

HELOA Office Annual Report 2021

Overview

The HELOA office consists of Dawn McClintock - Office Manager working 25 hours per week and Louise Povey - Office Assistant working 15 hours per week. The office continues to be based at Edge Hill University which provides stability for the Association and the office staff through the support of Simon Jenkins as line manager, HR and payroll facilities, office IT support and training opportunities.

Office Provision

The office has many core responsibilities which supports the association to function effectively. The office is often the first point of contact for members, and it is an ongoing priority to provide a high standard of customer care. To do this, the office 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, chasing and logging purchase order numbers, raising and chasing invoices and keeping accurate financial records and on occasions, supports with invoicing for national events.

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 ensures that incoming and outgoing elected and appointed officers are aware of their responsibility in handling members' data securely and in line with the privacy notice by sharing information, requesting confirmation and keeping GDPR records.

In 2021, national training events were both virtually and physically. The office supported the training team in various ways, including:

- Sending out national training event communications and confirmation emails,

- Dealing with conference enquiries, checking membership status, logging POs and COVID passes,
- Ordering merchandise and resources, and preparing delegate packs, name badges, registers and delegate lists,
- Supporting during the event by setting up at the venue, registering delegates and dealing with enquiries and providing general support during conferences.

The UK committee meets 3-4 times per year with the Annual General Meeting held in January each year. The office helps to facilitate these meetings by:

- Sending out meeting invitations, agendas and documents,
- Keeping a record of attendance and apologies,
- Making hotel, restaurant and travel reservations,
- Updating reports according to brand guidelines and circulating,
- Informing members of their primary contact ahead of AGM,
- Preparing office reports for each,
- Minuting the meetings.

Key Developments 2021

Membership:

- The information sent to members was reviewed and updated to ensure that members were well informed and had the most up to date information available. This included membership welcome emails; primary contact welcome and confirmation details; induction information for committee members, details for primary contacts; and UKC Welcome pack.
- Individual and institutional membership processes were reviewed to make sure they were efficient and accurate.
- The Membership survey provided an opportunity for the office to collect feedback from the membership. The questions were designed to examine the effectiveness of the office in supporting members and for members to feedback on any additional support the office could provide. Outcomes of the survey will be shared with members by the VC (Membership & Administration).
- A key priority for the office is to process membership applications, transfers and cancellations effectively. This involves a number of steps including updating the CRM, updating Jiscmail and Mailchimp (Bulletin) lists, sending welcome emails and

processing membership payments. Please see below for the number of memberships processed between November 2020 and November 2021.

	Individual	Institutional
Number of members 16.11.20	1611	147
Members Added	673	5
Members Removed	586	2
Number of members 16.11.21	1698	150

Associate membership:

- Following the decision at the 2021 AGM on the creation of associate membership, the office played a key role in ensuring the administrative processes were in place to do this:
 - Set up additional field on Dynamics for associate membership and changed current members to full members,
 - Created associate members' main and group Jiscmail mailing lists,
 - Reviewed and updated individual, institutional and primary contact welcome emails for full & associate members,
 - Added details regarding associate members to the UKC Welcome Pack,
 - Updated individual, institutional and primary contact membership forms with the option to choose full/associate membership.
 - Restructured the membership pages of the website and created the copy including, membership benefits, membership types, FAQs and joining details.
 - Updated necessary documents:
 - Created a Primary contact role descriptor for associate members,
 - Created the 'Criteria for Associate Membership' to be included in the Standing orders and reviewed the Standing Orders in collaboration with the VC (Governance) and VC (Membership & Administration) to incorporate the creation of associate membership,
 - Supported VC (Communication) with the development of the membership brochure by preparing membership joining and processing details. The brochure was shared with potential full and associate members.

Systems Review:

- The office created an Office Systems Review proposal to support formulating a way of bringing different systems together to help the office process memberships and communications more efficiently and an Organisation Consultation proposal to review how the UK Executive, UK Committee and group committees could work together more efficiently.
- Several IT companies were contacted to explore the level of support they could provide with the proposals. This proved to be challenging due the unique set up and structure of HELOA, resulting in one option to investigate further in 2022.

GDPR:

- GDPR compliance is an ongoing priority for the Association, so the office takes the necessary steps throughout the year to ensure this is completed successfully. Key actions undertaken in 2021 included the following:
 - Reviewing and updating privacy notices for full and associate members.
 - Conducting an annual GDPR review of members' data held by the office and committee members.
 - Creating Google Drives for groups to store HELOA data and documents to support with security, efficiency and continuity.

Future Developments

- Provide ongoing effective and efficient administration for both members and committees by reviewing and updating information.
- Continue to develop the office systems and processes with support from VC (Membership & Administration) and potential IT companies.
- Ensure office and committee processes are GDPR compliant by undertaking an annual GDPR review.
- Work with the VC (Governance) and VC (Membership & Administration) to review the Standing Orders and policies to ensure they are relevant and up to date.
- Support institutional and individual members to engage and benefit from their membership.
- Develop engagement with Primary Contacts.

Thanks

A big thanks to Louise Povey for her continued dedication, flexibility and enthusiasm for the role. The move back to physical events has allowed Louise to experience HELOA's activities as they were pre-pandemic and again Louise has adapted well to the changes.

Thanks to Jonny Atkinson, Andrew Cooper and Reena Kaur who have continued to provide invaluable support and finally, thanks to UKC for the assistance they have provided, on top of managing their own work schedules.

Dawn McClintock
Office Manager

Louise Povey
Office Assistant