

## AGM 2023 Minutes

Wednesday 11th January 2023

Crowne Plaza, Newcastle and online via Zoom

### 1. Welcome and Introduction - Jonathan Atkinson (JA), UK Chair

The UK Chair, Jonny Atkinson opened the meeting by welcoming everyone and explaining the process. Each item would be introduced, followed by an opportunity for comments and questions, then a proposer and seconder would be sought before a vote would be taken.

Everyone was welcome to comment, but only primary contacts and appointed proxies could vote. There are 150 institutional members and to be quorate one-third of those or their appointed proxies must be present (50). 103 primary contacts or proxies were in attendance, so the meeting was quorate and able to conduct formal business. The motions would be passed by a simple majority vote and in the event of an equality of votes, the Chair could either: call for another vote; or exercise his casting vote.

Non-member attendees: Dawn McClintock, HELOA Office Manager, Louise Povey, HELOA Office Assistant, Thea Chapman, Mi-Voice and the AV team, Maverick Live.

### 2. Apologies for Absence - Andrew Cooper (AC), UK VC (Membership & Administration)

The Vice-Chair (Membership and Administration) Andrew Cooper, Lancaster University, received 48 formal apologies from members.

### 3. Minutes of the AGM, 12<sup>th</sup> January 2022 - Jonathan Atkinson (JA), UK Chair

The Chair asked for any comments, questions or amendments to the 2022 AGM Minutes. No comments or questions were received.

<b>Proposer</b>	Jonathan Atkinson, University of Liverpool
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<b>Secunder</b>	Andrew Cooper, Lancaster University
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The Chair invited the meeting to adopt the 2022 minutes as a true and accurate record. The minutes of the 2022 AGM were accepted as an accurate record - For: 94, Against: 0, Abstain: 8.

## 4. Reports

### 4.1 UK Committee Report - Jonathan Atkinson (JA), UK Chair

**HELOA 2021-23 Strategy:** The strategic points in the 2021-23 strategy were broken down into objectives for each of the executive areas which formed part of the organisation development framework. From these, actions and goals were established to work towards. There had been good progress across all areas.

**Equality, Diversity and Inclusion:** An EDI Manager role was created as part of the UK committee to support EDI development over a year, integrating best practice into the association and forming part of the future strategy.

**Office Responsibilities:** Due to increased membership numbers and increased responsibilities, JA, AC and the office team reviewed the office responsibilities and processes. Time was the required resource, so the office manager's hours were increased by five hours per week. Office working hours may need to be increased again with the increased support to membership and the wider teams. Investing in a healthy, well balanced and well-resourced office was critical.

**Surplus:** Through the pandemic, the Association incurred a surplus as there were fewer outgoings. Proposals were sought from UKC on how to invest the surplus. Cost benefit analyses were conducted on these considering, cost, impact, time and practicality. Details on this can be gained from group chairs. Two key areas the surplus was invested in was the EDI consultation and professional development across volunteers of the organisation.

**Volunteers:** Committee members invest time onboarding and training new volunteers so that they are equipped with the necessary skills for the role. For members considering taking on a HELOA role, an induction and ongoing support will be provided.

**Sector Engagement:** As Chair, HELOA is represented at UCAS counsel and several advisory groups around English policy. This provides representation of student recruitment, outreach and other professionals, and shares valuable information with HELOA. There have also been discussions with Ofqual, collecting membership feedback and sharing that with Ofqual and the membership.

**Membership:** HELOA now has over 1700 members, 70 of which are volunteers across groups, UCAS groups, UK committee and the executive committee. There were over forty HELOA events held in 2022, both locally and nationally, which is a huge amount of work and a fantastic achievement. Thanks to those involved in these achievements over the past 12 months and beyond.

### 4.2 Partnerships Report - Jack Clare (JC), UK VC (Partnerships)

**Partnerships team:** The team currently consists of Jack Clare - VC (Partnerships), Kate Venables - Partnerships Manager, Alice Stonehouse - Partnerships Manager, Elliot Newstead - Partnerships Manager for Membership Engagement (UCAS). The VC (Partnerships) and the Partnerships Manager for Membership Engagement roles will soon be available. If members are interested in either of these roles, speak to a member of the partnership's team.

**Partnership engagement plan:** Over the last year in particular, the number of HELOA partners has grown. HELOA has strong relationships with a range of organisations from Find a University, The Student Room, SLC, Uni Taster Days and UCAS. A huge amount of work goes into these partnership arrangements. Many partners are in attendance at the national conference business exhibition.

**UCAS groups:** The UCAS Product Development Group and the UCAS Working Group are well established and in a position to influence decisions that UCAS make for example, involvement in a floor plan at an exhibition on WP content and being involved in UCAS application forms for prospective students. A huge amount of great work has been undertaken by these volunteers.

**Membership updates:** The partnerships team have met with groups and group VCs to communicate with members about the work of the team and the work that has been undertaken with different partners. A new partnerships framework was developed to provide an overview for members and partners, illustrating the different partnership arrangements for the organisations HELOA work with. Massive thanks to Alice Stonehouse, Kate Venables and Elliot Newstead for all their hard work with partners this year.

**Partners:** Previously reached out to members for suggested partners, continue to contact the partnerships team with any further ideas. Developing the relationship with Find a University came from members requesting more insight from a PG perspective and has provided the opportunity to share insights and activities with members. Members also requested to see WP partnerships. Current partners do have an element of WP and HELOA currently has draft agreements with Education and Employers, Unifrog and Zero Gravity. The partnerships team are driving forwards with group link partnerships which has been officially signed within the Welsh group, with others under development.

#### 4.3 Group Development Report - Amanda Kenningley (AK), UK VC (Group Development)

**Group Committees:** Some group positions have been difficult to fill since the pandemic however they are looking much healthier this year. Roles continue to become vacant due to end of terms and other circumstances so vacancies will be coming up.

**Group Meetings:** Since the pandemic, groups have run meetings physically or virtually, depending on what suits their members however, it is good to see that all groups have had at least one in-person meeting in 2022.

**Mentoring Scheme:** The aim for the mentoring scheme had been to roll it out to all groups during 2022. This however has been slightly delayed due to different circumstances and recruitment to group committee roles. Some groups are in the process of launching the scheme and others hope to have implemented it by the end of 2023.

**Group Budgets:** During the pandemic group budgets were frozen so being able to access these funds has provided more opportunities for group sessions such as training, speakers and open day posters. Members are encouraged to share ideas and suggestions with group committees on what they would like to see happen in their group ensuring they are useful and productive for members.

**Buddy Scheme:** Incoming group chairs were allocated a buddy who was an established group chair. This helped to provide them with the necessary support and information needed to start off in the role. Members interested in group positions can talk to current post holders for information on the roles.

**Thanks:** Thanks to Rebecca Oliver from the South West group who stayed on longer than her term, while a replacement was found. Thanks to Dylan Cozens, Midlands and Grant Cullen, Scotland for their time as group chairs. Charlie Smith was welcomed as the new group chair for the South West, Emily Day as Group chair for the Midlands and Callum Fraser, Scotland Group chair. Chris Mullen, North West and Northern Ireland chair is stepping down after conference with Ellie Lloyd-Davies as incoming chair. Emily Day is also stepping down due to a change in institution but has been elected as the UK VC (Training). Steven Joesbury is the incoming Midlands Chair. Thanks to everybody for the hard work and time commitment in addition to the day jobs.

#### 4.4 Communications Report - Andy Cotterill (ACOT), UK VC (Communications)

**Comms team:** The comms managers changed again in 2022 however, the team are now settled, bringing different experience and enthusiasm so are in a good position.

**Content:** The team work across every section of the association. More content was added to YouTube, redesigned the web pages and tried to be more image focused. 2023 will see more videos with a video project launched over the next 12 months.

**Conference miniguide:** The 40-page A4 booklet has been replaced with a much smaller miniguide with links to the relevant information on the website. This meant if information changed during conference, it could be updated on the website, so members had up to date information. This also supported HELOA to be more environmentally friendly by cutting down on paper usage for conference. Members have been engaged with the website which had had over 1000 page views

on the first day of conference. The website was redesigned following members' feedback in a way that works best for members.

**Developments for 2023:** Develop communications on LinkedIn, share insights from national events with members and commence work on the group pages. The group pages will be more prominent, including details of group events, local information and networking opportunities. Will use website trends to develop the site in a way that works for members, considering what members want to see as well as determining what else members need and making these more accessible.

#### 4.5 Membership and Administration Report - Andrew Cooper (AC), UK VC (Membership & Administration)

**Membership:** The current membership total is 1763 from 150 institutions (accurate as of 10.01.23).

**Membership Engagement Tracker:** The membership engagement tracker looks at engagement from different groups, individuals and institutions. This provides a good picture on which activities work well at group and national levels and training and support that can be given to institutions and groups.

**Membership Survey:** Thank you to all of those who completed the survey, we received 231 responses from which one member was randomly selected and won their place at national conference. Members' suggestions and ideas will be considered to support future projects.

**Going forward:** Will look at how to support primary contacts further, ensuring they have the relevant information, knowledge on what the role entails and look at how to support individual members of their institution. As there has been an increase in regional representatives we will conduct research into what regional representative roles look like and what support HELOA can provide.

#### 4.6 Governance & Policy Report - Kate Filimon (KF), UK VC (Governance & Policy)

**Changes to policies:** During the 2022 AGM the following policies were updated, Working with Associate Members, officers Standing for a Second Term and the Trustee Voting Process. Although the GDPR policies in place were good and will continue to be used, these were made more robust by creating Subject Access Requests and Data Breach policies. These are available on the website.

**Charity Status:** HELOA it is still on the waiting list to receive an invitation from the Charity Commission of Northern Ireland to apply for charity status.

**Strategy:** The 2022 strategy was reviewed and the progress updated by looking at objectives the committees were performing against and which to take forward in 2023. This information will be used to inform the 2023 strategy, in the coming year.

**Equality, Diversity and Inclusion:** Consultancy is underway with EMBED and the EDI project manager, reviewing policies, the recruitment process, name blind application process and events. The policy and events recommendations should be available from EMBED around February/ March 2023. Hope to run an EDI membership survey in 2023 to gain members' recommendations to support creating EDI policies.

#### 4.7 Training Report - Reena Kaur (RK), UK VC (Training)

**Engagement:** There are over 1700 members across 150 institutions and in the last year HELOA has engaged with 45% of members across the training events, from all of the nine groups. The conferences are growing with national 2023 having over 300 delegates, which is the largest national conference to date. The NPC, which was run in November 2022, was also one of the largest NPCs to date, with nearly 100 delegates. Over 50% of delegates usually complete the feedback surveys, with 95% of good or excellent feedback across those events. This is fantastic feedback and the training team makes sure to read each comment and action, where possible. The EDI consultation will support in making these events more accessible for members.

**CPD Accreditation:** Last year, it was reported that HELOA successfully gained CPD accreditation for the New Practitioners' and Professional Development conferences which is a great success. However, there is the challenge with getting the paperwork out to delegates due to time and ensuring it is in line with HELOA's GDPR policies, so this will be reviewed in 2023.

**Costs:** Part of the surplus was used to run a free Professional Development Conference with one member from each institution being allocated a place with over 140 members in attendance. This was a positive way of reinvesting the surplus in members.

#### **Challenges for 2023**

**Conference Costs:** It has been HELOA's aim to keep conference costs as low as possible. A third party company (Red Meet) supports with achieving a good rate with hotels. The after effects of the pandemic and the cost of living crisis has meant that hotels are coming back with higher costs than previously received. Better deals are gained when returning to hotels however, moving the venue provides fairness for members. Conference costs may have to be increased but will be done with the aim of raising them as little as possible, so as not to out price members from attending events. Consideration will also be given to utilising the surplus to support with this.

**EDI recommendations:** The training team are working closely with the EDI Manager and the VC (Governance) to ensure the recommendations are embedded and to make carefully considered choices about events. The training team always try to accommodate members' needs so please do get in touch with issues or requests.

**Online events/ training:** The plan for 2022 had been to run online conferences however, due to time constraints and changes in the team, these did not happen. The plan is to run two online events during 2023 so they are accessible to everyone.

**Keir Robinson, The University of Edinburgh** - Thanks for coming further north for this year's conference as many Scotland members have been able to attend. With the increased numbers coming to events like this, are we in danger of outgrowing hotel facilities and should we be looking at other facilities such as event and exhibition centres?

**RK** - We did an internal review of this with the UK committee about a year ago, considering whether we would potentially outgrow the venues, which will be on the agenda for the risk register. We work very closely with a company called Red Meet who are currently trying to scope out some slightly larger venues. If we were to move to a conference or exhibition centre, the annual conference membership price would probably double, as renting an exhibition centre is £55,000 minimum which doesn't include food or accommodation. The concern is that this would potentially price out many members.

**Helena Ziegler, University of Aberdeen** - The free PDC held in September 2022 was great to see but in future years please consider the timing for all regions and what's happening, as September and October are peak UCAS months so we were unable to send a member from my institution.

**RK** - It is a tricky one as across all of our events we try not to bombard them in a particular month and unfortunately, that was just the best time of year across the entire scope of events but this will be kept in mind, thank you.

<b>Proposer</b>	Andrew Jackson, University South Wales
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<b>Seconder</b>	Christine Todd, University of Liverpool
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The meeting was invited to adopt the reports of the UK Committee and UK groups as one. The reports were approved - For: 106, Against: 0, Abstain: 1.

### 5. Election and Appointment of Officer Posts - Kate Filimon (KF), UK VC (Governance & Policy)

#### 5.1 Elected Officers and 5.2 Appointed Officers

The elected and appointed officers were shared with the meeting.

Additions for the report of elected officers were as follows:

Amy Shimmin, Scotland VC (Training & Partnerships)

Becci Williams Midlands VC (Training & Partnerships)	
<b>Proposer</b>	Jen Barton, Durham University
<b>Seconder</b>	Amanda Boissevain, University of Surrey
The meeting was invited to adopt the elected and appointed officers of the association. The officers were approved - For: 101, Against: 0, Abstain: 3.	

<b>6. HELOA Office Report - Andrew Cooper (AC), UK VC (Membership &amp; Administration)</b>	
<p><b>Office Provision:</b> The office, staffed by Dawn McClintock, Office Manager and Louise Povey, Office Assistant continue to be the first point of contact for members and focuses on meeting the needs of members by: providing advice and guidance for enquiries, processing memberships effectively, ensuring that members are kept up to date with the affairs of the association through national and group mailing lists and subscriptions to the fortnightly newsletter, regularly reviewing and sending member communications such as, welcome emails, membership number reminders and sharing primary contact details with institutional members.</p> <p><b>Key developments 2022:</b></p> <p><b>Office provision:</b> Reviewed roles undertaken by the office and UKC to ensure that responsibilities were assigned according to the office capacity.</p> <p><b>Membership:</b> Informed primary contacts of unused individual memberships. Membership welcome emails and the membership pages of the website were reviewed and updated to ensure members had access to the necessary information.</p> <p><b>Office systems review:</b> Conducted a systems review to ensure the time was being spent effectively and ensuring value for money.</p> <p><b>GDPR review:</b> Ensured the charity remained GDPR compliant by reviewing the data in documents and systems at national and group level and ensured they were in line with the HELOA privacy notice.</p> <p><b>Membership Engagement:</b> Reviewed the membership survey ideas and suggestions and updated communications based on responses.</p>	
<b>Proposer</b>	Andy Long, Keele university
<b>Seconder</b>	Andy Jackson, University of South Wales
The meeting was invited to approve the report of the HELOA office. The report was approved - For: 104, Against: 0, Abstain: 1.	

**7. Hosting AGM - Andrew Cooper (AC), UK VC (Membership & Administration)**

AGM has been held at national conference as is a legal requirement of the Association and conference was the only time that everybody came together. From a training viewpoint, AGM consumes two hours during national conference that could be used for further training sessions. Legally, the AGM must be quorum to conduct formal business and one concern is reaching quorum if held solely online. When the AGM was previously held virtually, quorum was reached however as that was during the pandemic, circumstances were quite different.

If the decision is taken to decouple AGM, it is proposed to hold a virtual AGM in 2024 and possibly in 2025 to fully understand the effectiveness of these. The date of the 2024 AGM would be circulated as soon as possible, and consideration would be given to how best to make use of the extra available time during conference. If the membership votes to keep AGM as part of national conference, then it would be held at conference about this time next year.

**Andrew Wallis, Falmouth University** - It could be done online but if there is anything controversial there's no chance to have a public debate and as I don't think online allows that public debate. Online would work for the formality of reports. For many people here, especially those quite new, many have never known an AGM, committee or any other structure like this and it's actually a good learning curve in understanding how an organisation actually works and to get more involved.

**JA** - Just to clarify that this is a proposal to determine what members feel would work best for AGM and national conference and not what the Executive or UK committee wants.

**Helena Ziegler, University of Aberdeen** - Part of the reason I have encouraged one of my team members to attend conference every year is to see how an organisation is run and to hear about issues and concerns. AGM could be looked at and possibly shortened but the training that is acquired from coming to AGM for people who are new to the sector is invaluable.

**Louise Meredith, University of Portsmouth**

Having the AGM online allows people who can't attend conference to feel involved in HELOA as it can feel that if you can't attend conference you aren't as valued as a member.

**JA** - If AGM remains as part of conference, it will remain a hybrid meeting, so this isn't a vote to return AGM to in-person only, it would remain as it is today with the option to attend online or in person. It is a vote to decide whether AGM should be removed from conference.

**Hannah Wake, University of Leicester** - If it is voted in favour to decouple AGM, will it be revisited in a years' time to ascertain everybody's thoughts on whether this should be formally decoupled?

**JA** - The intention is to try AGM online and then there will be a vote for members to decide if it will remain virtual or if it will be returned to national conference.

**Keir Robinson, University of Edinburgh** - The rationale for trialling decoupling AGM is to create more opportunities at conference, so why don't we make the conference longer? We didn't start until midday today and how many people were here last night?

**RK** - This is something we have considered. I think this year more people stayed the night before due to the location and travel being difficult in the morning. On average around 70% of delegates travel on the morning of conference. With the day jobs getting busier it can be difficult for people to be released for even one day and many have to write a business case to be able to attend, so requesting more time out of the office may prove difficult. It is a conversation that could be had but it may not work for many of the members as it varies between institutions.

**James Kennedy, Leeds Beckett University** - If AGM is to be removed from National Conference, would this then only be online?

**JA** - If voted in favour to decouple AGM, AGM would be completely virtual.

**Natalie Johnston, University of Salford** - The points regarding structure as a learning curve are valid. Would there be an option to review an "in-between" alternative? So the structure exists at conference, but is shorter, and the exec updates are delivered in a series that people can sign up to online at another time, in advance over a few weeks? It would allow for discussion and understanding of each remit i.e. comms roles and what they do, new colleagues will be networking to learn more about that specific type of role within ed liaison - may encourage more members to apply for the roles if they have more time to learn about the exec updates in depth.

**JA** - The vote today is on decoupling AGM from conference, then the format of AGM can be reviewed throughout the year at a committee level, taking your points into consideration.

**Lily Rice, Guildhall School of Music and Drama** - I assume for an online AGM all members would be invited, not just the primary contacts, so they would still see the elements of how the organisation is run. Following up on a previous comment regarding in-person AGMs allowing members to have discussions and debates, this is my second AGM and the previous AGM didn't really have discussions in it. We do have time for discussions within our groups, so I wonder if there is a separate event that is more open for discussion.

**JA** - We used to have a training day and regular meetings but over the past three to five years there has been a tendency to have more of a training focus. However, each group meeting should have an element of constructive and open discussions about the challenges members face, and how HELOA as a network can use and support that information. Group chairs meet as a UK committee to feed that back. If there are similar conversations happening across groups, actions can be taken. The AGM content is based on what has been discussed and decided at committee meetings to ensure it is run to time and relevant for the majority of members.

**Amy Shimmin, University of Stirling** - If the AGM is decoupled from the conference, is it likely to increase capacity of the conference to more members?

**JA** - I don't think it would increase capacity because if a primary contact is unable to attend, they can send another member of their team to act as proxy like many of the online attendees today. Primary contacts are often in more senior roles and have possibly been in their roles for some time so they, along with other members in attendance, provide a wealth of different levels that can add to the conference.

<b>Proposer</b>	Carl Griffiths, Lancaster University
<b>Seconder</b>	Charlie Smith, University of Bath

The meeting was invited to vote on holding a trial AGM decoupled from National Conference. The meeting voted in favour - For: 60, Against: 40, Abstain: 8.

**JA** - With this result, AGM will be decoupled from national conference and will be brought back to members to decide whether or not to reintroduce it to conference. Please continue the conversation within your groups to be fed back to the UK committee. The format of AGM will also be reviewed.

### 8. Officer Report and Financial Proposals - Fiona Curry (FC) UK VC (Finance)

**Finance Team:** Thank you to Michelle Terrell, The University of Edinburgh for her hard work throughout her three-year term as UK VC (Finance) and to Jacob Brown for all the work he did as Finance Manager before stepping down. Thanks to Sarah Byard for helping me settle into my role. The team has also been a finance manager down since summer 2022 so thanks to Sarah, the office, exec and UK committee for their continued support.

#### 8.1 Completed Accounts for the 2021/2022-2023 financial year

The completed accounts for 2021-22 financial year have been audited.

### 8.2 Provisional Accounts for the 2023/24 financial year

**Surplus:** HELOA had a surplus coming into this financial year and will be in a similar position of carrying forward that surplus by the end of the financial year (March 2023). There were many great ideas of how to reinvest the surplus back into the membership in a sustainable way. The proposals were reviewed in terms of time, impact, sustainability and price. However, committee members' time was limited so some of these proposals will carry forward and the spending will be planned for over a number of years.

**Proposed Budget:** There is an increase on this year's budget on how much money is being put aside to reinvest across membership, for example, group budgets have significantly been increased and communications have been allocated a budget.

### 8.3 Proposed Membership Costs for 2023/24

Membership fees have remained static since 2016 but the consumer price index has not remained static. Therefore, the cost of goods for group meetings and events have increased, while membership costs have stayed the same. With the surplus in mind, I am proposing that membership fees remain static for a further year. However, to ensure sustainability, as the surplus won't be there forever, I'm proposing that ahead of AGM 2024, information will be provided to primary contacts and members on what those proposals might be and perhaps hold an online session to ensure members are consulted. I will propose membership fees are raised in line with the consumer price index to support raising costs for catering, training etc.

### 8.4 Proposed Budget for 2023/24

I am proposing a deficit and will be proposing a further deficit the year after simply to spend the surplus. What we will be looking at moving forward, really depends on the membership fees.

### 8.5 Proposed Auditor

Bick Accountants will continue as our auditor for next year.

<b>Proposer</b>	Kate Filimon, University of Huddersfield
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<b>Seconder</b>	Helena Ziegler, University of Aberdeen
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The meeting was invited to adopt the financial reports of the association. The reports were accepted - For: 106, Against: 1, Abstain: 2.

<b>9. Honorary Membership and Commendations - Andrew Cooper (AC), UK VC (Membership &amp; Administration)</b>	
<b>9.1 Nomination for Honorary membership</b>	
No nominations were received.	
<b>9.2 Nominations for Commendation of Contribution</b>	
<p>Nominations for commendations are for members who have made an impact on the organisation and supported HELOA to reach its goals, members that infuse the core values of HELOA through networking and sharing best practice, making sure we're giving the best support and advice to the students that we're engaging with.</p> <p>Commendations were received for:</p> <p>Chris Mullen, Edge Hill university</p> <p>Elliot Newstead, University of Leicester</p> <p>Heather Black, University of Strathclyde</p> <p>Jonathan Atkinson, University of Liverpool</p> <p>Krishna Maroo, University of West London</p> <p>Louise Irving, Abertay University</p> <p>Nicola Marsden, Sheffield Hallam University</p> <p>Sarah Crotty, University of Central Lancashire</p>	
<b>Proposer</b>	Carl Griffiths, Lancashire university
<b>Seconder</b>	Andy Jackson, University of South Wales
The meeting was invited to approve the honorary membership(s) and commendations of contribution(s). The nominations were accepted - For: 107, Against: 0, Abstain: 1.	

<b>10 AOB - Jonathan Atkinson (JA), UK Chair</b>	
No other business was raised.	

<b>11. Date and Venue of 2024 AGM - Jonathan Atkinson (JA), UK Chair</b>	
The Constitution states that the Annual General Meeting of the association is held early in the calendar year and not later than the end of March. Due to the outcome to decouple AGM, UKC will	

discuss the best time to hold AGM and share with members in accordance with the stated number of days, ideally, it will be announced as soon as possible for members' convenience.

*Please note that 103 primary contact/ proxies had registered their attendance at the start of the meeting but the total number attended was 109. Voting totals are those finalised by Mi-Voice.*

*Dawn McClintock  
HELOA Office Manager*