

HELOA Office Annual Report 2025

Office Provision

The office, based at Edge Hill University, provides a stable and supportive environment for HELOA and its staff. This partnership ensures access to IT, training and HR support. The office plays a central role in the effective operation of the Association by offering guidance to members and enquirers, processing memberships efficiently, distributing communications and assisting committee members. It is also responsible for ensuring that member institutions remain up to date with their financial obligations, including membership and national training fees. In addition, the office also oversees HELOA's compliance with GDPR regulations and helps to coordinate national training events, UK committee meetings and the Annual General Meeting.

Key Developments

Workload Review

Since becoming full-time roles in February, the office has worked closely with various areas of HELOA to assess and provide additional support. The impact of this support has been noticeable across the Association, with some of the key changes outlined below:

Communications - Significant progress was made in enhancing content on the website by creating dedicated pages for the Annual General Meeting (AGM), membership, and Professional Development Conference (PDC). Updates were also made to the homepage, to improve relevance and engagement, including removing outdated content and adding current blog posts and Instagram links. Integrated calendars and links for iCal and Google Calendar invitations were embedded providing good functionality, alongside improvements to overall website formatting.

Finance - Additional finance work was undertaken whilst awaiting the appointment of a new Vice-Chair (Finance) and to strengthen financial management and transparency. This included reviewing and updating financial documents and procedures and providing support with auditor queries and documentation to ensure compliance with relevant regulations. All payments and

invoicing were managed effectively, with monthly reports produced to provide clear oversight of HELOA's financial position.

Governance - Support was provided in updating the Standing Orders, policies and privacy notices to ensure compliance and consistency. The election processes were coordinated effectively, and trustee checks and procedures were introduced to strengthen governance standards to align with the recommendations of the Charity Commission and the Office for Scottish Charity Regulator (OSCR).

General Data Protection Regulation (GDPR)

As part of our continued commitment to data protection and due diligence, additional measures were implemented to strengthen the security and management of members' data. This included creating a privacy preferences form which was also incorporated into membership processes enabling members to review and update their data preferences. The Processing Activity Register, Privacy Notices and privacy statement were updated to reflect current data protection standards and ensure alignment with the recommendations provided by the Information Commissioner's Office (ICO).

Sustainability

HELOA continues to actively assess the sustainability of its operations, including detailed costing exercises for in person meeting locations and dates and associated travel to meetings and events. Committee members are encouraged to use the most cost effective forms of transport, such as rail or car sharing to reduce both expenses and environmental impact. Existing systems have been reviewed to ensure they remain fit for purpose and cost efficient, leading to the transition from Zoom to Microsoft Teams for meetings and webinars. Additionally, work has been completed to migrate the charity's digital operations to a Google non-profit account, further supporting sustainable and streamlined practices.

Thanks

A big thank you to Louise for her ongoing dedication and hard work in supporting HELOA's goals and activities. We also really appreciate the

committee members for their continued support and efforts in helping HELOA succeed.

Dawn McClintock
HELOA Office Manager
November 2025