



# Annual Report 2018



*This Annual Report highlights significant initiatives and achievements of the Higher Education User Group in 2018*

“Considerable time and energy is expended across the organisation through Advisory Groups, conference planning teams, volunteer groups, workgroups, Board of Directors and Finance and Audit Committees. 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.”

**- Jane Broad, President**

## CONTRIBUTORS

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Jane Broad - *President*

Brad Finley - *Vice President of Membership & Communications*

Dan Youngblood - *Vice President of Finance/Treasurer*

Nanci Regehr - *2-year Community, Technical and equivalent international colleges*

Cathy Thompson - *Alliance 2018 Conference Chair*

Scott Balthazor - *Executive Director*

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### LETTER FROM THE PRESIDENT



**Jane Broad**  
**PRESIDENT**  
UNIVERSITY OF GLASGOW

**PRESIDENT 2017-2019**

It is with great pleasure that I present the 2018 Annual Report of the Higher Education User Group!

2018 has been a year of reflection, preparation and of embracing opportunities. The 20-year anniversary and the retirement of our first (and at that time 'only') Executive Director in March 2018 offered a time for reflection, celebration and conversation about the current challenges and opportunities for the HEUG.

Our efforts this year have therefore been focused on our core purpose – to enable diverse institutions to come together to use collective knowledge to extract best value from our investments in our core systems – and ensuring we continue to evolve our services (both online and in-person) to meet the needs of our members now and in the future.

These efforts have resulted in:

- 📌 *The launch of the fabulous new website!*
- 📌 *Additional forums for new/emerging communities (including cloud)*
- 📌 *The second Cloud symposium event bringing together members and early adopters of Oracle's Cloud Financials, HR and Student Management solutions – something reminiscent of the very early days of the HEUG*
- 📌 *A review of the governance of the HEUG, including our foundational documents and the purpose, size and structure of the HEUG Board of Directors*
- 📌 *The continued realignment of our advisory group structure to better enable focus on member education and support activities where product lines are mature and stable, whilst facilitating and supporting advocacy efforts where clear business needs exist across the community*
- 📌 *New presentation formats and room layouts at Alliance – to support different types of content and approach, and appeal to different audiences*
- 📌 *Collaboration and cooperation with key strategic partners – the first being Tambellini and Quest – to provide additional educational resources to our members.*

All this in addition to our business as usual activities!

Lastly, but by no means least, is the creation of a new scheme to recognise, reward and retain our volunteers – those individuals who, with the support of their institution, have contributed to the overall success of the HEUG – through hosting a webinar, presenting at a conference, writing a white paper, volunteering on an advisory group or regional conference committee. The HEUG is what it is because of those volunteers and it is time we found a way to both recognise this and retain these individuals to help us ensure the future of this amazing organisation.

As I prepare for Alliance 2019 and the final weeks of my Presidency, I am grateful to have had the opportunity to volunteer myself, and contribute to the achievements of the HEUG in these past 2 years (and more) but also proud of the resilient and supportive nature of the HEUG – our willingness and ability to recognise the need for reflection and for change, and to not only embrace that change but to help shape it. This bodes well for the future of the HEUG and the future of our Higher Ed institutions!

Thank you for taking the time to review this year's report. I look forward to the next year of leadership, partnership, networking, and sharing.

## LETTER FROM THE EXECUTIVE DIRECTOR



**Scott Balthazor**

**EXECUTIVE DIRECTOR**  
HIGHER LOGIC

As Executive Director, I oversee the team of 10 amazing individuals whose job is to help handle the day to day operations needs and execute the myriad of projects that emerge throughout the course of the year. Each year brings new challenges and new opportunities for us to help make the HEUG a better, stronger organization. This year has been a year of big projects as we looked to strengthen the core mission of the HEUG. Some of our standout accomplishments:

- 🔖 *Supported the new Strategic Branding initiative that began with the design of the HEUG Logo and major update of the HEUG Online Website*
- 🔖 *Began the transition of email and administrative back office systems for the HEUG to Office 365*
- 🔖 *Streamlined Membership Signup and Tracking, enabling the HEUG to hit annual membership goals after only 6 months*
- 🔖 *Expanded our webinar program and created a new community monthly focus program to connect members to our Advisory Groups and others with similar interests year round*
- 🔖 *Designed new processes, training and reports to help regional events be more effective*
- 🔖 *Implemented new programs to help recognize our partners and grow opportunities for sponsorship*
- 🔖 *Provided all planning and support for the Alliance Conference, 6 US Regional Conferences, 6 International Conferences, 6 Board and Executive Meetings and Committee meetings around the world*

All of these accomplishments are part of our work with the amazing volunteers that make up the HEUG Board, Committees, and Advisory Groups to make the mission of the HEUG successful. The coming year has a host of new projects, priorities and goals that we are excited to help the HEUG achieve!

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# 2018 Annual Report

HIGHER EDUCATION USER GROUP

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## HIGHLIGHTS & INITIATIVES

The Higher Education User Group was formed around the need to improve and enhance the core PeopleSoft applications that all of our institutions had in common. Now with mature ERP applications and the pervasiveness of “all things cloud” in the IT space our Institutions are faced with managing rapid change as we try to deliver and integrate the quality systems our user demand. Similarly, the HEUG is challenged with evolving the organization to continue to provide value to our member institutions.

The ERP system is no longer the center of the IT universe on our campuses. Instead, it has become one of the many “best of breed” applications we use to fulfill the missions of our institutions. This year the HEUG Board focused a lot of attention on assessing our current organizational structure and policies in order to evolve the organization to meet this paradigm shift that is occurring.

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### JANUARY



#### EXECUTIVE BOARD MEETING

Denver, CO  
January 3-5, 2018

### JUNE



#### EXECUTIVE BOARD MEETING

New York City, NY  
May 29-June 2, 2018

### JULY



#### DIRECTOR BOARD MEETING

Austin, TX  
July 18-20, 2018

### DECEMBER



#### DIRECTOR BOARD MEETING

Orlando, FL  
December 5-7, 2018

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## HIGHLIGHTS & INITIATIVES

### Membership Renewal



### MEMBERSHIP DUES

This year saw an increase in membership dues. For the first time since the membership fees were introduced there was an increase. All levels saw approximately an 8% increase in annual membership costs. This increase was necessary to keep pace with rising costs.

### 2019 Cloud Symposium



### CLOUD SYMPOSIUM

The second HEUG Cloud Symposium took place in February. Oracle and several of the Cloud early adopter institutions gathered at Redwood Shores to share information about deployment challenges and successes with other interested institutions.



THE TAMBELLINI GROUP  
TRUSTED MARKET ADVISORS

### NEW PARTNERSHIPS

One of the special work groups this year worked on identifying and forming strategic partnerships with other organizations. The first agreement from this effort was with the Tambellini Group. The group continues its work and will continue to look for more partners that create value to membership.

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# 2018 Annual Report

HIGHER EDUCATION USER GROUP

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## HIGHLIGHTS & INITIATIVES



*Director Board Meeting*



*Advisory Group Summit*

### ORGANIZATIONAL STRUCTURE

The Governance Review workgroup did a lot of research into similar organizations to our size and also other non-profit organizations in an effort to make recommendations about the HEUG's organizational structure going forward. That work is ongoing but part of that effort resulted in the recommendation to change the articles of incorporation of the HEUG. The original articles referenced PeopleSoft, Inc. as a company. Since PeopleSoft no longer exists as a company the wording was changed and as required, it was put to a vote of the member institutions. The result was overwhelming approval to support the change as recommended.

### ADVISORY GROUP REORGANIZATION

Advisory Groups have been one of the primary ways the HEUG, from its inception, has provided value to our members. In the face of rapidly changing products we continue to try to find ways to help advisory groups maintain their value to HEUG members. This year reorganization of the groups continued on the path that was started a few years ago. In an effort to help promote the groups we started monthly spotlights on HEUG online to promote different groups each month and emphasize their value to our community.



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## HEUG BRAND

For the first time since it was created HEUG online, the website of the Higher Education User Group underwent a major overhaul. The external pages that are accessed before logging into the sight have been totally transformed and given a fresh new look. Now the development team will turn its attention to the internal pages and begin a refresh of the areas our members use once they have logged into the system.

The logo of the Higher Education User Group has gone through several changes over the years as the organization has grown. This year, to go along with the web site refresh the logo was revised with a slightly new look and color scheme. This refresh is symbolic in that it represents the launch of the next transformation of the HEUG.



## GOVERNING UPDATE

After two terms as President, Jane Broad will transition to her new role as Past President and Jason Wenrick will take over to serve the next two years as the President of the HEUG. Jason is currently the Executive Director at California State University Chancellor's Office.

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



Jane Broad  
**PRESIDENT**  
UNIVERSITY OF GLASGOW

**PRESIDENT 2017-2019**



Jason Wenrick  
**PRESIDENT ELECT**  
CALIFORNIA STATE UNIVERSITY  
CHANCELLOR'S OFFICE

**PRESIDENT 2018-2021**

### CONFERENCES

HEUG provides an extraordinary opportunity for higher education communities across the world to connect through regional conferences. Offering an annual Alliance conference attracting attendees globally, as well as, International and Regional conferences.

Although smaller in scale than the flagship Alliance conference, International and Regional 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. Conference attendance and interest continues to grow as new regions are established.

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### Alliance Conference

**MARCH 25 - 28, 2018**  
SALT LAKE CITY, UTAH



**3,189**  
ATTENDEES

**375**  
INSTITUTIONS

**15**  
COUNTRIES

**486**  
PRESENTATIONS

Alliance 2018 was another great accomplishment in a long line of successful conferences. Located at Calvin L. Rampton Salt Palace Convention Center in Salt Lake City, Utah over the last week in March.

The HEUG Advisory Group Summit took place over the two days leading into conference. Alliance attendance was a little short of the prior year's conference, which was attributed to the Easter Holiday observance and a national conference that drew some of our regular attendees.

Overall, it was a success, our attendees came from near and far with 16 countries represented. More than 440 sessions were presented, and once again, stop and share sessions as well as meet the experts were offered. To start our opening night, our first ever-happy hour was held, giving attendees and vendors some quality time together. Adding to the opening night was our keynote speaker, John Foley, former lead solo pilot with the Blue Angels.

Over the course of the conference, there were many opportunities for networking between attendees and vendors. The solutions center, formerly known as the vendor hall, was spacious and allowed for an easy flow between vendor booths, dining areas, and Alliance Community Service projects. Colony House, an Indie rock band, and FOCUS3D (DJ and drummer) provided the closing night entertainment.

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## INTERNATIONAL CONFERENCES

### Asia Alliance

**MAY 7 - 9, 2018**  
MONG KOK, HONG KONG



183 ATTENDEES	28 INSTITUTIONS
12 COUNTRIES	23 PRESENTATIONS

### Southern African Alliance

**JULY 9 - 11, 2018**  
BLOEMFONTEIN, SOUTH AFRICA



184 ATTENDEES	8 INSTITUTIONS
4 COUNTRIES	52 PRESENTATIONS

### Latin America Alliance

**SEPTEMBER 10 - 11, 2018**  
BOGOTA, COLUMBIA



92 ATTENDEES	22 INSTITUTIONS
7 COUNTRIES	12 PRESENTATIONS

### EMEA Alliance

**OCTOBER 9 - 10, 2018**  
ANTWERP, BELGIUM



176 ATTENDEES	27 INSTITUTIONS
12 COUNTRIES	36 PRESENTATIONS

### Alliance Down Under

**NOVEMBER 7 - 9, 2018**  
BRISBANE, AUSTRALIA



250 ATTENDEES	25 INSTITUTIONS
8 COUNTRIES	79 PRESENTATIONS

### Canada Alliance

**NOVEMBER 12 - 14, 2018**  
EDMONTON, ALBERTA, CANADA



288 ATTENDEES	27 INSTITUTIONS
3 COUNTRIES	56 PRESENTATIONS

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## US REGIONAL CONFERENCES

### NWHEUG Alliance

**JUNE 18 - 19, 2018**

TACOMA, WASHINGTON, US



161 ATTENDEES	14 INSTITUTIONS
5 STATES	59 PRESENTATIONS

### SWHEUG Alliance

**JULY 16 - 17, 2018**

SAN DIEGO, CALIFORNIA, US



187 ATTENDEES	39 INSTITUTIONS
7 STATES	43 PRESENTATIONS

### SCHRUG Alliance

**JULY 30 - 31, 2018**

RICHARDSON, TEXAS, US



223 ATTENDEES	33 INSTITUTIONS
7 STATES	50 PRESENTATIONS

### NERUG Alliance

**SEPTEMBER 24 - 25, 2018**

SPRINGFIELD, MASSACHUSETTS, US



171 ATTENDEES	36 INSTITUTIONS
11 STATES	42 PRESENTATIONS

### SEARUG Under

**OCTOBER 1 - 2, 2018**

DURHAM, NORTH CAROLINA, US



251 ATTENDEES	17 INSTITUTIONS
6 STATES	65 PRESENTATIONS

### MIDHEUG Alliance

**OCTOBER 11 - 12, 2018**

BROOKFIELD, WISCONSIN, US



368 ATTENDEES	67 INSTITUTIONS
14 STATES	73 PRESENTATIONS

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# 2018 Annual Report

HIGHER EDUCATION USER GROUP









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## MEMBERSHIP

A global community of higher education software users, the Higher Education User Group consists of over 32,000 members across the globe.

As a central hub, the HEUG allows members to connect and build relationships virtually and in-person to explore different, proven approaches and best practices for designing, configuring and deploying software to better serve their constituents.

### CONNECTING OUR GLOBAL COMMUNITY IN FOUR STRATEGIC WAYS:

-  +  *Connecting Members to Members*
-  +  *Connecting Members with our Primary Information System Partners*
-  +  *Connecting Members to Solution Partners*
-  +  *Connecting Members to Strategic Partners*

The HEUG enables members to connect and is constantly evolving to meet the needs of our membership. While our core mission of providing connections, educational opportunities and advocacy for our members has not changed.



### MEMBERSHIP

2018 Membership sales revenue increased by \$94,350.  
241 Institutional Members  
42 System Members  
51 Allied Members

**2017**

**\$473,200**

**2018**

**\$567,550**

### INSTITUTIONAL MEMBER FEES

Membership fees are tiered based on the Student Full-Time Equivalent (FTE) count for the institution and will give membership benefits to all employees of the institution.

10,000 FTE Students	\$950 Annually
10,000 - 29,999 FTE Students	\$1,900 Annually
30,000 - 59,999 FTE Students	\$2,850 Annually
60,000 or more FTE Students	\$5,700 Annually
Allied Group	\$400 Annually

## WEBINAR ATTENDANCE



5,936  
ATTENDEES

28  
INSTITUTIONS

12  
COUNTRIES

63  
PRESENTATIONS

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## FILE LIBRARY ACTIVITY



72,350  
FILES VIEWED ONLINE



360  
FILE ENTRIES CREATED



2,345  
FILES UPLOADED



133,005  
FILES DOWNLOADED

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## DISCUSSION FORUM ACTIVITY



19,408  
SUBSCRIPTIONS ADDED



204,857  
THREADS VIEWED  
ONLINE



6,911  
THREADS ADDED



22,139  
POSTS ADDED

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# 2018 Annual Report

HIGHER EDUCATION USER GROUP

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## FISCAL YEAR 2017-18 FINANCIAL REPORT

The financial health of the organization remains strong. During the 2017-18 fiscal year, net assets increased by \$239,196 largely due to the solid performance by conference planning teams in regions around the world. Of particular mention is the Alliance 2018 global conference held in a new venue city, Salt Lake City, Utah.

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 Dan Youngblood, Vice President for Finance/Treasurer at [support@heug.org](mailto:support@heug.org)

HIGHER EDUCATION USER GROUP, INC.  
STATEMENTS OF FINANCIAL POSITION  
As of June 30, 2018 and 2017

	2018	2017
<b>ASSETS</b>		
<b>CURRENT ASSETS</b>	\$3,163,236	\$2,792,520
Cash and cash equivalents	-	281,803
Certificates of Deposit	80,952	7,138
Accounts Receivable	<u>173,385</u>	<u>251,862</u>
Prepaid Expense	<u>\$3,390,573</u>	<u>\$3,333,323</u>
<b>TOTAL ASSETS</b>		
<b>LIABILITIES AND NET ASSETS</b>		
<b>CURRENT LIABILITIES</b>		
Accounts Payable and accrued liabilities	\$55,279	\$48,134
Deferred Revenue	<u>438,455</u>	<u>627,546</u>
<b>Total current liabilities</b>	<u>493,734</u>	<u>675,680</u>
<b>NET ASSETS - Unrestricted</b>	<u>2,896,839</u>	<u>2,657,643</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u>\$3,390,573</u>	<u>\$3,333,323</u>

Source: HEUG Audited Financial Statements



# 2018 Annual Report

HIGHER EDUCATION USER GROUP

## FISCAL YEAR 2017-18 FINANCIAL REPORT

HIGHER EDUCATION USER GROUP, INC.  
STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS  
As of June 30, 2018 and 2017

	2018	2017
REVENUE		
Conference Revenue	\$4,119,246	\$4,571,523
Membership Dues	477,154	476,426
Revenue Sharing Income	32,512	56,730
Interest Income	<u>4,512</u>	<u>7,805</u>
TOTAL REVENUE	<u>4,633,424</u>	<u>5,112,484</u>
EXPENSES		
Program Services		
Communications and Membership	303,727	309,317
Community Development	142,836	138,356
Alliance Conference	2,215,800	3,566,728
US Regional Conferences	213,811	240,863
International Conferences	452,794	355,876
Products (Advisory Groups)	129,113	148,195
Technology (Advisory Group)	38,769	29,504
Cloud Symposium	<u>-</u>	<u>23,850</u>
Total Program Services	3,496,850	4,812,689
Supporting Services:		
Management and General	<u>890,469</u>	<u>841,687</u>
TOTAL EXPENSES	<u>4,387,319</u>	<u>5,654,376</u>
CHANGE IN NET ASSETS FROM OPERATING ACTIVITIES	246,105	(541,892)
FOREIGN CURRENCY TRANSLATION	<u>(6,909)</u>	5,066
CHANGE IN NET ASSETS	239,196	(536,826)
NET ASSETS AT BEGINNING OF YEAR	<u>2,657,643</u>	<u>3,194,469</u>
NET ASSETS AT END OF YEAR	<u>\$2,896,839</u>	<u>\$2,657,643</u>

Source: HEUG Audited Financial Statements

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# 2018 Annual Report

HIGHER EDUCATION USER GROUP

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## FISCAL YEAR 2017-18 FINANCIAL REPORT

HIGHER EDUCATION USER GROUP, INC.  
STATEMENTS OF CASH FLOWS  
As of June 30, 2018 and 2017

	2018	2017
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in net assets	\$239,196	\$239,196
Adjustments to reconcile change in net assets from operating activities to net cash provided (used) by operating activities:		
(Increase) decrease in:		
Accounts receivable	(73,814)	61,546
Prepaid expenses	78,477	(7,615)
Increase (decrease) in:		
Accounts payable and accrued liabilities	7,145	(1,774)
Deferred revenue	(189,091)	(59,233)
NET CASH PROVIDED (USED) BY OPERATING ACTIVITIES	<u>61,913</u>	<u>(543,902)</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Proceeds from redemption of certificate of deposit	<u>281,803</u>	<u>172,911</u>
Net cash provided by investing activities	<u>281,803</u>	<u>172,911</u>
Net increase (decrease) in cash and cash equivalents		
Cash and cash equivalents at beginning of year	343,716	(370,991)
CASH AND CASH EQUIVALENTS, END OF YEAR	<u>2,792,520</u>	<u>3,163,511</u>
	<u>\$3,163,236</u>	<u>\$2,792,520</u>

Source: HEUG Audited Financial Statements

## HEUG.ONLINE SPONSORS

The vendors in all regions, nationally and internationally, are key components to the success of the HEUG. Without their support and guidance, we would not be able to understand and implement cost-effective solutions, collaborating with business partners throughout the world and driving great competition, and ultimately better products and services through the marketplace.

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### PREMIER SPONSOR

Oracle [www.oracle.com](http://www.oracle.com)

### PLATINUM SPONSORS

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HighPoint Technology [www.mhighpoint.com](http://www.mhighpoint.com)  
Sierra Cedar [www.sierra-cedar.com](http://www.sierra-cedar.com)

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