



# ANNUAL REPORT

THE HIGHER EDUCATION USER GROUP

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## CONTACT INFO

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2023

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# LETTER FROM THE PRESIDENT

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Dear HEUG Community,

On behalf of your elected Board, our Advisory Groups, Communities of Practice, the countless HEUG volunteers and our Higher Logic Team, it is my honor to present the Higher Education User Group Annual Report for 2023. This year we are celebrating continued growth and engagement across the HEUG community.

Our membership now includes representatives from more than 1,000 organizations across 48 countries - a new high for the HEUG! This steady expansion demonstrates the value HEUG provides to higher education and public sector seeking community, best practices, and professional development around enterprise solutions.

A key strategic priority has been growing the HEUG's model beyond a single platform. This evolution allows us to support our members holistically as their organizations embrace new technologies and innovations that meet their unique needs. In 2023, we made great progress through launching vendor-inclusive events, creating resources applicable across systems, and building relationships with new partners.

While COVID's impacts linger, nothing dampened the energy and enthusiasm at our in-person events. In the spring, the annual conference was held in St. Louis and was a great success, growing in attendance from the previous year. Our global and US regional events also featured well-attended sessions on hot topics like data privacy, student retention, and automation, and based on community feedback, we've made some adjustments to how we organize all of our events as we move forward. We also saw high engagement with the online forums on AI, digital accessibility, and change management.

As we look ahead through 2024 and beyond, our commitment remains to serving members through valuable networking, knowledge sharing, and collaboration. We will continue efforts to expand programming, increase diversity in speakers, and assure HEUG provides the greatest possible value to our community.

HEUG's progress depends on the dedication of our volunteers and partners. Thank you to the innumerable members who generously contribute their time and expertise for the benefit of others - we truly are an **Alliance for the Public Good**. We invite all members to get involved and help shape HEUG's future.

I am honored to lead this organization through an exciting period of growth and evolution. As needs change, the HEUG community adapts together, bound by our shared missions. I hope to see you all this March in Phoenix Arizona for Alliance 2024 and look forward to connecting in-person and online with you all throughout the year ahead.

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**JOSH VINCENT**

# LETTER FROM THE EXECUTIVE DIRECTOR

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Dear HEUG Members,

As we turn the page on 2023, I want to celebrate all that we accomplished as a community this past year. HEUG continues to thrive because of your dedication and collaboration.

## HIGHLIGHTS OF 2023

From thought-provoking E-Academy Webinars to engaging global conferences, 2023 offered numerous opportunities for members to connect and share insights. Our discussions explored important higher education trends and technologies, sharing best practices, and overcoming hurdles together. Regional events facilitated valuable networking and idea exchange.

We expanded our training programs significantly, empowering members with new skills. The E-Academy, Presenter Certification, and ThinkSpace events saw record participation this year and we also expanded our partnerships to offer more educational benefits to our members. We are now proud to offer discounted training options through SpearMC and United Training!

In 2023, the Higher Education User Group experienced an electrifying surge in engagement and collaboration. Welcoming 15 new institutional members to our vibrant community, we witnessed an impressive surge with over 71,000 logins, including more than 2,400 first-time logins. This influx of fresh perspectives was complemented by a remarkable 360+ first-time posters, showcasing the dynamic growth of our community. Setting new records, we proudly hosted the highest attended webinar in HEUG history, exemplifying our commitment to knowledge sharing and professional development.

Additionally, our resource repository saw an astounding 18,000+ downloads, reflecting the widespread impact of the valuable insights and resources shared within our thriving community. As we reflect on these achievements, we look forward to building on this momentum in the coming year, fostering even greater collaboration and knowledge exchange within the Higher Education User Group.

## STRATEGIC PROGRESS

This was a pivotal year for reinforcing HEUG's strategic direction. We updated our mission, vision, and values to align with our commitment to serve and lead in higher ed technology. This strategic realignment, outlined in our strategic plan, charts a clear course for HEUG's future and ensures we stay true to our core values.

## THANKS TO OUR COMMUNITY

None of this would have been possible without our passionate community. Thank you to our dedicated HEUG Team, Board, Advisory Group members, Alliance & Regional Program Teams, and all our active HEUG members. Your commitment, creativity, and collaboration are the lifeblood of the HEUG organization!

## EYES ON THE FUTURE

As we enter 2024, I'm excited about what's next for HEUG. Our strong foundation, strategic direction, and engaged members position us for continued success. I can't wait to see you all in Phoenix for Alliance 2024!

Thank you for being part of the HEUG community. Here's to an outstanding 2023 and even better 2024!

**BRITTANY MOON**

# EXECUTIVE SUMMARY

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# ADVISORY GROUP UPDATE



## 2023 OVERVIEW

In 2023, the HEUG Community revolutionized a significant milestone in our organizational evolution – the transition from **Advisory Groups (AGs)** to **Communities of Practice (CoPs)**. This transformative journey reflects our commitment to enhancing collaboration, inclusivity, and the overall engagement of our community members.

A dedicated AG Taskforce, comprising passionate individuals from various sectors of our community, reviewed the structure, community engagement, and election process. This group recommended changes that align directly with the HEUG's on-going strategic plan; as well as the best way to serve the needs of the HEUG community with its core objectives for education and engagement across the broad range of technology and business process areas it represents.

# ADVISORY GROUP UPDATE



## KEY HIGHLIGHTS

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### EFFECTED ADVISORY GROUPS

Customer Relations Management (CRM), Finance (FIN), Human Capital Management (HCM), Product and Change Management (PCM), and Technical and Reporting (TRAG), Campus Academic Records Support (CARS) and Campus Student Financial Support (CSFS) will remain as Advisory Groups.

### REBRANDING HEUG INTEREST AREAS

Following suit, the current 'Interest Areas' are under construction and will be rebranded to better align with the forward-direction of the CoPs early 2024.

### PURPOSEFUL EVOLUTION

The move from AGs to CoPs is a purposeful evolution designed to foster more dynamic, responsive, and inclusive collaboration. It aligns with our commitment to staying at the forefront of innovation within the higher education space.

### COMMUNITY-CENTRIC APPROACH

CoPs emphasize a community-centric approach, encouraging participation and knowledge-sharing among members with shared interests and objectives. This shift empowers our community to drive the agenda and co-create valuable resources and insights.

### ENHANCED COLLABORATION

With CoPs, we aim to facilitate enhanced collaboration by breaking down silos and provide a platform for members to connect, exchange ideas, and collectively address challenges faced within their specific domains.

### REVISED ELECTION PROCESS

This revision for the new advisory group members and the community of practice group members requires a balance of individuals for each detailed module within product systems. Each group will be required to identify the skillsets of members rolling off the team, allowing a detailed set of requirements to be advertised each election cycle which will now take place after the annual Alliance conference.

### TRANSITION TO COMMUNITY COUNCIL

A new Community Council (formerly known as the All HEUG Advisory Group) had been designed to balance the commitment for sustained representation across all existing product system used by HEUG members, while preparing the organization to engage on future challenges and solutions.

### ACKNOWLEDGING THE AG TASKFORCE

We extend our gratitude to the members of the AG Taskforce for their unwavering dedication, strategic thinking, and collaborative spirit. Their input and recommendations were instrumental in shaping the framework for this transition, ensuring that is aligns seamlessly with the evolving needs of the community.

# EDUCATION UPDATE



This year we focused on several initiatives. The first was the finalization of a PS Query four-part series. The team developed, and professionally recorded the final 2 parts of the series. These are slated to be released to the HEUG community in January of 2024. Upon completion of the series participants will receive a badge to mark their accomplishments.

The second initiative was the development of a Business Analyst training. The first part of the year was spent gathering survey results regarding what types of skills and tools the HEUG community was looking to develop. Upon analysis and discussion, the working group decided to refocus the direction of the work. The working group felt it was important to first develop an active community to share and generate ideas based on topics selected from the survey results. The team offered their first coffee hour aimed at Business Analysts in November. It was well attended and received. The working group will be offering monthly coffee hours. This will help build the community and identify experts in various fields. These experts will be called upon to help with the development of a training series.

Lastly, we worked with our strategic partner, Information Technology Research Group to develop a series of executive level round tables to engage C Suite members. This effort resulted in a four part series of roundtables presented virtually in small groups to facilitate open discussion and sharing of ideas. These round tables covered Generative AI, General Technology Trends in Higher Education, Security Trends in Higher Education: and Annual HR Trends for IT. This roundtable series lead up to the Alliance 2023 C suite Forum.



# GLOBAL COUNCIL UPDATE



The Higher Education User Group (HEUG) is the leading global user community in higher education with membership currently spanning 48 countries and with conferences in 2023 in the US and in Asia, Europe, Southern Africa and Australia and New Zealand.

- 22-23 May – Hong Kong, China
- 7-8 September – Johannesburg, South Africa
- 30 October – 1 November – Brisbane, Australia
- 27-28 November – Lille, France

The theme of the 2023 international conferences was ***Renew and Rejuvenate – the future or our systems***. Attendance at international conferences this year was higher than in 2022, but work needs to be done to raise numbers to the pre-covid era.

# GLOBAL COUNCIL UPDATE

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Through use of the HEUG Global Council we were able to facilitate an exchange of ideas and offer help to the different regions in helping gear up the different conferences and to share lessons learned to help the other regions of the world. The most important lesson however, learned year after year is that regions may differ in local legislation and budget constraints (or opportunities), the main challenges that institutions face are similar worldwide. This offers opportunities for the HEUG to grow to new regions and countries. In 2023 we therefore took two new endeavours in this regard:

## 1. ARAB REGION

With thank to the open invitation of the University of Doha, preliminary efforts are underway to support a regional conference for the Arab region. The setting of this conference is planned to be in Doha, and organization will be done with support from the Ministry of Education of Qatar.

## 2. DIGITAL DATA TRANSFER

The HEUG Global Council. is currently exploring a conjunction of efforts with the GDN (Groningen Declaration Network) on how to transfer student data between systems without the use of paper. Through the global council we were able to share how Singapore has set this up using blockchain diploma's and how the Netherlands have digitalized the high school diplomas with the effect that university admission for Dutch nationals is paperless. Interestingly this new endeavor was set up as a result of the HEUG Canada conference in 2022, even though the GDN was started in the Netherlands.

The start of 2024 is geared towards further developing these endeavours while we work globally on setting up the new Communities of Practice of the HEUG. That this will prove, again, to be a global challenge can be seen in the first discussions that have taken place in the Integration Community of Practice at the end of 2023. That the HEUG is worldwide, proves year after year to be a wonderful asset.

# REGIONAL TASKFORCE

In order to accurately align with the current Planning Committee's areas of reach and to strategically recognize the HEUG as the hosting organization, a decision was made to rename all of the Regional Conferences. The renaming initiative reflects the current regionalization of membership and ensures consistency and cohesion within the HEUG. The "Alliance" name will only be referenced to the annual U.S. conference.

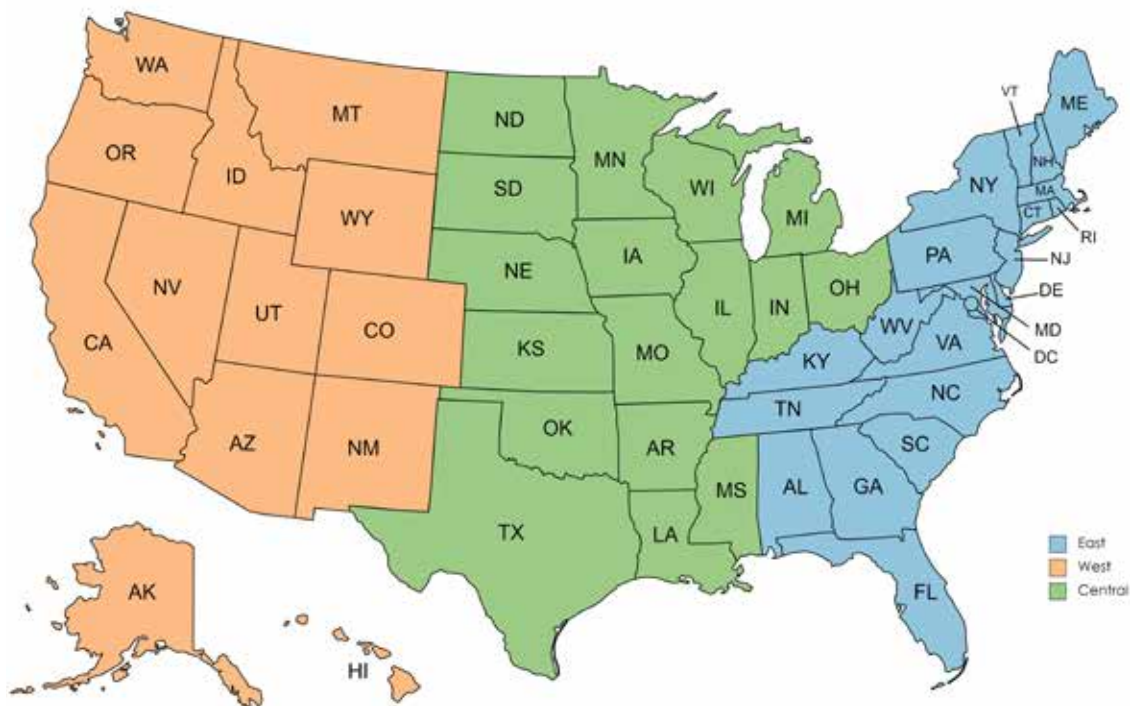
## NAMING UPDATES

### UNITED STATES

- HEUG EAST
- HEUG WEST
- HEUG CENTRAL

### INTERNATIONAL

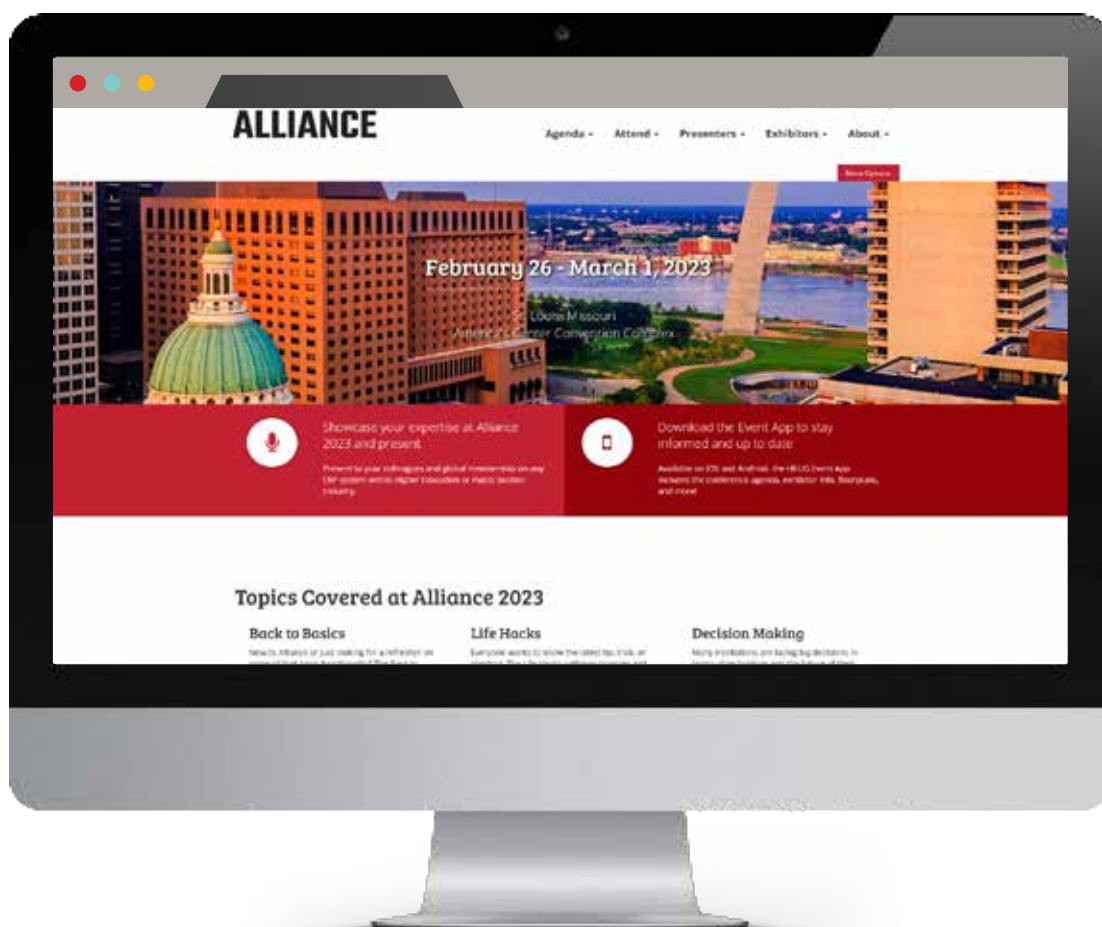
- HEUG ANZ
- HEUG ASIA
- HEUG CANADA
- HEUG EUROPE
- HEUG LATIN AMERICA
- HEUG SOUTH AFRICA



# **2023 EVENTS**

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# ALLIANCE 2023



## Workshops :

February 26, 2023

## Sessions :

February 27 - March 1, 2023

## Location :

St. Louis, Missouri - America's Center Convention Complex

## PROJECT MANAGEMENT

The 2023 conference was a highly anticipated event; held in a new city in a centralized location. The team was dedicated to an overall strategic plan to maximize resources as well as provide a consistent, yet unique and exciting experience for participants.

# ALLIANCE 2023

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The conference team maintained a conservative approach to anticipated registration targets and budget. HEUG staff was successful in reducing costs while at the same time providing an unforgettable conference experience.

The conference team intentionally continued many aspects from the prior year in a strategic approach to maintain consistency and stability for the conference attendees. Pathways, Think Space, Sandbox Sessions, Sponsor Demos, as well as the replacement of deep dives with two one-hour sessions and a repeat of a full day of sessions on the final day of the conference all made a re-appearance. With this approach, the conference team built on the success of the previous year and maintained a familiar experience for attendees.

New this year, was a return to keynote speakers. Feedback from conference attendees showed that there was an appreciation and desire for keynote speakers. In response, the conference team partnered with Beyond Academics, Tambellini, and a member institution to spotlight three talented individuals each morning.

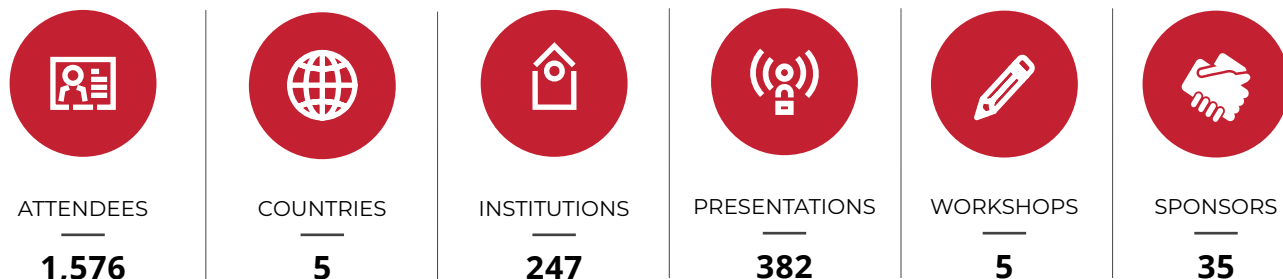
The standing-room-only attendance at multiple sessions is a positive indicator of the conference's success. It suggests that the topics covered in these sessions were not only relevant, but also highly sought after by attendees. It's a testament to the conference teams' ability to curate a program that resonated with the interests and needs of the audience.

**RENEE RILEY**



## ALLIANCE 2023

### CONFERENCE STATS



### CONFERENCE COMMITTEE

**Cheri McEnte**

Syracuse University, Conference Chair

**Renee Riley**

University of Missouri System, Program Chair

**Brad Carlson**

University of Minnesota, Conference Assistant

**Jason Koziara**

DePaul University, Past Conference Chair

**Michael Russell**

Virginia Community College System, HEUG President

**Lisa Skinner**

Sandford University, HEUG VP of Finance

**Buddy Combs**

Kentucky Comm. & Tech. College Sys, HEUG VP of

**Brittany Moon**

Higher Logic, Executive Director

**Erica Allen, CMP**

Higher Logic, Director of Events and Meetings

**Carol Valora, CMP**

Higher Logic, Meetings Manager

**Michelle Goytia**

Higher Logic, Meeting Manager

**Paige Ellis**

Higher Logic, Meeting Coordinator

**Selly Soetarso**

Higher Logic, Meeting Coordinator

**Tom Chambers**

Higher Logic, Exhibits/Sponsorship Sales Manager

**Tesha Vera**

Higher Logic, Education & Program Manager

**Hillary Chambers**

Higher Logic, Marketing & Communications Manager

**Amy Ewing**

Higher Logic, Creative Designer/Developer

**Alex Green**

Higher Logic, Membership Community Manager

# HEUG ASIA - HONG KONG 2023

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## ABOUT

The Higher Education Users Group (HEUG) Asia region is excited to announce that we will be in person to Rediscover, Reconnect and Rejuvenate the future of our systems at HEUG Asia - Hong Kong, 22-23 May 2023. For many institutions our ERP systems have a decade of experience. Our program will cater to how we ensure we are delivering first-class services to our students and staff as well as what we have learned to inspire others and what pitfalls we can help prevent in the future. As always, the HEUG Asia - Hong Kong will continue to be a great opportunity to learn, network and share best practices with your colleagues from other institutions throughout Asia. At the same time, you may wish to take the opportunity to explore the beautiful city of Hong Kong.



## HEUG ASIA - HONG KONG 2023

### CONFERENCE STATS



ATTENDEES

223



COUNTRIES

7



INSTITUTIONS

23



PRESENTATIONS

30



SPONSORS

15

### CONFERENCE COMMITTEE

**Derry Fong**

Hong Kong University of Science and Technology

**Yen Teck Kong**

Singapore University of Social Sciences

**Anthony Lam**

Hong Kong University of Science and Technology

**Charles Li**

City University of Hong Kong

**Senthil Kumar**

National University of Singapore

**Roger Wong**

Hong Kong Education University

**Carmen Tam**

University of Hong Kong

**Yee Suan Ong**

Singapore University of Social Sciences

**Jovan Man Wai Chiu**

University of Hong Kong

**Michael Zhang**

City University of Hong Kong

**Brittany Moon**

HEUG Executive Director

**Hillary Chambers**

HEUG Meeting Manager

**Tom Chambers**

HEUG Director of Community &amp; Development

# HEUG CENTRAL - TEXAS 2023

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## ABOUT

The Higher Education Users Group (HEUG) Central region is excited to announce that we will be in person to Rediscover, Reconnect and Rejuvenate the future of our systems at HEUG Central - Texas, July 31 - August 1, 2023. For many institutions our ERP systems have a decade of experience. Our program will cater to how we ensure we are delivering first-class services to our students and staff as well as what we have learned to inspire others and what pitfalls we can help prevent in the future. As always the HEUG Central - Texas will continue to be a great opportunity to learn, network and share best practices with your colleagues from other institutions throughout the Central Region. At the same time, you may wish to take the opportunity to explore the beautiful city of Dallas, Texas.

## HEUG CENTRAL - TEXAS 2023

### CONFERENCE STATS



ATTENDEES

**207**

STATES

**5**

INSTITUTIONS

**21**

PRESENTATIONS

**38**

SPONSORS

**11**

### CONFERENCE COMMITTEE

**William Culey**

University of Texas - Austin

**Ryan Meyers**

University of Texas at Dallas

**Bill Daley**

University of Texas Southwestern Medical Center

**Gayle King**

University of Houston System

**Alison Lewis**

University of Texas at Dallas

**Teresa Moreland**

University of Texas Southwestern Medical Center

**Emily Pudliner**

Baylor University

**Orkun Toros**

University of Texas at Dallas

**Brittany Moon**

HEUG Executive Director

**Charlene Liu**

HEUG Director of Meetings &amp; Events

**Tom Chambers**

HEUG Director of Community &amp; Development

**Hillary Chambers**

HEUG Meeting Manager

**Shawntia Key**

HEUG Meeting Manager

**Casey Hickman**

HEUG Meeting Coordinator

**Drew Ewing**

HEUG Marketing Manager

# HEUG SOUTHERN AFRICA - JOHANNESBURG 2023

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## ABOUT

The Higher Education Users Group (HEUG) Southern African region is excited to announce that we will be in person to Rediscover, Reconnect and Rejuvenate the future of our systems at HEUG Southern Africa - Johannesburg, 7-8 September 2023. For many institutions our ERP systems have a decade of experience. Our program will cater to how we ensure we are delivering first-class services to our students and staff as well as what we have learned to inspire others and what pitfalls we can help prevent in the future. As always the HEUG Southern Africa - Johannesburg will continue to be a great opportunity to learn, network and share best practices with your colleagues from other institutions throughout Southern Africa. At the same time, you may wish to take the opportunity to explore the beautiful city of Johannesburg.

## HEUG SOUTHERN AFRICA - JOHANNESBURG 2023

### CONFERENCE STATS



ATTENDEES

243



COUNTRIES

6



INSTITUTIONS

8



PRESENTATIONS

38



SPONSORS

11

### CONFERENCE COMMITTEE

**Luci Carosin**

University of the Witwatersrand

**Sashni Chetty**

University of Cape Town

**Yogini Govind**

University of the Witwatersrand

**Barry Hudson**

University of Pretoria

**Jacobus Kotze**

University of the Free State

**Maggie Maseka**

University of the Witwatersrand

**Itumeleng Marapjane**

University of the Witwatersrand

**Arthi Sooryalall**

University of the Witwatersrand

**Nimrod Noruwana**

University of the Free State

**Brittany Moon**

HEUG Executive Director

**Charlene Liu**

HEUG Director of Meetings &amp; Events

**Tom Chambers**

HEUG Director of Community &amp; Development

**Hillary Chambers**

HEUG Meeting Manager

**Shawntia Key**

HEUG Meeting Manager

**Casey Hickman**

HEUG Meeting Coordinator

**Drew Ewing**

HEUG Marketing Manager

# HEUG CENTRAL - ILLINOIS 2023

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## ABOUT

The Higher Education Users Group (HEUG) Central - Illinois region is excited to announce that we will be in person to Rediscover, Reconnect and Rejuvenate the future of our systems at HEUG Central - Illinois, October 2-3, 2023. For many institutions, our ERP systems have a decade of experience. Our program will cater to how we ensure we are delivering first-class services to our students and staff as well as what we have learned to inspire others and what pitfalls we can help prevent in the future. As always, HEUG Central - Illinois will continue to be a great opportunity to learn, network and share best practices with your colleagues from other institutions throughout the central region. At the same time, you may wish to take the opportunity to explore the beautiful city of Oak Brook.

## HEUG CENTRAL - ILLINOIS 2023

### CONFERENCE STATS



ATTENDEES

**139**

STATES

**11**

INSTITUTIONS

**33**

PRESENTATIONS

**49**

SPONSORS

**11**

### CONFERENCE COMMITTEE

**Ashley Bergemann**

University of Colorado

**Jessica Holler**

DePaul University

**Kevin Shalla**

University of Chicago

**Susan Johnson**

University of Wisconsin-Stevens Point

**Amanda Duval**

Harper College

**DeDe Young**

Northern Illinois University

**Brittany Moon**

HEUG Executive Director

**Charlene Liu**

HEUG Director of Meetings &amp; Events

**Tom Chambers**

HEUG Director of Community &amp; Development

**Hillary Chambers**

HEUG Meeting Manager

**Shawntia Key**

HEUG Meeting Manager

**Casey Hickman**

HEUG Meeting Coordinator

**Drew Ewing**

HEUG Marketing Manager

# HEUG EAST - NORTH CAROLINA 2023

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## ABOUT

The Higher Education Users Group (HEUG) East - North Carolina is excited to announce that we will be in person to Rediscover, Reconnect and Rejuvenate the future of our systems at HEUG East - North Carolina, October 9-10, 2023. For many institutions our ERP systems have a decade of experience. Our program will cater to how we ensure we are delivering first-class services to our students and staff as well as what we have learned to inspire others and what pitfalls we can help prevent in the future. As always the HEUG East - North Carolina will continue to be a great opportunity to learn, network and share best practices with your colleagues from other institutions throughout the East Region. At the same time, you may wish to take the opportunity to explore the beautiful city of Raleigh, North Carolina.



## HEUG EAST - NORTH CAROLINA 2023

### CONFERENCE STATS



ATTENDEES

126



STATES

11



INSTITUTIONS

19



PRESENTATIONS

40



SPONSORS

6

### CONFERENCE COMMITTEE

**Tom Johnson**

Duke University

**Beth Broyles**

Emory University

**Maribel Carrion**

University of North Carolina at Chapel Hill

**Christopher Derickson**

Duke University

**Gina Fogelsonger**

University of North Carolina at Chapel Hill

**Gwen Hazlehurst**

North Carolina State University

**Ron Reed**

North Carolina State University

**Kristine Williams**

University of North Carolina at Chapel Hill

**Brittany Moon**

HEUG Executive Director

**Charlene Liu**

HEUG Director of Meetings &amp; Events

**Tom Chambers**

HEUG Director of Community &amp; Development

**Hillary Chambers**

HEUG Meeting Manager

**Shawntia Key**

HEUG Meeting Manager

**Casey Hickman**

HEUG Meeting Coordinator

**Drew Ewing**

HEUG Marketing Manager

# HEUG AUSTRALIA & NEW ZEALAND - BRISBANE 2023

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## ABOUT

The Higher Education Users Group (HEUG) Australia & New Zealand region is excited to announce that we will be in person to Rediscover, Reconnect and Rejuvenate the future of our systems at HEUG ANZ - Brisbane, 30 October - 1 November, 2023. For many institutions our ERP systems have a decade of experience. Our program will cater to how we ensure we are delivering first-class services to our students and staff as well as what we have learned to inspire others and what pitfalls we can help prevent in the future. As always the HEUG ANZ - Brisbane will continue to be a great opportunity to learn, network and share best practices with your colleagues from other institutions throughout Australia & New Zealand. At the same time, you may wish to take the opportunity to explore the beautiful city of Brisbane.

# HEUG AUSTRALIA & NEW ZEALAND - BRISBANE 2023

## CONFERENCE STATS



ATTENDEES

277



COUNTRIES

5



INSTITUTIONS

22



PRESENTATIONS

75



SPONSORS

16

## CONFERENCE COMMITTEE

### Jodie Davis

Griffith University

### Clinton Lamont

Griffith University

### John Reed

University of New South Wales

### Christopher Dell

Griffith University

### Nikki Gaertner Eaton

University of South Australia

### Umesh Gupta

Deakin University

### Brett Ryan

Griffith University

### Michelle Wear

Griffith University

### Jason Dolan

University of New South Wales

### Ben Shelton

University of Newcastle

### Brittany Moon

HEUG Executive Director

### Charlene Liu

HEUG Director of Meetings & Events

### Tom Chambers

HEUG Director of Community & Development

### Hillary Chambers

HEUG Meeting Manager

### Shawntia Key

HEUG Meeting Manager

### Casey Hickman

HEUG Meeting Coordinator

### Drew Ewing

HEUG Marketing Manager

# HEUG EUROPE - LILLE 2023

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## ABOUT

The Higher Education Users Group (HEUG) Europe region is excited to announce that we will be in person to Rediscover, Reconnect and Rejuvenate at HEUG Europe - Lille, 27-28 November, Lille, France. The programme will cater to the diverse portfolio of campus IT systems. As always, the HEUG Europe programme looks at the needs of our students, our educational and administrative staff over the next five years and how can we best embrace technology to meet those needs. HEUG Europe - Lille is a great opportunity to network with your colleagues from other institutions from around Europe. At the same time, you may wish to take the opportunity to explore the beautiful city of Lille.

## HEUG EUROPE - LILLE 2023

### CONFERENCE STATS



ATTENDEES

128



COUNTRIES

7



INSTITUTIONS

20



PRESENTATIONS

48



SPONSORS

5

### CONFERENCE COMMITTEE

**Marije Bottinga**

University of Amsterdam

**Sarah Clarke**

ESADE

**Nancy de Jong-Walhof**

Inholland University of Applied Sciences

**Lukas Degens**

University of Amsterdam

**Jasper Faber**

University of Amsterdam

**Denise Kelly**

Queen's University Belfast

**Sandra Mieniczakowski**

University of Nottingham

**Kavitha Nirmaladevi**

University of Cambridge

**Taidhgh O'Regan**

University of Nottingham

**Carolien ten Oever**

University of Amsterdam

**Anna Ting**

University of Nottingham

**Stephan Jesper Voskamp**

Amsterdam University of Applied Sciences

**Brittany Moon**

HEUG Executive Director

**Charlene Liu**

HEUG Director of Meetings &amp; Events

**Tom Chambers**

HEUG Director of Community &amp; Development

**Hillary Chambers**

HEUG Meeting Manager

**Shawntia Key**

HEUG Meeting Manager

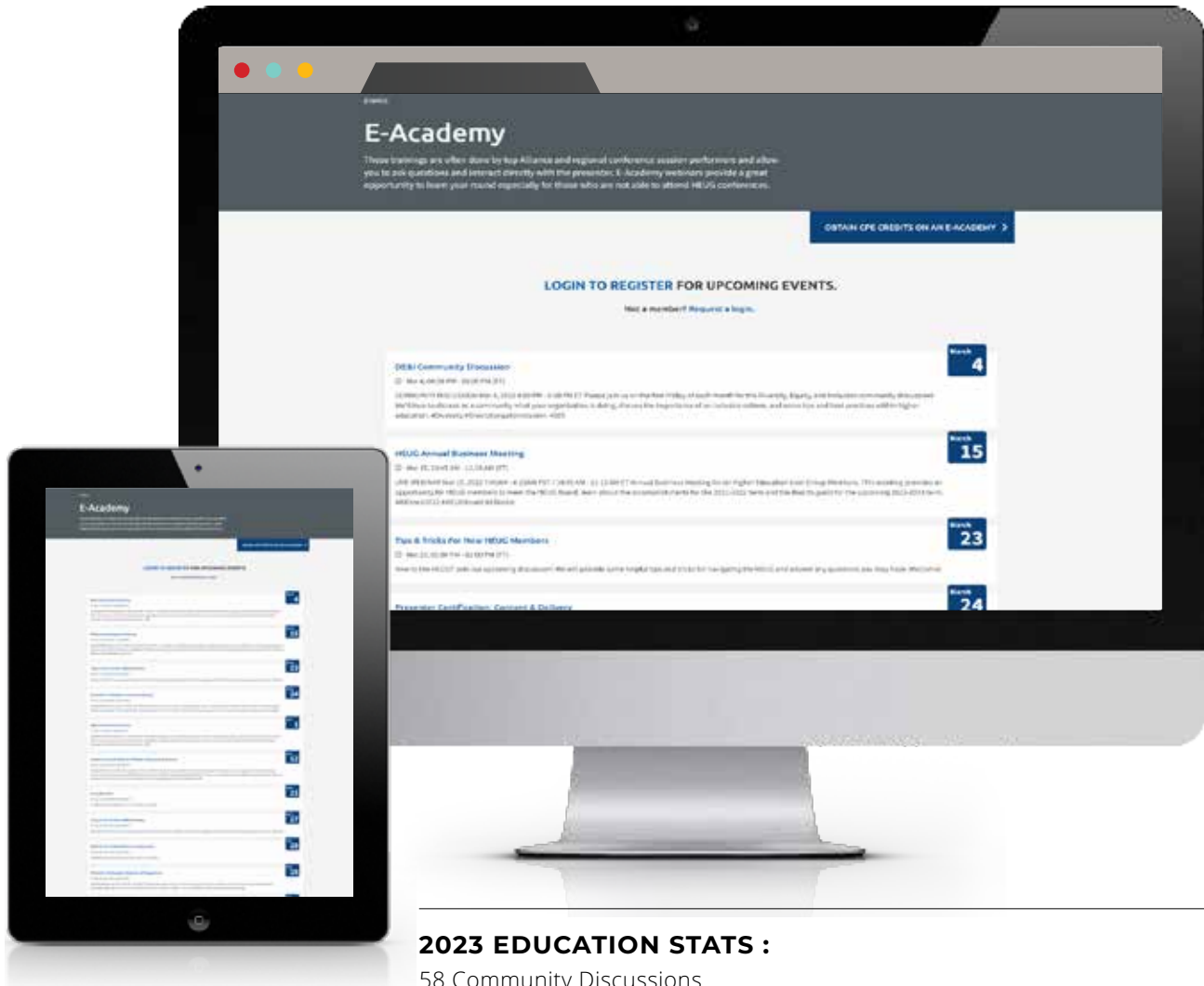
**Casey Hickman**

HEUG Meeting Coordinator

**Drew Ewing**

HEUG Marketing Manager

# E-ACADEMY WEBINARS



## 2023 EDUCATION STATS :

58 Community Discussions

28 Education Series

6 Sponsored

20 Promoted Sponsor Webinars



ATTENDEES

**7,925**

## PROJECT MANAGEMENT

E-Academy webinars provide a great opportunity to learn year-round especially for those who are unable to attend HEUG conferences.

The HEUG is pleased to share that we have had great success in providing high quality, innovative presentations with many of our partner organizations. These presentations have strengthened our partnerships and provided exceptional educational content to our members.

# **MEMBERSHIP UPDATE**

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# MEMBERSHIP

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



In planning for the 2023-24 membership year, the HEUG Board conducted a thorough and meticulous evaluation of the existing membership model. The decision was made that each institution will now be responsible for independently renewing their HEUG membership, signifying the sunset of the ‘system membership’ model. The aim is to enhance the membership experience, provide more flexibility, and better cater to the evolving needs of our esteemed members.

In line with this evolution, the HEUG announces the introduction of the HEUG Professional membership for the first time this year. The HEUG Professional membership offers an array of benefits, mirroring the exceptional advantages enjoyed by members, irrespective of their organization’s membership status.

MEMBERSHIP	2022	2023	GROUPS	2023
10,000 FTE Students	\$ 1,050	\$ 1,150	Institutional	273
10,000-29,999 FTE Students	\$ 2,100	\$ 2,300	Allied	31
30,000-59,999 FTE Students	\$ 3,150	\$ 3,450	System Office	19
60,000 or More FTE Students	\$ 6,300	\$ 6,900	System	4
Allied Group	\$ 420	\$ 1,150	TOTALS	310
System Office		\$ 4,500		
Professional		\$ 500		



## 2024 HALL OF FAME

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



**2023 INDUCTEES**

At Alliance 2023 three inductees were awarded:

1. Daniel Labrecque, University of Nevada, Las Vegas
2. Mike Chambers, Boise State University
3. Carolee Cohen, University of Minnesota

# 2024 HALL OF FAME INDUCTEE

## CLINTON LAMONT

LEAD PLATFORM ENGINEER  
GRIFFITH UNIVERSITY

In the ever-evolving landscape of the HEUG, it is the dedication, leadership, and passion of individuals like Clinton Lamont that drive our community forward. Today, we are proud to induct Clinton into the HEUG Hall of Fame, a recognition of his exceptional contributions and unwavering commitment to our organization.

Clinton's journey with the HEUG, spanning over a decade, has been characterized by influential leadership and a deep-seated passion for fostering collaboration and innovation. As the ANZ HEUG Program Chair for more than six years, Clinton has been instrumental in orchestrating key events such as Alliance Down Under and the ANZ component of the HEUG's International Virtual Week in 2020. His natural ability to unite individuals towards a shared vision has not only enhanced these events but has also strengthened the HEUG community's sense of purpose and collaboration.

Clinton's leadership extended beyond event coordination to stepping in as a Track Chair for the 2023 ANZ HEUG Conference at a moment's notice, ensuring its success despite unforeseen challenges. This act is a testament to his dedication and willingness to go above and beyond for the HEUG community.

Beyond his roles in event management and leadership, Clinton has been a beacon of service and support within the HEUG. Whether through his involvement in the Student Information Group, spearheading programming for ANZ HEUG events, or offering invaluable support to colleagues transitioning into new roles, Clinton's contributions have been both significant and impactful.

Clinton's respect and empathy for others have fostered an inclusive and welcoming environment within the ANZ HEUG, making him a highly regarded figure among his colleagues and across the broader HEUG community. His commitment to diversity and collaboration has not only enriched our organization but has also set a standard for professional conduct and mutual respect.

Moreover, Clinton's leadership during the significant TCSI legislative changes in Australia highlights his ability to navigate complex challenges and drive collaborative efforts to successful outcomes. His role as a trusted advisor and his proactive approach to community engagement have been instrumental in reactivating and expanding the HEUG community in the ANZ region, especially in the wake of challenges posed by Covid-19.

Clinton's sustained commitment, leadership, and impactful contributions to the HEUG, particularly in the areas of execution of the HEUG ANZ program, community support, and strategic initiatives, make his induction into the Hall of Fame not just well-deserved but also a celebration of the enduring positive impact one individual can have on our community.



- *BRITTANY MOON*  
HEUG EXECUTIVE DIRECTOR

# 2024 HALL OF FAME INDUCTEE

## VIC GOLDBERG

UNIVERSITY OF COLORADO BOULDER



Today, we celebrate the induction of Vic Goldberg into the HEUG Hall of Fame, an honor that reflects his exceptional contributions, profound expertise, and unwavering dedication to the HEUG community. Vic's journey with the HEUG, beginning in 2009, has been marked by a relentless pursuit of excellence and an unparalleled commitment to fostering knowledge and collaboration within the Financial Aid sector and beyond.

Vic's reputation within the Financial Aid community, among members, vendor partners, and Oracle is one of high esteem and respect. His leadership has glowed brightly through his active involvement in various HEUG initiatives over the years. Vic's consistent presence, presenting at multiple conferences for over a decade, leading webinars, and engaging in list serve discussions, has been a cornerstone of his contributions to our community. His tenure on the Financial Aid Advisory Group, serving for the maximum term limit of 8 years, highlights his commitment to guiding and shaping the future of Financial Aid within the HEUG.

Known for his expertise in the equation engine, 3Cs, and PS Query, Vic has become a go-to expert whose knowledge extends deeply into the realms of reporting and campus community. His adeptness in handling the complexities of repeat logic for federal compliance has set a benchmark for excellence within our community.

Remarkably, Vic's dedication to the HEUG has not waned with retirement; instead, it has taken on new dimensions. Maintaining his membership and active involvement, Vic continues to be a pillar of support and wisdom for the HEUG community. His ongoing participation in Alliance and discussion forums, even in retirement, underscores a genuine passion for helping peers and advancing the collective knowledge of our community.

Vic's generosity in sharing solutions, assisting colleagues on discussion forums, and offering personal support to those who reach out to him, cements his status as an invaluable asset to the HEUG. His ability to balance depth of knowledge with a willingness to support others exemplifies the spirit of collaboration and community that the HEUG stands for.

In light of Vic Goldberg's outstanding contributions, enduring commitment, and significant impact on the HEUG community, his induction into the Hall of Fame is not just deserved but celebrated as a testament to the remarkable influence one individual can have on our collective journey towards excellence in higher education technology.

- BRITTANY MOON  
HEUG EXECUTIVE DIRECTOR

# 2024 LIFETIME ACHIEVEMENT AWARD

## SUSAN BEIDLER

ORACLE

When approached to present the Lifetime Achievement Award to Susan Beidler, I was immediately consumed with the thought that there was no better person to offer this award to as a way of recognizing her years of dedication to the Higher Education User Group.

Susan was inducted into the HEUG Hall of Fame with the inaugural class in 2011. While there are no preconceived criteria for the Lifetime Achievement award it is important to present it when you find an individual whose body of work for the organization extended over the lifetime of the organization while constantly focusing on how to serve the members of the HEUG at a higher level than others. After being recognized in 2011 for 11 years of dedication, Susan's next 12 years had an even greater impact on HEUG members.



Susan began working at PeopleSoft in 1992. While her early years were focused developing curriculum and training customers on the core HR and Financials products, she finally came to the student system world in 2000 as the Product Strategy Director for the Student System. Over the years Susan was the one constant that HEUG members could rely on as Vice Presidents of the Student Product came and went. Susan trained most people she reported to over the years on the student product's intricacies.

While her focus was on providing service directly to HEUG members, Susan also had impacts at every level. Here is one example of the depth of Susan's involvement. While still working for Peoplesoft in the early 2000's Susan had a new Vice President for product who didn't care for the then name of the student product, which at the time was simply Student Administration. I recall sitting in Susan's office and the two of us discussing this. Susan always felt a great name for a student product was the name of the company that developed the product with the beta customers, which was Campus Solutions! Her new boss embraced the idea and soon after Peoplesoft's Student Administration product became Campus Solutions.

Susan's name can be found attached to thousands of posts on the HEUG Website and I've seen her present or be a part of presentations for hundreds of Alliance Sessions, Educause presentations, NASFAA conferences, as well as many others. Susan's impact was not felt only in North America. While she has presented and events in England, Spain, Colombia, Australia, Singapore and elsewhere around the world, she also helped these groups with their individual needs for the software. She clearly had an impact and was widely respected by the international community. It is impossible to identify every point of impact that Susan had while providing service to HEUG members. Her calm approach, during periods of change helped HEUG members often cope with unplanned complexities over the years. There was never a time, not even once, that I heard a HEUG member complain about Susan's approach.

I feel honored to be asked to write this and present this award to Susan. In appreciation for her years of dedication to the Higher Education User Group, this recognition of Lifetime Achievement is awarded to Susan Beidler.

- LEW CONNER HEUG EXECUTIVE DIRECTOR EMERITUS  
2011 HEUG HALL OF FAME INDUCTEE, 2018 LIFETIME ACHIEVEMENT AWARD WINNER

# **FINANCIAL STATUS**

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# FINANCIAL STATUS

**FY23 marked a significant rebound from the pandemic challenges, highlighted by the return of in person regional events.**



The HEUG hosted three US regionals, and four international regional conferences. This return to regular operations was highlighted by our community's enthusiastic participation. Both conference and membership revenues saw an uptick this year. The choice of St. Louis for its cost-effectiveness played a key role in maintaining low expenses, enabling HEUG to conclude the year with a financial surplus.

The year ended with a positive net asset change of \$534,420. A notable 20% increase in membership revenue was driven by a revamped structure and enhanced corporate membership program for our vendor partners.

However, the HEUG's investment portfolio did not recover from the previous year's downturn, with a continued focus on bond investments reflecting a cautious investment strategy. This approach will be re-evaluated in the forthcoming year.

The board made a strategic decision to secure future event locations through 2028, acknowledging the necessity of advanced planning to accommodate the scale and specific requirements of HEUG events.

The annual financial review conducted by Gelman, Rosenberg, and Freedman (GRF) concluded without any management advisories, affirming the organization's sound financial management.

# STATEMENT OF FINANCIAL POSITION

AS OF JUNE 30, 2023

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2022

## ASSETS

2023

2022

### ● CURRENT ASSETS

Cash and equivalents	\$ 2,321,651	\$ 2,386,755
Investments	944,399	913,125
Accounts receivable	-	-
Prepaid expenses	471,594	94,811
<b>TOTAL ASSETS</b>	<b>\$ 3,737,644</b>	<b>\$ 3,394,691</b>

## LIABILITIES AND NET ASSETS

2023

2022

### ● CURRENT LIABILITIES

Accounts payable and accrued liabilities	\$ 54,141	\$ 286,576
Deferred revenue	516,338	475,370
<b>TOTAL LIABILITIES</b>	<b>570,479</b>	<b>761,946</b>

### ● NET ASSETS

Without donor restrictions	3,167,165	2,632,745
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 3,737,644</b>	<b>\$ 3,394,691</b>



# STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED JUNE 30, 2022

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2021

## CASH FLOWS FROM OPERATING ACTIVITIES

	2023	2022
Change in net assets	\$ 534,420	\$ (460,878)
Adjustments to reconcile change in net assets to net cash (used) provided by operating expenses		
Unrealized gain	(15,446)	152,547
Realized gain	(5)	(1,268)
Decrease (increase) in:		
Accounts receivable	-	-
Prepaid Expenses	(376,783)	71,250
(Decrease) increase in:		
Accounts payable and accrued liabilities	(232,435)	216,926
Deferred revenue	40,968	173,670
Net cash (used) provided by operating activities	(49,281)	152,247

## CASH FLOWS FROM INVESTING ACTIVITIES

	2023	2022
Purchase of investments	(24,548)	(28,907)
Proceeds from the sale of investments	8,725	9,652
Net cash used by investing activities	(15,823)	(19,255)
Net (decrease) increase in cash and cash equivalents	(65,104)	132,992
Cash and cash equivalents at beginning of year	2,386,755	2,253,763
CASH AND CASH EQUIVILANTS AT END OF YEAR	\$ 2,321,651	\$ 2,386,755



# STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2022

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2021

## REVENUE

	2023	2022
Conference revenue	\$ 2,962,661	\$ 2,115,793
Membership dues	731,540	582,700
Partner Sales	51,739	344,427
Investment income (loss), net	31,273	(140,913)
Career center	20,311	-
Total revenue	3,797,524	2,902,007

# STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2022

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2021

## EXPENSES

	2022	2021
Program Services:		
Alliance Conference	\$ 2,021,591	\$ 2,265,666
Communications and Membership	105,581	186,901
US Regional Conferences	175,837	144,460
International Conferences	312,458	183,608
Community Development	80,784	-
Technology (TAG)	-	-
Products (PAG)	100,835	98,182
Total program services	2,798,086	2,878,817
Supporting Services:		
Management and General	463,408	480,361
Total expenses	3,261,494	3,359,178
Change in net assets from operating activities	536,030	(457,171)
Foreign currency translation	(1,610)	(3,707)
Change in net assets	534,420	(460,878)
Net assets at beginning of year	2,632,745	3,093,623
NET ASSETS AT END OF YEAR	\$ 3,167,165	\$ 2,632,745

# **HEUG PARTNERS**

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# SPONSORSHIP MODEL

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



HEUG Partners play a critical role in helping our membership achieve their mission. From providing innovative solutions to pressing issues or sharing invaluable thought leadership to meet community needs, their guidance and expertise is essential to our cause.

The HEUG Corporate Partners below have shown their significant support of our community by participating in our Corporate Membership Program. These partners share the expertise throughout the year in the HEUG community via blogs, e-academy webinars, and participation in our discussion forums to name a few.

The support given by our corporate members and event sponsors allows the HEUG to offer lower membership dues and event fees.

## Premier Partners 2023

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The Accenture logo, featuring the word "accenture" in a lowercase, sans-serif font. A small purple chevron symbol is positioned above the letter 'u'.The Huron logo, consisting of a stylized blue icon resembling a square with a diagonal line, followed by the word "HURON" in a bold, uppercase, sans-serif font.The Oracle logo, featuring the word "ORACLE" in a bold, uppercase, sans-serif font.The Workday logo, featuring a stylized orange arc above the word "workday" in a lowercase, sans-serif font.

## Alliance 2023 Platinum Partners

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The Deloitte logo, featuring the word "Deloitte" in a bold, sans-serif font, with a small green dot at the end.The Drivestream logo, featuring a stylized red icon of a person running or jumping, followed by the word "drivestream" in a lowercase, sans-serif font.The Gideon Taylor logo, featuring a stylized blue icon of a person running or jumping, followed by the words "GIDEON TAYLOR" in a bold, uppercase, sans-serif font.The Nelnet Campus Commerce logo, featuring a stylized green icon of a person running or jumping, followed by the word "nelnet" in a lowercase, sans-serif font, and "CAMPUS COMMERCE" in a smaller, uppercase, sans-serif font below it.The Sierra-Cedar logo, featuring a stylized blue icon of a person running or jumping, followed by the words "Sierra-Cedar" in a bold, sans-serif font.The Touchnet logo, featuring the word "touchnet" in a lowercase, sans-serif font, with a registered trademark symbol (®) at the end.The Transact logo, featuring the word "TRANSACT" in a bold, uppercase, sans-serif font, with a stylized red icon of a person running or jumping at the end.

# Corporate Membership 2023

● Accenture	● Gideon Taylor	● Pathlock
● Baker Tilly	● HighPoint Consulting	● Phytorion
● Collaborative Solutions	● HighStreet IT	● Sierra Cedar
● CY2	● Huron Consulting Group	● Spear MC
● Deloitte	● Infosys	● Study Planner
● Ellucian	● Mutara	● TouchNet
● ERPA	● Nelnet	● Visions
● Flywire	● Oracle	● Workday



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THANK YOU  
**FOR BEING A  
MEMBER**

