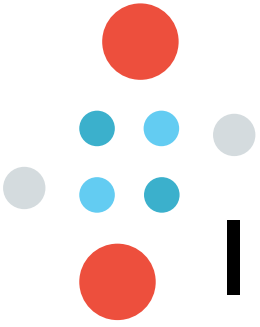


# ANNUAL REPORT



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# INTRODUCTION

# LETTER FROM THE PRESIDENT



Hello Everyone!

It is my pleasure to present your 2015 Annual Report of the Higher Education User Group!

Let me begin by saying what a pleasure it is to be one of the leaders of this organization. Having the opportunity to meet and talk with many of you around the world has truly been an honor and a privilege. At times, the responsibility and challenges have caused me to take a step back and realize what an opportunity this role has given me: No matter the obstacle I find joy because of the significance and impact it has on others' lives on both a personal and professional level.

As I reflect on the past year, there are countless examples illustrating how our volunteers and members are some of the greatest minds and contributors in the world. In 2015, we continued our historical successes, fulfilled our current efforts and initiatives, and took a more strategic look into future possibilities, all the while remaining true to upholding our core mission.

Our global expansion, adoption of additional mobile and cloud strategies, and establishment of a clear vision for where this organization is headed are just a few of the things you should be proud of. Not only did we successfully incorporate many of the things our members asked for but we also accomplished many additional goals that aligned with our vision, mission, and strategic plan.

I hope you find this year's Annual Report one of the first items in 2016 demonstrating the HEUG's continued support of transparent communication, focus on advocacy and inclusion, and passion to inform and educate.

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

And thank you for giving me this opportunity to share this journey with you!

Mario Berry  
Lone Star College System

# LETTER FROM THE EXECUTIVE DIRECTOR



HEUG Members and Friends,

It seems to have been a theme for the past few years that the HEUG continues to grow and evolve both in terms of the opportunities to fulfill its mission of Education and Advocacy, but also in terms of how to provide expanded services for our culturally pluralistic membership base. 2015 again was no exception!

As Mario Berry took over the Presidency he and I had a discussion about what I thought might be needed in his first year. After so much significant change over the past few years I told him I thought this should be a 'maintenance' year. He quietly absorbed my input, solicited similar feedback from others and then put together an excellent leadership plan that included a bit of maintenance but doing so while moving the HEUG forward.

With Mario leading our meetings in the spring and summer of 2015 a much focused strategic plan was developed that included a set of annual goals that the entire board focused on throughout the year:

1. Enhance the HEUG's support for communication, collaboration and education across the entire ecosystem, including a broad spectrum of applications and technologies relevant to the higher education community and market
2. Strengthen the HEUG's effectiveness in its advocacy role into and on behalf of our members, Oracle and the partner community
3. Increase HEUG member engagement and satisfaction
4. Ensure HEUG's continued organizational and financial health

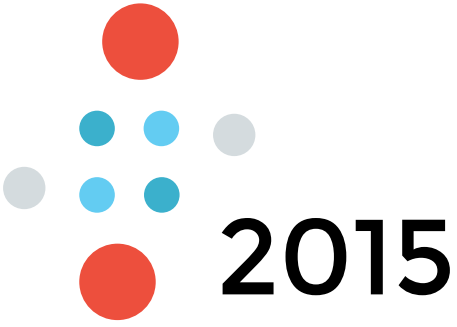
Mario's attention to detail and focus on completing the Vision 2016 document will allow the HEUG to move ahead while at the same time addressing any 'maintenance' requirements in the area of processes and by-laws.

Also, during 2015 a lot of focus on the evolution of the HEUG Advisory Groups took place. The changes that are now in motion will allow the HEUG to increase the quality of the advocacy it provides Oracle moving into the future. This evolution also allows a strong continued voice for the majority of our members who utilize 'on premise' applications, but also begins to develop a plan to give voice to our new members who are embracing Cloud alternatives. It was a busy year of change for the Advisory Groups that allows the HEUG to remain a relevant voice to Oracle moving forward.

With his continued leadership into the second year of his term, I am looking forward to the advancements Mario will facilitate throughout 2016!

Best regards,

Lew Conner, HEUG Executive Director



# EXECUTIVE SUMMARY

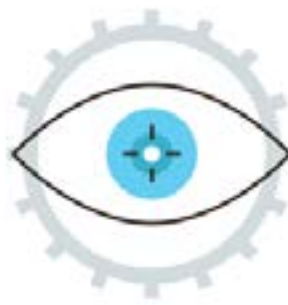


The Higher Education User Group (HEUG) is a Non-Profit, global organization consisting of Higher Education institutions that use application software, services and support from the Oracle Corporation. The Higher Education User Group (HEUG) is the largest independent, self organized industry-specific 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.



DISCOVER



REVIEW



DEVELOP

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.

The HEUG organization in 2015 turned its focus toward strategic initiatives that align with the evolution that is taking place in academia, and the business solution applications. The HEUG has been at the forefront of Cloud discussions and strategies to bring direction to the community. The organization has continued to build on its plans to restructure the Advisory Groups to enable agility and nimbleness for handling the changing landscapes, both in education and the ERP space.

# EXECUTIVE SUMMARY



**INVESTMENT MODEL**

The HEUG Board of Directors have worked tirelessly to make sure the community is kept informed, educated, and advocated for with our partners. For example, our VP of Products continues to structure and drive change for the Advisory Groups and our VP for Community Relations has been hard at work building relationships around the globe, and bringing new ideas for global support. The VP for Finance continues to keep us financially sound, and our Socious team continues to deliver innovative solutions and technologies to enhance our online experience, including maintaining excellence for our Alliance conference each year, and support for all our regional conferences around the globe.

The HEUG evolution will continue in 2016 with great momentum because of the foundation and vision set forth in 2015. Advocacy, Education, and Collaboration will continue to be our focus in 2016, which translates into a great future for the organization.



# OUR ORGANIZATION: 2015 IN REVIEW



The HEUG and the industry it serves are well-known for their 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 around the globe, these activities are propagated to support an energetic global community.

In 2015, HEUG membership has expanded to include regional communities on seven continents. An ever growing percentage of our member institutions are being added from outside of North America.

We now support communities and events in Asia, Australia/New Zealand, Europe, and Latin America. While our international regions continue to grow as multi-country regions we are also seeing an increasing number of communities developing at the local country level. Communities within the broader regions are growing and providing solutions for our members. In EMEA (Europe, Middle East, and Africa) these include the Senior User Group (SnUG) in the UK, the Dutch Education User Group (DEUG), the South Africa HEUG, and the Arab HEUG. In Latin America groups in Colombia, Mexico, and Peru have formed to assist in the development of the Latin America region. In Asia adding to the foundation group in Singapore are groups being formed in the Philippines, Hong Kong, India, China and Pakistan. The HEUG recognizes the need to support these communities, many facing similar challenges as institutions in the United States, as well as some additional issues posed by differences in educational systems, functional requirements, culture, language, and time zones.



As these new communities flourish and the HEUG looks for the best way to support them, we remain focused on serving the global community.

What can universities in North America and Europe learn from the experiences of universities in Asia and Latin America?

How can we ensure that our international members have the ability to attend our premier Alliance conference?

How can we integrate and streamline our advocacy efforts to support our entire community and continue to speak with one coherent voice?

# OUR ORGANIZATION: 2015 IN REVIEW

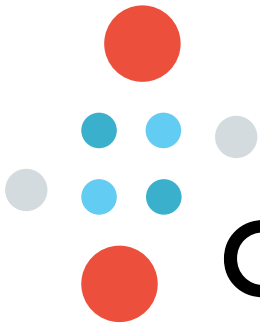
These are among the challenges that face the HEUG over the next few years. While we may not have all of the answers, we know we will meet these challenges with the same creative and sustainable solutions that have made us the organization we are today.

We have seen these creative solutions in many of the global events we have participated in over the past year. Our Alliance Down Under conference continues to serve the needs of our community in Australia and New Zealand. In November 2015, our fourth official EMEA Community Conference was held in Rotterdam, The Netherlands. In November 2015 our Asia members held their fourth annual event in Hong Kong. In North America, two new communities formed; the Southwest Regional User Group (SWHEUG) covering Arizona, California, Colorado, Nevada, New Mexico and Utah and the North west Regional User Group (NWHEUG) covering Idaho, Montana, Oregon, Washington, and Wyoming. The SWHEUG will have their first conference in July at the Hilton in Costa Mesa, CA. The other US Regionals include the Midwest HEUG, the Southeast Atlantic Regional Higher Education User Group (SEARUG), the South Central Regional User Group (SCHRUG) and the Mid- Atlantic.



No matter the event, the theme remains the same: creating educational experiences for our global community of practice and engaging in advocacy efforts on their behalf.

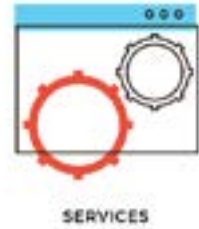
As we ended our year at our annual Board of Directors meeting in Seattle, we could continue to say that we had circled the globe to connect our members and we speak with one voice for all of them.



# **COMMITTEES & WORKING GROUPS**

# CLOUD MONITORING WORKING GROUP

The Cloud Monitoring Working Group was formed at the Board's request after the 2014 Alliance Conference. The group's charge from the HEUG Board was to help keep the Board and the membership apprised of Oracle's efforts to bring cloud-based SaaS (Software as a Service) applications and services to the Higher Ed marketplace.



**EDUCATION**

Oracle currently has cloud applications available for human resource management, financial management, financial planning and customer relationship management. In 2014 they announced plans to build a Student Cloud product and have since partnered with a number of institutions to help develop the design.

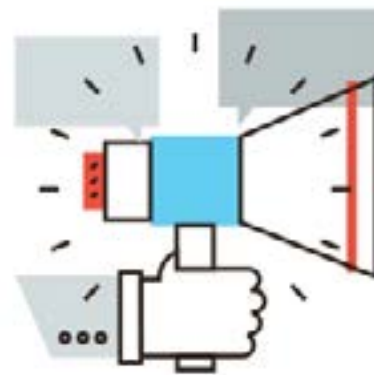
The initial focus was on supporting non-traditional educational offerings and on providing a flexible user interface that works well with any device. The longer-term plan is to provide a comprehensive student product offering.

In January of 2015, the work group surveyed the HEUG membership to get a sense of the level of awareness of Oracle's cloud product offerings; to identify perceived advantages and disadvantages of cloud applications, and to ask what the HEUG could do for its members to help them evaluate such applications. The group held monthly conference calls throughout the year and also met in person at the PAG Summit in Nashville. We also spoke with a number of people from Oracle with knowledge of their cloud SaaS products.

After Alliance, the group began work on a white paper which was published in August on HEUG Online, titled "Considerations for Moving to the Cloud". The group followed up the white paper with a "Cloud Considerations" webinar in November.

Plans for 2016 include resurveying the membership for a second year and hosting a webinar on the state of Oracle's Student Cloud product as well as ongoing conversations with Oracle about cloud application developments.

The work group's members were recruited primarily from the HEUG Board and from the Product Advisory Groups to ensure representation from a broad set of product areas.



**DIGITAL MARKETING**

# CLOUD MONITORING WORKING GROUP

## 2015 Members





NAME	TITLE
Judy Bauman	AD PAG
Cindy Bixler	Member
Randy Durante	Member
Kelli Heiser	Member
Terence Houser	Member
Criss Laidlaw	Chair
Marty Mag Uidhir	Member
Cindy Martin	HRMS PAG
Teri Thorsen	Member
Tina Thorstenson	Member
Jeremy Trumble	Member
Nadeem Zaidi	PTP PAG

# COMMUNICATION COMMITTEE

The HEUG Communication Committee has representatives from each Advisory Group, Young Professionals, the Volunteer committee, Socious, and the Board of Directors.

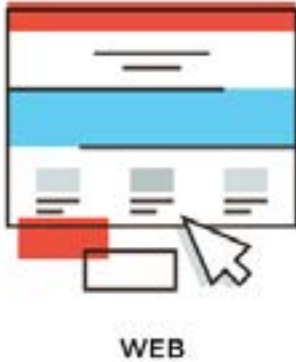
The HEUG Communication Committee continues to look for new and innovative ways to inform the HEUG membership, whether it's through social media, blogs, newsletters, or events. Communication is the heart and soul of the HEUG, without good efficient communications, we would not achieve transparency, and effective collaboration. We have many channels of communications to reach out to our member. Our main form of communication to the community is the monthly newsletter; the newsletter was re-designed at the end of 2014 and has evolved into a must have form of communication for the community. The HEUG Advisory Groups communicate with their various constituents at least quarterly, using the same forums mentioned above, they inform, educate, and advocate in lock-step with the HEUG strategic vision for the community.

In 2015 for the first time the Advisory Groups communications representative joined the Communications Committee to begin discussions around best practice for communications across the groups. Work is still in progress to develop a newsletters template, and spent time to educate and socialize the representative's in the use of twitter, Facebook, and blogs as additional means of communications to their constituents. In 2016 the committee will continue to collaborate on the development of best practice initiatives for the groups, as well as participating in more strategic communication initiatives as assigned by the HEUG board of directors, and the president of the board.

Promoting Social Media	Membership News
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>SOCIAL MEDIA</p> </div> <div style="text-align: center;">  <p>BLOGGING</p> </div> </div> <ul style="list-style-type: none"> <li>• Publishing monthly blogs</li> <li>• Tweeting and re-tweeting important communications from other members</li> <li>• Streaming tweets live on HEUG.Online</li> <li>• Increasing our social media following:             <ul style="list-style-type: none"> <li>• 👍 Facebook – 394 New Facebook Page Likes</li> <li>• 🐦 Twitter – 424 New Twitter Followers</li> <li>• + Encouraging Advisory Groups to setup twitter accounts for use at the Alliance conferences</li> </ul> </li> </ul>	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>NEWSLETTER</p> </div> <div style="text-align: center;">  <p>VIDEO</p> </div> </div> <ul style="list-style-type: none"> <li>• Sending more communications more frequently</li> <li>• Continue to make improvements to the HEUG monthly newsletter</li> <li>• Improving the annual membership survey and sharing more results with the membership</li> <li>• Continue to improve the online version of the annual report, no longer paper based!</li> <li>• Work on improving our translation services for our HEUG.Online Webinar program. We would like to ensure that all members are able to participate in the education series.</li> </ul>

# COMMUNICATION COMMITTEE

## Promoting Social Media



- Upgrading the membership instructional profile page to make it easier to use, and to capture more pertinent information about the member institution that could help the HEUG provide better service and communications to the membership.
- Gathering more statistics about the webinar attendance and quality so that we can continue to improve our services. We have set a goal to provide at least six webinars per month.
- Honoring our volunteers by sending them and their institution an appreciation letter for all of their hard work during 2015.
- Continue to develop and improve the conference mobile app. Planning to expand the mobile app to more US Regional and international conference.
- Continue to promote institutions and members in the HEUG Spotlight

# COMMUNICATION COMMITTEE

## 2015 Members

NAME	TITLE
Maureen Knight-Burrell	Chair
Paula Leadon	Student Records
Ashley Kennedy	Socious
Brittany Moon	Socious
Bonnie Raper	Student Financials
Tracey Robey	CRM
Damonique Sampson	Admissions
Pam Stuccliffe	Contributor Relations
Shareen Thewke	Financial Aid
Valerie Turner	Volunteer Committee
Barbara Vollmer	HRMS
Kelly Wilker-Draves	Academic Advising
Nadeem Zaidi	Procurement to Pay
Elisabetta Zodeiko	Reporting
Erica Zuniga	HRMS



# GLOBAL INTEGRATION WORKGROUP

2014 and 2015, including feedback from the annual survey of membership.



**DISTANCE EDUCATION**

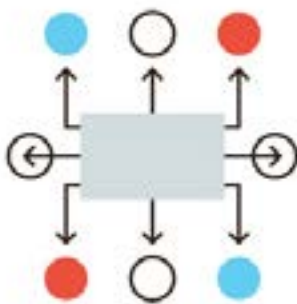
In 2015, discussions were held with Work Group members representing all five HEUG global regions

- 📍 Australia/New Zealand – ANZ;
- 📍 Asia-Pacific – APAC;
- 📍 Europe, Middle East and Africa – EMEA;
- 📍 Latin America – LA; and
- 📍 North America – NA.

Imagine those discussions taking place across eighteen time zones!

The charge to the group was as follows:

- Engage the global Board members to determine the best methods for recruiting global members to serve on PAGs or other volunteer opportunities.
- Enhance the effectiveness of our PAGs in advocating for global functionality.
- Implement a HEUG Board and PAG/TAG model that increases global participation.
- Advocate more strongly with Oracle to allocate product strategists that are focused on global localizations.
- Review our financial status to determine if more global investments are feasible (travel budgets, subsidies, translation services, etc.)
- Make investments that reduce the impact of language barriers and limit travel costs, and thereby stimulate positive growth in the global arena.
- Provide services to our member institutions that allow them to connect with Subject Matter Experts around the globe.



**PLANNING**



**MARKET ANALYSIS**



**DEPLOY**

# GLOBAL INTEGRATION WORKGROUP

The group made thirty-eight recommendations (based on the format of answers to questions) for the HEUG Board of Directors at the November, 2015 board meeting to meet the charge above. The recommendations were discussed and approved with minor modification at the December board meeting. Those recommendations can be grouped into the following general categories:

- 1 Training on cultural inclusiveness for the Board and PAGs
- 2 Development of and support for global volunteers
- 3 Modifications to and affirmation of organizational structures
- 4 Opportunities for enhancements at Alliance
- 5 Continuation of developing relationships with non-N.A. members

Look for changes based on these recommendations, including at the 2016 Alliance Conference.

# GLOBAL INTEGRATION WORKGROUP

## 2015 Members

NAME	TITLE
Teri Thorsen	Chair
Gail White	Member
Luis Martinez	Member
Yen Teck Kong	Member
Ian Holmes	SR PAG
Jose Flores	Member
Jaime Caro	Member
Jennifer Bayless	RBI PAG
Jane Broad	Member
Carolien ten Oever	AA PAG

# RE-ORGANIZATION WORKGROUP

In March 2015, the HEUG Board presented a number of potential re-organization initiatives at the Advisory Group Summit in Nashville, and then proceeded to collect feedback from a wide variety of sources. After many hours of analysis and deliberation, the Board concluded that the most prudent way forward was to use the natural advisory group election cycle to begin a re-sizing exercise that will reshape the HEUG organizational landscape over the next few years.



**BIG IDEA**



**REFINE**



**CORE IDEA**

The following guiding principles behind these changes were shared with the entire HEUG membership:

- The ultimate goal is not to reduce the size of the advisory groups. The goal is to restructure the distribution of resources across the advisory groups.
- The re-distribution of resources is a crucial step for the HEUG as we adapt to a changing engagement model with Oracle.
- Some existing advisory groups will indeed see a reduction in headcount; others may be largely unaffected. As these adjustments occur, new advisory groups/work groups will likely be born.
- As we work through these changes, we want to do so in a sustainable and fiscally responsible manner.

# RE-ORGANIZATION WORKGROUP

The approach the HEUG Board decided to take seeks to balance decisive action with the need to maintain the strength and health of the HEUG throughout the transition period. The advisory group election cycle in the fall of 2015 did move more advisory groups toward the standardization goal of 7 core members, while leaving some groups with a higher headcount where that is warranted by the scope of their responsibilities.



We plan to continue to work closely with the advisory group leadership, the Board liaisons, and with Oracle in a manner that reflects the high value we place on collaboration and transparency. In the year ahead, we will continue to pursue our re-sizing effort, and also focus on several other key objectives:

- 1 Training on cultural inclusiveness for the Board and PAGs
- 2 Development of and support for global volunteers
- 3 Modifications to and affirmation of organizational structures

We look forward to bringing the entire HEUG community forward into a future where we remain true to our mission, and thereby support the greater mission of higher education.

# RE-ORGANIZATION WORKGROUP

## 2015 Members

NAME	TITLE
Kathy Bader	Member
Jane Baratta	Member
Cindy Bixler	Member
Jane Broad	Member
Maureen Brown	CRM PAG
Tammy Cortes	GL PAG
Maureen Knight-Burrell	Member
Todd Langille	Chair
Jason McIntyre	AD PAG
Michele Thibodeau	Member
Teri Thorsen	Member

# SOCIOUS TOOLS



**POWER TOOLS**

In the 2014 annual report we discussed forming a HEUG.Online working group to look at improving the HEUG.Online experience for the membership.

In 2015 a Tools working group was formed to meet the goal of improving the HEUG.Online experience.

This workgroup was formed in early March 2015 and began monthly conference calls to start planning the revamp of the overall HEUG.Online site while taking advantage of the new UI Engine from Socious to create a responsive website.

The project began in early spring 2015 and we started with a Spring Cleaning Initiative in which we reviewed the entire content of HEUG.Online and began to archive content older than seven years. These included Forums, Events, Education Series Webinars and Discussion Topics.

During this time we archived 85,000+ forum post older than 2009; deactivate 80 groups older than 2011 and re-organized over 4,000 files (Alliance, International and US Regionals) into Years and Tracks to allow member to search efficiently.



**DATA VISUALISATION**

# SOCIOUS TOOLS

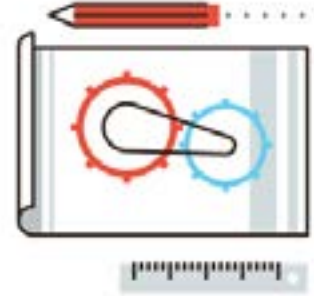
## HEUG.Online Redesign



**CUSTOMER SURVEY**



**ANALYTICS**



**CONSTRUCT**

In April, the team members attended five one hour on-line training sessions on the New Socious User Interface to develop an understanding of the new product and how it would work with HEUG.Online. In addition Cyndie Winrow and Buddy Combs attended the annual Socious User Conference for hands on experience with the new UI Engine. During this time the team members reviewed the 2014 Board Annual Membership Survey to gather information on the comments our members for HEUG.Online. Based on the responses, the Tools Committee developed a new survey to elicit feedback on improvements to HEUG.Online. In June the survey was sent out asking four questions with 313 responses:

**How often do you visit HEUG.Online?**

TOP RESPONSE: Weekly

**What are the top 5 things you visit HEUG.Online to Accomplish?**

TOP RESPONSE: View Forums

**What are 3 positive things about HEUG.Online that you like?**

TOP RESPONSE: The ability to share resources/information

**What are 3 challenging things about HEUG.Online that you'd like to see addressed?**

TOP RESPONSE: Navigation/Search



# SOCIOUS TOOLS

## HEUG.Online Redesign



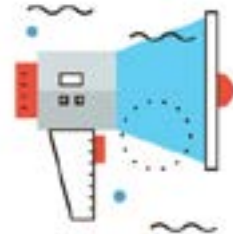
BRANDING



DESIGN



CODING



PROMOTE

Based on the survey results the Tools working group began work on the redesign the HEUG.Online site using the new UI Engine in June. In September we expanded the working group to include a few board members for User Testing and requested feedback on the new site. Based on these responses the Tools working group made some additional modification and schedule a release date of November 04, 2015 to have a soft launch prior to the Alliance 2016 Housing opening. During October the Socious Team developed several HEUG.Online Guided Tour Videos on the new site and module layouts which included instructions on the Homepage, Communities, Blogs, Forums, Files, Enhancements and User Profile. You can view them online here. In addition Tips & Tricks Blogs were produced. The Tools workgroup finished the testing phase and the new site went live on October 30, 2015 and was a success.



The Tools workgroup will continue to tweak and improve the site with some additional features for our next steps.

An additional satisfaction survey is planned for feedback on the new site and we are planning on expanded social login and social networking for the members. There are additional training videos planned and we continue to update blogs and Tips and Tricks.

# SOCIOUS TOOLS

## 2015 Members

NAME	TITLE
Brett Bendickson	Member
Buddy Combs	Member
Kee Chang	Member
Amy Ewing	Socious
Tom Johnson	Member
Brittany Moon	Co-Chair
Abbi Sennett	Member
Cyndie Winrow	Co-Chair

# VOLUNTEER COMMITTEE

In 2015, the Volunteer Committee selected a new chair, Renato Cayuela from University of Colorado, and reorganized other positions within the committee (link to short bio). The group has been participating in monthly conference calls in order to consolidate goals and strategies for 2016 which will include a new focus on international members and straightening relationships with the advisory groups in order to clearly identify volunteering opportunities and support recruiting by engaging HEUG members effectively in the process. The mission of the HEUG Volunteer Committee is to encourage a sustainable flow of high-quality, diverse, and dedicated volunteers to support the overall mission of the HEUG.



**SEARCH COMMUNITY**

The committee is focusing their objectives within three categories:  
**Recruitment, Recognition, and Resources.**

Some of the strategies of the Volunteer Committee are to



**STRATEGY**

- Oversee the HEUG Hall of Fame induction
- Recognize current and retiring members of the Advisory Groups, Board, working groups, and conference planners and presenters
- As we did in 2015 with the new advisory group appreciation letter, the Volunteer committee will continue to explore ways to recognize our HEUG volunteers.
- Increase our presence at future Alliance conferences by participating in stop and share sessions which will give us a great opportunity for face-to-face interaction with HEUG community, specially international members
- Engage members by keeping Social Media and HEUG.Online Volunteer Committee pages up-to-date with latest discussions and Volunteers testimonies from different areas
- Communicate regularly to the HEUG community on ways to volunteer and current opportunities

# VOLUNTEER COMMITTEE

## 2015 Members

NAME	TITLE
Rento Cayuela	Chair
Ashley Kennedy	Socious
Maureen Knight-Burrell	Board Liason
Brittany Moon	Socious
Samuel Shunk	YPG Liason
Michele Thibodeau	Conference Liason
John Jeunnette	Member
Carolee Cohen	Member
Valerie Turner	Member

# YOUNG PROFESSIONALS GROUP

The fundamental purpose of the YPG is connect, empower, and prepare young professionals to cultivate the highest class of future leaders both in the HEUG and at member institutions. To support this purpose, the YPG has set forth 3 strategic goals for the coming year: **Promote Awareness, Build and Share Resources, and Foster Member Development.**

2015 was a busy year for the Young Professionals Group. This year saw both a transition of Committee chair and Board Liaison, as Heather Soesbe, and Maureen Knight-Burrell stepped away from the board to pursue other opportunities. In their places, Sam Shunk has taken the chair position, and Scott Munson volunteered as board liaison. As the group settles in to new leadership, we are constantly looking for new ways to have a positive impact on the HEUG community. The new, quarterly “YPG on the Rise” segment will continue in to the new year, selecting prominent young professionals that are active in the HEUG community to highlight in the HEUG Newsletter. We will also continue to have a strong presence at the regional conference in order to raise YPG visibility in the HEUG community.

**Want to get involved in the YPG? Be on the lookout for applications for open positions in February and March. You too can make a difference to the HEUG community!**

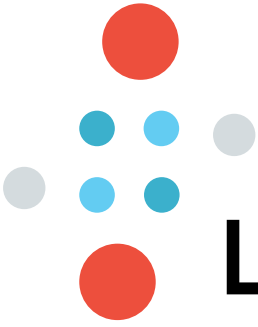
## YPG 2016 Strategic Goals

Promote Awareness	Build and Share Resources	Foster Member Development
<div data-bbox="203 1260 430 1491" data-label="Image"> </div> <div data-bbox="203 1512 430 1543" data-label="Caption"> <p>DIGITAL MARKETING</p> </div> <p data-bbox="138 1564 495 1995">The YPG will strive to promote awareness of opportunities within the HEUG, and in the College and University IT industry as they relate to Young professionals. By increasing the presence of the Young Professional's Group in the HEUG community, we will seek to position ourselves both as clearinghouse for new young members, and as future leaders within and outside of the HEUG community.</p>	<div data-bbox="625 1260 852 1491" data-label="Image"> </div> <div data-bbox="706 1512 771 1543" data-label="Caption"> <p>BUILD</p> </div> <p data-bbox="552 1564 917 1995">The YPG will create and maintain a shared pool of resources that will be used to generally support and promote the YPG and the greater HEUG community. The purpose of this is twofold: 1) to help maintain the legacy of the YPG by minimizing loss of knowledge due to turnover and 2) to develop a library of resources available to all young professionals in service of their own career and professional needs.</p>	<div data-bbox="1112 1260 1339 1491" data-label="Image"> </div> <div data-bbox="1193 1512 1258 1543" data-label="Caption"> <p>OPEN</p> </div> <p data-bbox="982 1564 1485 1995">The fundamental purpose of the YPG is to cultivate connected, empowered, and prepared members of the HEUG community. To this purpose, the YPG will generate career development initiatives of young professionals in the HEUG. These initiatives will seek to connect young professionals with experienced and successful members of the HEUG community to glean the requisite knowledge to create the best class of future leaders, and ultimately continue the legacy of the HEUG for decades to come.</p>

# YOUNG PROFESSIONALS GROUP

## 2015 Members

NAME	TITLE
Samuel Shunk	Chair
James Glickman	Secretary
Sarah McConville	Regional Conference Liaison
Heather Soesbe	Member
Karen Tellett	International Member
Jane Wilson	Communications



**LEADERSHIP**

# HEUG BOARD OF DIRECTORS

The HEUG is governed by a Board of Directors. The Board consists of the President, the Past-President, twenty two Directors elected by the HEUG membership, 3 Conference planning team members and up to 4 additional Directors appointed by the HEUG President with the approval of the Board, and the Past President. Elected Directors serve for a term of three years and may serve no more than two consecutive terms. Appointed Directors serve for a term on one year and may be reappointed. The Alliance Conference Planning appointees serve a 1 year appointment.

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, and consist of the following:

- Vice President of Administration
- Vice President for Communications
- Vice President for Community Development
- Vice President for Products
- Vice President for Technology
- Vice President of Finance/Treasurer
- Secretary

The President also designates one of the five Vice Presidents to serve as the Executive Vice President, who will complete the President's term if the President is unable to and will preside over meetings in the President's absence.

The Board is responsible for overseeing and approving nominations of members to the various Product Advisory Groups (PAGs) and the Technical Advisory Group (TAG). Those groups are responsible for working with the HEUG membership and Oracle on issues relevant to the appropriate areas within specific products or the technological infrastructure. Those groups do much of the detailed work of the HEUG and are instrumental to the HEUG's effectiveness. Each Advisory Group is assigned a Board member as a liaison.

The Board also establishes a number of committees and working groups to assist in the governance and administration of the HEUG, and to address specific issues that do not fall within the purview of a particular PAG or TAG. These committees and working groups usually include a mixture of Board members and others.

As Oracle continues to expand its product line via acquisitions and development, and as the community of Higher Education users of Oracle application software expands and evolves, the Board continues to review the scope of the HEUG and to propose changes in structure and governance that reflect the changing nature of the products and the organization.



# HEUG BOARD OF DIRECTORS

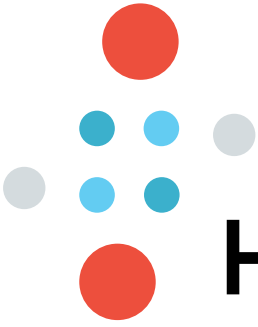
## 2015 Board of Directors

NAME	TITLE
Mario Berry	President
Steve Hahn	Past President
Jane Broad	Executive Vice President of Product/EMEA Rep
Criss Laidlow	Vice President of Administration
Maureen Knight-Burrell	Vice President of Communications & Membership
Teri Thorsen	Vice President of Community Development
Terence Houser	Vice President of Technology
Dan Youngblood	Vice President of Finance/Treasurer
Todd Langille	Secretary
Michele Thibodeau	Alliance 2016 Conference Chair
Luis Martinez	Board Member - Appointed
Jaime Caro	Board Member - Asia HEUG Rep
Gail White	Board Member - ANZ HEUG Rep
Buddy Combs	Board Member - Vendor Relations
Deborah Mero	Assistant Treasurer
Cyndie Winrow	Board Member - EBS Rep
Kathy Bader	Board Member
Brad Finley	2 Year & Technical College Representative
Scott Munson	Board Member
Gayle King	4 Year & Above Representative
Jason Wenrick	CIO Representative
Debby Hill	Past Conference Chair
Jane Baratta	Alliance 2016 Program Chair
Lew Conner	Executive Director
Stan Jakubik	IOUC Spokesperson

# HEUG BOARD OF DIRECTORS

## Past Presidents of the HEUG

NAME	INSTITUTION	TERM
Clyde Morrell	Brigham Young University	1996 - 1998
Helen Mohrmann	Cornell University	1998 - 1999
Dave Edmondson	Texas Christian University	1999 - 2000, 2000 - 2001
John Gohsman	University of Michigan	2001 - 2002
Paul Martin	University of Western Ontario	2002 - 2003
Ola Faucher	University of Kansas	2003 - 2004
Mike Ten Eyck	Texas Christian University	2004 - 2005 (March - August)
Joe Moreau	Mira Costa College	2005 - 2006 (August - March)
Tom Scott	University of Wisconsin, Madison	2006 - 2008
Stan Jakubik	University System of Maryland	2008 - 2010
Kari Branjord	University of Colorado	2010 (March to December)
Ted Simpson	Maryland Institute College of Art (MICA)	2008 -2013
Steve Hahn	University of Wisconsin, Madison	2013 - 2015
Mario Berry	Lone Star College System	2015 -Present



# HALL OF FAME

# HALL OF FAME

## 2016 INDUCTEES



### **Ola Faucher – Director of Human Resources, University of Kansas**

Ola was one of the initial founders of the HEUG and served as the HEUG first became incorporated, as the HEUG first met with Socius to develop HEUG.Online, but also she served as President of the HEUG during the turmoil of the Oracle purchase of PeopleSoft. She was the HEUG spokesperson for Higher Education on the change helping to write a letter of support for Peoplesoft that was printed in the Chronicle for Higher Education.

Ola worked with the HCM product long before Campus Solutions was developed, participating with the original group to build an organization of higher education users of HCM PeopleSoft starting in the version 4 days. Ola has been active in her industry as well, being awarded a CUPA best practices award several years ago for removing University of Kansas (KU) employees from the State Civil Service system. Though Ola's role has changed and she no longer has direct oversight of the PeopleSoft system, she still monitors and shares information from the list serves. As a founding HEUG board member, volunteering prior to the actual formation of our group, Ola defines what it takes to be a Hall of Fame member.

# HALL OF FAME

## 2016 INDUCTEES



### **Gail White – Academic Registrar, University of Newcastle**

During her five years of her leadership the ANZ region has developed significantly, in particular in bringing together technical, business and vendor expertise, and bringing a strategic focus to ANZ HEUG discussions. Gail has been an active member of the ANZ HEUG for over 10 years. As Chair/President of the ANZ HEUG she also served on the HEUG Board member for five years. Gail's more than 25 years' experience in the Australian higher education sector, and specifically her position as Academic Registrar at the University of Newcastle, has allowed her to develop a deep understanding of the sector. She is a highly respected senior professional amongst Australian and New Zealand institutions and higher education more broadly. She has led the development of the ANZ HEUG annual 'Alliance Downunder' conferences and the 'mini-HEUG' sessions between them. She has set up study tours and site visits with HEUG and Oracle colleagues, for ANZ members attending Alliance in the US. Overall she has the ANZ HEUG away from a

She is a longstanding advocate of improving communication between the IT professionals and business owners of systems within universities and has extended that positive reach to our valued system partners including PeopleSoft/Oracle. Under Gail's leadership the ANZ HEUG has been considerably strengthened with new members and product lines expanding the ANZ HEUG community. The Alliance Down Under conference has become an enduring success and Gail's tireless advocacy has ensured that the ANZ region maintains a strong voice globally with both the HEUG and Oracle. Gail is a worthy recipient of this honor as a long standing community member that has volunteered her time and energies over many years to the ideals of the HEUG.

# HALL OF FAME

## 2016 INDUCTEES



### **Jason McIntyre - Team Leader, Student Information Systems, University of The Sunshine Coast**

Jason has been a major volunteer and contributor to the HEUG for nearly 10 years. While he has had a tremendous impact within the ANZ HEUG over the years, he broadened his volunteer reach to serve on advisory groups including most recently as the chair of the Admissions Advisory group. He led the best practices session at the 2015 PAG-Summit for incoming PAG Chairs and Co-Chairs. Jason's contributions to this session and advice have been invaluable to Advisory Group members as the HEUG goes through re-organization around newly formed strategic goals. He consistently makes thoughtful comments and suggestions during the Product council calls. Jason consistently assists other members and freely shares his knowledge through conversations at Alliance Conferences and excellent advice over the various community forums. Through his dedicated volunteerism both within his international region and his support of the all HEUG members globally we welcome Jason to the Hall of Fame.

# HALL OF FAME

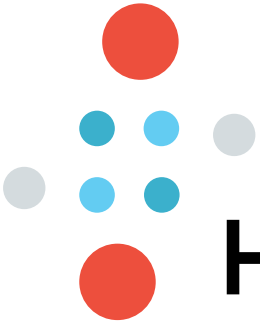
## 2016 INDUCTEES



### **Tina Thorstenson – Assistant Vice President and Chief Information Security Officer, Arizona State University**

Tina's support for the HEUG spans nearly 20 years. She understands the importance of the organization and is one reason why the organization is exceptional. Tina first became involved with the HEUG while at Northern Arizona University and continued when she moved to Arizona State University. As a volunteer for the HEUG, Tina has served on Advisory Groups for both Products and Technology also serving in a leadership roles for both, has led tracks for the Alliance conference, served for 6 years on the HEUG Board of Directors, including serving as the Vice President of Technology.

During her time on the HEUG Board Tina took the lead on all technical related issues, but also served as an expert for all HEUG members with any important security issue, be it concerns with Oracle applications, or other security concerns within the industry. The HEUG is only as good as it leaders and members - the HEUG is a better organization for Tina's participation and contributions.



**HEUG VISION**



# HEUG HISTORY

Described in detail in the History section of the HEUG 2009 Annual Report, the organization we now know as HEUG traces its origins to the grass roots efforts of several dedicated individuals at the handful of higher education institutions that were the early adopters, beta partners, and charter institutions for PeopleSoft's applications in the mid to late 1990s.

The organization was originally known as HESIG (Higher Education Special Interest Group) and held three conferences under that name in Dallas, Texas from 1998 to 2000. The HEUG was legally incorporated as a 501(c)(3) organization in 2001, firmly establishing itself as the official, independent voice for PeopleSoft's higher education customers.

One of the greatest values provided by this organization has been the opportunity to work collegially alongside other application users to share best practices in using and maintaining each institution's systems.

The scope of the HEUG has expanded considerably, both geographically and in terms of the range of software products it encompasses. One of the most significant events in the HEUG's history was the acquisition of PeopleSoft by Oracle Corporation in late 2004. The HEUG established the same type of strong, independent and productive relationship with Oracle as it had with PeopleSoft. Higher education institutions running Oracle's E-Business Suite (EBS) were welcomed into the HEUG community, and representatives from those institutions were added to the HEUG Board and Product Advisory Groups (PAGs). The geographical scope of the HEUG has grown both because of the inclusion of EBS institutions and because of the increasing adoption of PeopleSoft products, especially Campus Solutions, throughout the world.

# VISION 2016



**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.

The goal 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.

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, selforganized 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.

## 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.



**EDUCATION FOR ALL**

# VISION 2016

## 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.

# VISION 2016

## 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.



**GOAL**



Enhance the HEUG's support for communication, collaboration and education across the entire HEUG ecosystem



Strengthen the HEUG's effectiveness in its advocacy role



Increase HEUG member engagement and satisfaction



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

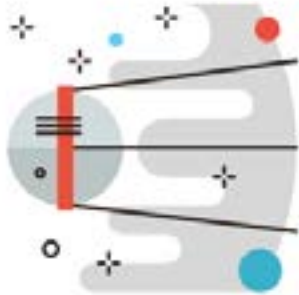
### Overall HEUG Value Statement

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:
<ul style="list-style-type: none"><li>• Enhancing the HEUG's support for communication, collaboration and education across the entire HEUG ecosystem.</li></ul>
<ul style="list-style-type: none"><li>• Strengthening the HEUG's effectiveness in its advocacy role.</li></ul>
<ul style="list-style-type: none"><li>• Increasing HEUG member engagement and satisfaction.</li></ul>
<ul style="list-style-type: none"><li>• Ensuring HEUG's continued organizational and financial health.</li></ul>



LEARN



EXPLORE



GENERATE IDEA

# VALUE STATEMENTS

## WORK GROUPS VALUE STATEMENTS

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### 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 ore 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

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### 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 membersto 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

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# VALUE STATEMENTS

## WORK GROUPS VALUE STATEMENTS

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### 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

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### 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

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# VALUE STATEMENTS

## WORK GROUPS VALUE STATEMENTS

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### 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 decisionmaking 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

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### 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

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# STRATEGIC PLAN

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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 on Oracle applications and middleware now and in the future. Our long history of value-added support services to members, partners, vendors and to Oracle will only strengthen as we focus our resources, talents and energy toward the simplification of strategies and outcomes that demonstrate our flexibility and agility.

## 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

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**EDUCATION FOR ALL**

# STRATEGIC PLAN

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Increase HEUG member engagement and satisfaction



Ensure HEUG's continued organizational and financial health

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**TECHNOLOGY  
PARTNERS**

# IMPROVING HIGHER EDUCATION

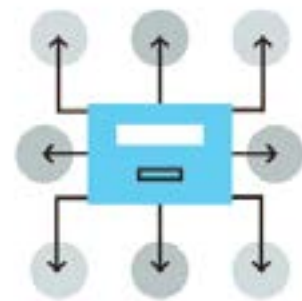
One of the outcomes of the Summit is for the advisory groups to agree on a set of goals for the upcoming year. Specifically they were asked to set SMART goals – thinking about the subject areas/themes to focus on and setting goals for these. All goals should align with one of the two HEUG objectives: ‘Education’ or ‘Advocacy’; and also with one of the 4 core values: ‘Leadership’, ‘Partnership’, ‘Building Community by Networking and Sharing’, ‘Communication’.



RESEARCH



ANALYTICS

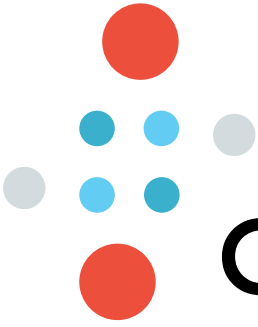


MIND MAP

Further the advisory groups were encouraged to work with their Board Liaison in this exercise, and also their Oracle strategists when determining themes (these could relate to new functionality, cloud or 9.2 design, topics of particular importance to the community). Advisory Groups are encouraged to feedback on progress against these goals during their Community Session at the annual Alliance Conference.

- The advisory groups participated in hosting 9 education series webinars in 2015, further aligning themselves with the HEUG’s educational mission.
- The advisory groups continued to support the advocacy mission of the HEUG by regular engagement with Oracle strategists, use of the HEUG’s Product Enhancement Tracker, discussion forums, and the use of surveys.
- The elections process in 2015 started the re-sizing exercise that will reshape the HEUG organizational landscape over the next few years (PAG charter link). A successful election was held in October 2015 with 29 new members elected to advisory groups with 3 being International (non-US) members.
- The elections process also saw the creation of a new Project and Change Management Advisory Group. It is proposed that the new Advisory Group will initially focus on the ‘Education’ strategic objective in respect of Project Management and Change Management, including end-user training and support, with activities including: building up a network of institutions at different stages of implementation and development of systems and solutions; best practice discussions (comparisons of ‘top ten’ or ‘how to’ lists from experienced Project Managers/Business Change Managers/and Business Analysts); and collating examples of PM/CM techniques successfully employed.

[View 2015 Advisory Group Members](#)



# CONNECTING MEMBERS

# CONFERENCES & EVENTS

## OVERVIEW

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HEUG provides an extraordinary opportunity for higher education communities across the world to connect through regional conferences. Conferences in 2015 included the South Africa HEUG conference in Cape Town; the Mid-Atlantic HEUG in Baltimore; the EMEA conference in Rotterdam; the South Central region (SCHRUG) in Houston, and the Asia HEUG in Hong Kong. The number of conferences will continue to grow, as two new US regional conferences start up over the next two years.



Although smaller in scale than the flagship Alliance conference, these 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. These events also allow members who would not normally have the budget to attend Alliance, such as mid-level managers and central office users, to attend a conference. High-level administrators, such as Presidents and Provosts, have also attend and heard about the issues and successes of their systems. Frequently, these individuals do not have the time to travel and attend Alliance and so the regional events allow them to better connect with the HEUG community.

Each of the regional conferences is produced by a regional conference committee made up of HEUG members from within the region and includes support from the HEUG Board and Socious staff. US Regional Conference Chairs meet regularly by conference call and have one in-person meeting each year, either at Alliance or in conjunction with a HEUG Board meeting. The calls provide an opportunity throughout the year to coordinate dates of conferences, venues and requests to Oracle and other vendors for participants and support. They also provide time to share best practices in running these types of conferences, assist with overall planning and provide ideas for developing a compelling conference program.

# ALLIANCE CONFERENCES

## VENDORS

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Vendors provide support for all of the regional conferences. Given the current and future growth of the regional conferences and the number of vendors who are supporting multiple conferences, the HEUG Board initiated coordinated vendor relations this year so that vendors have a consistent experience regardless of the conference they are supporting. In recent years, the HEUG has instituted programs that reward vendors who attend multiple events.

### 2015 Conference Sponsors

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#### PLATINUM SPONSORS

Academe Solutions  
 Ciber  
 ERP Analysts  
 Fischer International Identity  
 GreyHeller, LLC  
 HighPoint Technology Solutions, Inc.  
 OnBase by Hyland Software  
 Oracle  
 Sierra-Cedar  
 SkyBridge Global  
 Smart ERP Solutions

#### GOLD SPONSORS

ACI Worldwide  
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 Cognizant Technology Solutions  
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 Deloitte  
 DIGARC  
 Higher Technology Solutions  
 Highstreet IT Solutions, LLC  
 Huron Consulting Group  
 National Student Clearinghouse  
 Nelnet Business Solutions  
 Phire, Inc  
 Phyt Orion, Inc.  
 The Burgundy Group, Inc.  
 TouchNet Information Systems, Inc.  
 WorkForce Software



# ALLIANCE CONFERENCES

## ALLIANCE 2015

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Nashville, TN | March 15-18, 2015

The objective for Alliance 2015 was to CHALLENGE attendees to explore options, to CONNECT with others, and to CREATE new ideas for the future for Higher Education and Public Sector groups. Alliance 2015 set the stage for an exciting and endless future with over 3,800 attendees from 26 different countries engaging in the 550+ sessions over the 3 jam-packed days.



Alliance 2015 started with a challenge to make a difference one person at a time by keynote speaker and author, Tommy Spaulding. As in the past Alliance conferences, attendees were 'challenged' through user sessions, workshops, executive forum, 100+ vendor exhibits, and "stop and share" sessions just to name a few. New 'connections' this year included a mobile app so users could get current information on the sessions and activities, and a live stream of the Oracle Roadmaps. This investment by the Alliance Conference Team and HEUG Board was to engage HEUG and Public Sector members all over the world who otherwise would be behind on Oracle's strategic direction. "Creativity" is always a part of the Alliance Conference and this year was no different with social media, networking, visiting with "Minnie, Dolly, Garth, Trisha and many other music legends" before concluding on Tuesday night with country line dancing, and country music star, Phil Vassar.

Users sharing their creative ideas; challenging technology to be more efficient; and networking with other users, vendors, and developers are what makes the Alliance Conference the premier conference for Higher Education and Public Sector groups. Thanks to all the attendees Alliance 2015 surpassed its objectives and is sure to continue the tradition in the new venue, Seattle, for Alliance 2016. See YOU there!

Debby Hill, Chair  
Alliance 2015

# ALLIANCE CONFERENCES

## NORTH AMERICA CONFERENCES 2015

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The HEUG's US Regional Conference initiative started in 2011. In 2015 there were five conferences, with a total of 1,449 (1,227) attendees. Several of the conferences were held in new venues within the region to encourage attendance from a varied set of institutions. One very popular feature at a number of conferences was a question and answer session with a panel of students.

One of the primary goals of the regional conferences is to enhance the Alliance experience, not to compete with it. They continue to support that goal by attracting attendees who might not typically attend the larger Alliance conferences. These attendees include central office staff, mid-level managers, and even some higher-level administrators. Regional conferences also capitalize on their unique environment that facilitates peer conversation and interaction. They also give younger or inexperienced staff the opportunity to present in a professional setting. The smaller venue and smaller number of attendees make this a natural fit and provide a very 'personal' feeling for the regional conferences.

Each of the conferences has a planning committee. The chairs of each committee participate in a monthly call and regularly share thoughts and ideas. These conversations and experiences have been consolidated into a "Guidelines and Best Practices" document to be updated over time. This document includes a description of possible session types including Birds of a Feather sessions, guided discussions groups that concentrate on a specific topic of interest, participant led training/workshops and sessions presented jointly by two or more schools with differing approaches to a problem.

Regional Conferences continue to receive high ratings by attendees and the planning committees constantly look for ways to improve the attendee experience. These efforts include coordination with Alliance in terms of seeking sessions and presenters, conversations with the PAGs about program content, and new types of session formats that both increase the depth of some sessions and increase opportunities for the community to network and connect.

In 2015, the HEUG Board approved two new US regional conferences. The Southwest region includes Arizona, California, Colorado, Nevada, New Mexico and Utah. The Northwest region is comprised of Idaho, Montana, Oregon, Washington and Wyoming. The inaugural Southwest regional conference is scheduled for July 2016. The first Northwest regional conference will take place in 2017.

# ALLIANCE CONFERENCES

## NORTH AMERICA CONFERENCES 2015

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### The 2015 US Regional Conferences

- Mid-Atlantic Regional Higher Education User Group (Mid-Atlantic) – Serving the greater Washington DC metropolitan area including Maryland, Virginia, Delaware and Pennsylvania. More than 233(185) attended this June 2nd event in Baltimore.
- South Central HEUG Regional User Group (SCHRUG) – Serving Texas, Louisiana, Arkansas, Oklahoma and Mississippi. The July 22-23rd event in Houston was attended by over 395 (351) HEUG members.
- New England Regional Higher Education User Group (NEWHEUG) – Serving the New England states: Maine, New Hampshire, Vermont, Massachusetts, Connecticut and Rhode Island. The second annual event took place on August 10-11 in Worcester, Massachusetts and attracted 226 (184) attendees.
- Midwest Regional Higher Education User Group (MIDHEUG) - Serving Wisconsin, Iowa, Illinois, North Dakota, Colorado, Michigan, Minnesota, South Dakota and Indiana. The event was held on October 8-9 in St. Charles, Illinois, and over 307 (265) HEUG members attended.
- Southeast Atlantic Regional User Group (SEARUG) – Serving Virginia, West Virginia, North Carolina, Georgia, South Carolina, Florida, Tennessee, Alabama, Mississippi, and Kentucky. Held at the Sheraton Chapel Hill on October 5-6, over 288 (242) members attended.

# ALLIANCE CONFERENCES

## ALLIANCE DOWN UNDER 2015



RACV Royal Pines Resort, Benowa  
Gold Coast, Queensland, Australia  
4 - 6 November 2015

### PURPOSE

To report to the HEUG Board on the Alliance Down Under 2015 conference, held 4 -6 November 2015 at the RACV Royal Pines Resort, Benowa, Gold Coast, Queensland, Australia.

### REPORT FROM PRESIDENT, ANZ HEUG

After 5 years in the role, this will be my final report as President of the ANZ HEUG, Alliance Down Under Conference Chair and member of the HEUG Board. I am pleased to advise that Mark Erickson, Registrar at the ANU has been elected to the position of President. It has been a pleasure and a privilege to hold office and I look forward to continuing my involvement in the organisation, supporting Mark and the new executive.

After recent elections the ANZ HEUG Executive Committee now consists:

President and Chair	Mark Erickson	The Australian National University
Deputy Chair	John Reed	University of New South Wales
Secretary	Cathy McGrath	Griffith University
Elected Member	Russell Barron	University of Auckland
Elected Member	Alan Tabor	University of South Australia
Immediate Past Chair	Gail White	University of Newcastle

# ALLIANCE CONFERENCES

## ALLIANCE DOWN UNDER 2015

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### Alliance Down Under 2015

A hard working Planning Committee delivered a successful conference with overwhelmingly positive feedback from delegates on the venue, food, conference program, vendors and overall experience. This was our second year at the Royal Pines Resort venue which provides a bigger space for our vendors and community.

This year saw a change in the program schedule to commence on Wednesday afternoon and finish Friday afternoon lunchtime. This was in response to feedback from members to assist with travel arrangements to and from the venue. Initial feedback has indicated that this is the preferred format and is recommended to continue into 2016.

The planning and execution of the conference was again greatly enhanced by the guidance and expertise provided by Cathy Clifton in the led up and delivery. Delegates benefited from the attendance of Brittany Sarvis from Socious who assisted with use of the App and HEUG online. President Mario Berry and VPs, Teri Thorsen and Dan Youngblood provided great support throughout the Executive Forum and conference.

This year fewer of the senior US-based Oracle Executives were able to join us due to the timing of Oracle OpenWorld conference immediately prior in the US. However, with the strong support of Chanaka Kanagara, Industry Leader Higher Education & Research, 30 Oracle personnel enhanced the success of the conference. Gary Allen, Jeff Robbins and Joe Burkhardt.

We were fortunate to have join us to present the Plenary session Actionable Intelligence – Improving Student Success, Andy T Clarke and Brian A Haugabrook from Valdosta State University. The presentation provided fascinating and provocative content which generated good discussion and reflections throughout the conference.

Keynote speaker Peter Fitzsimons, a well-respected journalist, Australian rugby representative, radio presenter and interviewer, challenged delegates to think beyond the confines of their day-to-day work including topics such as the republic debate, social issues of note, experiences of being a writer, journalist and sportsman and views on higher education. The sporting theme of the conference dinner provided Peter with a platform for humour and entertainment, referencing the friendly sporting rivalry of Australia and New Zealand a number of times.

This year's Executive Forum saw a different format to previous years to dovetail with the changed conference start time and keynote addresses. The Executive Forum discussed it's ANZ business in the morning then joined delegates for the keynote and plenary addresses, and reconvened in the late afternoon with Oracle executives and Valdosta State University executives for post presentation discussions.

Again this year, the conference delivered some valuable workshops and training opportunities prior to the conference. The final budget position is yet to be finalised but it is expected that the conference will break even.

The 2016 Alliance Down Under Conference will return to the same venue in 2016, proposed for 9 - 11 November 2016. Oracle workshops and training opportunities will again be offered prior to the conference.

# ALLIANCE CONFERENCES

## ALLIANCE DOWN UNDER 2015

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### Organising Committee

Gail White	University of Newcastle	Conference Chair, HEUG
David Donnelly	University of Newcastle	Program Chair
Richard Olde	University of Newcastle	Assistant Program Chair
Tony Neaton	Griffith University	Vendor Chair
Rim El Kadi	The Australian National University	Assistant Vendor Chair
Nikki Gaertner	Eaton University of South Australia	Technical Track Chair
Stephanie-Anne	Maritz University of South Australia	Assistant Technical Track Chair
Gregory Kasch	University of New South Wales	Finance Track Chair
Linda Ngu	University of Queensland	Assistant Chair, Finance Track
Marty Mag Uidhir	University of Newcastle	CRM Track Chair
Allie Morgan	University of the Sunshine Coast	HR Track Chair
Shayne Simpson	University of The Sunshine Coast	Student Track Chair
Leah Vaz	University of Southern Queensland	Assistant Chair, Student Track
Linda Tracey	University of Newcastle	Conference Assistant

# ALLIANCE CONFERENCES

## ALLIANCE DOWN UNDER 2015

### Trusted Advisors

Maureen Bowen	University of Queensland
Allan Tabor	University of South Australia

### HEUG Representatives

Mario Berry	President
Low Conner	Executive Director
Dan Youngblood	Vice President Finance
Buddy Combs	Director of Vendor Relations
Cathy Clifton CMP, CMM	Sr. Director Global Meetings and Events
Brittany Sarvis	Director of Member Services
Jodi Coble	Vendor Sales

### Vendors

This year 13 Vendors participated in the Conference.

PLATINUM	GOLD	SILVER	BRONZE
Oracle	Presence of IT	Ellucian Flywire (formerly PeerTransfer) M-Power Solutions Maverick Solutions Touchnet UniLink Data Systems Neodata Australia	BlueLeap LLC College Scheduler Cyon JDR Software

# ALLIANCE CONFERENCES

## ALLIANCE DOWN UNDER 2015

Organization	Count	Registration Type	%	Country	%
Griffith University	33	HEUG Institutional Member	47%	Australia	87%
University of Queensland	23	Vendor	13%	New Zealand	7%
The University of Adelaide	20	Speaker	18%	United States	5%
University of New South Wales	16	HEUG Subscriber Members	7%	Vietnam	1%
University of The Sunshine Coast	16	Planning Committee Member	5%	UK	0%
University of Southern Queensland	15	Oracle Employee	3%		
University of Newcastle	14	Pre-Conference Training Workshop Only	2%		
RMIT University	11	Pass Only	2%		
The Australian National University	11	HEUG BOD	1%		
Federation University Australia	10	Executive Forum Only	1%		
University of Auckland	9	Keynote Speaker	1%		
University of South Australia	9	HEUG Guest	1%		
UNITEC Institute of Technology (New Zealand)	7				
Queensland University of Technology	5				
Organizations with under 5 attendees	64				



# ALLIANCE CONFERENCES

## ARAB HEUG ALLIANCE 2015



### Qatar University | Doha, Qatar 4 - 5 May 2015

Qatar University congregates a two day conference on Arab HEUG QU held the Arab HEUG Conference on the 4th and 5th of May 2015, in cooperation with many regional and international universities and institutions: ADU, College of North Atlantic – Qatar (CNA-Q, TouchNet, ITS Company, Oracle, and the Changers. The conference served as a venue for the exchange of experiences and sharing of progress in the use of Oracle applications in higher education, as well as its range of potential implementations, through the participation of experts and scholars from many Arab and international universities. The 1st day featured welcome statements by QU's Vice President & Chief Financial Officer (VP&CFO) Dr. Homaid Al-Madfa, HEUG Ex-President Steven Hahn, and Mrs. Sara Al-Marri, Qatar University Associate VP for Administration, and President of the Arab HEUG. Reach Out to Asia, "ROTA " Executive Director, Mr. Essa Al-Mannai gave his opening statement for the conference, explaining the importance of education and its effects on human civilization and that it is not only restricted to reading and writing, but also providing a wider and more comprehensive concept as it includes learning about and dealing with life. Mr. Al-Mannai also declared the launch of ROTA 3, which will have a foundation based on keeping up with technology, and thanked the Arab HEUG for their successful contributions in this held.

The 1st day of the conference was divided into many sessions, including: "Updating HEUG Status", and a session by Oracle global VP Cole Clark, entitled "Supporting Higher Education through Innovation and Partnership: a View of Oracle Strategy in Education and Research", in addition to other various sessions about institutions' experiences in developing applications to improve the academic field and admin services. Ms. Amani Othman, Section Head of Communication and Marketing at QU's Administrative Services Department, emphasized the success of the conference and its results at QU and for all participants and attendees, both within and outside the country. She further added that the audience membership was above expectation, indicating the success and cooperation of both work groups; QU and the Changers organization. The second day included various sessions: workshops in the application of Customer Relationship Management (CRM) program, workshops in financing, and how to set up a plan for conversing nancing functions for certain strategies. In addition to these, there were sessions by Mr. Clark that tackled analysis of massive data sets, and private data in students' board. In this respect, Mr. Clark said "I came to the conference as a speaker, but at the same time, I learned a lot about technology and how it is applied in other regions in the world, like the Middle East." In addition to that, Ms. Reem Al Ansari, Associate Chief Information Officer at QU, shared her opinion about her participation in the conference, saying "I participated in the Arab HEUG in the USA, and I was keen to attend it here in Doha. The conference this year is much better than last year, and we noticed the participation of many universities and the huge audience surpassed my expectations."

# ALLIANCE CONFERENCES

## ARAB HEUG ALLIANCE 2015

Organization	Count	Registration Type	%	Country	%
Abu Dhabi University	8	HEUG Institutional Member	65%	United Arab Emirates	17%
Dartmouth College	1	Vendor	19%	Belgium	2%
New York University	1	HEUG Subscriber Members	10%	France	2%
Northwestern University	4	HEUG BOD	4%	India	4%
Qatar University	20	HEUG Guest	2%	Jordan	2%
Singapore Institute of Management Pte Ltd	1			United States	12%
University of Wisconsin - Madison	1			United Kingdom	2%
Yanbu Industrial College	1			Qatar	48%
				Singapore	2%

# ALLIANCE CONFERENCES

## ASIA ALLIANCE 2015

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Eaton Hotel | Kowloon, Hong Kong  
9-10 November 2015

The Asia Higher Education User Group (Asia HEUG) led by Jaime Caro from the University of the Philippines once again organized an excellent event, this year at the Eaton Hotel in Hong Kong. The event was held on 9-10 November 2015.

Assisting Jaime (Jimmy) Caro on the organizing committee were the following HEUG members:

Derry FONG - Program Chair, The Hong Kong University of Science and Technology  
Yen Teck KONG, National University of Singapore  
Annette LAGMAN, University of the Philippines  
Philip LEUNG, The Chinese University of Hong Kong  
Steven WU, The Hong Kong University of Science and Technology  
Phyllis YEW, Singapore Institute of Management Global Education

From the HEUG Board of Directors, Gayle King (University of Houston), Terry Houser (University of Michigan) and Lew Conner (HEUG Executive Director) were in attendance.

Once again the program catered to the interests of all aspects of the use of PeopleSoft and Oracle applications/ technologies in our industry and was supported by key vendors. In addition to the main conference program, an Executive Forum was held bringing together key executives in the region to meet with Oracle executives.

This successful event was attended by 150 individuals from institutions and our vendor sponsors. The attendees came from 12 different countries.

We look forward to the 2016 Asia Alliance Conference to be held once again in Singapore in November.

# ALLIANCE CONFERENCES

## ASIA ALLIANCE 2015

Organization	Count	Registration Type	%	Country	%
The University of Hong Kong	36	HEUG Institutional Member	44%	Hong Kong	51%
The Hong Kong University of Science and Technology	12	Vendor	21%	Singapore	15%
University of Macau	9	HEUG Subscriber Member	11%	China	7%
University of the Philippines	9	Speaker	10%	Philippines	7%
The Open University of Hong Kong	8	Asia PAG/TAG member	4%	United States	6%
The Chinese University of Hong Kong	7	Planning Committee Member	4%	Indonesia	5%
National University of Singapore	6	HEUG BOD	3%	South Korea	4%
Singapore Management University	5	HEUG Prospective Members	1%	India	3%
Singapore Institute of Management Pte Ltd	4	Key Note Speaker	1%	Australia	1%
BINUS University	3			Malaysia	1%
				United Kingdom	1%

# ALLIANCE CONFERENCES

## EMEA ALLIANCE 2015

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### Hilton Rotterdam | Rotterdam, the Netherlands 17-18 November 2015

The EMEA Alliance Planning Committee once again delivered a highly successful conference with very positive feedback from delegates on the programme, the venue, the food and the contribution of the vendors.

The event was held in the bustling city of Rotterdam – the Netherlands' second biggest city and Europe's largest port (5th largest in the world). The conference team drew inspiration from the Port of Rotterdam. Its location, infrastructure and logistics mean it has excellent connections across Europe. Its connectivity both physically (rail, road, shipping air) and virtually (telecoms and internet) make it a true hub. Similarly the HEUG, with its global (and Europe, Middle East and African) presence, its physical infrastructure of advisory groups, website and content management, documentation, and conferences, and its virtual network of webinars, conference calls and online discussion forums, aims to be a connected hub for the Higher Education community.

Hosting the conference in the Netherlands for the second year running afforded the Committee to reach out to the wider DEUG (Dutch Education User Group) community to welcome them to both EMEA Alliance and the HEUG more generally. EMEA Alliance 2015 incorporated a number of Dutch-specific sessions into the conference; live translation services – from English to Dutch – for a number of key sessions within the conference; and a How (and Why!) to HEUG.online session to demonstrate the system and the benefits that HEUG membership offers.

This year's Executive Forum provided insight into the drivers influencing decision-making in higher education institutions and also into Oracle's response to these drivers, with the audience having the opportunity to hear directly from the Development 'arm' of Oracle (faces both familiar and new).

The Planning Committee welcomed 198 attendees from 8 countries – and speakers from 7 of those. An excellent conference programme was constructed with a strong focus on new/emerging tools and functionality and future plans. There was also a pleasing emphasis on project and change management reflecting the importance of this subject to our institutions at all stages of implementation and development of systems.

Looking forward the 2016 EMEA Alliance conference planning is underway with Glasgow, Scotland announced as the confirmed location and dates being finalised soon.

# ALLIANCE CONFERENCES

## EMEA ALLIANCE 2015

Organization	Count	Registration Type	%	Country	%
Universiteit van Amsterdam	23	HEUG Institutional Member	58%	Netherlands	56%
Noorderpoort	12	Vendor	20%	United Kingdom	20%
Alfa College	11	Speaker	9%	Belgium	11%
University of Leiden	11	Conference Team	5%	United States	5%
Vrije Universiteit Brussel	11	HEUG Subscriber Member	6%	South Africa	4%
ROC van Twente	10	HEUG Board	2%	Turkey	3%
Hogeschool In Holland	8	HEUG Prospective/Non-Member	1%	Spain	2%
KOC University	6	Higher Education Guest	1%	United Arab Emirates	1%
Leiden Uniiversity	6	Oracle Speaker	1%		
Universiteit Antwerpen	6				
University of Derby	6				
ROC Nijmegen	5				
Queen's University Belfast	4				
The University of Manchester	4				
University of Cape Town	4				
University of Glasgow	4				



# ALLIANCE CONFERENCES

## LATIN AMERICA 2015

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Lima JW Marriott | Lima, Peru  
15-16 June 2015

On June 15th and 16th, more than 100 IT professionals from more than 22 higher education institutions and companies based in South and North America as well as Europe, gathered at the Lima, Miraflores JW Marriott hotel, to share and discuss their experiences in using Oracle Peoplesoft and other applications in their organizations. It was a great networking opportunity for these international community of Latin American professionals in order to develop a community of practitioners, and to enhance their IT systems as a means for improving the quality of the Education and other services that Higher Education Institutions provide.

It was also a great opportunity for these institutions to learn about the Higher Education User Group and the support that it can provide to them. The presentations from universities, Oracle and vendors provided state-of-the-art knowledge and experience on Higher Education, Financial, Human Resources, Technology and mainly Academic and Administrative support to teaching-learning processes as well as support for research processes.

After the Conference the network of practitioners developed in the conference has expanded and become active which was one of the main objectives of the Conference in Lima, Perú.

# ALLIANCE CONFERENCES

## LATIN AMERICA 2015

Organization	Count	Registration Type	%	Country	%
Pontificia Universidad Catolica del Peru	22	HEUG Institutional Member	33%	Peru	42%
Pontificia Universidad Javeriana	7	Vendor	31%	United States	19%
Instituto Toulouse Lautrec	6	HEUG Subscriber Member	21%	Colombia	17%
Pontificia Universidad Catolica Madre y Maestra	6	Conference Team	6%	Brazil	7%
Universidad de la Sabana	5	Speaker	4%	Chile	7%
Universidad Tecnologica del Peru SAC	5	HEUG Board	4%	Mexico	6%
Universidad Cientifica del Sur	4	HEUG Prospective/Non-Member	2%	United Kingdom	2%
Universidad Panamericana	4			Venezuela	1%



# ALLIANCE CONFERENCES

## SOUTHERN AFRICAN HEUG CONFERENCE 2015

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### University of Cape Town 14 - 15 July, 2015

The seventh SAHEUG conference was hosted in 2015 by University of Cape Town. This conference started in 2009 as a meeting of the then three Oracle Campus Solutions customers, with 30 attendees, and has since grown to an event drawing 150 – 200 delegates. It is hosted on a rotation basis at one of the customer campuses.

A set of pre-conference workshops was offered on the day before the conference, providing the opportunity for training/deep dives on areas of new functionality such as Activity Guides and Fluid UI. These were well received and likely to be offered at future conferences.

The 2015 event drew approximately 223 delegates from 12 institutions across 6 countries, and provided 4 keynote/plenary and 27 track sessions.

For the 2015 conference, the local organising committee worked more closely with the HEUG via a regional support MOU. The ability to access the experience and resources of the HEUG led to a more professional offering, and is something which we intend to continue. We are also grateful to Visions Consulting and TouchNet Information Systems for their generous sponsorship of the event, which included conference meals and an evening event at Cape Town's Two Oceans Aquarium.

The 2016 conference will be held at the University of the Witwatersrand (WITS) in Johannesburg. The final date is to be confirmed, but is expected to be in the week of 11- 15 July.

# ALLIANCE CONFERENCES

## SOUTHERN AFRICAN HEUG CONFERENCE 2015

Organization	Count	Registration Type	%	Country	%
Habib University	1	HEUG Institutional Member	61%	Australia	1%
KOC University	1	Vendor	10%	Belgium	1%
Northwestern University	2	Speaker	8%	Botswana	13%
St. Lawrence College	1	HEUG Subscriber Members	26%	Pakistan	1%
The Aga Khan University	1	Planning Committee Member	1%	South Africa	79%
University of Botswana	25	HEUG BOD	1%	United States	3%
University of Glasgow	1	HEUG Guest	1%	United Kingdom	1%
University of Cape Town	60				
University of Pretoria	21				
University of South Africa	1				
University of the Free State	26				
University of the Witwatersrand	28				

# ALLIANCE CONFERENCES

## ORACLE OPENWORLD 2015



Oracle OpenWorld  
October 2015  
San Francisco, California, United States

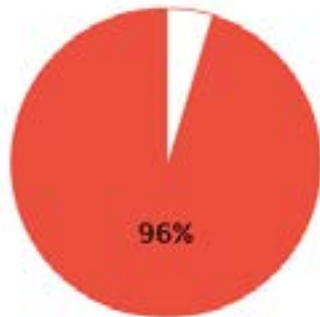
Each year, the HEUG sends a delegation to the Oracle OpenWorld conference. The Sunday prior to the conference is dedicated to user groups, and the HEUG uses this opportunity to host a meeting for our members attending OpenWorld in addition the HEUG.Online booth is available to HEUG users as well as prospective members. OpenWorld is the premier annual event for Oracle, so this venue offers the HEUG delegation one of its best opportunities to fulfill one key aspect of our mission- advocating on behalf of the higher education and research industry.



# **MEMBERSHIP & FINANCE**

# HEUG MEMBERSHIP INFORMATION

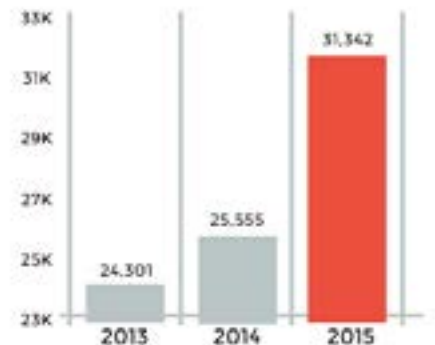
The membership program established during 2010 continued with much success through 2015.



**RENEWAL RATE**



**MEMBERSHIP**











**COUNT OF USERS**

A renewal rate of 96% and a member institution increase of over 5% is a testament to both the benefits of the program and the diligence of the membership committee. The Higher Education User Group is made up of 69% North American Memberships and 31% International Memberships. With the total membership from 2014 to 2015 being:

- March 2014 – 25,555 users
- March 2015 - 31,342 users

The HEUG membership program consists of two types of membership: Institutional/Institutional System membership and Subscriber membership. Subscriber members enjoy basic access to the HEUG.Online. These members have access to all forums, blogs, and many files on the HEUG website. Upgrading to Institutional or Institutional System membership gives user access to additional services and files on the website. Institutional members enjoy access to all Education Series webinars and recordings free of charge, a discount on Alliance conference registration and access to Alliance file presentations. Institutional members are also eligible to serve as PAG/TAG members and on the Board of Directors and are the only membership classification with voting privileges.

## HEUG MEMBERSHIP STATS

	312 Institutions renewed their membership
	Allied Group Membership Revenue – \$10,400
	Institutional/System Membership Revenue – \$465,600
	Blogs Posted – 415
	Files Downloaded – 167,357
	New Forum Post – 27,395
	Forum Topic Daily Feed – 48,976
	New HEUG.Online Users – 5,787

Membership dues are based on the Student Full-Time Equivalent (FTE) count for your institution or institutional system. Both institutional and system membership benefits all users at your college or university.

Membership Dues FTE Guidelines

# HEUG MEMBERSHIP INFORMATION

## HEUG EDUCATION WEBINAR SERIES

The HEUG Education Webinar Series continued to grow in 2015 offering more educational webinars to more people. Education Series webinars bring members hot topics, relevant training and demonstrations. This program is designed to help our HEUG members grow their knowledge of PeopleSoft/Oracle products and is a great opportunity to learn all year and helps those who are not able to attend HEUG conferences.

The HEUG Education Series brings together leaders from within our membership, Oracle, vendor partners and HEUG management to provide useful webinars that will help members with implementing, maintaining or upgrading their PeopleSoft/Oracle solutions.



**In 2015 the HEUG offered 61 webinars, attended live by 5,135 people. The session recordings were downloaded 3,364 times.**

2015 saw a partnership with the Product and Technical Advisory Groups to share their knowledge and expertise with the broader HEUG audience.

Oracle applications team members also created more of a presence in 2015 as part of the Education Series, bringing members the most up-to-date information on new product releases and advancements.

This program offers three types of webinars:

HEUG Education Series Events	Sponsored Webinars	HEUG Webinars
<p>These sessions are presented by members and experts on topics that are relevant and timely. Some of these will be done by top Alliance and regional conference session performers, allowing you to ask questions and interact directly with the presenter. They also include new presentations that were not part of a conference, including Oracle Roadmap style sessions. There is a \$59 per person fee to access these sessions both live and recorded for Subscriber members. HEUG Institutional and System members can attend these sessions free of charge.</p>	<p>These sessions are presented and are sponsored by our vendor partners. In some cases, they are presented in conjunction with a customer. They are not sales-oriented, but rather sessions for the sharing of valuable information. Since they are sponsored, access is free of charge</p>	<p>These sessions provide training on HEUG programs, tools, and initiatives. These training and educational webinars are occasionally available in multiple languages. They are free of charge.</p>

All webinars are recorded and the recordings are made available. This allows us to bring educational opportunities to users around the world regardless of time zones, since they can be accessed at the users' convenience.

# FINANCIAL STATEMENTS

Statement of Activities Years Ended June 30, 2015 and 2014		
	<u>2015</u>	<u>2014</u>
Revenues		
Conference Revenue	\$4,301,321	\$4,491,784
Membership Dues	473,478	408,665
Revenue sharing income	68,692	64,899
Interest Income	<u>14,543</u>	<u>19,889</u>
Total Revenue	4,858,034	\$4,985,237
Operating Expenses		
Program Expenses	4,472,434	\$4,510,268
Administrative Expenses	<u>430,754</u>	<u>404,952</u>
Total Operating Expenses	\$4,903,188	\$4,912,220
Change in Net Assets from Operating Activities	(45,154)	70,017
Non-Operating Income (Expense)		
Foreign currency translation	(12,867)	(34,978)
Change in Net Assets	<u><u>(57,841)</u></u>	<u><u>\$5,039</u></u>

Source: HEUG Audited Financial Statement

# FINANCIAL STATEMENTS

## Statement of Financial Position Years Ended June 30, 2015 and 2014

	<u>2015</u>	<u>2014</u>
Assets		
Current Assets		
Cash and Cash Equivalents	2,302,808	\$2,614,696
Certificates of Deposit	447,525	-
Accounts Receivable	2,515	49,350
Prepaid Expense	<u>175,981</u>	<u>111,595</u>
Total Current Assets	2,928,829	2,775,641
Certificate of Deposit, Long-Term	<u>173,891</u>	<u>616,071</u>
Total Assets	<u><u>\$3,102,720</u></u>	<u><u>3,391,712</u></u>
Liabilities and Net Assets		
Current Liabilities		
Accounts Payable	40,120	61,100
Deferred Revenue	<u>376,454</u>	<u>586,625</u>
Total Current Liabilities	416,574	647,725
Net Assets – Unrestricted	<u>2,686,146</u>	<u>2,743,987</u>
Total Liabilities and Net Assets	<u><u>\$3,102,720</u></u>	<u><u>\$3,391,712</u></u>

Source: HEUG Audited Financial Statement



# HEUG VENDORS

Our appreciation for your support...

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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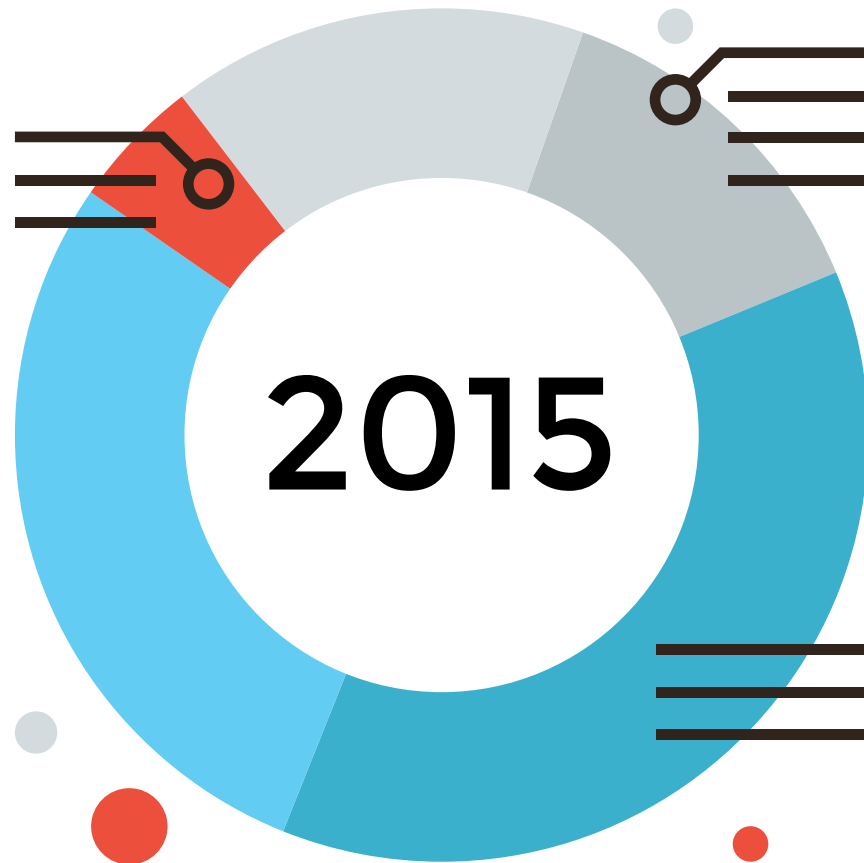
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# ANNUAL REPORT

## THE HIGHER EDUCATION USER GROUP

HEUG's mission is to educate and advocate by facilitating the sharing of ideas, information and experiences among its members, and to provide a unified and effective voice to Oracle on all issues involving the use of Oracle application software in the Higher Education community. The HEUG achieves their purposes while remaining independent of Oracle.

