Advisory Committees & Track Chairs to select and develop topics for annual conference

To support the new annual conference format, the Planning Team began with a review of how other higher education user groups, including several Banner users' groups, are managing content for their annual conferences. We have decided to form Advisory Committees with representatives from among our member schools organized around the Banner product modules and technologies. Each Advisory Committee will have a Track Chair.

Current plans are for 3 to 5 members on each Advisory Committee. Terms for Advisory Committee members and Track Chairs will be one year with the option to renew. Once these roles are established, terms will run from November of the current year through October of the following year. As functionality is rolled out for Slack, we will plan to use that as a communications tool for the Advisory Committees.

We will continue with the UMBUG vendor sponsorship plan, and we may have up to three vendor sponsors for the annual conference. Vendor sponsors will continue to present sessions, and the UMBUG Coordinator will work with vendor sponsors and the respective Track Chairs to coordinate topics presented by vendor sponsors. The Executive Committee must approve funds for outside speakers in advance. The UMBUG Chair will schedule conference planning meetings (August and January); planning meeting minutes will be kept by the UMBUG Vice Chair; and planning meetings will also include Track Chairs and the UMBUG Coordinator.

Advisory Committees – one for each track: the Planning Team has identified the following tracks. Next to each track you will see the number of sessions the respective Advisory Committees are responsible for – these are based on relative attendance of these groups at past UMBUG conferences:

- Student (includes student accounts, student, Degree Works) – responsible for 4 sessions
- Financial Aid – responsible for 4 sessions
- Enrollment management/admissions – many schools using Salesforce, Recruit, Slate. Start with Salesforce Users' Group – responsible for 2 sessions
- Finance - responsible for 2 sessions
- HR/payroll - responsible for 4 sessions
- Technical (technical development/integration, analytics/reporting, DBA's) - responsible for 4 sessions
- Advancement (tentative) - responsible for 2 sessions

The UMBUG Coordinator will continue to work with Ellucian on their sponsored sessions for the Ellucian Update, the Ellucian Q & A, and 3 other Ellucian sponsored sessions. Strata has typically sponsored an UMBUG conference each year and the UMBUG Coordinator will work with Strata on 3 sponsored sessions. Other vendors such as TouchNet occasionally sponsor a conference. As occasional sponsorships occur, the UMBUG Coordinator in collaboration with the Track Chairs will manage these.

Members will be encouraged to recommend session topics and speakers and to volunteer to present sessions. An electronic form will be added to the Conferences page of the UMBUG web site for this purpose.

Transition from Planning Team to Advisory Committees

- December, 2017 – review format changes for annual conference and get preliminary input on upcoming changes
- January - February, 2018 – review drafts and agree on new annual conference schedule by day
- February - March, 2018 – review drafts and agree on roles and responsibilities for Advisory Committees and Track Chairs
- April, 2018 – recruit Track Chairs and start recruiting Advisory Committee members; set up Slack tool for each track.
- May – July, 2018 – begin using Slack and start collecting potential topics for annual conference, continue recruiting Advisory Committee members
- August, 2018 – Track Chairs meet via conference call with UMBUG Chair, UMBUG Vice Chair and UMBUG Coordinator to review vendor sponsorship topics; Track Chairs and Advisory Committees meet and identify session topics and presenters. Follow up as needed by UMBUG Chair.
- September, 2018– registration for annual conference on the UMBUG web site
- February, 2019 – topics for Ellucian Live on the UMBUG web site

Responsibilities of the Advisory Committees: Advisory Committees will solicit, evaluate, and determine respective conference topics by track as follows:

- Participate in ongoing member communication about specific Banner and related 3rd party product features, problems, and opportunities relevant to their respective track
- Participate in conference calls approximately twice a year (July and December) to identify content for the UMBUG annual meeting and the UMBUG meeting at Ellucian Live respectively.
- Maintain content for respective component of the Slack site
- Designate a member(s) with to maintain the respective Advisory Committees access and content on the UMBUG Slack site
- Designate a member(s) to take notes for each Advisory Committee meeting and post to Slack site

Additional Responsibilities of the Track Chairs:

- Chair the respective Advisory Committee - includes scheduling the approximately twice a year advisory committee meetings (July and December), and regularly reviewing associated content on the Slack site
- Coordinate work of the respective Advisory Committee - including identifying topics for discussion at Ellucian Live and identify respective subject matter experts/presenters for the annual conference
- Coordinate topics with the UMBUG Coordinator who works with Ellucian and other vendor sponsors on topics vendors will be presenting
- Review and report the Advisory Committee meeting notes with final topic selections to the UMBUG Coordinator and UMBUG Chair for their respective track to be used in the final planning of the UMBUG meeting at Ellucian Live in the Spring and the UMBUG annual meeting in November. Final topic selections in August and January will incorporate input from the respective Advisory Committees from July and December.
- Track Chairs are strongly encouraged to attend the annual conference.