



VC Membership and Administration – Harri Tatnell

Annual Report 2018-2019

Overview of membership 2018-2019

Total number of members:	1, 527
Total number of institutions:	145
Total number of members in each region:	
Anglia	83
Greater London	192
Midlands	250
North East England	259
North West England and Northern Ireland	201
Scotland	97
South East England	212
South West England	159
Wales/Cymru	73

Report and overview of activities 2018-19

After significant period of change, the main aim for my first year in post was to ensure that the HELOA Office Coordinator (Dawn) was fully supported in her role to cover the general administration of the membership, administrative support of the UKC and Exec and conducting the annual membership renewals.

I will continue to support Dawn in her role and ensure the role remains fit-for-purpose for both the association and Dawn herself. A number of issues have arisen surrounding the large workload experienced by the HELOA Office, I am currently working with Dawn to explore ways to overcome this going forward.

It has been noted that the attendance at regional group meetings has progressive been increasing with the majority of group exceeding the strategic target of engaging with 20% of the membership through group meetings.

I have given particular focus to role of the primary contact. This has involved writing a role descriptor for the primary contact to help members truly understand the purpose of the role. The HELOA office has emailed members in each institution, on several occasions, to make them aware of who their primary contact is. The role of the primary contact is crucial to the success of the organisation. Furthermore, it is promising to see that 91% of those who answered the membership survey knew who their institutional primary contact was.

The HELOA Annual Membership Survey was sent out at the beginning of the academic year. I am particularly keen to implement changes as indicated by the membership.



I have also written the GDPR Privacy Policy for the association along with the data protection notice for all of our membership forms.

HELOA Strategic Plan: January 2018- December 2020

Under the HELOA Strategic Plan – 2018-2020, I report the following developments with regard to Membership and Administration.

1d) The HELOA Office provides for the relevant needs of the membership. We will invest in its growth to enable our development as an Association and will undertake a 'systems' review to ensure our processes are fit for purpose;

Responsible: Vice-Chair (Administration and Membership)

It has been agreed with the HELOA Office Coordinator that we will continue to use our current systems. A 'systems' review has been undertaken and it has been identified that our current systems have do have some issues, but an alternative 'system' has not been identified as a suitable replacement.

4a) An action plan will be drawn up on the basis of our member and potential member surveys with 'you said, we did' information provided for both, outlining the changes we made to encourage ongoing and/or new engagement;

Responsible: Vice-Chairs (Administration and Membership) and (Group Development)

Ongoing. This will be produced for the next UKC.

4b) HELOA undertakes a one-off democratic review, at both National and Group level, to ensure that our elected and appointed roles are appropriate and relevant to enable delivery of this Strategy;

Responsible: Vice-Chairs (Governance and Policy), (Group Development), and (Administration and Membership)

Ongoing. Priority for 2019.

4c) HELOA Groups, in collaboration with the National Office and supported by the relevant Vice-Chair, will work proactively and innovatively to encourage engagement from members, potential members and Primary Contacts;

Responsible: Vice-Chairs (Group Development) and (Administration and Membership)

Ongoing for 2019. Will continue to prioritise this in 2019 with Vice-Chair (Groups).

4d) The scope and limit of HELOA's membership is firmly established, with active efforts made to diversify participation from different segments within that framework, including through monitoring participation trends in all aspects of HELOA activity;

Responsible: Vice-Chairs (Administration and Membership), (Group Development) and (Training);

Priority for 2019.

4f) The role and purpose of Primary Contacts is reviewed, ensuring that it meets the needs of both institutional administration and of ongoing representation, including at AGM;

Responsible: Vice-Chairs (Governance and Policy) and (Administration and Membership).



Happy with the development made this year. Will look to review this following AGM.

5b) Our membership benefits are fully articulated and widely circulated to deliver a growing membership, with additional membership benefits actively sought and communicated on an ongoing basis;

Responsible: Vice-Chairs (Administration and Membership), (Group Development) and (Communications)

Development has been made with regard to advertising membership benefits through the Digest, sponsor representation at the annual conference and at a local group level. For 2019, I will look to develop a page on the HELOA website to detail the exact benefits of being a member of HELOA.

Focus for 2019

I look forward to developing in my role in 2019 and in particular achieving the strategic targets associated with my role. Building on my success in 2018, I am particularly focused on achieving the following in my role in 2019:

- Continue to support the HELOA Office with administration to ultimately achieve the needs of the membership and association.
- Internally, improving the process surrounding annual membership renewals and finances
- Implement the “you said, we did” project using the results from the recent membership survey
- Work with Group Chairs and regional Vice-Chair Administration and Communication to achieve the 20% engagement from members in group meetings for 2019.
- Work more closely with regional Vice-Chair Administration and Communications to streamline administration across the association.

Many thanks to Jack Clare – HELOA Partnerships Manager - for his support with the analysis and presentation of the Membership Survey

A special thanks to Dawn – the HELOA Office Coordinator. Her supportive nature, resilience and sheer tenacity is integral for the growth and continued success of HELOA.

Harri Tatnell

UK Vice Chair (Membership and Administration)

January 2019

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