



# ANNUAL REPORT

**THE HIGHER EDUCATION USER GROUP**

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## **CONTACT INFO**

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

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**2022**

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# LETTER FROM THE PRESIDENT

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On behalf of the Board, AGs, countless HEUG volunteers, and the Higher Logic Team, it is my pleasure to present the Higher Education User Group Annual Report for 2022. The HEUG has experienced another exceptional year. The community membership numbers continue to increase, and the volunteers who make up the backbone of this organization are ever-engaged in moving our organization forward. The Board is proud to report another significant year of accomplishments.

The in-person conferences are back and picking up momentum. COVID continues to impact events, as people continue to forgo travel and large gatherings, but you would not know it if you were in Seattle or NC, where I had the opportunity to participate. I attended sessions that were standing-room only. A heartfelt thank you to all those on the program committees who pulled together programs with significance for our broadened membership. One of the Board's priorities this coming year is to continue efforts to reinvigorate our conferences with more content and speakers that meet members' needs.

The ongoing effort to shift from a single ERP model to a more open model continues. Change is not easy, and this is a monumental change for our organization. The HEUG continues to attract the attention of institutions that have yet to benefit from a large user group focused on the ERP and surrounding systems. The vendor/partner community continues to support our direction as we navigate this challenging course that is viewed as a significant disruption. The effort is manageable, and the end game will provide increased value and enhanced support for our member institutions, our primary goal.

Work continues around several high-interest areas that the membership and board felt were worth exploring:

Integration and Security remain a work in progress, while Data Governance is in a holding pattern. A tremendous amount of effort is required to bring a new community of interest into being, and I urge anyone interested to join one of these efforts to help get it off the ground. Members sharing expertise with others is the primary ingredient of a thriving community of interest. We welcome your involvement in continuing to expand these critical conversations.

These are exciting times for the HEUG as we celebrate our accomplishments. The relevance of all we offer, evidenced by attendance at events and the ongoing participation in HEUG online, continues to grow. This past year's work continued redefining and mapping our communities to meet your needs better. You will have the opportunity to experience the outcome of this work at Alliance 23 in St. Louis, and I hope to see you there.

It is an honor to serve as President of this extraordinary all-volunteer organization. I am forever impressed by the number of volunteers that keep this organization moving. Remember, this is your organization, and your participation and feedback are always welcome. There are so many opportunities to get involved, and I encourage you to do so in whatever capacity works for you. As we roll into 2023, we are excited to come back together for another Alliance conference. It will be a time to connect, reconnect and build on the relationships that have created and sustained this resilient global community of institutions and colleagues.

I look forward to seeing many of you there.

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**MICHAEL RUSSELL**

# LETTER FROM THE EXECUTIVE DIRECTOR

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As we close the book on another successful year, I want to take a moment to reflect on the tremendous achievements of our organization in 2022. I am incredibly proud of the dedication and hard work demonstrated by our members and staff, which have allowed us to make great strides in our mission to support and enhance the use of technology in higher education.

Throughout the year, we continued to provide valuable resources and opportunities for our members to network and collaborate. This included virtual events, webinars and online discussions that allowed us to stay connected, even amidst the challenges posed by the ongoing pandemic. We kicked off the return of in-person events with our annual conference, held in Seattle, Washington, and it was a resounding success. It was so great to see our members reconnecting in person, attending sessions, collaborating and learning from one another. In addition to Alliance, the HEUG hosted US regional conferences at California State University Fullerton and North Carolina State University, as well as three international regional conferences at the University of Nottingham, Griffith University-Nathan Campus and University of Waterloo. A special thank you to our hard-working volunteers and HEUG staff that made these conferences come to fruition.

Additionally, our communities, dedicated to specific areas of interest, such as student success, analytics and IT governance, continued to thrive. The strength and aptitude of these communities provided exceptional opportunities for members to share knowledge and expertise with peers from institutions across the globe.

Finally, I am thrilled to report that our organization continued to grow in size, diversity and impact with a record number of new members joining HEUG in 2022. This growth is a testament to the vital role we play in the higher education community and I am confident that our efforts will ensure we continue to have a positive impact for years to come.

As we look ahead to the future, I am excited about the opportunities and challenges that lie ahead for HEUG. I am confident that, with your continued support and involvement, we will continue to make a difference in the lives of students and educators and help drive the use of technology in higher education to new heights.

Thank you for your continued support of HEUG. I look forward to working with you in the coming year to achieve even greater success.

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**BRITTANY MOON**

# **EXECUTIVE SUMMARY**

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# EXECUTIVE SUMMARY

“

*If you look at history, innovation doesn't come just from giving people incentives; it comes from creating environments where their ideas can connect.*

- Steven Johnson

”



## 2022 OVERVIEW

Since its inception in 1998, the HEUG has provided a “platform” for connecting individuals, institutions, entities, and corporation in higher education. By setting these means of connection paramount, along with being mindful of our core values of Education and Advocacy - the HEUG positioned itself quickly, intelligently, and intentionally in order to adapt to meet the needs and values of our constituent members globally.

Fast-forwarding to 2022, the HEUG is still the “platform” for giving our members the connections they need to do what constitutes most of their day – their jobs! As the landscape has shifted from the early years, the HEUG has adapted and is committed to creating a new hub of forums within the “families of practice” that will increase engagement, professional development, education, fresh thinking, best practices, innovated solutions, and new opportunities.

The HEUG team continues to give its focus to strategic repositioning to help the HEUG community move forward in this post-pandemic era. Building on our roots, we are committed to prioritizing membership, engagement, education, and training, with being the global leader in higher education. As a professional organization hub, we have a unique ability to bring people together through education, hosting events, and collaborating with common causes by implementing focused “Connect, Learn, Grow, and Belong” initiatives to both sustain and expand our membership and international communities.

# ADVISORY GROUP UPDATE



## MOVING FORWARD WITH NEW ADVOCACY STRUCTURE

By combining closely related Advisory Groups we gain new perspectives that help move all areas on our campuses forward.

During 2022, the Advisory Groups worked to implement Phase II of the Advisory Group Structure by combining the Advisory Groups within Student Information Systems into two segments: Campus Academic Records Support (CARS) and Campus Student Financial Support (CSFS). These two segment groups are moving steadily towards serving their communities in new ways by engaging in activities that involve members from all areas. At the same time, Advisory Group within these two areas continue to advocate for their individual communities with Oracle strategists.

The combined membership of all Advisory Groups is collaborating to develop a comprehensive onboarding process for new members as well as identifying and developing the resources needed for Advisory Group members to engage effectively with their communities. This initiative will serve both the Advisory Groups and the HEUG well into the future.

As always, education is key - this extraordinarily active group of volunteers continues to work with Oracle to disseminate information on updates and assist their communities as each release is tested and applied. In addition to this, they have sponsored numerous training webinars and "coffee chats" that have kept their communities engaged and actively assisting each other.

Looking forward, the Advisory Groups will collaborate to develop cross-functional, cross-module business requirement and best practice documents. To do this they will tap into the expertise within their group as well as the larger HEUG community.

### >> Campus Academic & Records Support

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

### >> Campus Student Financial Support

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

# GLOBAL COUNCIL UPDATE



Higher education is a global endeavour. Amongst many possible examples, we learn this from the students at each of our institutions, as representatives of the millions of students who annually cross national borders with the intent to study at the higher education institution of their choice. With the available technology, this crossing of borders can be physically or in digital form.

Technology offers opportunities, but it also comes with challenges for institutions wishing to implement, manage, and develop these technological initiatives. The challenges to institutions as higher education becomes more international, flexible, and digital are not overcomeable. The HEUG, as a global community with members from 37 countries and spanning 6 continents, makes facing these challenges much easier by facilitating learning between institutions not only on a national level but also on an international level. Through HEUG institutions are able to engage in discussion amongst each other through the HEUG

website, community groups, and at conferences. The great thing about working in higher education is that it truly feels like community where people freely share their ideas and thoughts with their peers. This is valuable because it adds extra insight by pushing educators and members of the community out of their own (national) filter bubble. The HEUG achieves this by hosting monthly global council meetings, and in-person conferences around the globe. The regional HEUG events in Brisbane Australia, Nottingham UK, and Waterloo Canada all enhanced the HEUG global community connection efforts. All of these conferences were highly evaluated with attending members being glad to finally meet up with peers from other institutions again after the global Covid-19 pandemic kept in-person events from being held.

Looking forward to 2023 in regards to the global council, the HEUG is going to expand the regional conferences attendance, address any and all challenges that come up at

**JASPER FABER**

# **2022 EVENTS**

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# ALLIANCE 2022



### Workshops :

March 12, 2022

### Sessions :

March 13-16, 2022



## PROJECT MANAGEMENT

The 2022 conference was long awaited one as it marked a return to the first in-person event in two years. The conference team spent the year planning, closely monitoring, and adjusting in response to the changing status of travel, vaccine, and masking requirements to ensure safety of our attendees.

## ALLIANCE 2022

We planned and budgeted for reduced attendance to anticipate for the travel and budget restrictions in place at many of our member institutions. The team had to look for ways to maximize the conference's benefits at a significantly reduced cost point. Higher Logic staff worked hard with WSCC and hotels to reduce overall minimums in an effort to manage expenses which ended up significantly reducing the anticipated losses.



The team wanted to make sure the return to a smaller in-person conference had a fresh and welcoming feel by putting emphasis on opportunities for attendees to reconnect with each other and to achieve the maximum benefit from conference's offerings. This year we introduced several new learning opportunities through out the conference to enhance overall experience.

### >> PATHWAYS

Guided selections of sessions designed to help the attendees focus on a particular topic thread. There are five pathways for attendees to choose from: Back to Basics, Life Hacks, Professional Development, Data Management and Decision Making.

### >> HEUG THINK SPACE

Beyond Academics led a series of discussions leading up to and during the conference. These highly collaborative, tech enabled discussions engaged Higher Ed professionals in topics designed to shift the culture and mindset through brainstorming, ideation, and visioning.

### >> SANDBOX

Allowed attendees to experience products in a hands-on environment.

### >> SPONSOR DEMOS

Vendors had small product demos during breaks in the solution center

We took the opportunity to further modify the structure of the conference. We kept the prerecorded Roadmaps from Ellucian, and Workday Oracle making them available before the conference coupled them with on-site opportunities to meet with experts to discussion the contents. Sunday saw the return of workshops with four half day options and a full day Agile training. We simplified the session offering by replacing deep dives with two one hour sessions allowing increased scheduling flexibility for the planning team and attendees. We also extended to a full day on Wednesday scheduling to expand offering and help with our hotel attrition.

We were extremely excited to offer an invite only pre-conference event "Cloudy with the chance of ERP". This event featured presentations by Ellucian, Oracle, and Workday discussing the future of ERP and administrative systems. The second day focused on how significant players in the higher education administrative system world are leveraging the cloud to help their customers transform their business in significant and unbiased ways.



ATTENDEES

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**1,576**


COUNTRIES

---

**5**


INSTITUTIONS

---

**247**


PRESENTATIONS

---

**382**


WORKSHOPS

---

**5**

## EXPERT TEAM

### 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. &amp; Tech. College Sys, HEUG VP of

Products

**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 &amp; Program Manager

**Hillary Chambers**

Higher Logic, Marketing &amp; Communications Manager

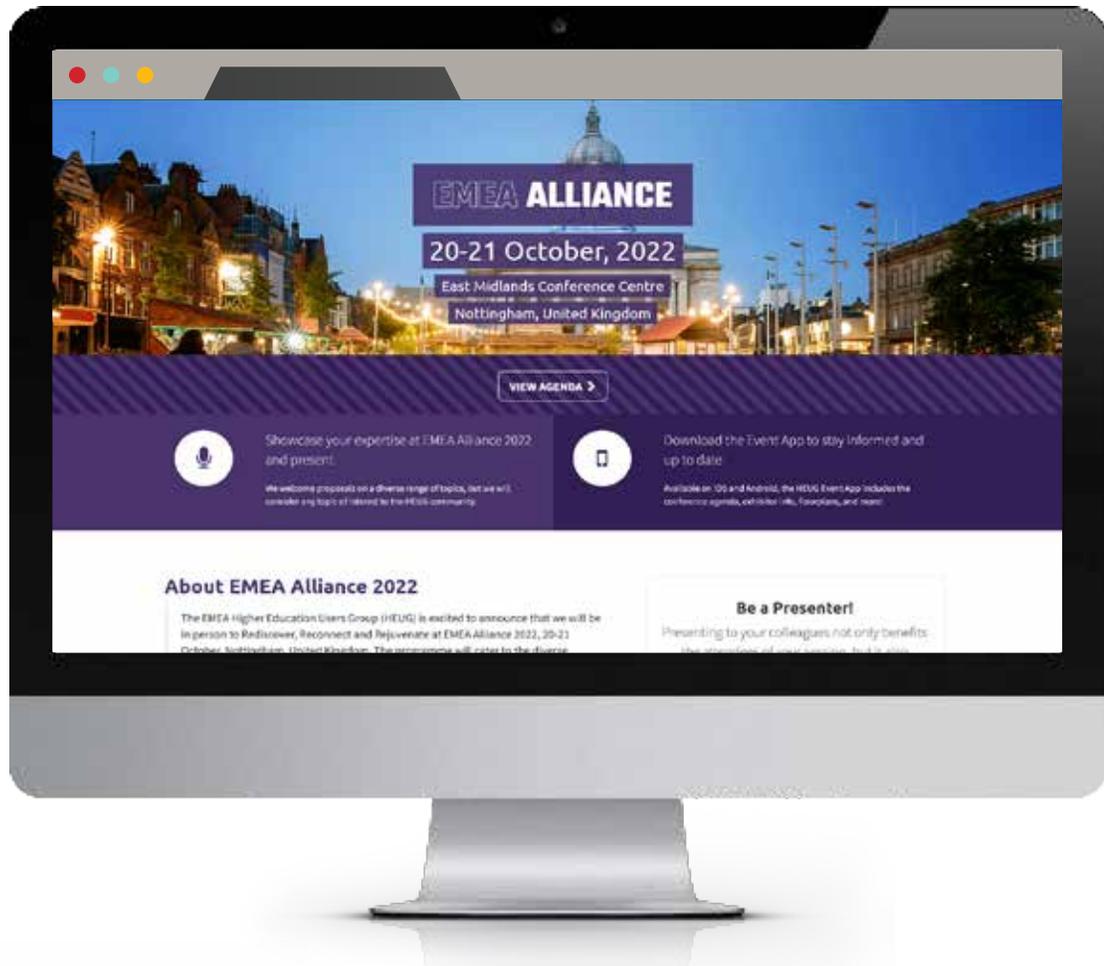
**Amy Ewing**

Higher Logic, Creative Designer/Developer

**Alex Green**

Higher Logic, Membership Community Manager

# EMEA 2022



## ABOUT

The EMEA Higher Education Users Group (HEUG) is excited to announce that we will be in person to Rediscover, Reconnect, and Rejuvenate at EMEA Alliance 2022, 20-21 October, in Nottingham, United Kingdom. The programme will cater to the diverse portfolio of campus IT systems. As always, the EMEA Alliance Conference 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. EMEA Alliance is a great opportunity to network with your colleagues from other institutions from around Europe, Middle East and Africa. At the same time, you may wish to take the opportunity to explore the beautiful city of Nottingham.

## EMEA 2022



ATTENDEES

103



STATES

6



INSTITUTIONS

17



PRESENTATIONS

31

# EXPERT TEAM

## Conference Committee

### Jasper Faber

University of Amsterdam

### Stephen McAuliffe

University of Nottingham

### Denise Kelly

Queen's University Belfast

### Carolien ten Oever

University of Amsterdam

### Phil Sugden

University of Derby

### Steve Smith

University of Cambridge

### Barry Hudson

University of Pretoria

### Sandra Mienczakowski

University of Nottingham

### Jason Wenrick

California State University Chancellor's Office

### Brittany Moon

Higher Logic, Executive Director

### Charlene Liu

Higher Logic, Director of Events and Meetings

### Hillary Chambers

Higher Logic, Meetings Manager

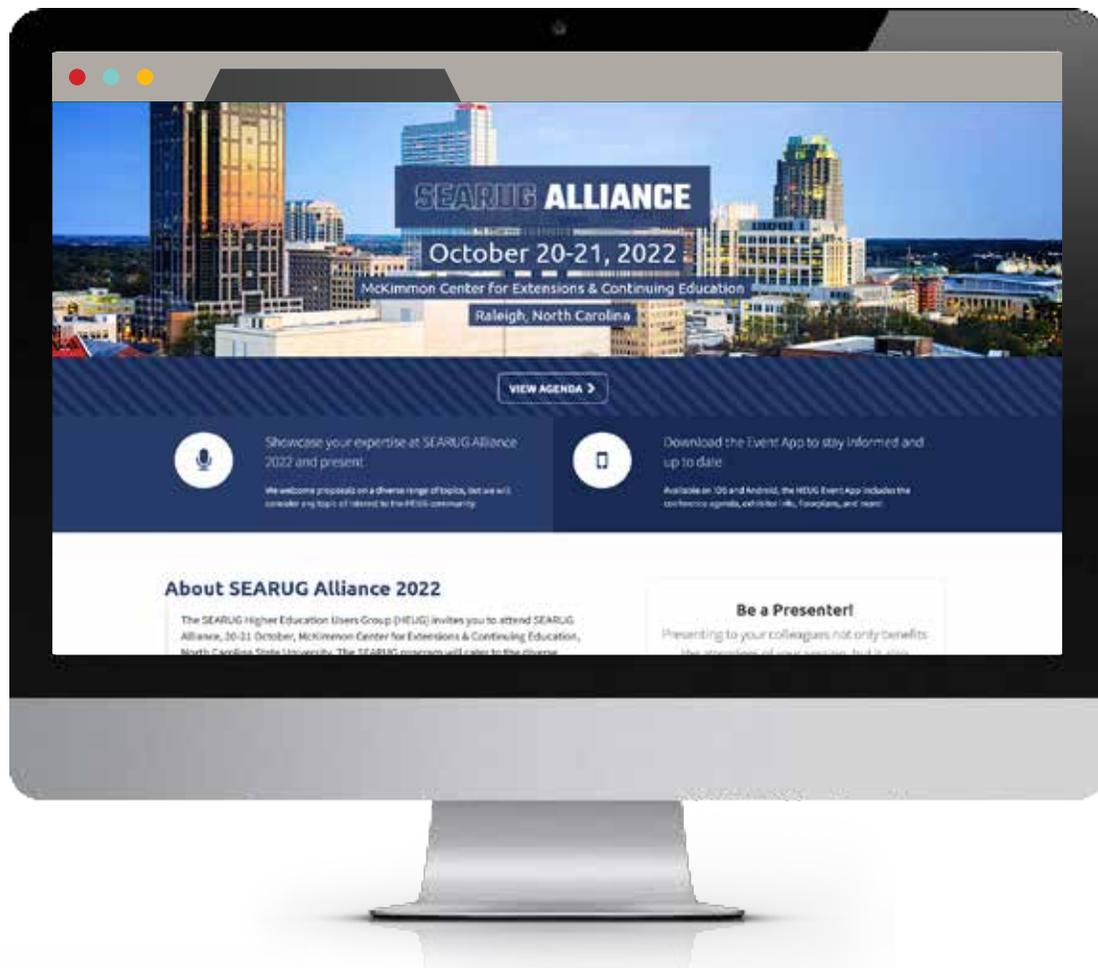
### Selly Soetarso

Higher Logic, Meeting Coordinator

### Tom Chambers

Higher Logic, Exhibits/Sponsorship Sales Manager

# SEARUG 2022



## ABOUT

The SEARUG Higher Education Users Group (HEUG) invites you to attend SEARUG Alliance, 20-21 October, at the McKimmon Center for Extensions & Continuing Education, at North Carolina State University. The SEARUG program will cater to the diverse portfolio of campus IT systems and will focus on the needs of our students, education and administrative staff and how we embrace technology to meet their needs. SEARUG Alliance is a great opportunity to network with your colleagues from other institutions throughout the east coast!

## SEARUG 2022



ATTENDEES

160



STATES

9



INSTITUTIONS

40



PRESENTATIONS

40

## EXPERT TEAM

### Conference Committee

#### **Beth Broyles**

Emory University

#### **Kristine Williams**

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

#### **Tom Johnson**

Duke University

#### **Ron Reed**

North Carolina University

#### **Maribel Carrion**

University of North Carolina at Chapel Hill

#### **Chris Martin**

Florida State College at Jacksonville

#### **Anneli Richter**

Duke University

#### **Brittany Moon**

Higher Logic, Executive Director

#### **Charlene Liu**

Higher Logic, Director of Events and Meetings

#### **Hillary Chambers**

Higher Logic, Meetings Manager

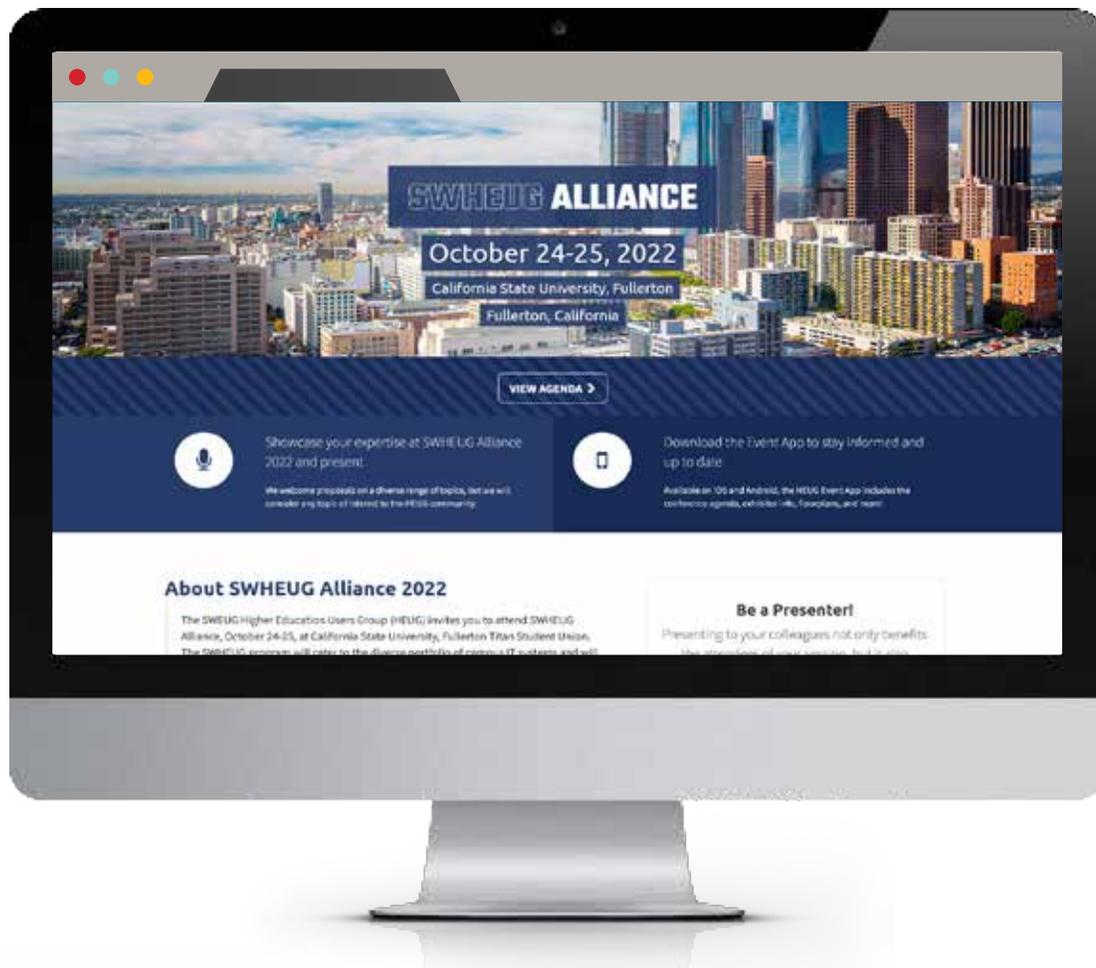
#### **Selly Soetarso**

Higher Logic, Meeting Coordinator

#### **Tom Chambers**

Higher Logic, Exhibits/Sponsorship Sales Manager

# SWHEUG 2022



## ABOUT

The SWEUG Higher Education Users Group (HEUG) invites you to attend SWHEUG Alliance, October 24-25, at California State University, Fullerton Titan Student Union. The SWHEUG program will cater to the diverse portfolio of campus IT systems and will focus on the needs of our students, education and administrative staff and how we embrace technology to meet their needs.

SWHEUG Alliance is a great opportunity to network with your colleagues from other institutions throughout the west coast!

## SWHEUG 2022



ATTENDEES

140



STATES

7



INSTITUTIONS

38



PRESENTATIONS

36

## EXPERT TEAM

### Conference Committee

#### **Vivek Chiddarwar**

San Diego Community College District

#### **Carl Larson**

University of Utah

#### **Andrea Lloyd**

University of California, Berkeley

#### **Antoinette Roberts**

California State University, Fullerton

#### **Delane Swank**

Los Rios Community College District

#### **Carolyn Veek**

California State University, Dominguez Hills

#### **Brittany Moon**

Higher Logic, Executive Director

#### **Charlene Liu**

Higher Logic, Director of Events and Meetings

#### **Hillary Chambers**

Higher Logic, Meetings Manager

#### **Selly Soetarso**

Higher Logic, Meeting Coordinator

#### **Tom Chambers**

Higher Logic, Exhibits/Sponsorship Sales Manager

# ADU 2022



## ABOUT

The Australia & New Zealand Higher Education Users Group (HEUG) invites you to attend Alliance Down Under (ADU), 3-4 November, at Griffith University, Nathan Campus. The program will cater the diverse portfolio of campus IT systems and will focus on the needs of our students, education and administrative staff and how we embrace technology to meet their needs.

ADU is a great opportunity to reconnect and network with your colleagues from other institutions!

## ADU 2022



ATTENDEES

166



STATES

2



INSTITUTIONS

20



PRESENTATIONS

33

## EXPERT TEAM

### Conference Committee

#### John Reed

University of New South Wales

#### Clinton Lamont

Griffith University

#### Barbara Buckley

Griffith University

#### Christopher Dell

Griffith University

#### Nikki Gaertner Eaton

University of South Australia

#### Umesh Gupta

Deakin University

#### Linda Ngu

The University of Queensland

#### Shayne Simpson

University of the Sunshine Coast

#### Brittany Moon

Higher Logic, Executive Director

#### Charlene Liu

Higher Logic, Director of Events and Meetings

#### Hillary Chambers

Higher Logic, Meetings Manager

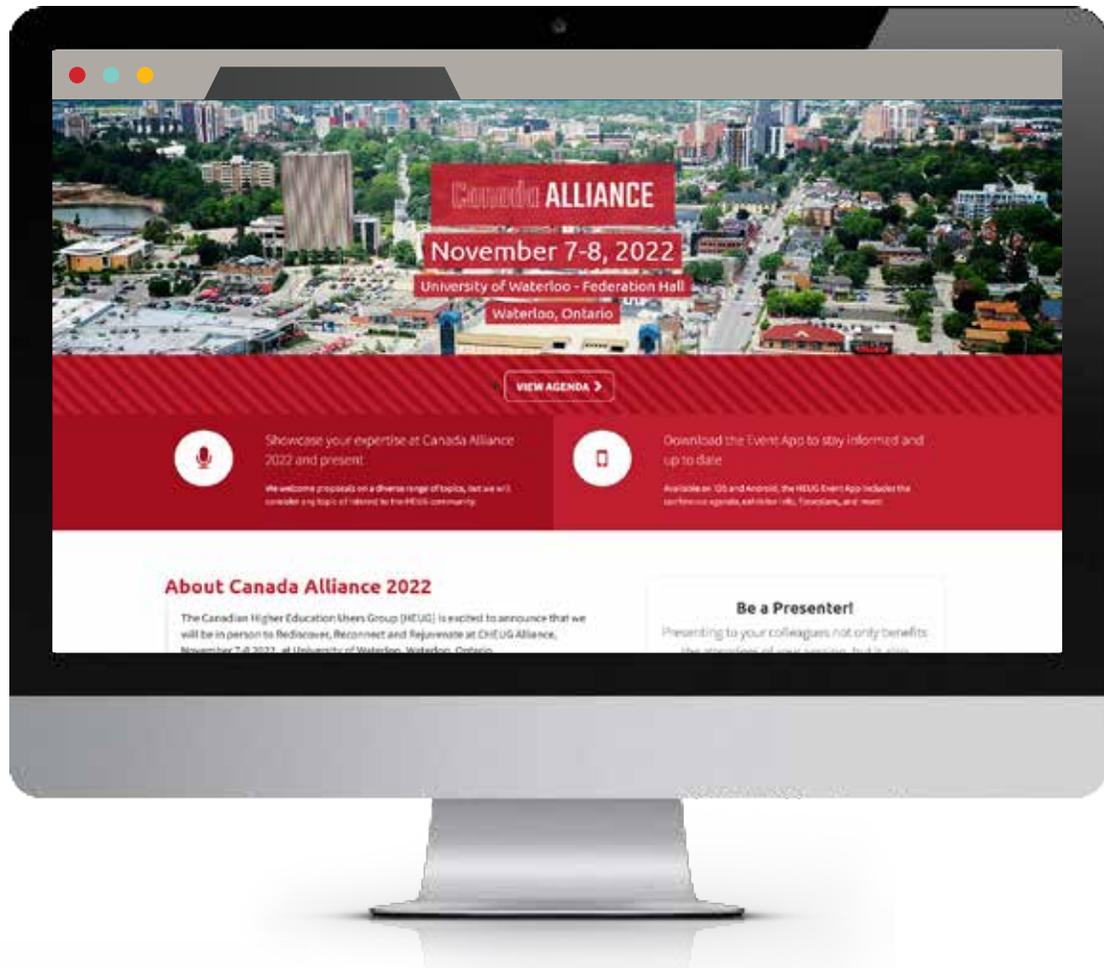
#### Selly Soetarso

Higher Logic, Meeting Coordinator

#### Tom Chambers

Higher Logic, Exhibits/Sponsorship Sales Manager

# CANADA 2022



## ABOUT

The Canadian Higher Education Users Group (HEUG) is excited to announce that we will be in person to Rediscover, Reconnect and Rejuvenate at CHEUG Alliance, November 7-8 2022, at University of Waterloo, Waterloo, Ontario.

The programme will cater to the diverse portfolio of campus IT systems. As always, the CHEUG Alliance Conference 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. CHEUG Alliance is a great opportunity to network with your colleagues from other institutions from around Canada.

## CANADA 2022



ATTENDEES

159



STATES

2



INSTITUTIONS

21



PRESENTATIONS

32

## EXPERT TEAM

### Conference Committee

#### Jane Baratta

Western University

#### Stacey Farkas

McMaster University

#### Anne Fazzalari

York University

#### Stacey Mahoney

University of Waterloo

#### Doris McGuire

McMaster University

#### Kelly Wilker

University of Waterloo

#### Brittany Moon

Higher Logic, Executive Director

#### Charlene Liu

Higher Logic, Director of Events and Meetings

#### Hillary Chambers

Higher Logic, Meetings Manager

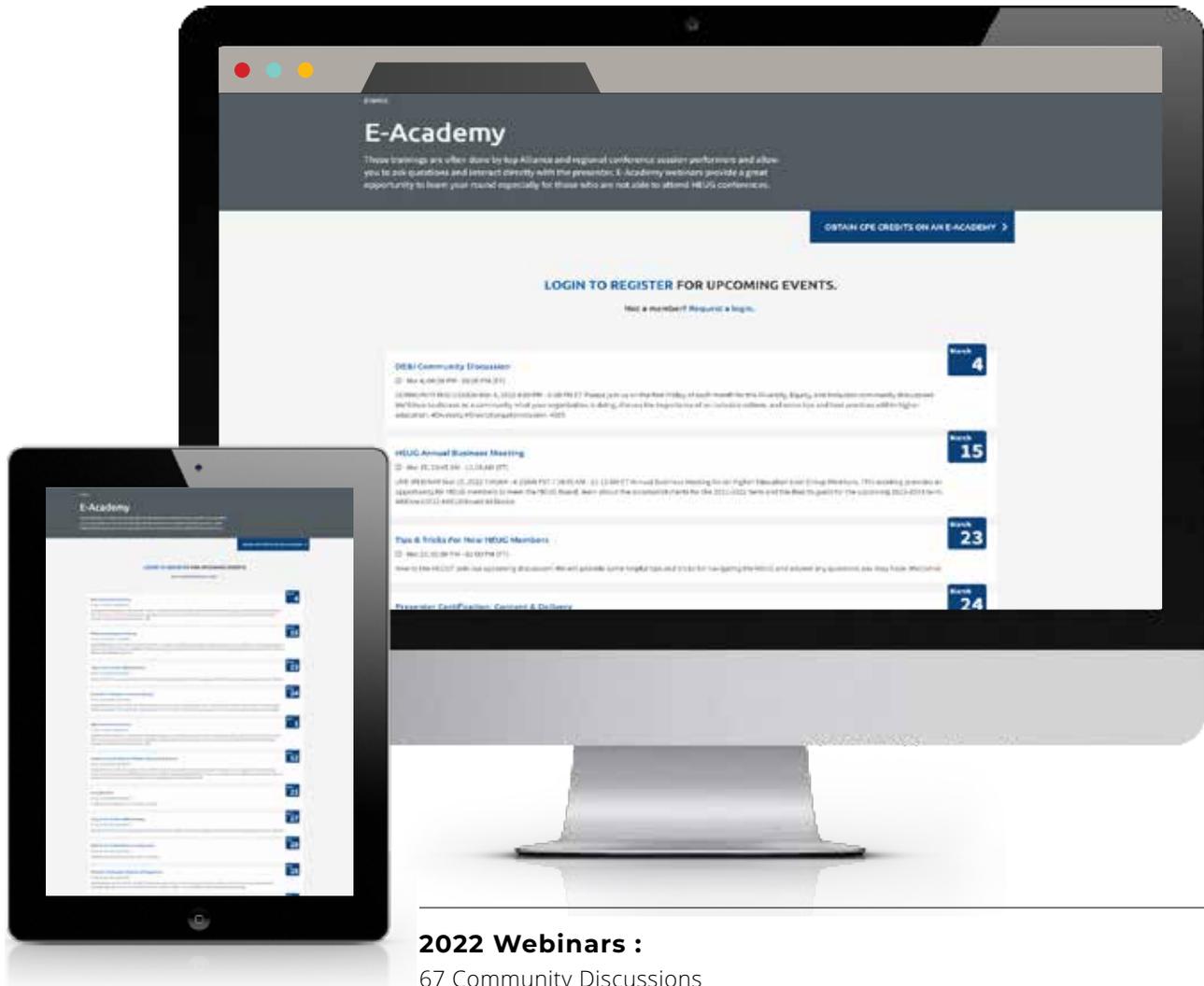
#### Selly Soetarso

Higher Logic, Meeting Coordinator

#### Tom Chambers

Higher Logic, Exhibits/Sponsorship Sales Manager

# E-ACADEMY WEBINARS



## 2022 Webinars :

- 67 Community Discussions
- 19 Education Series
- 6 Sponsored
- 22 Promoted Sponsor Webinars



ATTENDEES

**6,131**

## 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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# OUR MEMBERSHIP

A global community of higher education & public sector software users, the Higher Education User Group consists of over 35,000 members across 46 countries.



## OUR BACKGROUND

The HEUG is dedicated to helping members effectively manage their institution's administrative technologies and business processes to improve student and user experience, as well as enable effective management of faculty and staff talent, resources, operations and the institution's data, information and knowledge.



## WHAT WE DO

The HEUG supports members by giving access to the expertise, resources, and solutions they are seeking.

While our core mission of providing connections, educational opportunities and advocacy for our members has not changed in our 24 year existence, the HEUG is constantly evolving to meet the ever-changing needs of our membership.



# MEMBERSHIP OVERVIEW

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



## REVENUE

In preparation for the 2021-22 membership year, the HEUG Board spent time evaluating membership dues and a minimal fee increase was approved for 2022. The HEUG maintained a retention rate of 99% for the 2022-2023 membership renewal with 303 paid organizations.

INSTITUTIONAL MEMBERSHIP	2021	2022
10,000 FTE Students	\$ 1,000	\$ 1,050
10,000-29,999 FTE Students	\$ 2,000	\$ 2,100
30,000-59,999 FTE Students	\$ 3,000	\$ 3,150
60,000 or More FTE Students	\$ 6,000	\$ 6,300
Allied Group	\$ 400	\$ 420



## COUNTS

The HEUG support executives, managers and staff in our member institutions who are faced with a constantly evolving digital landscape and select, deploy, integrate, manage and use the institution's portfolio of administrative systems acquired from disparate vendors, as well as supporting those who are responsible for designing and optimising their institution's business processes.

We achieve this by delivering value-adding platforms, channels, forums and events that bring together the global HEUG community of 37,000 like-minded, passionate individuals from diverse organizations to learn, collaborate, and share best practices, experiences, and knowledge.

GROUP MEMBERSHIP	2021	2022
Institutional Members	227	225
System Members	37	48
Allied Members	40	37
<b>TOTALS</b>	<b>304</b>	<b>310</b>

## 2023 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.



### DANIEL LABRECQUE

UNIVERSITY OF NEVADA, LAS VEGAS  
BUSINESS ANALYST, OFFICE OF INFORMATION TECHNOLOGY

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A presenter at 8 HEUG related conferences Dan Labrecque has grown to be a trusted resource for the Financial Aid Community. One initiative that Dan championed was to create a 'Resource Center' found on the Financial Aid home page. This center provides a location where the Advisory Group could tag posts and files that answered frequently asked questions, solved issues that face many schools or provided helpful guides to new members.

As a service to HEUG members Dan served on the Financial Aid Advisory Group for 6 years and helped with track planning for Alliance for 4 of his years on the FA Advisory Group.

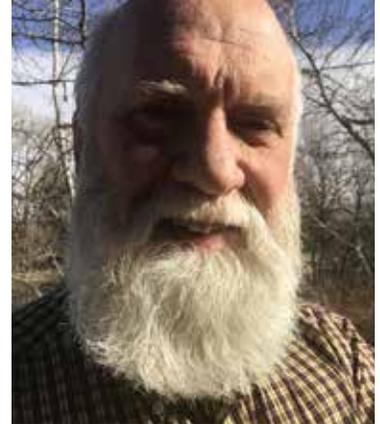
While Dan is one of the first HEUG members to provide answers and guidance on the listserv he goes further by also posting thoughtful questions to help other schools think about their strategies.

Recently elected to the HEUG Board of Directors Dan will continue to provide service to the HEUG community in the years to come.

- BRITTANY MOON  
HEUG EXECUTIVE DIRECTOR

# 2023 HALL OF FAME

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## MIKE CHAMBERS

BOISE STATE UNIVERSITY  
PROGRAM MANAGER

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As a program manager at Boise State University Mike Chambers frequently brings people together to discuss shared challenges and problem-solve together. Helping Project management professionals improve their skills is another incredible way Mike gives back to our community.

Mike is acknowledged as a popular facilitator, presenter, and educator especially in the areas of project management, change management and testing. Mike brings these important skills, and so many others, to the HEUG.

An example of respect as a professional by those inside the higher education industry, Mike leads a monthly Oracle call with representatives from several institutions, which is semi-HEUG related. The resources used for the call ((discussion thread, blog, document repository) are provided by HEUG but there are several non-HEUG members who participate in the call, which expands the overall awareness of HEUG.

Congratulations Mike for your induction into the HEUG Hall of Fame

- BRITTANY MOON  
HEUG EXECUTIVE DIRECTOR

## 2023 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.



### CAROLEE COHEN

UNIVERSITY OF MINNESOTA  
ACADEMIC SUPPORT RESOURCES, INFORMATION TECHNOLOGY



During the HEUG 20th anniversary Alliance conference, Carolee sat with some seasoned HEUG members to reminisce about the early days of the HEUG. Carolee was there at the first PeopleSoft Student Administration (now Campus Solutions) Charter conference hosted by the University of Minnesota in 1997. These conferences lead to the beginning of the HEUG as it exists now. From that time until now, Carolee has served on Advisory Groups, responded to listserv posts, presented at conferences both national and regional, is the program chair for 'Stop and Share' and served on several HEUG ad hoc committees and working groups.

Carolee possesses the primary traits that develop positive relationships with our members, the Advisory Groups and the Board by actively listening, providing empathy and cultural sensitivity."

If you look at the number of 'badges' that Carolee has obtained over the years, her work with multiple white papers, her willingness to volunteer at conferences and on work groups, you will find that her list of sustained contributions is as long as any HEUG member in history.

HEUG Executive Director Emeritus Lew Conner stated that Carolee has provided over 25 years of service to the HEUG, so this Hall of Fame induction is long overdue!

- BRITTANY MOON  
HEUG EXECUTIVE DIRECTOR

# **FINANCIAL STATUS**

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# FINANCIAL STATUS

In FY23 HEUG will see a return of US and international regional events! The Board is happy to report the annual audit was performed by Gelman, Rosenberg, and Freedman (GRF) with no management comments.



## THERE WAS AN UNREALIZED LOSS IN HEUG'S INVESTMENT PORTFOLIO AT THE END OF THE FISCAL YEAR WHICH CAN BE ATTRIBUTED TO THE GLOBAL MARKET DOWNTURN IN 2022.

With hopes the pandemic was moving behind us, HEUG was eager to host its first in-person Alliance in two years our only conference for the year. The Board was happy to welcome members and sponsors to the event. Aware of health safety being an ongoing concern and limited travel allowances at most institutions, the Board and conference teams further reduced expenses and negotiated with hotels to reduce attrition. Even with cost savings, HEUG saw a reduction in net revenue with over \$300,000 being paid in hotel attrition. HEUG closed the year with a net change in assets of \$(460,878). HEUG anticipated this net loss due to contracts signed prior to the pandemic. HEUG continues to have a healthy balance in cash and investments. Our investment strategy continues to be low risk.

Membership revenue remained the same as FY21 at \$582,700 and Partner sales increased 25% with more online activity.

**LISA SKINNER**

# STATEMENT OF FINANCIAL POSITION

AS OF JUNE 30, 2022

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2021

## ASSETS

2022

2021

### ● CURRENT ASSETS

Cash and equivalents	\$ 2,386,755	\$ 2,253,763
Investments	913,125	1,045,149
Accounts receivable	-	-
Prepaid expenses	94,811	166,061
TOTAL ASSETS	<u>\$ 3,394,691</u>	<u>\$ 3,464,973</u>

## LIABILITIES AND NET ASSETS

2022

2021

### ● CURRENT LIABILITIES

Accounts payable and accrued liabilities	\$ 286,576	\$ 69,650
Deferred revenue	475,370	301,700
TOTAL LIABILITIES	<u>761,946</u>	<u>371,350</u>

### ● NET ASSETS

Without donor restrictions	2,632,745	3,093,623
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 3,394,691</u>	<u>\$ 3,464,973</u>

# STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED JUNE 30, 2022

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2021

## CASH FLOWS FROM OPERATING ACTIVITIES

	2022	2021
Change in net assets	\$ (460,878)	\$ 609,031
Adjustments to reconcile change in net assets to net cash (used) provided by operating expenses		
Unrealized gain	152,547	(112,265)
Realized gain	(1,268)	(4,452)
Decrease (increase) in:		
Accounts receivable	-	11,000
Prepaid Expenses	71,250	(61,556)
(Decrease) increase in:		
Accounts payable and accrued liabilities	216,926	(159,341)
Deferred revenue	173,670	(378,721)
Net cash (used) provided by operating activities	<u>152,247</u>	<u>(96,304)</u>

## CASH FLOWS FROM INVESTING ACTIVITIES

	2022	2021
Purchase of investments	(28,907)	(13,876)
Proceeds from the sale of investments	9,652	9,014
Net cash used by investing activities	<u>(19,255)</u>	<u>(8,928)</u>
Net (decrease) increase in cash and cash equivalents	132,992	(105,232)
Cash and cash equivalents at beginning of year	<u>2,253,763</u>	<u>2,358,995</u>
CASH AND CASH EQUIVILANTS AT END OF YEAR	<u><u>\$ 2,386,755</u></u>	<u><u>\$ 2,253,763</u></u>

# STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2022

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2021

<b>REVENUE</b>	2022	2021
Conference revenue	\$ 2,115,793	\$ 1,128,181
Membership dues	582,700	590,895
Partner Sales	344,427	275,362
Investment income, net	(140,913)	125,837
	<hr/>	<hr/>
Total revenue	2,902,007	2,120,275
	<hr/>	<hr/>

# STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2022

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2021

<b>EXPENSES</b>	2022	2021
Program Services:		
Alliance Conference	\$ 2,265,666	\$ 396,735
Communications and Membership	186,901	247,640
US Regional Conferences	144,460	145,839
International Conferences	183,608	17,947
Community Development	-	-
Cloud Symposium	-	-
Technology (TAG)	-	-
Products (PAG)	98,182	-
	<hr/>	<hr/>
Total program services	2,878,817	808,161
Supporting Services:		
Management and General	480,361	707,117
	<hr/>	<hr/>
Total expenses	3,359,178	1,515,278
	<hr/>	<hr/>
Change in net assets from operating activities	(457,171)	604,997
Foreign currency translation	(3,7070)	4,034
	<hr/>	<hr/>
Change in net assets	(460,878)	609,031
Net assets at beginning of year	3,093,623	2,484,592
	<hr/>	<hr/>
NET ASSETS AT END OF YEAR	\$ 2,632,745	\$ 3,093,623
	<hr/> <hr/>	<hr/> <hr/>

# 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.



## 2022 SPONSORS

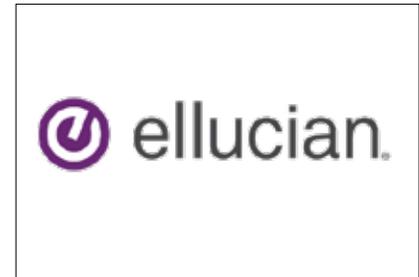
HEUG Partners play a critical role in helping our membership achieve their mission. From providing innovative solutions to pressing issues or sharing invaluable thought leadership to meet community needs, their guidance and expertise is essential to our cause.

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.

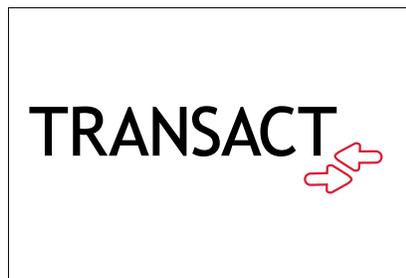
## Premier Partners 2022

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## Alliance 2022 Platinum Partners

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# Corporate Membership 2022

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- |                           |                            |                 |
|---------------------------|----------------------------|-----------------|
| ● Baker Tilly             | ● HighPoint Consulting     | ● Pathlock      |
| ● Campuslogic             | ● HighStreet IT            | ● Phytorion     |
| ● Collaborative Solutions | ● Infosilem Berger-Levault | ● Process Maker |
| ● ERPA                    | ● Infosys                  | ● Sierra Cedar  |
| ● Evisions                | ● L Cartman Consulting     | ● Spear MC      |
| ● Ferrilli                | ● Modo Labs                | ● TouchNet      |
| ● Flywire                 | ● Mutara                   | ● Transact      |
| ● Gideon Taylor           | ● Nelnet                   |                 |



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THANK YOU  
**FOR BEING A  
MEMBER**

