

HEL^oA

Primary Contact Role Descriptor



What is the role?

The primary contact is the main contact for HELOA within a member institution. Each HELOA institution must nominate one primary contact who must be a HELOA member. The role of the primary contact is to support their institutional members to participate and contribute in HELOA activities and initiatives.

The primary contact for each institution is decided by its HELOA members. HELOA does not outline a specific duration for the length of the post, this should be decided by the members within each institution but should be reviewed annually. HELOA would suggest that ideally primary contacts hold the position for up to 2 years to encourage HELOA engagement throughout its institutional members and to consider junior posts for the role to support their understanding of the association.

What will you get to do?

The role will be responsible for supporting the HELOA Office with the processing of membership through communicating membership records and ensuring that the institution remains up-to-date with any financial remunerations to the HELOA association. The post-holder is encouraged to canvas the input of institutional members to ensure a representative vote of the institution in local and national elections and on initiatives. The post-holder should also encourage engagement, where possible, of institutional members in all that HELOA offers.

What will you learn?

- Understanding association governance through committee reports, attendance at the Annual General Meeting (AGM) and partaking in local and national elections.
- Developing communication and networking skills with HELOA members through discussions, voting, role opportunities and event attendance.
- Learning how to canvass institutional member input for election voting.
- Understanding how members can contribute to and influence and shape the association.



The role will be expected to:

1. Inform their institutional HELOA members of their primary contact role.
2. Keep an up-to-date list of HELOA members at their institution.
3. Liaise with the HELOA Office to add or remove members within the institution.
4. Organise the annual institutional membership renewal in collaboration with the HELOA Office.
5. Raise purchase order numbers for the yearly membership renewals, subsequent additional members and for HELOA conference attendees.
6. Ensure that the institution remains up-to-date with any financial remunerations to the HELOA association, including membership and conference fees.
7. Represent their institution in voting in HELOA elections, as well as voting for any key changes to HELOA that are made at, and outside of, the Annual General Meeting. This involves canvassing the input of institutional members to ensure a representative vote of the institution.
8. Attend or delegate a proxy to attend the HELOA Annual General Meeting, informing the HELOA Office of details of their proxy, in writing, and at least two weeks prior to the AGM.
9. Encourage representation from at least one institutional member at local HELOA meetings.
10. Encourage engagement, promoting opportunities by supporting institutional members to stand for HELOA elected and appointed roles.
11. Encourage engagement, promoting HELOA opportunities for institutional members, including the various national training opportunities offered by HELOA (National Conference, New Practitioners' Conferences and Professional Development Conferences).
12. Encourage institutional members to take advantage of training days held by their HELOA group.
13. Market institutional roles to the local HELOA group as well as inclusion in the HELOA Bulletin, where appropriate.
14. Review the institutional primary contact post-holder annually, together with the HELOA institutional membership renewal (1st September).
15. Inform the HELOA Office of the primary contact's finish date and support their institutional members to appoint a new primary contact, communicating these changes to the HELOA Office.

What are we looking for?

- Excellent organisational skills.
- Enthusiasm for HELOA and its aims.
- The post-holder may hold any role within their institution and must be a member of HELOA. They may hold a junior post with the primary contact role supporting their understanding of the association.

- An individual who feels that they have the time and capacity to facilitate these responsibilities, and can encourage engagement from their institutional HELOA members.
- No prior direct experience is required.

Nominating a Proxy

In the absence of the institutional primary contact, a suitable proxy can be nominated. A proxy can be any HELOA member from the primary contact's institution, who is in a suitable position to canvass the wider opinion of their institutional members. See further details on this below.

Extended Leave: When the primary contact is on an extended leave of absence due to holidays, illness, secondment etc., where possible, the primary contact can nominate a proxy for the period of absence by informing the HELOA Office. Where this is not possible, another institutional member may request to be appointed as the proxy by emailing the HELOA Office and copying in the primary contact.

Standing for a HELOA Role: On the occasion where the primary contact is standing for a local or national HELOA position, a suitable proxy will be nominated to vote on their behalf and that of the institutional members.

Annual General Meeting: If the primary contact is unable to attend the Annual General Meeting, they are invited to nominate a proxy who can vote on the institution's behalf. This is strongly advised, where possible, as the meeting must reach a quorum (one third of primary contacts in attendance) to proceed and conduct formal business.

Reporting

The primary contact does not need to compile formal reports but supports HELOA by providing the following:

- Provide institutional membership updates when required to the HELOA Office.
- Submit an annual membership update as part of the institutional membership renewal.
- Report financial remunerations to the HELOA Office or HELOA finance team.

Remuneration

Roles within HELOA are undertaken on a voluntary basis.

*Reviewed March 2026, next review due March 2029.