



Non publicly funded Institutions as HELOA members

At the HELOA AGM 2019, the HELOA membership voted in favour of a proposal to explore the option of allowing 'Private Providers' to join the association.

The following information is designed to provide context and support proposals that will be presented to the HELOA membership at AGM 2020.

What is a private provider?

Many questions were raised from the membership regarding the definition of private provider. As this term is not clear, for the purpose of this proposal the term 'private provider' will be replaced with 'non-publicly funded institution' with a definition of what is meant by this below.

An institution that does not benefit from public funding, unlike traditional universities that receive government grants for both teaching and research. Some providers are classed as 'for profit' whilst other providers are run as charities or classed as not for profit.

HELOA as a charitable organisation

In 2018 HELOA was granted charitable status within England and Wales* The charity commission made the decision to grant charitable status based on the information provided within the application which states that HELOA members are **'publicly-funded higher education institutions who have Access and Participation Plans in place with the Office for Students'**

However, Clause 9.7.1 of the HELOA constitution allows some flexibility that would provide a mechanism for non-publicly funded institutions to take part in our training and development opportunities, should members vote in favour of proposals:

"The charity trustees may by Standing Orders create honorary, associate or other classes of non-voting membership, and may determine the rights and obligations of any such members (including payment of membership fees), and the conditions for admission to, and termination of membership of any such class of members"

*application for charitable status in Scotland & N.Ireland is currently underway

What do other similar organisations do?

Research on similar organisations show slightly different approaches to membership but two main consistencies.

- Different pricing structures depending on the nature of the organisation
- A code of conduct and / or members etiquette document that members must adhere to

NEON - National Education Opportunities Network

There is no specific restriction on who can become a member with pricing structures available to the following:

- HEIs
- FE colleges
- Charity / Voluntary organisation / Partnership
- Private Sector organisation
- Local Authority
- School / Sixth Form College / Students Union

Two membership types are available 'membership' and 'Premium membership' only HEIs, FE Colleges and Charity / Voluntary organisations have access to the Premium membership. The difference between 'membership' and 'Premium' is the addition of NEON event credits.

NASMA - National Association for Student Money Advisors

NASMA membership is done on an individual basis rather than institutional. The main criteria for joining are based on job role. To qualify for Full Ordinary membership, you must be one of the below:

- Student Money Adviser in a University or College or HE, Students' Union, Guild and Association
- Discretionary Fund and Bursary Administrator in a Higher Education Institution
- A member of staff in a Further Education College whose remit includes money advice and / or discretionary fund administration

There is a reduced rate for FE membership.

NASMA have confirmed that members from 'Private' institutions can join if they satisfy the job role criteria.

Associate membership is available to those not working in roles eligible for Full membership with applications however these must be approved by the NASMA board. Associate members are eligible for the same membership benefits as Full HE Ordinary members except for mail base access. An Associate Member rate for training and development events also exists.

BUILA - British Universities' International Liaison Association

BUILA have one level of membership and is done on institutional basis.

To qualify for membership, institutions must be a member of Universities UK, Universities Scotland or a full Guild HE member.

The proposal

Based on this information and in line with HELOAs commitment to helping students make informed decisions, the following proposals will be put to members at AGM.

1. The creation of an Associate membership for institutions who are not (or part) publicly funded and have commitment to widening participation with an Access and Participation Plan in place with the Office for Students in England, or for providers based within Scotland and Wales can show a clear and demonstrable commitment to Widening Participation as part of their institutional strategy and operational delivery, and have published figures showing their WP targets and their current progress towards those targets.

Associate members would allow institutions who meet the criteria, access to HELOA national training events including national conference. Costs of both membership and training events will be determined by the HELOA training team and agreed by the HELOA executive

2. Should the membership vote in favour of the creation of an Associate membership with access to national training events, the HELOA executive propose a second motion to consider the practicalities around allowing Associate members access to group level activity. This activity would be included as part of a wider membership review that is currently being undertaken.

3.

How many institutions / members would this involve?

At the time of writing, there are 389 institutions registered with the OfS in England, of these 243 have Access and Participation Plans in place for 2019/20. HELOA currently has 119 member institutions from English HEIs plus a further 25 from Welsh and Scottish Institutions who would not be included in the 389. For information the HELOA office has had a very low number (less than 10) of previous enquiries regarding HELOA membership

What would the impact be on the current HELOA membership?

With an increase in members, this could place higher demand on the training opportunities that HELOA offers. As with any training opportunity numbers are capped depending on maximum capacity, however in this case a proportion of places would be allocated by the training team to associate members with further places released subject to both demand and availability. It must be noted that non HELOA members are currently allowed to attend both the HELOA New Practitioners conference (NPC) and Professional Development Conference (PDC) provided they pay the non-member rate.

Should the HELOA membership vote in favour of allowing associate members access to group meetings then a larger piece of work would be required to explore the practicalities of this.

If Associate Members attended the HELOA national conference, would they be able to vote at AGM?

No. Clause 9.7.1 of the HELOA constitution clearly states that associate membership would be a non-voting membership, therefore associate members would not be invited to attend AGM. The practicalities of this would be determined by the HELOA executive and training team.

Why would institutions need to have an APP (or equivalent) in place?

As a charitable organisation, HELOA is for the public benefit to advance the education of people within the United Kingdom and helping students to make informed choices. Following initial consultation with existing HELOA members on the idea of letting non-publicly funded institutions joining the organisation, concerns were raised regarding the WP commitments of these institutions, particularly those who operate on a 'for profit' basis. By asking for an APP (or equivalent) they have had commitment to WP plans approved by a government body.

Would Associate Members have to abide by the HELOA Good Practice Guidelines?

These guidelines apply to all HELOA institutions regardless of membership 'status'. During 2020, these guidelines will also be updated ensuring they are fit for purpose in our evolving sector.

What are the benefits to creating an Associate membership?

The creation of an Associate Membership could have several benefits, these include:

- The opportunity for HELOA to expand its reach across the sector
- The potential to increase finances which could be reinvested in training and resources for members both nationally and across groups

- The scope to broaden discussions and share best practice with a wider audience which benefits HELOA members as practitioners and the students and communities in which we work - a key condition of the organisations charitable status.

What are the challenges of creating an Associate membership?

The main challenge to HELOA as an organisation would be around its capacity to accommodate an increased membership. Training events, both nationally and at group level are currently well attended and an increase in numbers could potentially restrict venue choice or require an increase in events and have cost implications on members institutions. There would also be an impact on the HELOA Office in terms of the administration of membership and potential increase in enquiries received each day. What must be considered is that HELOA is a charitable organisation run by a team of volunteers and 2 part-time paid staff.

However, the organisation in its current format still has to face these challenges in accommodating existing member demands.

Would Associate Members receive beneficial rates with UCAS or any other partnerships / collaborative relationships?

Existing HELOA members do not receive beneficial rates with UCAS. Any existing membership benefits extending to Associate members would be explored by the HELOA partnerships team as part of part 2 of this proposal.

What are the timescales of this?

If the HELOA membership vote in favour of part 1 of the creation of an Associate membership, then this would form part of the ongoing membership review which is looking at institutional membership structures and pricing. The proposed date for implementation of the Associate membership, along with any changes to existing HELOA membership would be September 2020, in line with annual membership renewals.

If members vote in favour of part 2 then this work will still form part of the membership review, however a proposal of how this will work will be brought to the AGM in 2021.

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On behalf of the HELOA Executive

