



# UK Vice Chair (Finance) Role Descriptor

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## **HELOA**

HELOA is the professional association of higher education staff working to help students make an informed decision about university by providing guidance and information to prospective higher education students, their families and advisers. Established in 1990, the Association has over 1500 members from 145 higher education institutions across the United Kingdom. Our members work in a wide range of functions within universities, covering areas of schools and colleges liaison, student recruitment, widening participation, external relations, marketing, publications and publicity, and student services. All members are committed to high standards of professionalism.

### **The HELOA Executive and UK Committee**

HELOA operates with an Executive consisting of the UK Chair and seven UK Vice-Chairs covering the following areas:

- Administration and Membership
- Communications
- Partnerships
- Finance
- Governance and Policy
- Group Development
- Training

The UK Committee comprises of the UK Executive, Group Chairs and invited appointed Officers including Conference, Finance, Digital Development, Communication and Partnership Managers. The UK Committee physical meets 4 times per year with additional executive committee web meetings regularly throughout the year..

### **Responsibilities of Vice-Chairs**

The seven UK Vice-Chairs should be members of HELOA and shall be elected according to procedures set out in the constitution. Each Vice-Chair shall normally serve for a three year period of office. To ensure continuity, the periods of office of the seven UK Vice-Chairs shall, where possible not be coterminous. The longer serving Vice-Chair will be deemed the 'senior' Vice-Chair.

The general responsibilities of the seven UK Vice-Chairs are:

- To chair UK Committee and Executive Committee meetings in the absence of the UK Chair;

- In the event of the UK Chair resigning, one of the Vice-Chairs (normally the 'senior') to become acting Chair of the Association, as determined by the UK Committee, until such a time as a new UK Chair is elected;
- To represent the Association on such external bodies as determined by the UK Committee, and to deputise for the UK Chair as official representative of the Association when the Chair is not available.
- To establish links with external organisations with whom the association may wish to associate;
- To oversee the activity of the appointed Officers of the Association;
- To liaise with HELOA group Chairs on the development of links between the UK Committee and the HELOA groups, and support them in the running of their groups;
- To take responsibility for all member and membership issues in conjunction with the HELOA Office;
- To undertake such additional responsibilities as periodically requested by the UK Committee.

Within these general responsibilities, each Vice-Chair shall have a specified portfolio of responsibility. This shall be determined in discussion with the UK Chair, on election to post, subject to the approval of the UK Committee.

### **UK Vice-Chair (Finance)**

This is a varied, challenging and exciting role within the Association. Working as part of the UK Executive and UK Committees this post plays a key role in the management and direction of the Association alongside specific responsibilities. The main aim of this post is:

- To account for all income to and expenditure from the Association's account, to prepare budgets and forecasts and to recommend levels of Subscriptions and Project Funding.

Responsibilities include:

#### **1. Accounting**

- To oversee the recording of all income to and expenditure from the Association's accounts
- To oversee the prompt reconciliation of all payment received for and paid from the Association
- To prepare reports on all budget income and expenditure against the budget for each UKC meeting.
- To check and promptly pay all expense claims and invoices associated with HELOA

- To arrange for the auditing of each year's accounts for submission to HELOA's accountants at the end of the financial year
- To report at the Annual general meeting of HELOA detailing projected final spend and income for the year and propose the budget for the next financial year.

## 2. Budgeting

Annually to:

- Receive HELOA Group Budget requests for funding and in conjunction with UK Vice Chair (Group development) propose agreed funding totals for group spend.
- Prepare budgets, in partnership with the UK Officers and/or the UK Committee, for UK Committee projects for inclusion in the Association's annual budget.
- Recommend levels of Annual Membership Subscriptions effective from 1 April each year, for initial approval by the UK Committee and subsequent submission to and approval by the members at the Association's AGM.
- Prepare an Annual Income and Expenditure Budget for the Association for initial approval by the UK Committee and subsequent submission to and approval by the members at the Association's AGM.
- Liaise with the Conference Officers in recommending to the UK Committee the Delegate Rate for the Association's Annual Conferences.
- Prepare, in conjunction with the UK Vice-Chair (Training), budgets for training courses and annual conference.

## 3. Forecasting

- To prepare for each UK Committee meeting a Financial Report usually consisting of an Income and Expenditure Forecast and a report on payments made in respect of all budget lines
- To communicate strategic financial direction to the membership.

## 4. Administrative

- To liaise with the UK Vice-Chair (Administration and Membership) and the HELOA Office on the process for invoicing members Annual Subscriptions, and providing assistance where required.
- To liaise with the UK Vice-Chair (Training) on the process for invoicing fees to attend the Annual Conference.
- To continually review the financial policy and procedures document to ensure best practice is being followed and any regulations are being met.

## 5. Leadership

- Provide strategic direction and training to the two Finance Managers and meet at each UKC meeting to discuss issues any issues and make changes to processes as necessary.

### **Further information**

Interested members should ensure that they have the support and backing of their employing institution, particularly their line manager, as the role of UK Vice-Chair (Finance) has the potential to be high profile, and will also take some time away from the post-holder's "day job". The UK Vice-Chair (Finance) attends 4 meetings per year (normally over two days to cover both Executive and UK Committee meetings), and will also have regular communication with the Executive and UK Committee along with the Finance Managers.

For more information about the role, please contact the current UK Vice-Chair (Finance) Joe Bradbury-Walters on [j.bradbury-walters@surrey.ac.uk](mailto:j.bradbury-walters@surrey.ac.uk)