

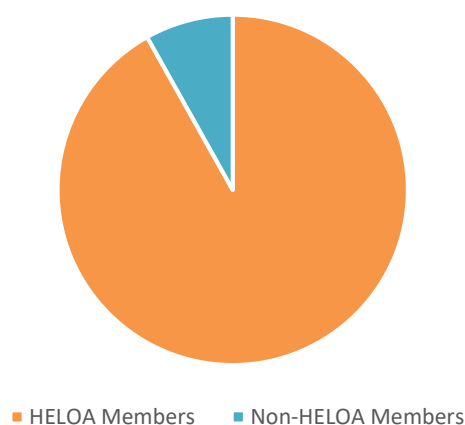


## Training Team National Report 2020

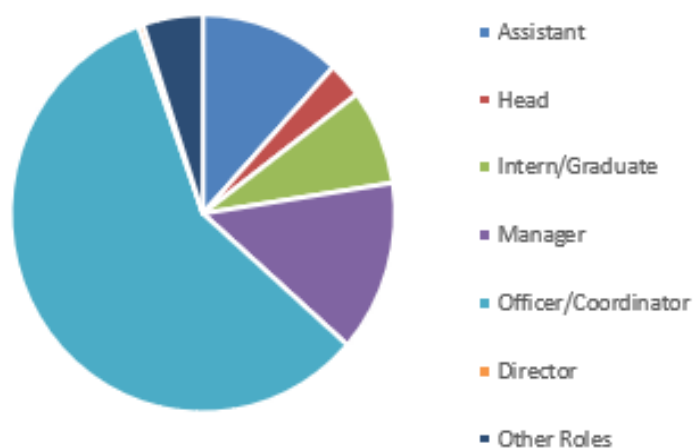
### HELOA Strategy

#### Successes and future developments

People Engaged at National Events



HELOA Members Job Levels



\*Of those attending National events 2018 - 2020

Within the three-year HELOA Strategy, the training team had 7 areas and targets to work on and I'm pleased to report we've met most of the targets set in the strategy over the past 3 years. Our main successes include;

- Consistent increases in attendance across all our events
- Several additional events being run to offer more opportunities to share best practice
- Engaging with **64%** of our individual membership at National Training events between 2018 - 2020

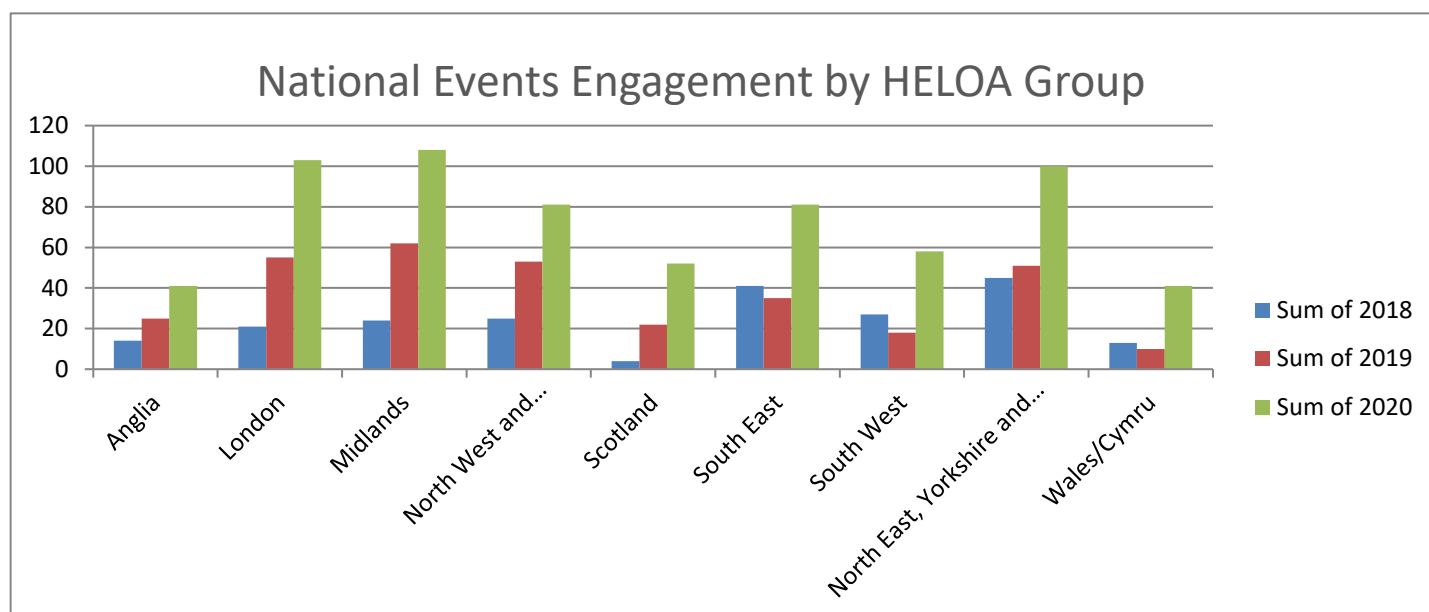
| National Training Team Strategic Goals  | Status | Notes  |
|---|--------|--|
| Driven by a relevant and inspiring programme for networking and sharing best practice, the HELOA Annual Conference will grow year-on-year to appropriate levels as determined by the UKC on an annual basis | ✓      | We've seen an increase in delegates across all of our conferences with a 20% increase between National 2019 and 2020 |

|  |   |  |
|--|---|--|
| Two conferences are held each year for new practitioners to the sector, with delegates drawn from a broad cross-section of our potential membership  | ✓ | 6 New Practitioners' Conferences have been held between 2018 and 2020 with over 400 delegates overall  |
| Additional training events are held each year at a national level, with multiple platforms of delivery, to engage at least 20% of our individual members   | ✓ | Introducing webinars and increasing our range of sessions at events has seen us engage 64% of our members  |
| Two new training sessions will be held each year in partnership with both the SLC and with UCAS, enabling our members to better understand and access our Partners, engaging at least 10% of our membership  | ✓ | Working closely with our Partnership teams we have engaged with SLC and UCAS at all events engaging with at least 30% of our HELOA members             |
| We fully explore, examine and, if possible, introduce the opportunity to provide accredited training and/or formal CPD, with options presented to UKC for consideration  | ✓ | In 2020 we researched and scoped out option to upgrade our PDC's to include CPD accreditation  |
| 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 | ✓ | Recently created a Conference Analysis spreadsheet that allows us to analyse member attendance across events, institutions, job level and HELOA Groups |
| A toolkit, including Best Practice, is fully developed and actively updated, enabling our members to usefully share and learn from those areas of our work which are not deemed commercially sensitive   | ✓ | Worked with Group VC's to create a Training Database that shares and identifies useful speakers and sessions   |

**N.B** In 2020 we had hoped to also introduce formal accredited training certification to our Professional Development Conferences however this development was delayed due the Covid-19 pandemic, but we hope for this to be formalised and approved for events in 2021.

### Working with the HELOA Groups

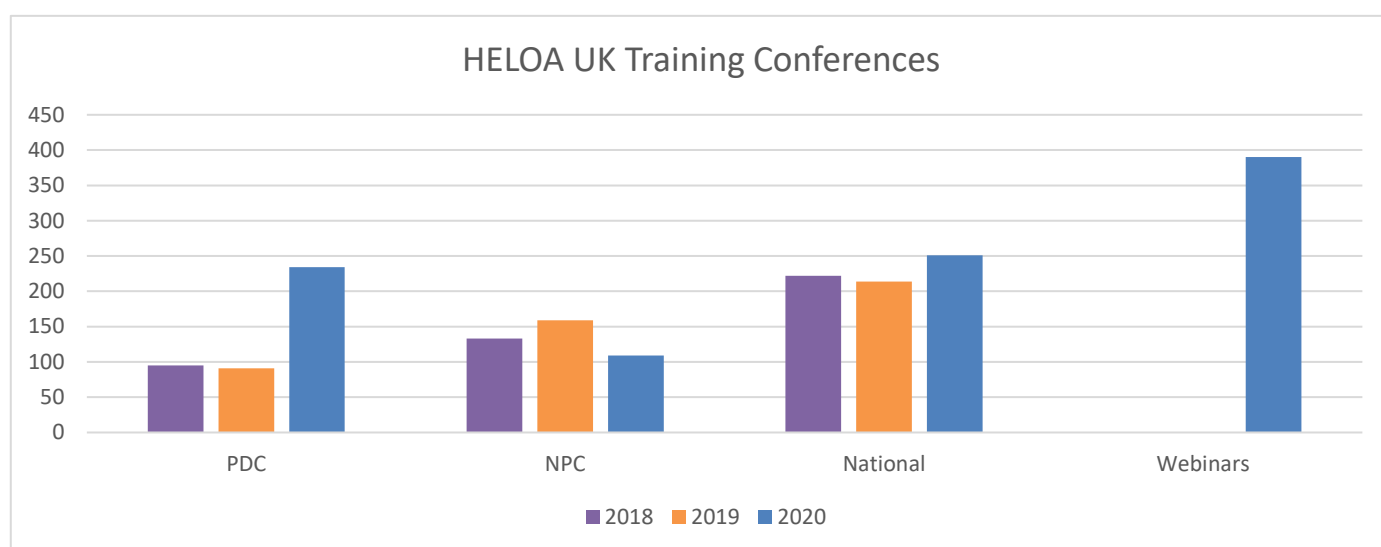
We've continued to develop our relationship with HELOA Group Vice Chair's over 2020 and have had more discussions around the range of training available at group and national level. The Training Database, which was created in 2019, has had information added by all Groups and allowed us to look more broadly at what we offer our members. We also created a Slack channel for Group VC's to communicate and share training ideas and when the decision was made to postpone the National Conference due to Covid-19, the national training team events plan was shared with Group VC's for comment before being shared with the wider membership.



### Working with the HELOA Partnerships

Working with our Partnerships team has been key part of our targets, and we're consistently trying to engage and connect with relevant sponsors and partners for our national training events. At the National 2020 event we had **17 sponsors and partners** exhibit and contribute by sponsoring our HELOA awards. With our virtual events we've engaged with Unibuddy, The Student Room, UCAS, Student Finance and Wonkhe and have plans to run events with UCAS and Student Loans Company in early 2021. We have also recently incorporated our Partnerships information into our Training Database which gives us a fantastic oversight of external partners and sponsors we can contact for input at National and Group training.

## Training events - Membership Engagement



### HELOA National Conference and AGM

The HELOA National Conference and AGM takes place in January each year and is the largest of the HELOA training events with sessions covering Student Recruitment, Widening Participation, Marketing and Professional Development. The 2020 event was a huge success with the highest number of delegates and some of the some of our best feedback so far with multiple responses highlighting it was “Genuinely the best conference I have attended (& I think I've attended at least 7 over the years!)”

|  | 2019  |     | 2020  |     |
|--|---|-----|---|-----|
| <b>Delegates</b>                       | 214   |     | 251   |     |
| <b>Job levels</b>                      | Director  | 1%  | Director  | 1%  |
|  | Head  | 3%  | Head  | 4%  |
|  | Manager   | 20% | Manager   | 25% |
|  | Officer/Coordinator                                 | 62% | Officer/Coordinator                                 | 61% |
|  | Assistant   | 4%  | Assistant   | 9%  |
| <b>Feedback</b>                        | 90.3% rated the conference as 'good' or 'excellent' |     | 93.2% rated the conference as 'good' or 'excellent' |     |
| <b>First conference attendees</b>      | 35.3%   |     | 37.6%   |     |
| <b>Will attend future HELOA events</b> | 96.7%   |     | 98.5%   |     |

Unfortunately, the training team and HELOA UK Committee had to take the difficult decision earlier this year to postpone the 2021 National Conference due to the Covid-19 pandemic. As a team, we have focussed on the new and different ways to engage our members with virtual events and have aimed to ensure the same level and number of training events are available. We made the decision that trying to replicate the National Conference online may not be ideal due to the length and number of sessions, so we've instead developed additional Professional Development Conferences and introduced the HELOA Best Practice Webinars. More information about these in the below sections. We plan to hold our 2022 conference at Carden Park Hotel between 12<sup>th</sup> and 14<sup>th</sup> January.

### Professional Development Conference

The HELOA Professional Development Conferences are intended to be smaller, one-day conferences based around a specific topic that is relevant to our members. The events, due to their smaller nature, are intended to focus on networking and sharing best practice.

After making the decision to postpone 2021's National Conference, we decided that offering additional one-day Professional Development Conferences, focussed on the wider session themes we'd offer at National, would be the best way to engage with members and provide accessible training. In 2020 we've held PDC's on Mental Health - supporting students and staff, Student Recruitment - Blended Delivery and Widening Participation - challenges for the year and ways to reach underrepresented groups.

Thanks to close working with our Partnerships team, Unibuddy sponsored our first virtual PDC and we were able to offer this event for free to members. For subsequent events, we have charged a minimal cost to ensure they are still accessible in these difficult times.

In 2020, we aimed to engage more HELOA members who are currently at working at a Manager level and we would like to continue this increase next year. Based on delegate feedback, we aim to include 1 external speaker, 1 case study, 1 sponsor/partner and 2 networking opportunities (offered as Breakout Rooms) per event.

|                              | 2018 (3 events) | 2019 (2 events) | 2020 (3 Virtual events) |
|------------------------------|-----------------|-----------------|-------------------------|
| <b>Delegates</b>             | 95              | 91              | 234                     |
| <b>Job level (Manager)</b>   | 9%              | 15%             | 19%                     |
| <b>Feedback (Gd. or Ex.)</b> | n/a             | 87.5%           | 91%                     |

Due to the success and increased engagements at these conferences (each one has fully booked and had a waiting list) we've agreed that going forward even with a return to in person conferences we will offer at least one virtual Professional Development Conference per year.

### New Practitioners Conference

The HELOA New Practitioners Conferences are run twice a year and are aimed at members that are new to the higher education sector and have been in their roles for less than six months. Members are provided with training on the broad skills needed within the sector across widening participation, marketing and student recruitment roles.

This year we were due to hold our events in Sheffield after holding our 2019 events in Leeds and Nottingham but with the Covid-19 pandemic we made the decision to move the event online to support those new members who've joined the sector in a very new time. We continue to see a lot of interest and engagement with the conferences. We saw 64 delegates in June and 45 in October, a slight decrease in numbers from the previous year, however we attribute this to the lack of new roles available in the sector. We considered not running the 2<sup>nd</sup> NPC in October, but conversations with our members via their Group meetings indicated there would still be interest and new members to benefit from it being run.

Based on delegate feedback from the June virtual conferences, we included additional breakout sessions at the beginning and end of the conference and asked speakers to always allow for 15 minutes discussion between delegates after presenting their main content.

|                              | 2018   | 2019  | 2020 (Virtual) |
|------------------------------|--------|-------|----------------|
| <b>Delegates</b>             | 133    | 159   | 109            |
| <b>Feedback (Gd. or Ex.)</b> | 95.75% | 95.9% | 97%            |

Next year we will continue to analyse delegate feedback to offer new sessions that reflect the changed experience of new practitioners in the current higher education environment and, if the event has to run in a virtual setting again, look at adding a social session in addition to work networking.

### Webinars

With the pandemic and the lack of physical events across the UK, we knew that our members were really missing opportunities to chat to one another, share ideas and best practice around the challenges they were facing and solutions to some of those issues. We created the Best

Practice webinars to be an open space for members to discuss the new changes within the academic year and imitate some of the informal conversations that would usually occur over a tea or coffee at an event. The webinars are free to attend and are for HELOA members only.

Our first Best Practice Webinar about Covid-19 challenges, was fully booked up in less than an hour leading to us repeating the event a week later. We then held webinars focused on Clearing in July with input from UCAS, Ofqual and The Student Room. In October we tried a new format with A Conversation with... Directors/Head's of Departments discussing the challenges and impacts of Covid-19 answering questions submitted by our members. Finally, we will be hosting a Reflection 2020 webinar in December with a session from Wonkhe and conversations with HELOA Communications and Partnerships. (Please note booking form for this webinar was not live at the time of writing).

|                  | April 2020 (Covid-19)            | July 2020 (Clearing)             | October 2020                     |
|------------------|----------------------------------|----------------------------------|----------------------------------|
| <b>Delegates</b> | 150                              | 120                              | 120                              |
| <b>Feedback</b>  | 91.5% rated<br>Excellent or Good | 94.7% rated<br>Excellent or Good | 92.9% rated<br>Excellent or Good |

The webinars have proved popular and we will continue to try new formats based on member feedback and hope to offer relevant webinars every few months in the new year. As a team we will look to increase conversion from bookings to attendance.

## Training events - Evaluation

As indicated in the conference overviews above, each event continues to see over 90% of our delegates rating them as 'Good or Excellent'. We are grateful to see that speakers, sessions and opportunities to share best practice with other members are well received and this consistent positive feedback has led to multiple fully booked HELOA Training events.

Moving conferences online has been an interesting challenge and we haven't perfected conferences (...yet) but we've received some lovely feedback from our 2020 events:

*"I really enjoyed it, it can be quite deflating at the moment in our line of work, so I think the positive reinforcement from that level of staff was very encouraging."* - October Webinar

*"Thank you for putting it all together, it ran very smoothly and definitely didn't feel it was a 'first time' attempt, super professional :)"* - June PDC

*“A huge thank-you to a fantastic and dedicated training team for another brilliant conference. Workshops and (most!) keynotes were another level this year. Lots of useful discussions and actions to implement within my own group and team” - January National Conference*

*“This was my first HELOA conference and I am really looking forward to the next one. The event flowed really well and the sessions were engaging and kept me interested for the full conference” - November PDC*

*“Overall a great conference, massive thank you to everyone at HELOA who managed to organise this! It was really valuable, and has increased my confidence in working in my new role.” - May NPC*

Whenever the team receive constructive comments we look carefully at where changes can be made to improve the member experience. Some members would like more networking and longer events and others prefer snappy presentations/information and an overall shorter conference. We will always read every comment received in our evaluation forms and strive to improve every training opportunity we offer.

| <b>You said...</b>  | <b>we did!</b>   |
|---|--|
| More networking with other members especially due to the lack of UK wide events | In April, we introduced the webinars and added at least 2 breakout room sessions to each conference. We try to keep breakout rooms as small as possible (around 8 - 10 delegates) so they mimic our round tables at physical conferences.                                      |
| More sessions around Mental Health and Wellbeing                                | We offered a Professional Development Conference in June themed around student and staff mental health and worked with our Partnerships team to gain a sponsor for the event, so it could be offered for free.   |
| Having a lead/facilitator in breakout rooms                                     | For each breakout room, we ask a member of HELOA UK Committee to chair and host delegates. We try to provide a few prompts and questions which will facilitate discussion.   |
| Lack of people engaging during the event  | To get more engagement during conferences and webinars we've altered and highlighted in our pre-conference communications that delegates should be prepared to turn on cameras and microphones as we will be encouraging this for breakout rooms and questions after sessions. |

|  |   |
|--|---|
| Icebreakers/ interactivity with speakers | It can be quite awkward to socialise on virtual conference in comparison to in person events, so we've tried to include some time for an icebreaker in breakout rooms (where possible) and asked speakers to always have some discussion time built into their sessions so networking and chatting is encouraged. |
|--|---|

Next year we'd like to focus on how to increase participation rates of our evaluation forms so that we can be confident that changes we consider are reflective of the majority of our membership rather than just some. We currently see around 50 - 55% response rate and 30 - 40% free text comments which have all been extremely helpful in tailoring our conference programmes.

### **Training events - Budget**

The Training team make every effort to ensure each conference is run at a low-cost to benefit the charity and our members. Our current pricing structure is great value for money for our members and we have highlighted that the small cost we are currently charging for our virtual events is being invested in external speakers, online platform licenses and future physical venues.

We've worked closely with the Finance and Office team to ensure delegates are providing PO's in a timely manner for conference attendance. However, in line with some changes to institution finance processes following Covid-19, we have been able to allow for PO's to be supplied post virtual events to guarantee attendance for our members.

The Partnerships team have been invaluable in sourcing appropriate and relevant sponsors and partners to speak and support our events. Input from these organisations allows us to run conferences at discounted prices for our members and in the case of our June Professional Development Conference completely free.

Going forward we will continue to work with RedMeet, an organisation who offer a free service to charitable associations, to find appropriate and high-quality venues at a low cost. We will be looking for 2023 National Conference venues and member feedback and awareness of an overall cost for the conference will be the top priorities to consider when making final decisions. We intend to invite at least one external speaker to each conference to give additional sector insight to our members and we are also planning to invest in formal accredited certification for

our Professional Development Conferences, which will be a fantastic opportunity for our members.

## Training Team thanks

This year our events and above successes would not have been possible without the fantastic Conference Managers:

- Andrew Cooper, Conference Manager (Professional Development Conferences)
- Emily Day, Conference Manager (National Conference, Membership Liaison)
- Emma Thomason, Conference Manager (New Practitioners' Conference)
- Jonas Rae, Conference Manager (National Conference, Venue Liaison)

You've all managed the challenges of HELOA, your day jobs and any additional challenges that Covid-19 threw at us amazingly and I have been so lucky and grateful to continue working with this team.

Emma joined the team just before the pandemic hit and hasn't run a conference in person yet, but has had some great success with the virtual New Practitioners' Conference. Thanks for coming in with a fab attitude and doing such a great job with a team you've only met in person once! Jonas attended team meetings and supported events whilst moving houses during the pandemic with a toddler and I honestly think he's a tech superman. Andrew is the multitasking king who successfully ran a PDC, virtual fair and attended a LJMU team meeting in the same day - his skills are marvellous. Emily, words cannot describe how much support and motivation you offer to the team and I'm sure you won't rest until all of HELOA adore Disney as much as you - the conference titles and playlists are always on point.

And finally, thank you to Dawn and Louise in the HELOA Office for their invaluable support and to the rest of the UK Committee for running breakout rooms, offering ideas and supporting the National training events when they can. It is a joy to work with you all.

**Reena Kaur, HELOA UK Vice Chair (Training)**  
**November 2020**