STRATEGIC **PLAN**

DEFINING OUR STRATEGY AND DIRECTION

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HEUG Membership

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EXECUTIVE SUMMARY

The Higher Education User Group (HEUG) is dedicated to helping institutions effectively manage their administrative technologies to improve constituent experiences. Over the next five years, HEUG will focus on providing relevant and innovative professional resources, fostering a global community of like-minded individuals, and creating opportunities for collaboration and knowledge-sharing.

To achieve these goals, the HEUG will prioritize the following initiatives:

STEP 1
ENHANCE

Expanding and enhancing the organization's educational offerings, including webinars, in-person events, and online forums.

STEP 2
BUILD

Building partnerships with industry leaders and technology vendors to provide cutting-edge resources and support for higher education professionals.

STEP 3
DEVELOP

Developing and maintaining a robust online platform that enables members to connect, collaborate, and share best practices.

STEP 4
GROW

Growing the organization's membership base and increasing engagement among existing members through targeted outreach and communication initiatives.

STEP 5
INVEST

Investing in technology and infrastructure to support the HEUG's operations and enhance its ability to provide high-quality services and resources to members.

By focusing on these initiatives, the HEUG builds on its foundation as a valuable resource for higher education, helping administrators and institutions effectively navigate the constantly evolving technological and legislative landscapes. This will result in improved student and user experiences, faculty and staff talent management, resource sharing, data management practices, operational efficacy, and a stronger, more vibrant global community of higher education administrators.

HEUG MISSION, VISION & VALUE STATEMENTS

MISSION STATEMENT

The Higher Education User Group (HEUG) empowers higher education institutions to optimize their use of administrative technologies and improve the student and user experience.

VISION STATEMENT

To be the premier organization for higher education professionals at the intersection of business processes and technology by fostering a diverse, international community of passionate members supported with knowledge sharing, opportunities, and resources to drive positive change at a global level.

VALUES STATEMENT

EMPOWERMENT

The HEUG empowers higher education professionals to make informed decisions and effectively use administrative technologies to improve student and user experiences.

COLLABORATION

The HEUG drives collaboration and sharing best practices, experiences, and knowledge.

PROFESSIONALISM

The HEUG provides development resources and opportunities for higher education administrators to hone their skills and expertise.

INCLUSIVENESS

The HEUG curates a global community that is inclusive and welcoming to all individuals.

INNOVATION

The HEUG is committed to exploring new technologies and approaches to help institutions achieve their goals and improve student and user experiences.

SWOT ANALYSIS OF THE HIGHER EDUCATION USER GROUP

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STRENGTHS

- Uniquely positioned as solely focused on the Higher Education industry, assuring relevant content.
- Experienced leadership team with a deep understanding of higher education administration and technology.
- Strong reputation as a provider of high-quality professional resources and opportunities for higher education administrators.
- Active and engaged membership base that provides valuable input and feedback.
- Strong partnerships with industry leaders and technology vendors that enable the HEUG to provide cutting-edge resources and support.
- Innovative approach to professional development and knowledge-sharing, including a robust online platform and in-person events.
- Incredible sharing-philosophy, an extension of higher education, where community members collaborate—without competition--to improve outcomes at all, driving end users' success institutions, bolstered by a vendor inclusive philosophy.
- Content of conferences, online discussions, and resources are directly tailored to enable the community members find success in their roles and pitfalls to avoid.
- International perspectives help member institutions traverse legacy thinking and promote advances.

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WEAKNESSES

- Limited resources, including funding and staffing, may limit the HEUG's ability to fully execute its strategic plan
- Challenges in expanding beyond external, legacy perspective for being a PeopleSoft and/or Oracle community while assuring adequate support of membership who are here for those resources
- Challenges in growing membership and engagement for both institutions and individuals
    - Existing institutions changing technology
    - Existing institutions membership diversity/new silos
    - Existing membership users' engagement and participation
    - Existing membership new users
- Lack of visibility and recognition among some segments of the higher education community.
- Unequal distribution of engagement across board membership

SWOT ANALYSIS OF THE HIGHER EDUCATION USER GROUP

OPPORTUNITIES

- Growing and persistent demand for both in-person and virtual training opportunities
- Growing demand for resources, and support in the rapidly changing digital landscape of higher education. Growth areas include:
  - Increased industry focus on Data Analytics, Data Governance, Integration and Security.
  - Recognition of accelerating vendor migration to cloud solutions
  - Coordination and integration of multi-vendor, multi-platform and homegrown technology ecosystem inherent in the modern institution
- Integrate community-driven feedback loops to continuously improve communication quality and relevance.
- Growing recognition of the importance of collaboration and knowledge-sharing within our industry.
- Opportunities to partner and ally with other organizations and industry leaders to provide additional resources and support for our members.

THREATS

- Competition from other organizations offering similar services and resources.
- The pace of changes in higher education administration and technology requires prompt action to assure the HEUG's offerings remain relevant, increasing resource demands.
- Competition for attention and decreased funding or support from industry partners and members.
- Alienation of existing user base as the HEUG expands marketable offerings to realize growth opportunities.
- Historic association with User Group branding stifles market penetration opportunities.
- Marketing challenge to traverse our target member population and financial decision makers.

FIVE YEAR STRATEGIC GOALS

YEAR 1

- Develop a comprehensive online education platform that includes webinars, tutorials, paid training, and other resources for HEUG members to learn about the latest administrative technologies and best practices.
- Establish a membership growth plan with measurable targets and key performance indicators.
- Establish recurring processes to examine and align efforts, roles and responsibilities among professional/third-party and volunteer staff.
- Strategic growth and deployment of regional events with a mix of US and International conferences, workshops, and/or executive events, to provide opportunities for members to network and learn from each other.
- Develop a plan for HEUG Leadership recruitment with a focus on engaging the right mix of skillsets, core values and diversity to ensure organizational success.
- Develop a mentorship program that pairs experienced members with newer members to provide guidance and support.

YEAR 2

- Expand the online education platform to include more advanced content and certifications for members who wish to deepen their expertise in specific areas.
- Host a mix of US & international events to bring together a global community of higher education professionals.
- Build an Executive Leadership event either tied to the annual Alliance conference or hosted separately to promote the value of the organization to institution and partner stakeholders.
- Increase the organization's visibility by participating in industry-related events and conferences, and publishing articles and whitepapers on relevant topics.

FIVE YEAR STRATEGIC GOALS

YEAR 3

- Expand mix of events focusing content on senior leaders/executives in higher education to discuss the future of the industry.
- Explore new partnerships and collaborations with other organizations in the higher education field to expand the reach and impact of the HEUG.

YEAR 4

- Expand the mentorship program to include professional development opportunities for members.
- Increase the focus on data management by offering resources and education on data governance and analysis.
- Offer customized consulting services to members to help them with specific challenges or projects related to administrative technologies.

YEAR 4

- Develop a leadership development program to prepare the next generation of higher education leaders.
- Launch a certification program for HEUG members who demonstrate a high level of expertise in administrative technologies.
- Expand the organization's presence globally by hosting in-person events in different regions and partnering with other organizations to bring the benefits of HEUG membership to more higher education professionals.
- Continuously evaluate and adjust the strategic plan based on the evolving needs and feedback from the members and the board of the HEUG.

KEY PERFORMANCE INDICATORS

01. Membership Growth and Retention

Measuring the number of new members added each year, subscriber (non-paying) members, and retained memberships.

02. Membership Diversity and Health

Measuring the overall technological diversity underpinning member institutions and respective member engagement.

03. Resource utilization

Measured by the number of members accessing HEUG's educational resources and attending events, as well as the overall satisfaction of members with these offerings.

04. Revenue growth

Measured by the increase in total funding from industry partners, as well as the increase in membership fees, and event revenue, coupled with increases in total number of payers.

05. Community Engagement and Health

Measured by the level of engagement and collaboration among members through best practice sharing, forum interactions, webinars, and in-person events, as well as the overall satisfaction of members

06. Brand recognition

Measured by the number of mentions and references to HEUG in industry publications and events, as well as the overall level of recognition and awareness of the organization among higher education administrators.

By regularly tracking and evaluating these KPIs, HEUG can regularly validate that its five-year strategic plan is on track and making a positive impact on the higher education community and determine course-correction opportunities when and where appropriate.

HEUG TARGET AUDIENCE/CUSTOMER

WHO

The target customer for the HEUG is higher education administrators, executives, managers, and staff who are responsible for selecting, deploying, integrating, managing, and using administrative systems and technologies. This includes professionals working in areas such as information technology, student services, human resources, finance, and academic administration and research.

WHAT

HEUG's target customers are professionals seeking to improve constituent experiences, and effectively manage data, faculty and staff talent, resources, and operations. These individuals are typically looking for ways to stay informed about new trends and advancements in administrative technology, updates to local, state, federal and global regulations, and policies as well as for opportunities to network and collaborate with peers from other institutions.

WHY

HEUG's offerings, including its educational resources, professional development opportunities, and networking events, are designed to meet the needs of its target customers and provide them with the tools and support they need to succeed in their roles. Through its community-driven approach, HEUG is committed to helping higher education administrators and staff stay ahead of the curve and make the most of their administrative technologies.

HIGHER EDUCATION INDUSTRY ANALYSIS

The higher education industry refers to the sector of post-secondary education and includes institutions such as colleges and universities, trade schools, and vocational institutions. The industry is facing a number of challenges and opportunities as it evolves in response to changes in the global economy, advances in technology, and shifting societal, legislative, and demographic trends.

Some of the key trends affecting the higher education industry include:

INCREASING DEMAND

Despite rising tuition costs and student loan debt, there is a growing demand for higher education, particularly among students from emerging economies.

COMPETITION

The growth of online education platforms and alternative education providers has increased competition within the industry, putting pressure on traditional institutions to evolve and innovate.

TECHNOLOGY

Advances in technology are transforming the way students learn, leading to new pedagogical approaches and the development of new learning tools and platforms.

DEMOGRAPHIC SHIFTS

As the world's population continues to grow, so does the number of students seeking higher education, leading to increased demand for new and relevant offerings and competition for resources and funding.

COST CONCERNS

The rising cost of higher education is a major concern for students and families, leading to calls for reform and increased support for alternative education models.

REGULATION AND POLICY

Changes in regulations and policies, such as accreditation standards and financial aid programs, are also affecting the higher education industry.

To succeed in this rapidly evolving landscape, higher education institutions must be strategic and proactive in their approach to adapting to these trends and opportunities. This may involve accelerating investments in technology and innovation, developing new models of delivery and assessment, and collaborating with other institutions and organizations to leverage collective resources and expertise.

COMPETITIVE ANALYSIS & ADVANTAGE

The HEUG operates in a competitive landscape that includes a variety of organizations and associations that serve the higher education industry. Some of the key competitors in this space include:

Professional associations and organizations

There are several professional associations and organizations that serve higher education administrators, including those focused on specific areas of administration such as finance, human resources, and information technology.

Technology vendors

Many technology vendors that provide administrative systems and technologies for higher education institutions have their own support networks and user groups that offer resources and opportunities for professional development and collaboration.

Conferences and events

There are several conferences and events that serve the higher education community, including those focused on specific areas of administration such as finance, human resources, and information technology.

ADVANTAGE

HEUG differentiates itself from its competitors by offering a unique combination of resources, opportunities, and services that are specifically designed to meet the needs of higher education administrators, executives, managers, and staff. Some of the key advantages of HEUG include:

1. Community-driven approach: HEUG is built on the principle of bringing together like-minded individuals from diverse organizations to learn, collaborate, and share best practices, experiences, and knowledge. This sense of community is a key differentiator for HEUG and is central to its mission of improving the student and user experience through the effective management of administrative technologies.
2. Focus on higher education: Unlike many of its competitors, which may serve multiple industries or have a broader focus, HEUG is dedicated exclusively to serving the higher education community. This focus allows HEUG to provide a deep level of expertise and resources that are specifically designed for higher education administrators and staff.
3. Wide range of resources and services: HEUG offers a comprehensive suite of resources and services that are designed to help its members navigate the constantly evolving digital landscape, including educational resources, professional development opportunities, and networking events. These offerings are designed to help HEUG's members stay informed, stay connected, and succeed in their roles.
4. By leveraging these advantages, HEUG is well positioned to meet the evolving needs of higher education administrators and staff, and to help its members succeed in their roles and make the most of their administrative technologies.

MARKETING PLAN

This marketing plan will help HEUG reach its target audience, increase brand awareness, and achieve its marketing objectives. By conducting market research, developing a content strategy, and regularly measuring and analyzing the effectiveness of marketing campaigns, HEUG can continually improve its marketing efforts.

TARGET AUDIENCE

The first step is to define the target audience. This can be done by researching the demographics, behavior patterns, and pain points of current HEUG members and potential members.

OBJECTIVES

The first step is to define the target audience. This can be done by researching the demographics, behavior patterns, and pain points of current HEUG members and potential members.

MARKETING MIX

Decide on the marketing mix that will be used to reach the target audience. This can include tactics such as email marketing, social media marketing, content marketing, event marketing, and digital advertising.

CONTENT STRATEGY

Develop a content marketing strategy that provides value to the target audience. This could include blog posts, e-books, case studies, webinars, and podcasts. The content should educate, entertain, and inform the target audience.

CAMPAIGNS

Plan and execute marketing campaigns that are aligned with the marketing objectives and target audience. This can include email campaigns, social media posts, and events.

MEASUREMENT AND ANALYSIS

Regularly measure and analyze the performance of marketing campaigns to determine their effectiveness. This information can be used to refine the marketing strategy and improve its effectiveness.

OPTIMIZATION

Continuously optimize the marketing plan based on the analysis of the marketing campaigns.

OPERATIONS PLAN

This operations plan will help HEUG run its operations effectively and efficiently, ensuring that its activities and initiatives are aligned with its goals and objectives. By establishing clear processes, using technology solutions, and measuring performance, HEUG can continuously improve operations and better serve members.

01. ORGANIZATIONAL STRUCTURE

Define the organizational structure of HEUG, including the roles and responsibilities of each team member.

02. PROCESSES

Establish clear processes for daily operations, such as member onboarding, event planning and execution, and communication with members.

03. TECHNOLOGY

Identify the technology solutions that HEUG will use to support its operations, such as a membership management system, event management software, and communication tools.

04. RESOURCE ALLOCATION

Determine the resources that will be needed to support HEUG's operations, including staffing, budget, and technology.

05. RISK MANAGEMENT

Develop a risk management plan to identify potential operational risks and develop contingency plans to mitigate those risks.

06. COMMUNICATION PLAN

Create a communication plan to ensure that members, staff, and stakeholders are informed about HEUG's activities, events, and initiatives.

07. PERFORMANCE METRICS

Define performance metrics to measure the success of HEUG's operations, such as membership growth, event attendance, and member satisfaction.

08. CONTINUOUS IMPROVEMENT

Continuously review and evaluate HEUG's operations to identify opportunities for improvement and make necessary changes.

FINANCIAL PLAN

This financial plan will ensure that the HEUG continues to provide services and educational opportunities to its members for years to come. By identifying areas to build revenue and continue to operate efficiently, the HEUG will build back a healthy cash reserve and be able to provide more opportunities for members and sponsors.

1. Succession Planning – Assure the HEUG has a qualified Assistant Treasurer that will move into the Treasurer role.
2. Analysis of potential revenue streams to determine viability.
3. Analysis of regional activities to determine event's alignment with Regional Task Force guidelines for approving an event.
4. Requests for Proposal (RFP)
    - New accounting firm(s) and software – seeking improved service, tools, and competitive pricing.
    - Evaluate Australian banking needs and perform gap analysis.
5. Create a cash flow analysis report – automated to the extent possible.
6. Create process manuals (after determining if Bill.com, Tallie and Intacct will continue).
7. Continue to work with Audit Committee to identify risk analysis and recommendations.
8. Ensure annual audit and taxes are completed in a timely manner.

THANK YOU

HEUG

Higher Education User Group