



# Good Practice Guidelines

Author:	Andrew Cooper - UK Vice Chair (Membership and Administration)		
Contributors:			
Version:	1.0	Status:	Bi-annual review; amendments included
Date:	December 2021		
Consultation:	UK membership – email amendments requested UK Executive and Committee Group consultation Final UKC Approval	September 2021	

AGM



## **HELOA: Good Practice Guidelines**

### 1. Introduction

1.1 The Association seeks to be recognised as a key sector stakeholder and as such is committed to the professionalism of the Association and its membership.

1.1.1 HELOA is a UK-wide Association and is therefore mindful of the subtleties and distinctions which exist in approach between the Governing bodies and agencies which oversee Higher Education across the United Kingdom. However, all HELOA members are bound by this Code of Practice and remain united behind the collective aims and objectives of the Association as set out in our Governing Constitution.

1.1.2 These Guidelines should be read in Conjunction with the HELOA Code of Good Practice, [Subject Speaker Guidelines](#) and other materials provided by HELOA and related organisations.

1.2 The objective of these guidelines is to assist HELOA members, both individual and institutional, in providing the best possible information, advice and guidance to potential applicants and students. Such advice should be full, frank and comprehensive and should be provided without prejudice.

1.3 HELOA recognises that many institutional staff involved in providing information, advice and guidance to potential applicants are not HELOA members. The Association does however strongly encourage members to ensure that all staff within their institution involved in this and related work, are aware of the existence and contents of these Guidelines.

1.4 Finally, these Guidelines should not be seen as a restraint on individual or institutional activity, but as an overarching set of principles and guidelines to assist HELOA members and their institutions in meeting the needs and expectations of potential students.

## 2. Contents

2.1 These Guidelines are broken down into a number of sections reflecting major areas of work with which the Association and its members are involved. This list is clearly not exhaustive and there is much overlap between sections, these Guidelines should therefore be read and seen as one document.

2.2 The Guidelines have the following sections:

**[Section 1: General Principles](#)**

**[Section 2: HE/Careers Conventions and Related Events](#)**

**[Section 3: General HE Advice Talks/Sessions](#)**

**[Section 4: Students as Ambassadors: Working with Current Students](#)**

**[Section 5: Developing our Members](#)**

**[Section 6: Good Practice in Widening Access](#)**

**[Section 7: Virtual Activity](#)**

2.3 In addition to the above sections, the following documents are attached for information:

**[Appendix 1: HELOA Code of Good Practice](#)**

**[Appendix 2: HELOA Subject Speaker Guidelines](#)**

**[Appendix 3: Good Practice Guidelines for Convention Organisers](#)**

**[Appendix 4: How to report concerns](#)**

## Section 1: General Principles

1. HELOA members, both individual and institutional, should seek to provide potential applicants, their parents and advisors with the best possible information, advice and guidance to assist them in making the most appropriate decisions for their future. Members should seek to recognise the role that they play in dispelling myths about higher education which exist in the public domain.
2. In advising potential applicants, HELOA members shall ensure that they do not provide information or advice that is inaccurate, incomplete or out of date.
3. HELOA members should ensure that they do not say or do anything that might be construed as negative towards, or biased against, other institutions or courses.
4. HELOA Corporate members should ensure that all institutional representatives, whether or not they are HELOA members, are aware of the existence and contents of these Guidelines.
5. HELOA members should seek to keep themselves fully up to date with developments in Higher Education and related sectors and seek to maximise the benefits of HELOA membership and the opportunities in training, development and networking that comes from being a member.
6. HELOA members should be able to effectively signpost potential students to authoritative sources of information and guidance if they themselves are unable to assist with questions or queries.
7. HELOA members and their institutions should aim to only attend UK events and conventions that visitors may attend free of charge, and where the cost to Institutions is not prohibitive or exclusive.

Information, Advice and Guidance Framework Definitions:

Information	Provision of Information without any discussion of relative merits
-------------	--

	of options available for a particular individual
Advice	Generally involves more interaction with an individual or 'enquirer' (eg. explaining and assisting with interpretation of information)
Guidance	More personalised, and 'client-centred' service offering comprehensive and impartial sessions; reflect on and clarify needs with individuals, explore, assess and choose between options and develop action plans.

## **Section 2: HE/Careers Conventions and Related Events**

1. As outlined in the HELOA Code of Practice, the Association strongly encourages member institutions to only attend Higher Education conventions and other events in the United Kingdom where:
  - Visitors can participate free of charge
  - No prohibitive or exclusive charge is imposed on Institutions in membership of HELOA to participate
2. HELOA members, and representatives of institutions in membership of HELOA, should provide a professional, accessible and helpful service to all visitors to such events. This should include attending events on time and remaining throughout their duration (or until advised by the event organiser). HELOA members should be attentive to visitors throughout the events and should not engage with other work based duties such as emails, or use their mobile phones, whilst on duty.
3. Representatives should present their institutions, the Association and the Higher Education sector in such a way as to promote a positive view of Higher Education to prospective students, their sponsors and supporters.
4. When attending HE/Careers Convention and related events, HELOA members and their institutions should familiarise themselves with the exhibitors' pre-event information before arriving at the event, and pay due regard to information and instructions from event organisers, particularly with regard to health and safety and current public health advice.
5. Whilst it is not always possible for institutions to send HELOA members to all events, the Association believes that all institutional representatives, whether or not they are an HELOA member, should be able to provide a minimum level of information, advice and guidance to enquirers.
6. With regard to their own institution, representatives should normally be able to provide information/advice on:
  - Range and type of courses provided
  - Typical offers and other entry requirements for all common post-16 qualifications

- Content, structure and teaching and assessment methods for courses
  - Career opportunities/destinations information for recent graduates
  - Understanding and making use of Key Information Sets (KIS)
  - Basic explanations of National Student Survey (NSS) results and meanings
  - Fees, bursaries, scholarships and other financial support
  - Accommodation provision for students, both through the institution and the private sector
  - Student support facilities
  - Student social and sporting facilities and societies
7. Representatives should also be able to provide up to date and relevant information, advice and guidance to potential students with regard to the following issues:
- Appropriate choice of A level, IB, BTEC, Diplomas, Highers, Access to HE and T-Level subjects for courses/subject areas provided by that institution
  - Applications procedures and deadlines (including subsequent and future changes to the application procedure)
  - Student Finance (*including an understanding of cross-border fees and funding*)
  - Current issues affecting the Secondary/Post-16 Sector (including curriculum reform agenda)
8. Institutional representatives should be able to provide or be able to guide potential students on how to receive information available in forms accessible to students with a disability and/or special need.
9. Exhibitors should not give out materials or engage with students in aisles or other public areas of an event, or in a way which distracts visitors from other exhibitions. Equally, an organisation's materials or staff should not be permitted to obscure other stands at recruitment events.
10. All members should feel safe at all times and should not put themselves in harmful situations or act in a way that makes others feel uncomfortable.
11. Institutions are strongly encouraged to make full and positive use of current and past students in advising potential students. Students attending events on behalf of institutions should however normally be accompanied by a HELOA member or other suitable member of



staff and should be aware of the expectations and limitations of these Guidelines.

12. Where practical, basic level training for students should be provided in advance of event attendance by student workers. HELOA members should be mindful of current legislation relating to Disclosure and Barring Services checks and Safeguarding.
13. HELOA advocates the responsible collection of data from potential students including the safe storage of personal details and adherence to the Data Protection Act (1998) (see <https://ico.org.uk/> for further details).
14. HELOA would encourage member institutions working outside the UK to follow these same guidelines.

### **Section 3: General HE Advice Talks/Sessions**

*This section is intended to cover occasions where HELOA members or their Institutions are asked to deliver general, non-institutional talks or seminars to groups of potential applicants. Such talks may take place at HE/Careers Conventions, in schools/colleges or within an HE institution.*

1. When delivering general HE advice talks to potential students and/or their advisors, HELOA members and their institutions should always seek to provide full and honest information without prejudice or bias.
2. Speakers should be careful to avoid focusing too heavily on their own institution or course, or the type of institution or course for which they work.
3. Speakers should, on all occasions, avoid making negative comments about, or negative comparisons with other institutions or courses, or saying anything that might be regarded as prejudicial against particular institutions or types of institutions.
4. Speakers delivering subject talks are strongly encouraged to use the HELOA Subject Speakers Guidelines when writing and delivering talks. These Guidelines are attached as [Appendix 2](#).
5. All speakers should ensure that the information provided in their talks is accurate and up to date. HELOA members and their institutions are encouraged to keep abreast of changes within HE and related sectors.
6. Speakers should allow sufficient time for questions including, where possible, an opportunity for visitors to ask individual questions after the end of the talk/seminar.

#### **Section 4: Students as Ambassadors: Working with Current Students**

1. HELOA strongly encourages members and their institutions to make full and positive use of Students as ambassadors for HE and information providers to potential students.
2. HELOA does however recognise that using students carries risks, as they are unlikely to be as informed of accurate and up to date information about HE and related areas. HELOA members and their institutions are therefore encouraged to ensure that all students attending events, particularly when attending without a member of staff, are fully briefed on common questions and areas of interest of potential students.
3. A HELOA member or other appropriate member of staff should normally accompany students attending HE Conventions or related events. In all cases, but particularly where a student is attending an event alone, they should be aware of the expectations and limitations of section 1 of these Guidelines.
4. When delivering talks about student life or related topics, students should ensure that they follow section 2 of these Guidelines. In particular they should ensure that they provide full, accurate and up to date information to potential students.
5. HELOA members should ensure that they do not place students in situations in which they are uncomfortable or for which they are not properly prepared.
6. HELOA members should ensure that they pay due regard to best practice in regards to Health and Safety issues affecting student workers in particular to those instances where those students find themselves in lone-working/travel situations.
7. HELOA members should be mindful of current legislation relating to Disclosure and Barring Service (DBS) checks and Safeguarding and ensure that student workers are appropriately cleared for the work they are expected to undertake.
8. HELOA members should be familiar with Institutional policies and procedures relating to safeguarding, child protection and lone working and ensure that they appropriately brief colleagues on any policy changes (particularly non-HELOA members). Members should also

be able to identify their designated Institutional Safeguarding Officer.

### **Section 5: Developing our Members**

1. As part of our commitment to the professional development of our members, HELOA offers a range of training and development opportunities at local and national level. As an Association we are committed to providing 'top quality, competitively-priced training', and always seek to deliver innovative and timely activities.
2. The Association recognises that identifying training needs is part of a two-way conversation with our membership and we will regularly canvass member needs and opinions in the development of our training provision.
3. Communication with members is also a key part of this dialogue and the Association will continue to communicate with members via timely digest communications as well as by providing resources where appropriate and by investing significantly in the members' area of the HELOA website and HELOA blogs.
4. At Group level, members are able to access a range of training opportunities and networking support through regular meetings. One of the key benefits of the Association is the way in which it enables members to communicate, share information, provide mutual support and create opportunities for cooperation and collaboration.
5. Our AGM & Annual Conference provide members with a platform to shape HELOA's national development and take advantage of sessions from numerous high-profile keynote & plenary speakers, as well as a range of topical, engaging workshop and discussion sessions. The Annual Conference also includes the HELOA Innovation & Good Practice Awards which recognise and celebrate examples of excellence from within the membership.
6. HELOA runs a series of specialist conferences aimed at new & experienced practitioners. The New Practitioner's Conference provides an opportunity for new or inexperienced members to learn from education liaison professionals; typical sessions include delivering presentations and running a Student Ambassador scheme. The New Practitioners Conference will normally include an overnight stay and plenty of opportunities to network and develop good practice. Professional Development Conferences provide the opportunity

for individuals who are operating at, or aspiring to, management level to come together and interact with policy makers and leading practitioners in a particular field as well as share good practice from across the sector.

## **Section 6: Good Practice in Widening Access**

1. HELOA members are committed to providing information, advice and guidance to all prospective students, regardless of background, ethnicity, age, or socio-economic status. As such, all HELOA members support the belief that everyone should have access to information to make an informed choice about higher education.
2. HELOA members are involved in a range of activities, including careers conventions and education fairs, talks and workshops in schools and colleges, on-campus events, and summer schools, amongst others. HELOA recognises that each member institution will organise and participate in activities that meet institutional strategic priorities of student recruitment and widening participation; however each institution and HELOA member is encouraged to continually support the ethos of widening access to higher education. Students from non-traditional backgrounds should not be discouraged from attending any event that may promote awareness of higher education.
3. Whilst not intended to be an exhaustive list, the Association generally recognises widening access groups as:
  - Young people from lower socio-economic groups
  - Mature students
  - Looked after children/care leavers
  - First in family HE applicants
  - Minority ethnic applicants
  - Young people from military families
  - Asylum seekers and refugees
4. The Association recognises that responsibility for widening participation activities is sitting more within member institutions due to changes within the sector, and specifically changes to organisations and agencies. HELOA offers training and opportunities for members to network and share good practice, and members are encouraged to share good practice in

widening access in Groups.

### **Section 7: Virtual Activity**

This section is to give guidance for all virtual activities.

1. Members should abide by the same points for the above sections to ensure good practice and fairness to students.
2. If attending virtual fairs, members will respond quickly to queries with suitable information, including signposting to further information on their own websites that relates to the interest of the enquirer.
3. At virtual fairs, in general areas, exhibitors should answer queries and offer advice and guidance, but should not over post links to their own stand, in a similar manner to point 6 of Appendix 1.
4. We encourage members to ensure all institutional safeguarding measures are taken place, and strictly adhere to the measures set out by virtual fair organisers.
5. Staff should ensure that they are not in a one-on-one situation with students. A staff member should be in the room if possible, or record the session or be on another call with a colleague to ensure no accusations can be made.
6. If responsible for establishing or maintaining areas of virtual activity, ensure that the relevant information is refreshed regularly and is up to date.

## **Appendix 1: HELOA CODE OF PRACTICE**

All Institutions in membership of the Higher Education Liaison Officers Association will endeavour to ensure that those giving information and guidance on their behalf to all potential applicants to Higher Education, their families and advisers, honour this Code of Practice.

All individual members of HELOA undertake to:

- 1 Maintain the highest standard of professionalism in their work;
- 2 Keep abreast of the trends and developments in Higher Education;
- 3 Offer information, advice and guidance effectively and with integrity to assist potential applicants in making informed choices of course and institution;
- 4 Normally be willing to provide Institutional information on:
  - The range of courses and their content, structure, teaching and assessment methods
  - The normal entry requirements and application procedures
  - Fees, bursaries, scholarships and other forms of financial support (*including an awareness of cross-border fees and funding*)
  - Understanding and making use of Key Information Sets (KIS)
  - Basic explanations of National Student Survey (NSS) results and meanings
  - Applications and admissions statistics for previous years
  - Advice for students with special needs
  - Career opportunities and typical first job destination data for recent graduates
  - The types, location, facilities and costs of accommodation both owned by the Institution and in the private sector
  - The range of student support facilities



- The range of student social and sporting facilities
  - Any alternative sources of independent information about the Institution
- 5 Use promotional materials which are believed to provide a balanced view of the Institution, the courses offered and the facilities;
- 6 Exhibitors should not give out materials or engage with students in aisles or other public areas of an event, or in a way which distracts visitors from other exhibitions. Equally, an organisation's materials or staff should not be permitted to obscure other stands at recruitment events;
- 7 Provide advice free of charge to all enquiries;
- 8 Attend Higher Education conventions and other events in the United Kingdom where:
- Visitors can attend free of charge
  - No prohibitive or exclusive charge is imposed on Institutions in membership of HELOA to participate
- 9 Maintain a commitment to develop themselves and other staff within members' Institutions in order to effectively discharge the requirements of this Code of Practice
- 10 HELOA members will maintain an awareness of the environmental impact of their work and seek to minimise this where possible;
- 11 HELOA advocates the responsible collection of data from potential students including the safe storage of personal details and adherence to the Data Protection Act (1998);
- 12 Uphold the good name of the Association at all times, to promote the brand values of the Association through the effective delivery of day-to-day role and to seek to raise the profile of HELOA with stakeholders and key audiences

## **Appendix 2: HELOA SUBJECT SPEAKER GUIDELINES**

All Institutions in membership of HELOA will endeavour to ensure that those giving subject specific information to potential applicants, their families and advisers, are aware of these guidelines.

All subject speakers should be aware that students attending their talks may be interested in a variety of courses available across the subject discipline, throughout the UK HE sector. Information should be provided, in an impartial yet informative way, using their own institution as an example alongside examples of other courses available across the sector. For further information, please contact your Institutional HELOA member.

The following areas should be covered within a subject-specific talk:

- **Different types of courses:** degree/non-degree. Selected examples might be: sandwich courses, modular, single honours, joint honours, foundation degrees, conversion courses, year abroad schemes, integration of professional training.
- **The range of courses:** Including specialist areas and combined courses (this information can be accessed via the 'Course Search' facility on the UCAS website).
- **An indication of the number of HEIs offering the courses:** This information can be found via the 'Course Search' facility on the UCAS website.

- **An outline of study and assessment methods:** teaching and assessment methods vary widely between institutions and different types of courses. Speakers should provide advice about choosing a course and university and the research that students should undertake. This should include advising students to access the Key Information Sets (KIS) available for each university and course. Specific areas of research could include: contact hours, field work, assessment methods (including balance of assessments, dissertation topics, and research interests). The speaker may also want to discuss the role of each year of a course, and the importance attached to assessments and performance throughout the degree.
- **Entrance requirements and selection:** HELOA members have a duty to ensure that subject speakers are aware of the importance of not saying or doing anything that could be construed as negative towards another institution. Entrance requirements and selection procedures vary by institution and course, and subject speakers should encourage students to seek clarification on the procedures at each university of interest. If work experience, portfolios, or interviews are normally required for the course, the speaker can provide advice and information about these – but with explicit guidance to check specific detail with other institutions. Subject speakers should be aware of the audience when discussing entry requirements, providing appropriate information for different academic backgrounds.
- **Popularity of courses:** Applicants should be encouraged to check the number of applicants and places available with individual institutions.
- **Professional accreditation:** Subject speakers should note the significance of any professional accreditation on career development, while also acknowledging the opportunities available if students chose a non-accredited course.
- **Finance:** Subject speakers should have a basic understanding of student finance, in the form of tuition fee loans and maintenance support. However, specific questions regarding financial support outside their own university should be forwarded to individual institutions.
- **Employment prospects:** Including graduate destinations, and particular areas that degree holders would be qualified to work in. Subject speakers should provide a balanced view of employment prospects.

Speakers should provide some time for questions and audience interaction, and be prepared to speak to members of the audience individually after the presentation has concluded

### **Appendix 3: HELOA GOOD PRACTICE GUIDELINES FOR CONVENTION ORGANISERS**

These guidelines are designed for Convention Organisers who are responsible for the operational aspects of a Higher Education Convention. They also provide a useful starting point for those organising smaller scale events in schools, colleges and other centres.

The majority of Higher Education Conventions organised by HELOA members are organised jointly with UCAS. Where HELOA members are organising independent Conventions, they are encouraged to ensure that the event will not clash with other local events. It is also important to ensure that events are not organised in a period of time particularly busy for UCAS HECs, where HELOA members may find it difficult to staff an additional event. Members are encouraged to discuss possible dates with other members in their HELOA Group or in local Groups.

#### **Convention Venue and Exhibition Space**

The ideal venue is for all exhibitors to be on a single site, all in one room at ground floor level, with an environment conducive to in-depth, one-to-one discussion between exhibitor and visitor. HELOA recognises that there are many constraints on organisers being able to access this ideal and offer the following advice based on the diversity of situations in which HELOA members have exhibited.

- Convention venue: The preferred venue is one located on a Higher Education campus but a commercial venue is considered to be a suitable alternative. If using temporary

accommodation, such as a marquee, organisers should be aware that there may be issues relating to security and working conditions. Exhibitors should be given information prior to attending about the venue, and the expected temperatures and conditions during an exhibition.

- Number of rooms: A single room or hall containing all exhibitors is the preferred option, and where more than one room is used, these should be as close together as possible and equally accessible. Exhibitors should be notified in advance where they will be located.
- Level of visitors: It is obviously desirable to have the convention all on one level of a particular site and where this is not possible, organisers should ensure there is disabled access and implement a visitor flow system which creates equal opportunities for all exhibitors and visitors.
- Signage: All signage should be clear and distinctive and customised to the convention where possible. Customised AA or RAC road signs are particularly useful, with external signage clearly directing exhibitors and visitors to parking and loading areas. Where more than one site, room or level is used, internal signage should clearly indicate which exhibitors are located where. Seminar rooms should be clearly signed and identifiable.
- Exhibitor space: The minimum space per exhibitor is expected to be 4 square meters (2m x 2m) and the preferred size is in excess of this up to a maximum of 6 square meters (3m x 2m). All exhibitors should be allocated the same amount of space, and any restrictions to the space should be communicated to exhibitors in advance.

If a shell scheme is used, it is important to clearly specify the type of panels and fixing methods for exhibition materials. Open spaces should be clearly marked on the floor to indicate the space allocated per exhibitor. Organisers should make a clear statement of the maximum size of exhibition stand that can be accommodated, and reserve the right to remove stands which encroach on the space of other exhibitors.

Exhibitors should be provided with a minimum of one table and chair, and should be told if any additional materials are available to them.

- **Working environment:** The levels of heating and ventilation should provide a comfortable working environment in which to stand and talk to visitors, and should take into account the time of year and likely weather conditions. Levels of natural or artificial light should be sufficient for exhibitors to operate effectively. Noise levels should be kept to a minimum, with minimal use of PA systems or “entertainment”.
- **Layout:** The layout of the exhibitor space should be conducive to creating a good circulation of visitors in safety, particularly in respect of fire exits and with due allowance for groups of students collecting at the more popular exhibition stands. HELOA would recommend a minimum of 2.5m aisle widths. Exhibition spaces should normally be allocated in UCAS code order except where specifically required by an individual or group of HEIs or to avoid congestion if popular institutions were placed next to each other.
- **Safety:** HELOA members participate in conventions on the understanding that there is full compliance with all health and safety requirements for the venue, there is adequate first aid cover and appropriate insurance. Event organisers should have a valid health and safety risk assessment, which will provide a valuable source of information on these issues. It also assumes that the staff involved in the organisation and running of a convention have been adequately briefed to deal with emergencies.

### **Access and Parking**

Exhibitors should be provided with information in advance of parking arrangements and access to the convention. Parking should be clearly signposted, with appropriate signage into the venue also highlighting lifts and disabled access. Adequate time should be allowed for setting up, for both exhibitors and contractors, and whenever possible, should include the evening before the event opens to the public.

The majority of exhibitors are likely to arrive by car, and the provision of suitable parking is highly desirable. Ideally this should be free of charge, as close to the venue as possible, reserved specifically for exhibitors, and clearly signed or stewarded. Where parking is not available close to the venue, exhibitors should be notified of loading/unloading options.

## **On-site Facilities and Support**

Exhibitors appreciate assistance with unloading and the delivery of material to their exhibition space, so this should be provided wherever possible. Empty boxes should be removed from the stands by student ambassadors/support staff when the convention is open to the public. Wifi should be offered where possible, with exhibitors given log-in details if required.

Drinks should be available throughout the exhibition, and where exhibitors are on their own on a stand, a delivery service of refreshments is appreciated. If exhibitors need to purchase food and drink at the venue, debit/credit cards should be accepted where possible, and receipts given for cash purchases.

Temporary staff and Student Ambassadors should be appropriately trained to support the safe and comfortable running of the exhibition.

## **Opening and Closing Times**

Whilst recognising that opening and closing times should be dictated by visitor convenience, organisers should note the travel distances of exhibitors and a desire to minimise the requirement for overnight stays.

Lunchtime closing is preferred where possible. If the venue does not close for lunch, this should be clearly communicated to exhibitors beforehand. Provision should be made for lone exhibitors to purchase lunch, either from their stand or at a venue nearby.

Closing times in particular should reflect departure times of organised school groups, which are often dictated by the length of the school day. HELOA strongly recommends that the last admission time is 1hr before the end of the convention, to ensure that the event can close on time and organisers have the flexibility to close early in the absence of any visitors.

## **Visitors**

Exhibitors should be given advance notice of the total numbers expected and the attendance pattern. If a large number of students are expected without traditional qualifications, this should also be communicated to exhibitors in advance. A controlled attendance pattern is preferred in order to create an even flow of visitors and to minimise overcrowding.

The advance preparation of school and college students is seen as fundamental to maximising the benefit of attending the convention for all participants. HELOA members welcome the opportunity to contribute to Higher Education Convention brochures in advance of the event.

### **Seminar Programme**

HELOA encourages a seminar programme as part of a convention, provided suitable facilities are available. An invitation to contribute should be sent to exhibitors in advance of the event, and the seminars should be appropriately advertised throughout the venue. Organising institutions should not monopolise the seminars, and should provide exhibitors with the opportunity to contribute to these.

### **Advance Information**

It is important that detailed advance information is made available to exhibitors, with sufficient time for them to plan their attendance. This should include contact details for the host institution, travel and accommodation information, access, on-site facilities, and opening times. Negotiation on hotel rates is always appreciated.

Information about the convention floor plan, parking permits, and campus maps should be provided within one month of the event.

### **Other Information**

The following information should be provided either in advance or at the convention:

- Convention programme (including opening times and lunch breaks)
- Emergency information
- Lists of schools and colleges attending (with expected arrival times)

### **HELOA Code of Practice**

To show its commitment to these guidelines and to the professionalism and integrity of HELOA, the Association encourages all members to follow good practice and in particular, to observe the HELOA Code of Practice and Exhibitor Guidelines. Convention Organisers are



encouraged to let HELOA know if there are any breaches of the Guidelines.

In particular, HELOA is concerned that all exhibitors:

- Attend all events as expected. HELOA members should not withdraw from events without good cause. Failure to attend without an explanation to Convention Organisers is considered to be a serious breach of Exhibitor Guidelines. Exhibitors should provide as much advance notice as possible if they are unable to attend an event, to allow the space to be offered to any other institution on the waiting list.
- Arrive on time. Exhibitors are expected to arrive and set up in good time before a convention opens to the public.
- Use only the stand space allocated. HELOA supports the removal of any stand exceeding the space allocated as communicated in advance.
- Behave with professionalism and integrity. HELOA members are expected to conduct themselves in accordance with the HELOA Code of Practice.
- Remain available to visitors as long as the convention is open. Exhibitors are considered to be contracted to attend within the specified opening and closing times, and should not break down stands or leave the venue without the consent of the Convention Organiser.

### **Feedback**

An opportunity for constructive feedback and comment is important for all participants whether this is through official channels or by direct communication.

HELOA would recommend that Exhibitors, Convention Organisers and HELOA are open to communication about events, through formal evaluation procedures or informal contact.

#### **Appendix 4: How to report concerns**

This section details what to do if you feel a breach of the Code of Good Practice has occurred.

1. Speak to staff at the institution during the event with your concerns.
2. If unresolved speak to the event organiser with your concerns
3. If this is not resolved then legitimate concern should be raised in writing to the Group Chair representing the group in which the HELOA member is based. The group chair will then speak to the primary contact. A log of the conversation will be raised with the UK Vice-Chair (Membership and Administration). If the concern is about a Group Chair, the procedure in Standing Order 2.003 should be followed.
4. If similar concerns about a member or institution are raised then the Group Chair will ask the UK Vice-Chair (Membership and Administration) to speak to the primary contact.

5. If an additional case is raised within a year, the Group Chair will send it to the UK Vice-Chair (Membership and Administration), with the previous incidents included.
6. The written document will be forwarded to the HELOA member involved in the complaint, with details of the HELOA member raising the concern being removed. The HELOA member will be asked to provide a response to the complaint, in writing, within 30 days.
7. The complaint and response will be scheduled for discussion at the next HELOA Executive meeting and UK Committee meeting. The HELOA Executive will make a recommendation to the UK Committee regarding further action.
8. Both parties will be contacted following the meeting with the decision. If a decision has been made to terminate membership, the HELOA member will be able to appeal this decision, in writing, within 30 days. The HELOA Executive will make a final decision and the Chair or Vice-Chair (Membership and Administration) may speak to the HELOA member for further information as part of this process.
9. The HELOA member will be contacted in writing by the UK Vice-Chair (Membership and Administration) to communicate the decision. HELOA will not refund any membership subscriptions for that year, or monies paid towards training still to take place. Any members who have their membership terminated will not be able to attend future training or conferences which are otherwise limited to HELOA members; they may however continue to attend non-member conferences under the standard terms and conditions for non-members.
10. The HELOA member involved will be able to apply for membership again in the next membership year, but there will not be an automatic right of membership. The application will be considered by the UK Committee.
11. The HELOA Executive will contact the HELOA member's institutional Primary Contact with the decision, in writing, 14 days after the decision has been made. The complaint and decision will be kept in confidential minutes of the Executive and UK Committee meetings, and will not be published on the HELOA website.