



ANNUAL REPORT

THE HIGHER EDUCATION USER GROUP

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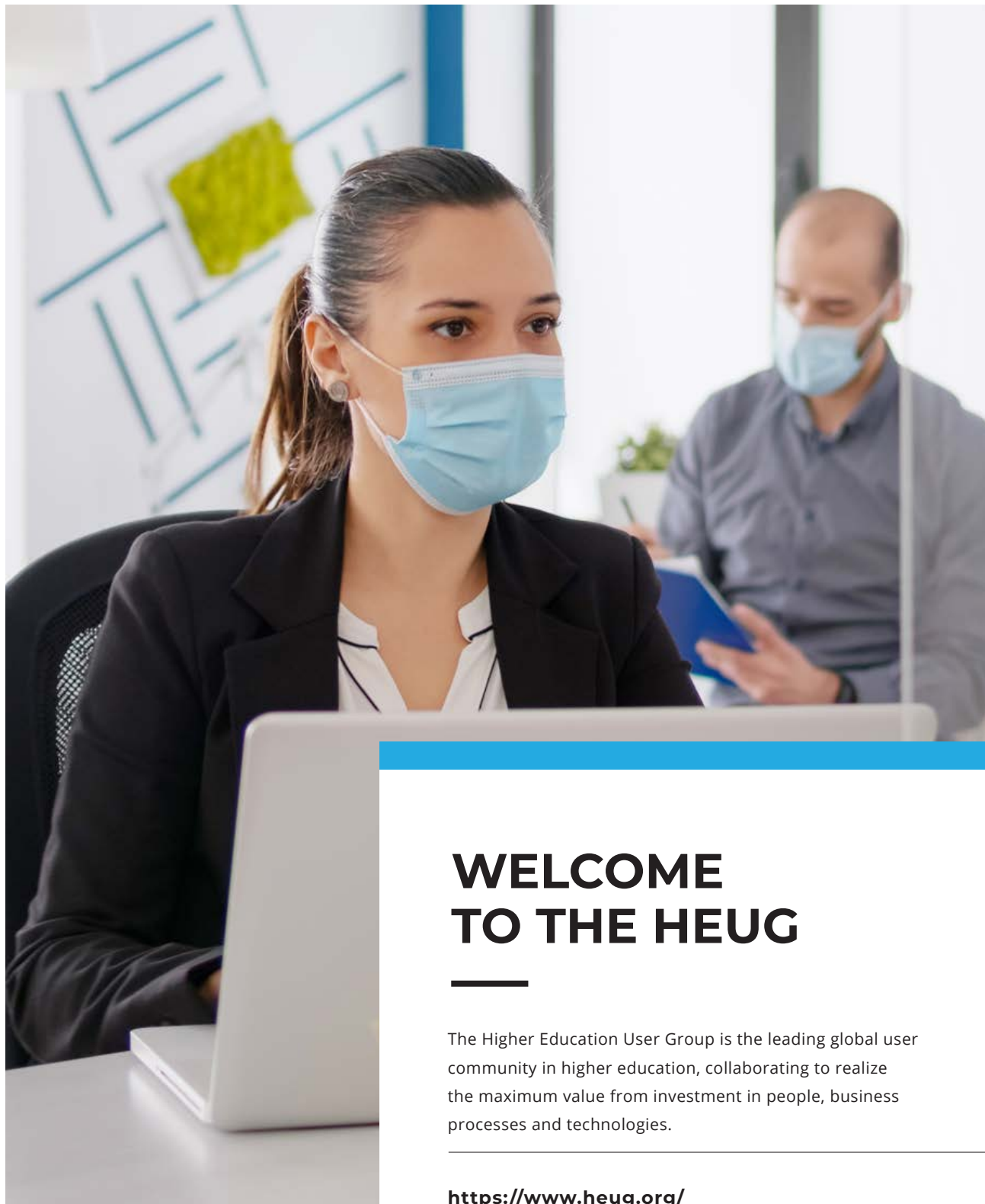
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2021



WELCOME TO THE HEUG

The Higher Education User Group is the leading global user community in higher education, collaborating to realize the maximum value from investment in people, business processes and technologies.

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

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HFI I O!



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**THE AMOUNT OF TIME
AND EFFORT EVERYONE
PUTS IN TO KEEP THIS
GROUP VIBRANT IS QUITE
IMPRESSIVE.**

With more than 900 organizations around the globe and growing, I feel it safe to say ‘it takes a village’ is an understatement. This is your organization, and your participation and feedback are encouraged and always welcome. There are so many opportunities to get involved in and I encourage you to do so in whatever capacity works best for you.

Michael Russell

HEUG President 2021-2023
Virginia Community College
System

LETTER FROM THE PRESIDENT

On behalf of the Board, Advisory Groups, countless Higher Education User Group (HEUG) volunteers and the dedicated Higher Logic Team, it is my pleasure to present the HEUG Annual Report for 2021. This was the second year that all of our meetings remained virtual due to the COVID pandemic. The pandemic has challenged the HEUG, as we have been unable to come together in person to share for such a long time. Despite the challenges, we have accomplished a great deal on behalf of the organization.

One major accomplishment the HEUG achieved was our highly anticipated goal of expanding our focus to support institutional portfolios that have grown beyond single ERP solutions. This change has provided needed functionality within our environments and marks a new era for our organization. There have been years of effort put into this initiative by several presidents, board members and Higher Logic staff, and we were excited to see it come to fruition. This change sets us on a path forward that creates a new set of opportunities to expand our reach and assist each other through our shared expertise and experiences. These are exciting times for the HEUG, as we celebrate our past accomplishments and look to a future that is limited solely by our ability to imagine it.

Throughout 2021, HEUG's virtual, global and regional events continued to draw significant attendance. It is nothing short of amazing to watch colleagues jump into sessions or conversations with participants from around the globe; to view one person drinking coffee in their first meeting of the day, while another enjoys an after-dinner beverage, and yet another person awake in the middle of the night to catch up on the latest updates. I think it is safe to say that I know of no other organization that displays such a strong sense of camaraderie.

The relevance of what the HEUG offers its members is evident by the large attendance at our 2021 Virtual Alliance, International Virtual Week and US Virtual Forum within the HEUG community. Throughout the past year, we delved into new areas, sometimes focused on specific ERP functionality and other times based on areas of broad interest, irrespective of the software solution in use.

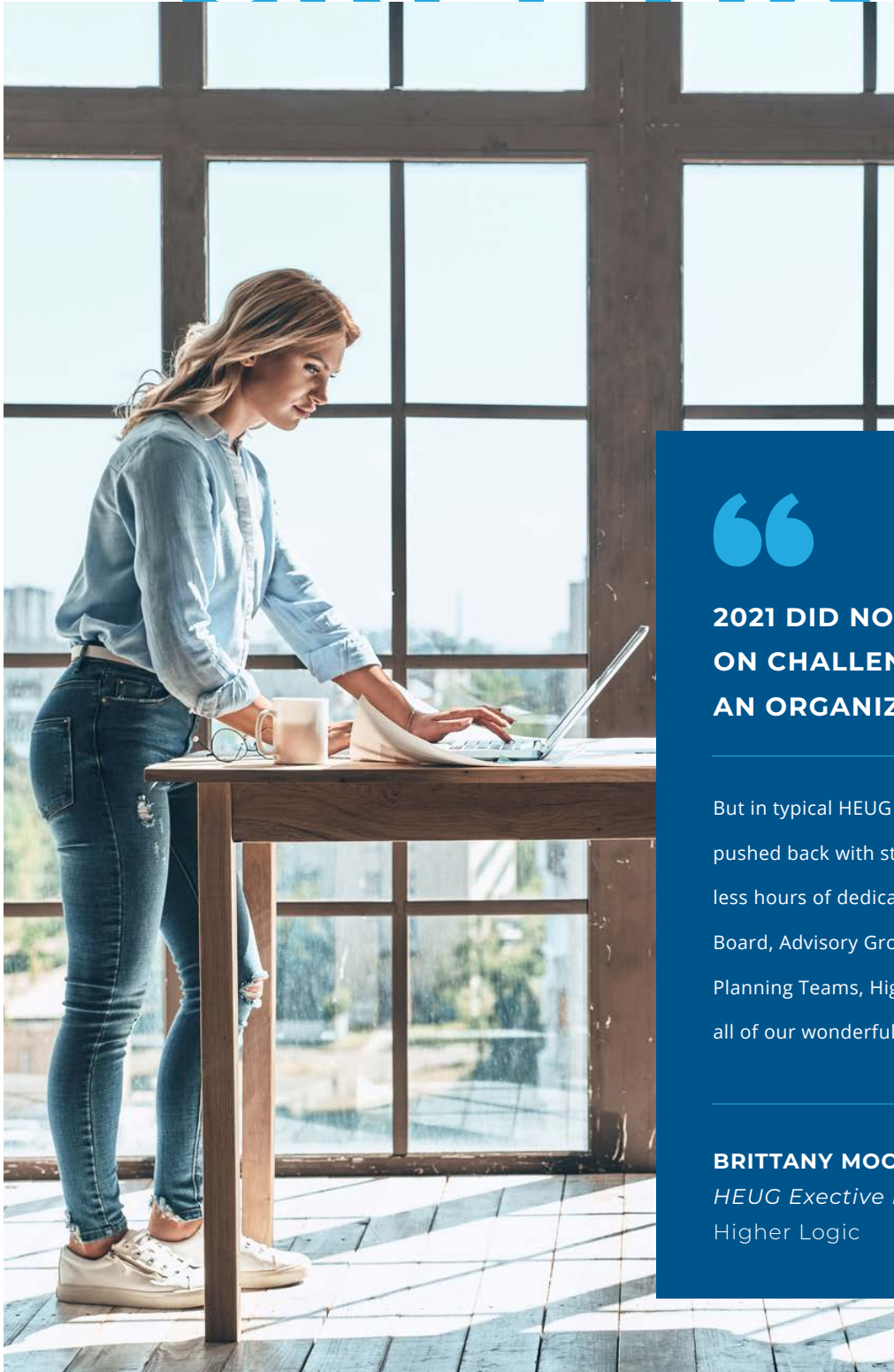
Integration, data management and security continue to be viewed as high interest areas for our community. We have worked to build structures around these new offerings that meet the needs of the generalist, as well as the technical and functional specialists within the community. At the upcoming Alliance 2022 conference, members will have the opportunity to engage with others who share an interest in these topics. The HEUG's broader perspective helps meet the needs of our community and has opened the door to many institutions who have not experienced the value of a large, global user group.

It is an honor to serve as President of this extraordinary volunteer-based organization. The amount of time and effort everyone puts in to keep this group vibrant is quite impressive. With more than 900 organizations around the globe and growing, I feel it safe to say 'it takes a village' is an understatement. This is your organization, and your participation and feedback are encouraged and always welcome. There are so many opportunities to get involved in and I encourage you to do so in whatever capacity works best for you.

As we roll into 2022, we are excited to come back together in person for our first on-site Alliance in two years. It will be a time to connect, reconnect and build on the relationships that we have created and sustain this resilient global community of institutions and colleagues. I look forward to seeing many of you there.

MICHAEL RUSSELL

GREETINGS!



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**2021 DID NOT HOLD BACK
ON CHALLENGING US AS
AN ORGANIZATION.**

But in typical HEUG fashion, we pushed back with strength and countless hours of dedication from our Board, Advisory Groups, Conference Planning Teams, Higher Logic staff and all of our wonderful volunteers.

BRITTANY MOON

HEUG Exective Director
Higher Logic

LETTER FROM THE EXECUTIVE DIRECTOR

As we continue to navigate through the ongoing global pandemic, there are few things as important as the need to feel connected; to bond with others over common interests, beliefs and experiences. This has been difficult over the past two years, as we have come to embrace a world of virtual communication, navigating online conferences and speaking to colleagues through virtual meeting spaces. I continue to be encouraged and inspired by the HEUG community. It never ceases to amaze me how this community shows up for one another; continuing to connect, share and grow despite any challenge a global pandemic may put in our way.

2021 did not hold back on challenging us as an organization. But in typical HEUG fashion, we pushed back with strength and countless hours of dedication from our Board, Advisory Groups, Conference Planning Teams, Higher Logic staff and all of our wonderful volunteers. As a result of our collective tenacity, we were able to bring high quality programs and exciting changes to our members throughout the world, such as:



VENDOR INCLUSIVE MODEL

In January, the HEUG announced that the organization was moving forward with a vendor inclusive model. With this model in place, HEUG expanded our portfolio of vendor partners to include Accenture, Deloitte, Ellucian, Huron, Oracle and Workday. We are excited to continue to build the community and provide our members with access to the full range of information and conversations they are searching for.



ALLIANCE

After our on-site venue was cancelled due to the pandemic, HEUG successfully hosted the second Alliance Virtual Conference in March. We were ecstatic to see an increase in participation, including: 2,361 attendees located across 15 countries representing 334 organizations. Attendees enjoyed access to more than 350 sessions, five workshops, community discussion topics and virtual networking sessions.



REGIONAL EVENTS

Again, the HEUG took advantage of remote options and offered our membership the second US Regional Virtual Forum and International Virtual week. We are proud to say that we were able to keep these events free for our paid membership and provided opportunities for our members to continue to connect and collaborate. The US Regional Networking Forum had 485 attendees across 38 states, representing 154 institutions. International Virtual Week saw 970 attendees across 17 countries and represented 194 institutions.

LETTER FROM THE EXECUTIVE DIRECTOR



MEMBERSHIP

As we continue to grow our offerings and build out our new communities supporting our Workday and Ellucian Members, we are thrilled to announce that the HEUG membership grew to over 35,000 members in 2021 and we saw a retention rate of 93 percent.



SOFTWARE

The new platform for our HEUG Community brought members new features and benefits they had been requesting, while making it easier for them to connect and share with colleagues from around the world. We've seen the most user adoption of new features in discussions, particularly replying directly to the sender of a thread post and attaching documents to messages now that they are automatically added to the community file library.

2021

● 68,283 User Logins

● 1,802 Documents Created

● 3,892 Discussion Threads Created

● 7,772 Group Replies Created



EXPENSES

Due to the cost-saving systems the Board implemented, the HEUG was able to minimize loss once again, and remain stable during a time where large numbers of organizations have suffered. I'm very proud of how the HEUG has navigated the tremulous waters.

On a personal note, I would like to say there is a type of magic in the HEUG and its membership. Despite the challenges and constraints, our members continue to support each other, connect and grow. I must say this has been a very productive year and I'm excited for the future of the organization. Moving forward, we will continue to adapt to the changing environment and remain optimistic as we get ready to host our first in-person Alliance in two years.

I hope you all can join us in Seattle, and I can't wait to reconnect in person!

BRITTANY MOON



EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

2021 was, once again, a year like no other. The word “disruption” came to mind throughout 2021, and it continues as we launch into the new year.



2021 OVERVIEW

Our member institutions are still navigating obstacles, as some have been forced to change operations and rethink day-to-day business practices. With these seemingly endless obstacles, we continue to see our HEUG members strive to work collaboratively and effectively to achieve and advance initiatives within their institutions.

Looking toward the future, the HEUG is committed to creating ways to enhance our member experience long-term, including programs that will increase engagement, professional development, education, fresh thinking, best practices, innovative solutions and new opportunities.

In 2021, the HEUG Board reprioritized and now has a bold vision of being the global leader in higher education as we move into the future. This will allow our members to engage across institutional boundaries to experiment, innovate and change our communities for the better, no matter what system or technology they are using.

As challenging as the past two years have been, it has forced us to look at operations differently, but at the same time, it has also been filled with moments of optimism and enlightenment.

VENDOR INCLUSION UPDATE

The Higher Education User Group (HEUG), one of the leading user communities in higher education and the public sector, in an announcement welcomed Accenture, Deloitte and Ellucian to the group's expanding portfolio of premier vendor partners and sponsors.



The Higher Education User Group (HEUG), one of the leading user communities in higher education and the public sector, in an announcement welcomed Accenture, Deloitte and Ellucian to the group's expanding portfolio of premier vendor partners and sponsors. In an effort to foster a global community for sharing collective knowledge, capabilities, and resources, the HEUG recently embarked towards a significant business model shift with a focus on growing and improving the information and services rendered to their community members. The inclusion of these three "new big names" exhibits HEUG's commitment towards this new direction.

Kari Branjord, SVP Digital Transformation, Ellucian, added "We are thrilled to be part of the HEUG community, and look forward to engaging with member institutions to address the most pressing challenges facing today's students, faculty and administrators. HEUG represents the very best in collaboration -- bringing together technology leaders with a shared focus on improving the higher ed experience and creating better opportunities for learners."

Michael Russell, HEUG President, commenting on the model shift and the addition of Accenture, Deloitte and Ellucian to the group of sponsors, stated, "Through our 25-year journey, we have aimed to organize and transform institutional capabilities by exchanging ideas and solutions among a growing group of community users. I believe the addition of these three incredible partners is a step that will help us enhance the community experience as a whole."

The addition of new partners now enables HEUG and its partners to expedite and augment sharing of knowledge among institutions around the globe. It also aims to expand the knowledge base, build skills & expertise, enhance efficiencies, and ultimately improve the member experience. As stated by Deloitte's managing director, Betty Fleurimond, who leads the company's US Higher Education Cloud ERP Portfolio, "The HEUG ecosystem is an invaluable alliance for Deloitte. The sense of community and power of the collection continues to be both a strength and a differentiator. Deloitte is honored to participate at the Premier level."

Commenting on the incorporation of these new partnerships and the community's growing user-base, Kelly Wilker, HEUG Vice President of Engagement, commented, "We are focused on illustrating industry best practices, along with knowledge sharing and lessons learned and now with Accenture, Deloitte and Ellucian onboard, the community will have access to a wealth of experience from industry leaders."

Ryan Gaetz, Accenture Managing Director – Global Workday Education and Government Lead, said, "Accenture's top priority continues to be supporting our clients and the higher education community, and so we are thrilled to sponsor HEUG at the Premier level. We welcome this partnership as another way for us to learn from and connect with the higher education community, and we are also excited about the additional opportunities for

VENDOR INCLUSION UPDATE

Accenture to demonstrate the immense value that we can bring to campuses.”

Steve Harris, SVP & Chief Revenue Officer, Ellucian “Like HEUG, Ellucian is solely focused on serving the higher education community and has a long history of working with institutions to solve for the unique challenges of this industry. We look forward to engaging in the HEUG community as we work together to improve the future for learners everywhere.”

Brittany Moon, HEUG Executive Director added, “The power of the HEUG has always been in its members. I am excited about how the addition of Accenture, Deloitte and Ellucian will bring a new level of information, experiences and support for our member institutions across the globe. These amazing partners will help institutions maximize their technology investments as well as provide additional professional development opportunities at all levels.”

“ QUOTES FROM



KARI BRANJORD

SVP Digital Transformation
Ellucian



MICHAEL RUSSELL

HEUG President
Virginia Community College
System



BETTY FLEURIMOND

Managing Director
Deloitte



KELLY WILKER

HEUG VP of Engagement
University of Waterloo



RYAN GAETZ

Managing Director
Accenture



STEVE HARRIS

SVP & Chief Revenue Officer
Ellucian



BRITTANY MOON

HEUG Executive Director
Higher Logic

<https://www.heug.org/blogs/brittany-moon1/2021/12/06/the-higher-education-user-group-continues-expansio>

ADVISORY GROUP UPDATE

Rethinking our advocacy structures for the future



NO LONGER ARE ERP APPLICATIONS THE SOLE FOCUS OF EVERY HEUG MEMBERS ATTENTION FOR TECHNOLOGY ON CAMPUS.

In 2016, the Board signaled the need to rethink our existing advocacy structures to better position the organization for the future. A resizing of the existing advisory groups was adopted, and the plan started to take place. Over the next few years, HEUG consolidated five advisory groups, Budgeting, General Ledger, Grants, Contracts and Billing, and Procure to Pay to create the Constituent Experience and Outreach and Contributor Relations as an Advisory Group.

In addition, the existing Reporting and Business Intelligence, and technical groups were combined to create a new group. These changes helped to balance our commitment for continued representation across existing

product solutions used by HEUG members, while preparing the organization to be able to engage in future challenges and solutions.

During 2021, HEUG approved Phase II of our Advisory Group structure to consolidate our Student Information Systems Advisory Groups. This revised framework furthers our vision to balance the commitment for continued representation across existing product solutions used by HEUG members, while preparing the organization to be able to engage in future challenges and solutions. It also provides an opportunity for the HEUG to open a new avenue of community engagement by allowing members to define and drive what is important to them.

ADVISORY GROUP UPDATE

In the spring of 2021, twenty members of the Admissions, Academic Advising, Campus Community and Student Records group were consolidated into one advisory group called Campus Academic & Records Support. In addition, the existing Financial Aid and Student Financials group were to create a twelve-member team under the name Campus Student Financial Support.

One year into the restructure of our Campus Solutions Advisory Groups, we have seen significant levels of operational planning, building strategic advocacy roles and continued education for our members. Each newly formed team is conducting conference calls with Board Liaisons while developing an operational plan for the upcoming years. These meetings provide a gradual adjustment to a new way of working together and providing efficiencies to our members.

Education is key in this new structure. As a team, our volunteers continue to work with Oracle to disseminate updates regarding PUM and upgrade releases, as well as advocate, on behalf of members, as this is integral to the development of the Student Management product. More importantly, these new teams facilitate the sharing of best practices through listservs, blogs, educational webinars, virtual Birds of a Feather and Community Coffee Breaks.

During 2021, our e-Business Suite (EBS) Advisory Group experienced a decrease in community involvement. Securing volunteers was a challenge, both in the election process and in the recruitment of presenters for Alliance. In September, the HEUG Board made the decision to sunset the EBS Advisory Group. We continue to support the EBS member listserv and encourage members to continue posting questions for support.

As we move into the next generation of HEUG, the Advisory Group structure will continue to be project-oriented, utilizing cross functional, cross module, system-wide groups of industry experts working toward short- and long-term strategic initiatives.



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

The Global Council was formed in 2019 to assist its member institutions around the world through education and advocacy.



Going Global builds strong partnerships, working together internationally and connecting our members around the world. This is something the HEUG has accomplished in the past, but with the creation of the newly restructured Global Council, the HEUG is focusing more resources in this important area. Over the past year, a change was made to bring all international areas into the single Global Council. This re-structure helps strengthen communication and collaboration across the regions, allowing the group to react to significant challenges more quickly.

As HEUG moves into the future and pursues more global strategic partnerships, Global Council will continue in its efforts to foster meaningful interaction, diversity and inclusivity as we expand our advocacy, educational offerings and strive to better serve our global regions.

The HEUG's Global Council executed the second International Virtual Event (IVW21) in 2021. A free event for our paid members, it was a way for our international community to connect, collaborate, network and learn. We are looking forward to 2022 and the possibility of bringing back our in-person International Conferences.





2021 EVENTS

ALLIANCE VIRTUAL 2021



Workshops :

March 8-9, 2021

Sessions :

March 15-18, 2021

66
LEADING
CHANGE
TOGETHER

PROJECT MANAGEMENT

While there were some early hopes that an in-person Alliance 2021 conference would be possible, world events and public health priorities dictated an online format for the second year in a row. Once again, the support of the HEUG membership for the virtual event was amazing. Alliance Virtual 2021 drew over 2,300 attendees from 15 countries who benefitted from over 350 breakout and networking sessions.

ALLIANCE VIRTUAL 2021

The 2020 conference was largely a lift-and-shift of the on-site conference program to a virtual format. For 2021, the entire conference team worked diligently throughout the year to study which aspects of the traditional conference translated well to the new format to bring the best possible online experience to our attendees. For example, all of the roadmap sessions were pre-recorded and made available the week before the conference to attendees on-demand. The feedback we received for this new opportunity was very positive, with attendees appreciating the opportunity to view the sessions prior to the conference kickoff. This allowed attendees to focus their attention on other sessions and it allowed the conference team to offer more sessions during the week. It was a win-win for everyone.

One highlight of the 2021 Alliance Program was the introduction of the Leading Change track. Rather than focusing on specific technologies or methodologies, Leading Change provides a forum for our members to highlight how they are leading change in our industry – from transitioning to a remote work world or championing diversity and inclusion, to tips on career and professional development. All fresh perspectives were welcome and showcased.



Other highlights of the conference included working closely with our Community Partner, SOUNDS Academy – a non-profit music education organization based in Phoenix. Their mission is to teach, mentor and provide musical experiences to all children, and to remove any barriers that may prevent them from receiving a high-quality music education. With the return of the Alliance Run/Walk, members of the HEUG community ran, walked and biked in their own community and shared their results. Not only did they improve their own health and foster virtual community, all proceeds were donated to SOUNDS Academy, so they also moved their bodies for a good cause.

The past two years have proven that a virtual conference can be a great event and provide outstanding value to our attendees, however, we know that nothing will replace the experience and networking of an in-person event. We've learned so much from the experiences of the past two years, and we are confident that we can use that experience in 2022, as we return to a traditional format, to make our yearly event even better than it has been in the past.



ATTENDEES

2,361



COUNTRIES

15



INSTITUTIONS

334



PRESENTATIONS

361



WORKSHOPS

5

EXPERT TEAM

Alliance Virtual 2021 Conference Team

Jason Koziara

Conference Chair, DePaul University

Cheri McEntee

Program Chair, Syracuse University

Cathy Thompson

Past Conference Chair, University of Florida

Sandy Blackwell

CPE Coordinator, State of Tennessee

Jason Wenrick

HEUG Board President, California State University Chancellor's Office

Lisa Skinner

HEUG Board VP of Finance, Sandford University

Buddy Combs

AG Summit/ HEUG Board VP of Product, Kentucky Comm. & Tech. College Sys

Brittany Moon

Executive Director, Higher Logic

Sarah Bryan

Membership Services Manager, Higher Logic

Erica Allen

Director of Meetings and Events, Higher Logic

Carol Valora

Meetings Manager, Higher Logic

Michelle Goytia

Meetings Manager, Higher Logic

Hillary Chambers

Meetings Manager, Higher Logic

Paige Ellis

Meetings Coordinator, Higher Logic

Amy Ewing

Creative Designer/Developer, Higher Logic

Tom Chambers

Events Sponsorship & Partner Program, Higher Logic

US REGIONAL VIRTUAL FORUM 2021



Sessions :
June 8-9, 2021

“
**ONE DAY DEDICATED
TO NETWORKING
FROM THE
CONVENIENCE OF
ANY LOCATION**

ABOUT

Offering valuable networking opportunities such as community discussions, kick off coffees, networking lunch and happy hours. Topics include current events, challenges and opportunities that we are all facing in these unprecedented times. Such as managing change, thriving in telework, etc.

US REGIONAL VIRTUAL FORUM 2021



ATTENDEES

485



STATES

38



INSTITUTIONS

154



PRESENTATIONS

24

EXPERT TEAM

US Virtual Forum 2021 Conference Team

Brian Bernoussi

South Central, University of Texas at Dallas

Carla Boyd

Midwest, University of Minnesota

William Culey

Northwest, Washington State University

Pam Kenyon

Northeast, University of Massachusetts Office of the President

Mary Gagliastro

Northeast, University of Massachusetts Office of the President

Tom Johnson

Southeast, Duke University

Carl Larson

Southwest, University of Utah

Nanci Regehr

HEUG Regional Conference Board Chair, Rio Salado College

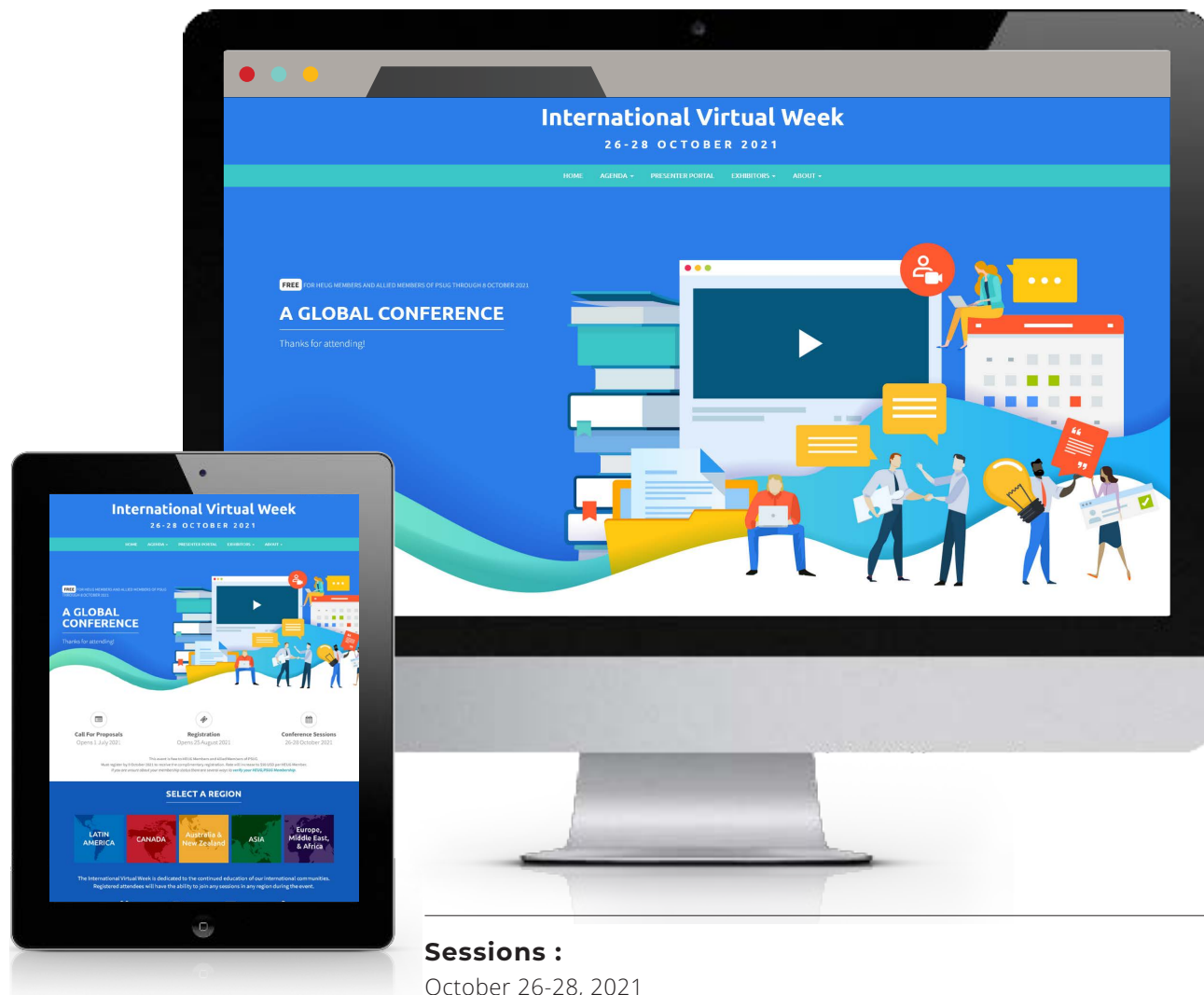
Carol Valora

Meetings Manager, Higher Logic

Hillary Chambers

Meetings Manager, Higher Logic

INTERNATIONAL VIRTUAL WEEK 2021



Sessions :

October 26-28, 2021

“
A GLOBAL
CONFERENCE IN A
NEW SETTING

ABOUT

The International Virtual Week is one week dedicated to the continued education of our international communities. Registered attendees will have the ability to join any sessions in any region during this week, though we have split out each region into their own tracks for your convenience.

INTERNATIONAL VIRTUAL WEEK 2021



ATTENDEES

970



COUNTRIES

17



INSTITUTIONS

194



PRESENTATIONS

89



WORKSHOPS

N/A

EXPERT TEAM

International Virtual Week 2021 Conference Team

ASIA COMMITTEE MEMBERS

Derry Fong

The Hong Kong University of Science & Technology

Vetrivillalan Vennila

Singapore Management University

KC Cheung

City University of Hong Kong

Handoko

Singapore Institute of Management Pte Ltd

Anna Hui

The Education University of Hong Kong

Yen Teck Kong

National University of Singapore

Senthil Kumar

National University of Singapore

Anthony Lam

The Hong Kong University of Science & Technology

Ivy Lao, University of Macau

University of Macau

Carmen Tam

The University of Hong Kong

Roger Wong

City University of Hong Kong

Michael Zhang

Guangdong Technion-Israel Institute of Technology

AUSTRALIA & NEW ZEALAND COMMITTEE MEMBERS

John Reed

University of New South Wales

Clinton Lamont

Griffith University

Jason Dolan

University of New South Wales

Nikki Gaertner Eaton

University of South Australia

Umesh Gupta

Deakin University

Dave Lamb

The University of Adelaide

Julie Lehmann

University of South Australia

Cathy McGrath

Griffith University

Linda Ngu

University of Queensland

Shayne Simpson

University of The Sunshine Coast

Leah Theuerkauf

University of Southern Queensland

EXPERT TEAM

International Virtual Week 2021 Conference Team

CANADA COMMITTEE MEMBERS

Kelly Wilker
University of Waterloo

Jane Baratta
Western University

Stacey Farkas
McMaster University

Sophia Holness
McMaster University

Doris McGuire
McMaster University

EUROPE, MIDDLE EAST & AFRICA COMMITTEE MEMBERS

Carolien ten Oever
University of Amsterdam

Denise Kelly
Queen's University Belfast

Steve Smith
University of Cambridge

Phil Sugden
University of Derby

LATIN AMERICA COMMITTEE MEMBERS

Luis Francisco Martinez
Pontificia Universidad Javeriana

Lara Alcauter,
Universidad Panamericana

Pedro Creuheras
Universidad Panamericana

Juan Carlos Ruiz Cruz
Universidad Panamericana

Michele Volpi
Universidad Catolica del Uruguay

EXPERT TEAM

International Virtual Week 2021 Conference Team

HIGHER LOGIC

Brittany Moon

Executive Director

Sarah Bryan

Membership Services Manager

Erica Allen

Director of Meetings and Events

Michelle Goytia

Meetings Manager

Hillary Chambers

Meetings Coordinator

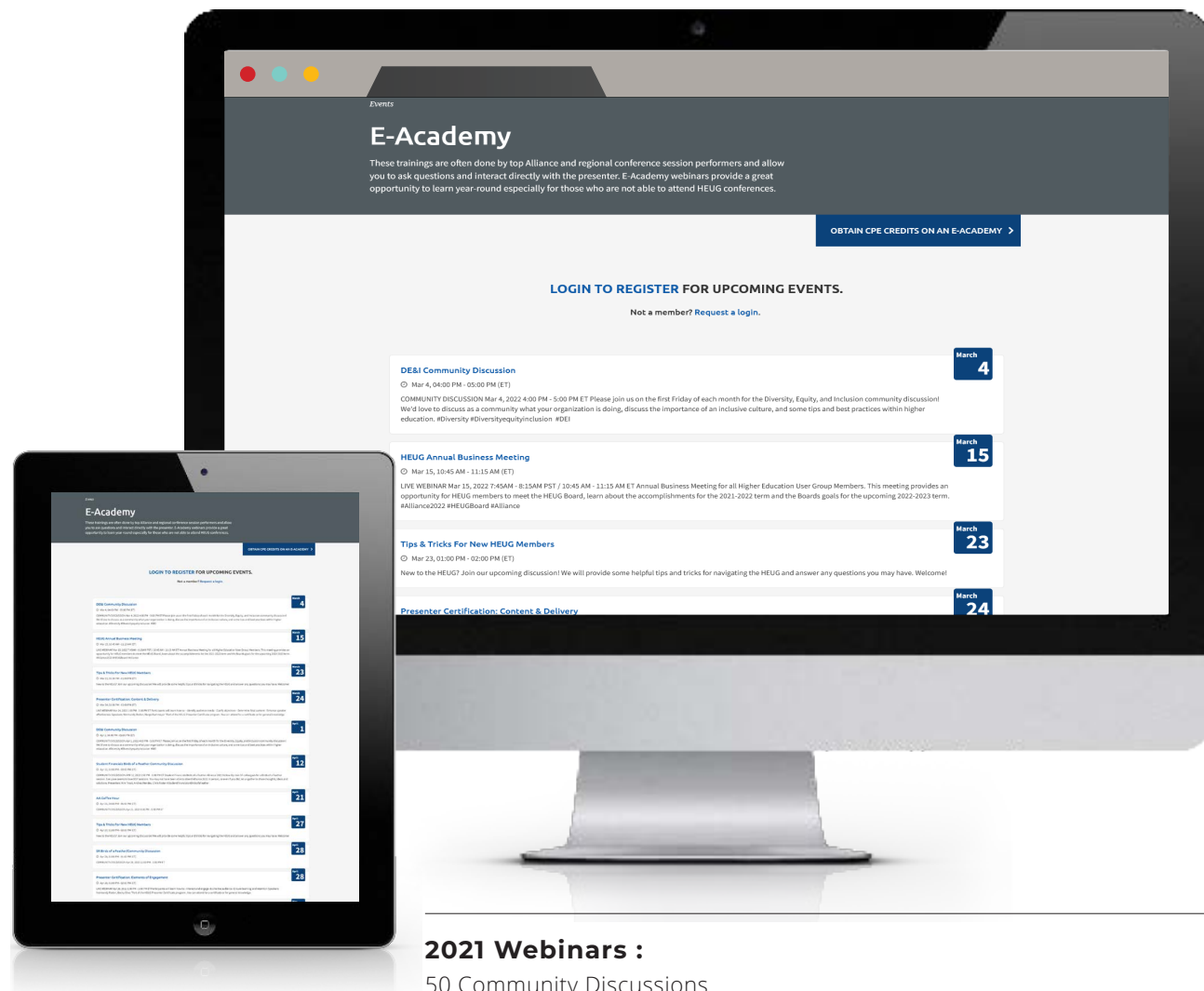
Paige Ellis

Meetings Coordinator

Tom Chambers

Events Sponsorship & Partner Program

E-ACADEMY WEBINARS



2021 Webinars :

50 Community Discussions

61 Education Series

19 Sponsored



ATTENDEES

7,740

PROJECT MANAGEMENT

E-Academy webinars provide a great opportunity to learn year-round especially for those who are not able to attend HEUG conferences.

The HEUG is pleased to announce that in 2021, we expanded our CPE Credit offerings to the year-round E-Academy program. All CPE eligible sessions are classified as group-internet-based delivery method.



MEMBERSHIP UPDATE

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 serves as a central hub, allowing members to connect and build relationships, both virtually and in-person. These connections allow members to explore a variety of approaches and best practices for designing, configuring and deploying software to better serve their constituents.



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.





MEMBER ACCESS

01

PROFESSIONAL

Unmatched expertise with over 20 years of knowledge and experience on a platform with the latest tools and features.

02

PASSIONATE PEOPLE

Continued commitment to member achievements through year-round training and networking opportunities.

03

KNOWLEDGABLE

Unlimited resources through discussion forums, job postings and file libraries to share and collaborate as a community of users, for users.

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 2020-21 membership year, the HEUG Board spent time evaluating membership dues. Based on the cost of living increases for services, a minimal fee increase was approved. For the 2021-2022 membership year, we kept rates the same.

INSTITUTIONAL MEMBERSHIP	2021	2020
10,000 FTE Students	\$ 1,000	\$ 1,000
10,000-29,999 FTE Students	\$ 2,000	\$ 2,000
30,000-59,999 FTE Students	\$ 3,000	\$ 3,000
60,000 or More FTE Students	\$ 6,000	\$ 6,000
Allied Group	\$ 400	\$ 400



COUNTS

The priority of the HEUG is member satisfaction. Each year, the HEUG Board pays close attention to membership renewals and views our member's continued support as proof of their satisfaction. Though members were faced with some severe budget cuts, the HEUG maintained a retention rate of 99 percent.

We will continue to ask for member feedback and make improvements to provide the best collaborative community for our membership. For example, in 2020 we created a work group to focus on our year-round training efforts. With their help, we have already seen an uptake in varied offerings and registrations. The new community platform will allow for even more areas of growth like forum engagement, file sharing, dynamic content and much more in 2021.

GROUP MEMBERSHIP	2021	2020
Institutional Members	227	230
System Members	37	37
Allied Members	40	48
TOTALS	304	326

2020 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.



TOM JOHNSON



Our first new inductee to the Hall of Fame, Tom Johnson, Associate Director / Sr Business Systems Analyst at Duke University, has provided outstanding service to the HEUG Membership, being an engaged member of a variety of HEUG communities since 2009, presenting numerous sessions at both Alliance and regional events, an Advisory Group Member, and serving as Chair of the Southeastern Alliance Conference. Tom has always been quick to step forward with his extensive knowledge and industry insight and good humor. During his tenure with the Financial Aid Advisory Group, he was justly outspoken and driven to help lead change within the group and for the HEUG as a whole.

Our first new inductee to the Hall of Fame, Tom Johnson, Associate Director / Sr Business Systems Analyst at Duke University, has provided outstanding service to the HEUG Membership. Tom is an engaged member of many communities; he is always willing to lend his expertise to anyone in need. He has played an integral part in our conferences, presenting multiple times at Alliance and regional events. Always willing to share his experiences and collaborate with our membership, Tom is an Advisory Group Member, and serving as Chair of the Southeastern Alliance Conference. Through the years, he has undoubtedly been generous with his extensive knowledge and good humor. During his tenure with the Financial Aid Advisory Group, he was justly outspoken and driven to help lead change within the group and for the HEUG as a whole.

Tom is acknowledged as an expert in Financial Aid within the United States, a person who promotes collaboration, and truly desires to improve the product we all use for the benefit of the entire higher education industry.

I would like to personally thank Tom for his dedication and contributions to the HEUG community that will continue to serve our membership for years to come.

- *BRITTANY MOON*
HEUG EXECUTIVE DIRECTOR

2020 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.



BUDDY COMBS



Our second inductee to the Hall of fame is as dedicated to the HEUG community as they come, Buddy Combs, Assistant Vice President of Financial Support Services at Kentucky Community and Technical College System. Buddy has been a member of the HEUG for more than 20 years and this year marks his 22nd Alliance attended. He has volunteered and engaged in the HEUG at every level, starting out as an Advisory Group member, then becoming a dedicated Board member, serving on the Alliance planning team, supporting our US and Global regionals from volunteering at the registration desk to presenting sessions at almost every conference he attends. Buddy has led many successful work groups, created white papers, been actively engaged in many communities, and chaired several successful board working groups.

During his time on the HEUG board, Buddy served in many leadership roles, successfully leading the advisory group reorganization work group, participating on the governance reorganization work group that significantly changed the structure of the organization, the boards longest serving Vice President of Product- a position that Buddy takes great pride in and there is no doubt about the love and support he receives from our advisory group members.

In 2022, Buddy will be rolling off as a member of the HEUG Board of Directors after serving for eight years. Buddy has been a selfless volunteer and has devoted thousands of hours for the greater good of the HEUG community. I would like to personally thank him for his leadership, commitment, and dedication to this great organization!

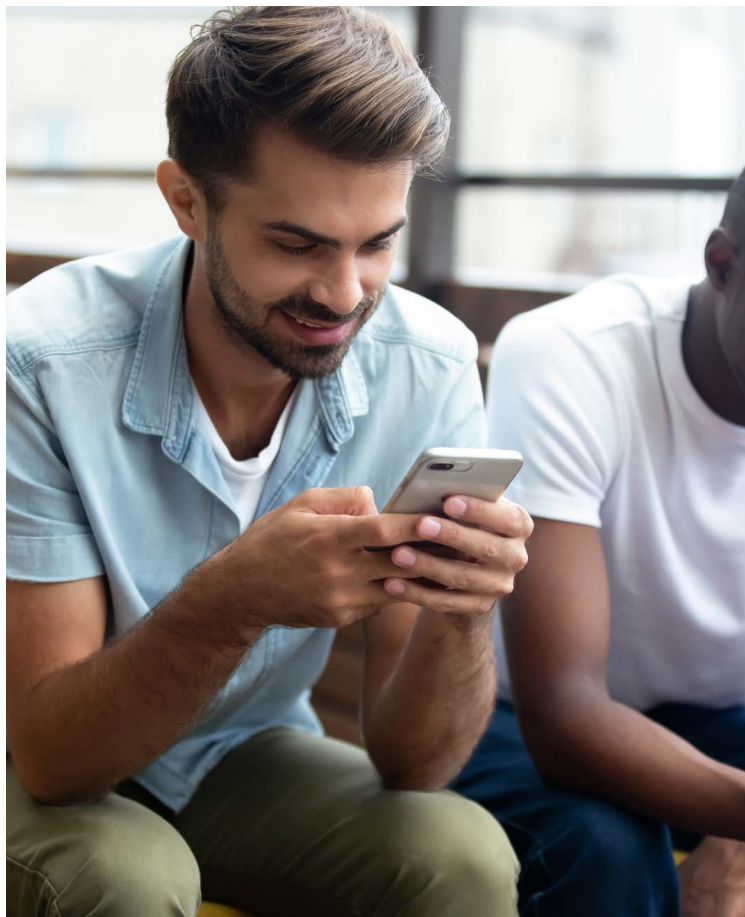
- *BRITTANY MOON*
HEUG EXECUTIVE DIRECTOR



FINANCIAL STATUS

FINANCIAL STATUS

At the end of the fiscal year, there was no change in the investment portfolio; however, an increase has been seen since the end of the year.



THE EFFECTS OF THE COVID-19 PANDEMIC CONTINUED TO BE FELT BY THE HEUG AS IN-PERSON EVENTS COULD NOT BE HELD AND VIRTUAL WAS OUR BEST OPTION.

As the pandemic continued to disrupt plans for in-person conferences, the HEUG conducted its second annual Virtual Alliance and International Virtual Alliance. Leveraging information and technology from the prior year and increasing the bandwidth for virtual sessions, with new vendors and tremendous reduction in expenses, the HEUG was able to close the year with a net increase of \$609,301.

Membership revenue, partner sales and investment income were strong, demonstrating that the HEUG is still a positive force.

Anticipating uncertainty for the future of the pandemic and in-person conferences, the budget for FY22 continues to be lean and limited to essential expenses. Negotiations with the conference center and hotels to reduce commitments has been a priority.

The Board is happy to report the annual audit was performed by Gelman, Rosenberg and Freedman (GRF) with no management comments.

LISA SKINNER

STATEMENT OF FINANCIAL POSITION

AS OF JUNE 30, 2021

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2020

ASSETS

2021

2020

● CURRENT ASSETS

Cash and equivalents	\$ 2,253,763	\$ 2,358,995
Investments	1,045,149	919,504
Accounts receivable	-	11,000
Prepaid expenses	166,061	104,505

TOTAL ASSETS	\$ 3,464,973	\$ 3,394,004
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LIABILITIES AND NET ASSETS

2021

2020

● CURRENT LIABILITIES

Accounts payable and accrued liabilities	\$ 69,650	\$ 228,991
Deferred revenue	301,700	680,421
TOTAL LIABILITIES	371,350	909,412

● NET ASSETS

Without donor restrictions	3,093,623	2,484,592
TOTAL LIABILITIES AND NET ASSETS	\$ 3,464,973	\$ 3,394,004

STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED JUNE 30, 2021

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2020

CASH FLOWS FROM OPERATING ACTIVITIES

	2021	2020
Change in net assets	\$ 609,031	\$ (318,706)
Adjustments to reconcile change in net assets to net cash (used) provided by operating expenses		
Unrealized gain	(112,265)	(27,749)
Realized gain	(4,452)	-
Decrease (increase) in:		
Accounts receivable	11,000	15,730
Prepaid Expenses	(61,556)	79,849
(Decrease) increase in:		
Accounts payable and accrued liabilities	(159,341)	190,457
Deferred revenue	(378,721)	301,641
Net cash (used) provided by operating activities	(96,304)	241,222

CASH FLOWS FROM INVESTING ACTIVITIES

	2021	2020
Purchase of investments	(13,876)	(13,876)
Proceeds from the sale of investments	9,014	-
Net cash used by investing activities	(8,928)	(13,876)
Net (decrease) increase in cash and cash equivalents	(105,232)	227,346
Cash and cash equivalents at beginning of year	2,358,995	2,131,649
CASH AND CASH EQUIVILANTS AT END OF YEAR	\$ 2,253,763	\$ 2,358,995

STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2021

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2020

REVENUE

2021

2020

Conference revenue	\$ 1,128,181	\$ 1,171,117
Membership dues	590,895	590,800
Partner Sales	275,362	227,013
Investment income, net	125,837	60,400
	<hr/>	<hr/>
Total revenue	2,120,275	2,049,330
	<hr/>	<hr/>

STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2021

WITH SUMMARIZED FINANCIAL INFORMATION FOR 2020

EXPENSES	2021	2020
Program Services:		
Alliance Conference	\$ 396,735	\$ 723,981
Communications and Membership	247,640	245,278
US Regional Conferences	145,839	301,822
International Conferences	17,947	124,356
Community Development	-	43,287
Cloud Symposium	-	421,655
Technology (TAG)	-	14,838
Products (PAG)	-	1,705
Total program services	808,161	1,481,525
Supporting Services:		
Management and General	707,117	881,193
Total expenses	1,515,278	2,362,718
Change in net assets from operating activities	604,997	(313,388)
Foreign currency translation	4,034	(5,318)
Change in net assets	609,031	(318,706)
Net assets at beginning of year	2,484,592	2,803,298
NET ASSETS AT END OF YEAR	\$ 3,093,623	\$ 2,484,592



HEUG PARTNERS

SPONSORSHIP MODEL

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



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

The HEUG Corporate Partners below have shown their significant support of our community by participating in our Corporate Membership Program, as well as Virtual Events in 2021.

The support given by our Partners allows HEUG to offer lower membership dues and event fees. Their expertise is a valuable asset, along with their participation in HEUG webinars and education programs.

2021 COMMUNITY SPONSORS

● Appsian	Premier
● Huron Consulting Group	Premier
● Oracle	Premier
● Workday	Premier
● Deloitte	Platinum
● Flywire	Platinum
● Nelnet	Platinum
● Sierra-Cedar	Platinum
● Touchnet	Platinum
● Transact	Platinum
● Amazon Web Services	Gold
● Baker Tilly	Gold
● Blackline	Gold
● ERPA	Gold
● Gideon Taylor	Gold
● Highstreet	Gold
● TCP	Gold



HEUG 2020 PARTNER OF THE YEAR

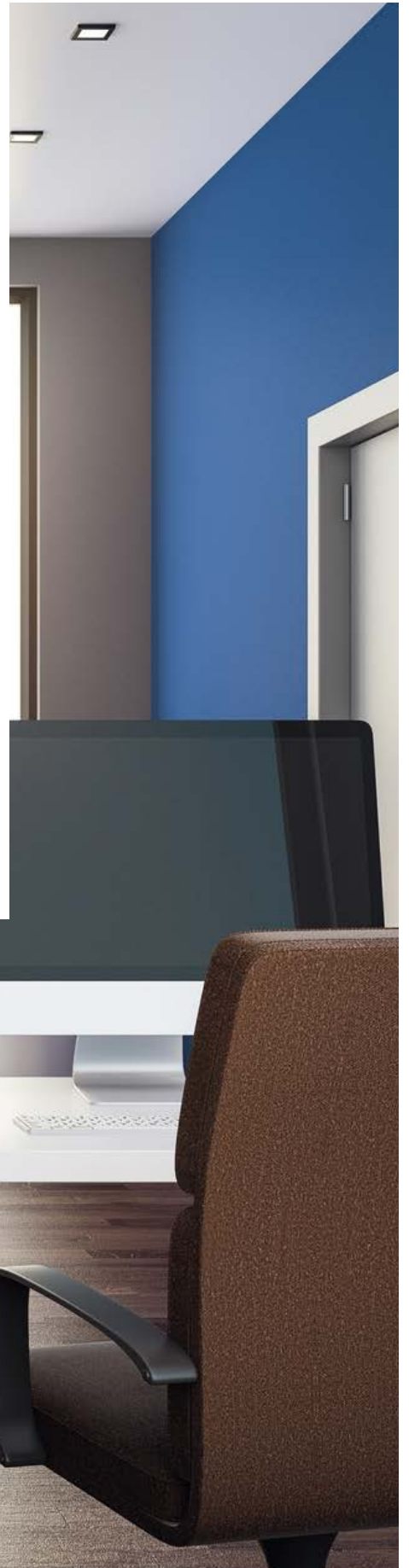
The HEUG has an amazing network of valued partners who support our members and organization each year. Huron Consulting was named the HEUG 2021 Partner of the Year.

Members were invited to nominate a partner that went above and beyond during the course of the past year. We asked these members to share stories of how their nominee impacted their institution in a positive way, and how that nominee represented the HEUG's Mission. Huron received numerous nominations including those from Baylor University, Hackensack Meridian School of Medicine, and Butler University.

The HEUG Nominations & Elections Committee scored all the partners against a rubric that includes total number of nominations, overall participation in 2020 for Alliance, US/International regionals, HEUG.Online and qualitative member submission.



THANK YOU
**FOR BEING A
MEMBER**



SEE YOU