



HEUG Vision 2016

Introduction

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

Executive Summary

The Higher Education User Group (HEUG) is a Non-Profit, global organization consisting of Higher Education institutions that use application software, services and support from the Oracle Corporation. The Higher Education User Group (HEUG) is the largest independent, self-organized industry-specific Oracle User Group in the world. Our members include a wide range of institutions, from community colleges and small liberal arts colleges to huge research universities and entire university systems. It is a global organization and includes members with many varieties of administrative, funding, legislative and accreditation structures, offering degrees or coursework with varying and innovative modes of instruction.

The HEUG's business model and its sustainability are contingent upon the organization's financial stability and relevance to its members, vendors and partners by dutifully providing strategic input and feedback on Higher Education industry priorities as they relate to Oracle applications and middleware now and in the future. We have a long history of providing value-added support services to members, partners, vendors, and to Oracle: we believe our support



will be strengthened and kept agile by a timely and rigorous review of our strategies and processes.

Vision

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

Mission

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

Core Objectives: Education and Advocacy

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

Foundational Core Values

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

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

Networking & Sharing: Through an open exchange of information, ideas and learned experiences we strive to gather as a community in support of education, by supporting and strengthening our individual and collective organizations locally, nationally and globally.



Communication: We constantly utilize our opportunity to be transparent and disseminate information. Through our collective experiences and partnerships we are able to identify and strengthen our products, processes and organizations by being aware and making use of a set of constantly evolving communication methods.

HEUG's Annual Goals

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

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

Goals

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

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

Value Statements

Overall HEUG Value Statement

As the largest industry specific user group, representing over 900 campuses globally, the HEUG is a powerful tool for its members and for Oracle. Because of this, it is critical for the HEUG to maintain its relevance by continuing to provide the level of education and advocacy required by



its members. The HEUG will continue to represent members utilizing a wide range of Oracle applications by:

- Enhancing the HEUG's support for communication, collaboration and education across the entire HEUG ecosystem.
- Strengthening the HEUG's effectiveness in its advocacy role.
- Increasing HEUG member engagement and satisfaction.
- Ensuring HEUG's continued organizational and financial health.

Work Groups Value Statements

Communications

Through feedback from the annual membership survey it was realized that there is a need for change to the HEUG.Online website. HEUG.Online users expressed five major issues with the site; navigation, search functionality, forums, conference registration, and information sharing. How will the HEUG resolve the current issues with HEUG.Online? The Socious Tools work group is in the process of revamping HEUG.Online and providing HEUG members a platform where they can communicate, problem solve, access information easily and efficiently, while providing a useful educational experience through our webinars, regional & international conferences, as well as our Alliance Conference.

- Value to HEUG Members: Updating the HEUG website will ensure that the HEUG members will continue to communicate with each other and their representatives. An active, involved community is one that is kept up to date and has a clear way to make themselves heard and ask questions.
- Value to Oracle – Having a more efficient tool for HEUG members to use will make it easier for them to find solutions to their problems. We can also work with Oracle to get more relevant content added to the HEUG website. It would be beneficial to create a file library with all of this information, such as solution – and cloud-based content, and we just continue to update annually.

Core Values: Building Community by Networking & Sharing, Partnership and Communication

Advocacy

With Oracle's application product direction continuing to evolve, their need for advocacy has shifted from tactical to strategic. How can the HEUG continue its strong voice for its members to Oracle? The HEUG Reorganization work group will work with the advisory groups to implement a new model for advocacy that will continue to offer input for on premise applications, while creating new opportunities to advocate as new products are developed.

- Value to HEUG Members: The HEUG membership requires a model of advocacy that is flexible and forward thinking to actively support current products as well as guide the development of the new.



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

Core Values: Leadership, Building Community by Networking & Sharing and Partnership

Education

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

- Value to HEUG Members: As new members adopt Oracle product(s) it is important for the community to share best practices and lessons learned about implementations, and set up and maintenance issues. It is also critical that members are kept up to speed on Oracle’s future development efforts and how that impacts our institutions’ planning efforts. Education done between members and between the members and Oracle will continue to bring core value to the HEUG organization.
- Value to Oracle- Enhancing the opportunities for Oracle to be involved with the event beyond presentations about on premise applications will allow members who are considering emerging products and new members who have already purchased emerging products the opportunity to stay current on technology and learn about products they may wish to move to in the future.

Core Values: Building Community by Networking & Sharing, Partnership and Communication



Globalization

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

- Value to HEUG Members: The international initiatives benefit all members. As we expand our vision of how education is offered, and the boundaries of the classroom and the institution, how our global partners operate and organize themselves administratively and systematically becomes critical to our effectiveness, Expanding the conversation ensures that the HEUG members are making forward thinking decisions about their use of software.
- Value to Oracle – By providing additional services to our international members we will draw more people to our conferences in turn helping Oracle communicate with these members.

Core Values - Building Community by Networking & Sharing & Communication

Administration

With the growth of the HEUG globally, the complexity of the organization has increased significantly. Because of this many HEUG procedures are outdated. How can the HEUG increase transparency to members and promote intentional decision-making? The Business Plan & Services Work group will address these items as well as provide increased financial accountability and work to provide plans and procedures to allow for agility in handling changes in strategic focus and organizational needs.

- Value to HEUG Members – Improved transparency and communication of decision-making provides increased opportunities for better engagement with the HEUG community.
- Value to Oracle – A well-organized corporation with defined business processes will maximize the life of the organization, thereby allowing Oracle to utilize the HEUG as a tool for education, advocacy and prospective customers into the distant future.

Core Values: Leadership and Partnership



Targeted Engagement

The HEUG membership is composed of university administrators of varying ages who hold a wide array of positions – CEOs, central office administrators, and student services staff. Therefore, an increasing number of strategies must be deployed in order to remain engaged with members and to solicit the textured feedback the HEUG and Oracle requires. How best can the HEUG identify what communication media and organizational structure should be used? By targeting three primary areas, the strategic or executive, directors, referred to as ‘agents of change’ and the Young Professionals, we believe a new level of membership experience will be reached.

- Value to HEUG Members – By targeted engagement with all levels of staff, HEUG is better able to support member institutions in developing consistency of strategy and messaging throughout their organizations in respect of Oracle products and development.
- Value to Oracle – By focusing on three unique target groups establishing communication lines, and providing the tools to obtain input, Oracle will have better access to the type of strategic input they desire, as well as having specific targets they can communicate with for information, education and marketing.

Core Values: Leadership, Building Community by Networking & Sharing, Communication and Partnership



Feedback and Assessment Plan

In order to ensure member needs are being met as we move forward with the work included in this plan it will be important to seek periodic feedback from the membership to ensure that our communication delivery methods are working. The HEUG will develop surveys for periodic assessments.