

HELOA Office Annual Report 2022

Overview

The HELOA office continues to be based at Edge Hill University which provides stability for the Association and the office staff through the provision of office IT support, HR facilities, training opportunities and the support of Simon Jenkins as the key HELOA contact and Ruth Slater as line manager. The office is comprised of Dawn McClintock - Office Manager working 30 hours per week and Louise Povey - Office Assistant working 15 hours per week.

Office Provision

The office core responsibilities support the association to function effectively. The office is often the first point of contact for members and focuses on meeting the needs of members by: providing advice and guidance for enquires; processing memberships efficiently; ensuring that members are kept up to date with the affairs of the association through national and group mailing lists, and subscription to the fortnightly newsletter and; regularly reviewing and updating member communications such as welcome emails, membership number reminders and sharing of primary contact details.

The office has responsibility for ensuring all member institutions remain up to date with financial remunerations to the Association. This involves informing institutions of their current members and cost implications, logging purchase order numbers, raising membership invoices and keeping accurate financial records.

The office, with the support of UKC, leads on ensuring HELOA is GDPR compliant and monitors and reviews the GDPR systems and processes. The office supports with the induction of newly elected and appointed members and ensures that they are aware of their responsibility in handling members' data securely and in line with the privacy notice.

The office also supports the training team with conference preparations and helps to facilitate UKC meetings and the Annual General Meeting.

Key Developments 2022

OFFICE PROVISION

As the office has developed and taken on more responsibilities over the past five years, a review of the office tasks, responsibilities and timeline was undertaken to ensure tasks were assigned to the correct member of UKC or office. As a result of this, the office manager's working hours was increased from 25 to 30 hours per week. This and further outcomes of the review has ensured that the office can support the needs of the Association and committee members effectively.

MEMBERSHIP

A key priority for the office is processing membership applications, transfers and cancellations effectively and informing primary contacts of unused membership places, supporting institutions to benefit from their membership. Membership welcome emails and the membership pages of the website were reviewed and updated to ensure members had access to the necessary information. Induction emails and welcome pack for elected and appointed members were reviewed to support the onboarding of new committee members.

Please see below for the number of memberships processed between November 2021 and November 2022.

	Individual	Institutional
Number of members 16.11.21	1698	150
Members Added	593	3
Members Removed	578	3
Number of members 16.11.22	1713	150

OFFICE SYSTEMS & PROCESSES REVIEW

We undertook an office systems and processes review and a communications review to ensure that these were fit for purpose. Although membership processing is across a number of systems, they are successful and cost effective and as we continually adjust and streamline processes where possible, felt that the current set up was effective. The addition of the group Google drives and increased use of Google documents had a positive impact on internal communications and information sharing.

GDPR & POLICIES

Continued to ensure that the office and committee processes were GDPR compliant by undertaking an annual GDPR review and the ongoing implementation of GDPR procedures for incoming and outgoing elected and appointed members. Reviewed the privacy notices for members and elected and appointed members and met with the VC (Governance) to ensure we met the GDPR requirements of the Charity Commission. This indicated that HELOA had taken sufficient steps to ensure the safety of members' data but highlighted the need for Data Breach and Data Request Policies which the VC (Governance) then compiled.

MEMBERSHIP ENGAGEMENT

Reviewed the office communications with members following membership feedback on the 2021 membership survey which was very positive. Implemented actions including, sending regular membership lists and highlighting action points in communications.

To support engagement with primary contacts, we reviewed the primary contact role descriptor and increased the number of occasions where the primary contact details were shared with members. In addition, the membership renewal and primary contact emails were updated to ensure clarity and making the key information more accessible.

Future Developments

- Provide ongoing effective and efficient administration for both members and committees by reviewing and updating information.
- Ensure office and committee processes are GDPR compliant by undertaking an annual GDPR review.
- Support members to engage and benefit from their membership.

Thanks

All this work would not have been possible without the ongoing dedicated support from Louise Povey, the UK committee and Group committees. Thank you for being a fantastic team to work with.

Dawn McClintock

HELOA Office Manager

Louise Povey

HELOA Office Assistant

November 2022