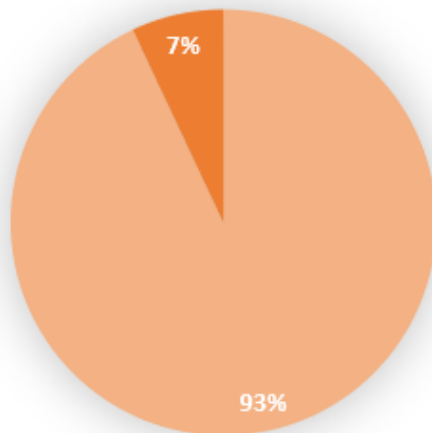
Renewed Membership ■ Did Not Renew Membership

A RENEWAL RATE OF 93% 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 73% NORTH AMERICAN MEMBERSHIPS AND 26% INTERNATIONAL MEMBERSHIPS. WITH THE TOTAL MEMBERSHIP FROM 2016 TO 2017 BEING:

- **MARCH 2016 – 32,200 USERS**
- **MARCH 2017 – 34,111 USERS**

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 users 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 Advisory Group 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 benefit all users at your college or

MEMBERSHIP & FINANCE

MEMBERSHIP INFORMATION

university.

The HEUG Education Webinar Series continued to grow in 2017 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. It also 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.

HEUG Education Series: These sessions are presented by member and experts on topics that are relevant and timely. Some of these are done by top Alliance and regional conference session performers, allowing users 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 fee per person for Subscriber members to access these sessions, for both live and recorded webinars. HEUG Institutional and System members can attend these sessions free of charge.

Sponsored Webinars: These sessions are presented and 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 for all users.

HEUG Webinars: These sessions provide training on HEUG programs, tools, and initiatives. They are trainings and educational webinars that are occasionally available in multiple languages. They are free of charge.

2017 MEMBERSHIP STATS

Blogs Posted	401
Files Downloaded	166,041
New Forum Post	21,134
Forum Topic Daily Feed	32,224
New HEUG.Online Users	3,585
New HEUG.Online Organizations	44
Total HEUG Users March 2016/2017	32,200/34,111
Allied Group Membership Sales	$17,200
Institutional/ System Membership Sales	$432,000
Instutions that Renewed their Membership	313

2017 EDUCATION SERIES

Number of Webinars	68
Number of Attendees	5,868
Number of Downloaded Recordings	3,485
Total Income	$2,950

In 2017 the HEUG offered 68 webinars, attended live by 5,868 people. The session recordings were downloaded 3,485 times.

MEMBERSHIP & FINANCE

FINANCIAL POSITION 2017

The financial health of the organization continues to be strong. During the 2016-17 fiscal year, net assets were decreased by $597,833 due to a small decrease in conference participation at our signature event, Alliance 2017 in Las Vegas, Nevada. Considerable increases in the cost of programming and event services across the board also contributed to the decrease.

For 2017-18, the organization is reviewing our budgeting strategy and spending plans with the idea of implementing tighter controls for event planning and execution. A contract review work group is established to review significant event expenses and contracts with the focus on consolidating expenses and issuing multi-year contracts to leverage potential savings. In addition, agreements with our primary event and administrative services contractors are being reviewed in 2017-18 with the idea of lowering the costs associated with these contracts.

Alliance 2018 will see us visit a new host city, Salt Lake City, Utah, and the Board of Directors and the Conference Planning team are both very excited at the opportunities presented by this first-time venue.

Looking forward, we will continue to use the non-profit expertise of Tate & Tryon to develop a more strategic approach to cash management and investments. We are in the process of reviewing our international spending practices and expect to make significant changes in our operations overseas to streamline our business process, resulting in operational efficiencies and savings. On a related note, we are happy to announce a new audit services engagement with Gelman, Rosenberg and Freedman, CPAs, beginning in January, 2018. GRF has provided financial, tax and consulting solutions to tax-exempt organizations since 1981 and the Board of Directors is excited at the opportunity this new relationship will provide over the next few years.

Statements of financial position and activities are included in the following pages. Questions regarding the audited financial statements and requests for additional information may be referred to the Board of Directors at support@heug.org

MEMBERSHIP & FINANCE

STATEMENTS OF FINANCIAL POSITION

HIGHER EDUCATION USER GROUP, INC.
STATEMENTS OF FINANCIAL POSITION
YEARS ENDED JUNE 30, 2017 AND 2016

	2017	2016
ASSETS		
CURRENT ASSETS		
Cash and cash equivalents	$2,792,520	$3,163,511
Certificates of Deposit	281,803	280,823
Accounts Receivable	7,138	68,684
Prepaid Expense	251,862	244,247
TOTAL CURRENT ASSETS	3,333,323	3,757,265
CERTIFICATES OF DEPOSIT, Long-Term	-	173,891
TOTAL ASSETS	$3,333,323	$3,931,156
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable	$48,134	$49,908
Deferred Revenue	627,546	686,779
TOTAL CURRENT LIABILITIES	675,680	736,687
NET ASSETS – Unrestricted	2,657,643	3,194,469
TOTAL LIABILITIES AND NET ASSETS	$3,333,323	$3,931,156

Source: HEUG Audited Financial Statements

Source: HEUG Audited Financial Statements

MEMBERSHIP & FINANCE

STATEMENTS OF ACTIVITIES

HIGHER EDUCATION USER GROUP, INC.
STATEMENTS OF ACTIVITIES
YEARS ENDED JUNE 30, 2017 AND 2016

	2017	2016
REVENUE		
Conference Revenue	$4,571,523	$4,634,529
Membership Dues	476,426	472,073
Revenue sharing income	56,730	53,337
Interest Income	7,805	8,956
TOTAL REVENUE	5,112,484	5,168,895
OPERATING EXPENSES		
PROGRAM EXPENSES		
Consultants - program	1,013,375	911,870
Consultants – operations	171,093	64,666
Supplies and materials	130,775	163,746
Mailing and production	10,232	14,615
Telecommunications	55,804	82,588
Travel	504,820	442,681
Events	3,199,585	2,449,640
Business expenses	143,850	137,573
TOTAL PROGRAM EXPENSES	5,229,534	4,267,381
ADMINISTRATIVE EXPENSES		
Legal and professional fees	94,312	93,470
Executive services	286,701	283,884
Miscellaneous expenses	43,829	14,978
TOTAL ADMINISTRATIVE EXPENSES	424,842	392,332
TOTAL OPERATING EXPENSES	5,654,376	4,659,713
CHANGE IN NET ASSETS		
FROM OPERATING ACTIVITIES	(541,892)	509,182
NON-OPERATING EXPENSE		
Foreign Currency Translation	5,066	(859)
CHANGE IN NET ASSETS	(536,826)	508,323
NET ASSETS, BEGINNING OF YEAR	3,194,469	2,686,146
NET ASSETS, END OF YEAR	$2,657,643	$3,194,469

Source: HEUG Audited Financial Statements

MEMBERSHIP & FINANCE

STATEMENTS OF CASH FLOWS

**HIGHER EDUCATION USER GROUP, INC.
STATEMENTS OF CASH FLOWS
YEARS ENDED JUNE 30, 2017 AND 2016**

	2017	2016
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in net assets from operating activities	$ (541,892)	$ 509,182
Adjustments to reconcile change in net assets		
from operating activities to net cash		
provided (used) by operating activities:		
Foreign currency translation	5,066	(859)
Increase in certificates of deposit		
from interest earned	(980)	(3,205)
(Increase) decrease in accounts receivable	61,546	(66,169)
(Increase) decrease in prepaid expenses	(7,615)	(68,266)
Increase (decrease) in accounts payable	(1,774)	(9,788)
Increase (decrease) in deferred revenue	(59,233)	310,325
NET CASH PROVIDED (USED) BY		
OPERATING DEPARTMENTS	(544,882)	690,796
CASH FLOWS FROM INVESTING ACTIVITIES		
Redemption of certificate of deposit	173,891	169,907
NET CASH PROVIDED BY INVESTING ACTIVITIES	173,891	169,907
NET INCREASE (DECREASE) IN		
CASH AND CASH EQUIVALENTS	(370,991)	860,703
CASH AND CASH EQUIVALENTS,		
BEGINNING OF YEAR	3,163,511	2,302,808
CASH AND CASH EQUIVALENTS, END OF YEAR	$2,792,520	$3,163,511

Source: HEUG Audited Financial Statements