

#### **HECOS AND CAH MANAGEMENT GUIDE**

v.2.0.2

February 2020

The following document is a Management Guide for the Higher Education Classification of Subjects (HECoS) and its associated Common Aggregation Hierarchy (CAH). Its purpose is to specify the processes used to manage change to the standard, with the aim of offering all stakeholders and users confidence and predictability.

For comments and questions relating to this Management Guide, please contact

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#### 1. **DESCRIPTION AND APPLICATION**

HECoS was created by the Higher Education Data and Information Improvement Programme (HEDIIP) as a sector standard for the classification of subject information that is intended to be used by all data collectors. It was established as a replacement for the JACS system in order to meet the needs of a broader group of stakeholders and to reflect the diverse and dynamic nature of Higher Education in the twenty-first century. HECoS is comprised of a vocabulary of subject terms and their descriptions, along with scope notes that help determine their application. HECoS has an associated Common Aggregation Hierarchy (CAH) designed to provide standard analytical groupings. The standard has the flexibility to allow other aggregations and specialist vocabularies to be adopted. A guide to implementing HECoS is also available. All use of or change to HECoS and CAH is covered by this management process. Further materials describing HECoS can be found on the HESA website<sup>1</sup>.

#### 2. **HECOS GOVERNING BODY**

The HE Data Landscape Steering Group (DLSG) has been confirmed as the Governance Body for HECoS and the Group agreed their responsibility at their first meeting in November 2016.

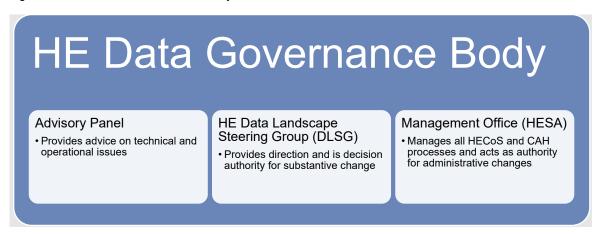
HESA has subsumed the role and responsibilities of the HE Data and Information Landscape 'Management Office' and will be therefore be responsible for overseeing the relevant processes and procedures relating to HECoS.

<sup>&</sup>lt;sup>1</sup> See: <a href="https://www.hesa.ac.uk/innovation/hecos">https://www.hesa.ac.uk/innovation/hecos</a>

The Advisory Panel will perform the role of the HECoS Consultative Group on a standing basis. There may on occasion also be a need to convene a technical expert's panel with members from outside the Governance Body and Advisory Panel. Where this is considered necessary then the Management Office will convene this for the duration it is considered necessary.

The diagram below illustrates the Data Governance model that will support all standards, policies and processes within the remit of the Governance Body.

Figure 1 - The HE Data Governance Body



The Governance Body provides strategic direction and acts as the single definitive authority for substantive changes. The Advisory Panel is an essential source of advice and guidance, responsible for bringing professional practice to bear on the management of HECoS, and supporting and advising both the Governance Body and the Management Office in the management of HECoS and CAH. The Management Office, a team based at HESA, are the authority for decisions about administrative changes.

#### COMPLIANCE WITH THE UK CODE OF PRACTICE FOR STATISTICS

HECoS and CAH are not in themselves statistics, but the management of a robust set of definitions of subjects and subject groupings forms an important part of the data infrastructure underpinning data about the UK's HE sector. This includes Official and National Statistics uses, data presented to legislative authorities, major market uses including league tables, and data used in statutory, regulatory and funding exercises. "Statistics have to be based on the right data sources, with transparent judgements about definitions and methods, and judgements about the strengths and limitations of the statistics. Producers should demonstrate how they assure themselves that their statistics are robust and reliable." By complying with and implementing the

<sup>&</sup>lt;sup>2</sup> (Office for Statistics Regulation & UK Statistics Authority, 2018, p. 4)

Code of Practice, we intend to support users of the HECoS standard to meet their obligations under the Code of Practice<sup>3</sup>

This guide ensures that HE subject data compliant with the HECoS/CAH standard can be depended upon as trustworthy, high quality, and offering the value that stakeholders expect. We believe this guide supports the three pillars of the Code (Trustworthiness, Quality, and Value) in the following ways (please see the Code of Practice for Statistics to cross-reference the full wording of its principles and practices referred to in parentheses in the text below):

#### 3.1 Trustworthiness

This guide enables the people making decisions about the HECoS standard to be held to account for adherence to the practices and principles required by it. It specifies the requirements for transparent management of the process (T4) and codifies the principles for independent decision-making (T2) by which honesty and integrity can be demonstrated in practice (T1). The guide expresses how the standard will be managed and how implementation of changes to the standard will be applied and version-controlled (T6), supporting the orderly release of statistics dependant upon the standard (T3).

# 3.2 Quality

The function of this guide is to support the curation of an appropriate master data source that supports high-quality public and regulatory information about and services relating to HE based on the best available and most widely-recognised standard for HE subjects (Q2).

The guide has been developed using practice drawn from the Data Management Association's Data Management Body of Knowledge and benefits from the professional oversight of the Governance Body for HE(Q2.1). This guide defines how the HECoS and CAH standards are defined, and how they relate to the previous standard, JACS3 (Q2.2). The guide permits transparency over use of the standard (Q2.3) and evaluation of its limitations (Q2.4). It specifies an appropriate method of change management (Q2.5) and supports collaboration by identifying the roles of the DLSG, Advisory Panel, and Management Office in determining the standard (Q2.6)

By specifying the conditions under which the HECoS and CAH standards are managed, it supports end-user judgements about:

- the appropriateness of the standard for its intended uses (Q1.1)
- the way change is managed over time and the impact of this on users (Q1.7), including their understanding of potential limitations of the standard (Q1.6) helping them to explain their reasons for selecting the standard (Q1.5) and how it meets their requirements (Q1.3)
- the coherence of the aggregations represented by the CAH (Q1.4)

The guide also supports the quality assurance of the standard's fitness for purpose, by specifying the purpose of the standard and our understanding of the intended users' needs in the principles

<sup>&</sup>lt;sup>3</sup> Find the Code of Practice for Statistics at <a href="https://www.statisticsauthority.gov.uk/code-of-practice/">https://www.statisticsauthority.gov.uk/code-of-practice/</a>

(Q3.1). The guide specifies the decision making process in detail, and has been evaluated by the DLSG as being proportionate to the uses of the standard (Q3.2) permitting end users to understand the quality of the metadata in detail (Q3.3). The guide explains how changes are released and notified (Q3.4) and shows the approach to periodic and systematic reviews (Q3.5)

#### 3.3 Value

HECoS and CAH have been developed to be more relevant to users (V1) than the previous national standard, JACS3. This guide defines a management approach that builds-in responsiveness and the possibility of incremental change (V1.1, V1.6, V4) in response to user feedback (V1.3, V1.5). We have successfully engaged administrative data suppliers responsible for implementing the standard, and obtained major adoptions by different parts of government, winning an industry award for our work in developing, implementing and awareness-raising on the standard (V1.2, V4.7)<sup>4</sup>.

We intend to make HECoS and CAH available as a standalone machine-readable open standard in due course (it is currently available through the HESA Coding Manuals and on the HESA website) (V2.1, V4) and all detailed information about the standard is on the HESA website (V2.2, V2.4)<sup>5</sup>. This information is clear (V3) and proportionate to the uses to which the standard is put (V5)

#### 4. HECOS ARTEFACTS

The governance of HECoS and CAH relies upon common understanding and acceptance of an agreed approach to its management and implementation. This is achieved through the production and maintenance of artefacts. The Governance Body is responsible for the maintenance and development of these artefacts. The Management Office will undertake an annual review of the management guide and implementation guide, with potential issues being handled through the change management process specified here. Where specific implementation hurdles faced by users are notified to the Management Office, these may be considered outside the annual review cycle. These artefacts are as follows:

#### 4.1 HECoS Management Guide

This specifies the processes utilised for managing changes to the HECoS and CAH, to ensure it retains the level of coherence users require.

#### 4.2 HECoS Implementation Guide

This specifies the behavioural expectations required of supply-side and demand-side users, in order to ensure semantic interoperability (shared meaning). This is required to enable common adoption of the HECoS and CAH.

<sup>&</sup>lt;sup>4</sup> HESA was a recipient of a WonkHE award for HECoS.

<sup>&</sup>lt;sup>5</sup> www.hesa.ac.uk/innovation/hecos/

# 4.3 HECoS Coding Frame

This is the list of HECoS terms, with their associated codes, descriptions and scope notes. It also includes enhancements in the form of translations to other related coding structures.

## 4.4 The Common Aggregation Hierarchy (CAH)

Provides standard groupings that provide consistent aggregation for analysis across a wide range of use-cases. The CAH can be applied to both HECoS and JACS3 subjects allowing for consistent analysis across both coding frames, providing continuity in subject analysis through the transition from JACS3 to HECoS.

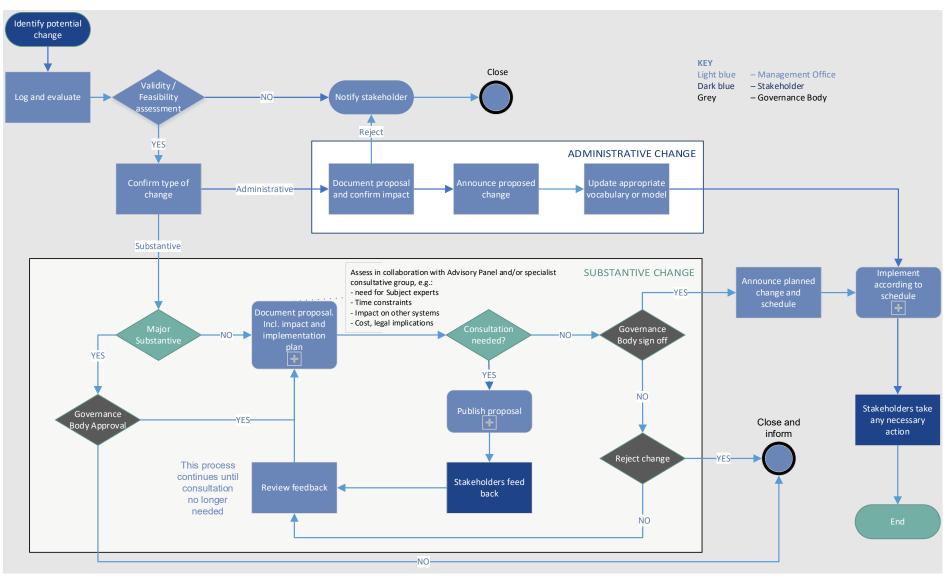
#### 5. HIGH LEVEL MANAGEMENT PROCESS – FOR HECOS AND CAH

This section deals with the approach to gathering user needs, and making decisions on them. The following section explains the principles that underpin decision-making, and the section following that deals with how decisions are implemented. Together, they form the core of the management activity for HECoS and CAH.

The diagram on the following page shows the decision-making flows to be exercised in the management of HECoS and CAH. It does not, however, cover the full range of information provision that will necessarily exist around the process. Supporting infrastructure to systematize communications was identified as a priority for the Management Office by the Governance Body, and is currently being put in place. However, prior to publishing the detail of this, there is broad agreement that communications around the process should be rigorous and involve all stakeholders affected by the decision. The Management Office will be required to bear this in mind when operating the process. Once the new communications approach is fully implemented, this guide will be updated further.



Figure 2: HECoS and CAH change management process – overview (v.1.0.2)





## 5.1 Identifying potential change

A change can originate from a number of sources and it is not expected that the Management Office would wish to limit where a change can be originated. The main sources of requests for change are expected to be:

- The Advisory Panel
- The Management Office
- The Governance Body to initiate more strategic work
- Data collectors either using, or intending to use the standard dataset
- Any subject matter expert in the subjects covered (or potentially covered) by HECoS and CAH
- Any other organisations that wish to adopt HECoS or the CAH

Each of these initiators would be expected to formally raise a change into the Management Office which would triage the request, and either place it into the correct governance process, request further information or reject the request.

A HECoS change request form must be completed by the stakeholder requesting the change. The form will be available from the HECoS page of the website and will be submitted *via* the HESA website.

# 5.2 Log change request

Once a change request form has been received and an initial review to determine whether it is complete, has been done, an acknowledgment will be sent by the Management Office to the stakeholder requesting the change. The Management Office will be responsible for processing any received requests, ensuring to log them in the appropriate system and amend their status as appropriate. Upon receiving the request, the Management Office will expect to respond to the initiator within a published service standard framework. The Management Office intends to develop this set of service standards as it understands the requirements and expectations.

## 5.3 Evaluate change request

A regular (proposed quarterly but may be required more or less frequently) meeting will be held by the Management Office to determine if the change request is feasible. If not, then the submitter will be notified of this and the reason for the change not being actioned. If the change is accepted then the type of change needs to be determined (administrative or substantive based on the definitions below), as well as deciding on the next steps to be taken and assigning the responsibility for the implementation of the change to a member of the Management Office. Where no decision can be made at it may be necessary to request further information from the submitter. In this case the change will remain in a pre-triage state until sufficient information is available. The change request will need to be updated on the appropriate system.

# 5.4 Definitions and tests for the type of change

Changes to any HECoS artefact may be considered by this process. Changes can be as small as amending a typographical error on a scope note, or a major project to amend the CAH or

support a new national-level implementation of HECoS. Changes can also be made to the Management Guide and the Implementation Guide using this process.

When triaging the requested change to determine feasibility, the Management Office will make explicit reference to the Principles for making decisions about the Higher Education Classification of Subjects.

On determining that the change is feasible, the Management Office will further assess whether the proposal constitutes an *administrative* change, and can therefore be authorised and implemented by the Management Office. If the change request exceeds the specification of the administrative change process, it will be considered a *substantive* change, and routed appropriately.

The tests for whether a change is an administrative one are as follows:

- The proposal will not result in a new candidate term
- The proposal will not result in the deprecation of an obsolete term
- The proposal does not alter the Common Aggregation Hierarchy
- The proposal does not raise broader policy or practice issues
- The proposal can be resourced by the Management Office
- The proposal represents a minor correction or clarification
- The proposal will not affect the statistical usage of the coding frame.

If the answer to all of the above tests is either TRUE or NULL, then the proposed change is an administrative one. If the answer to any test is FALSE, then the change is substantive.

Examples of substantive changes include:

- A new candidate term
- A proposal to split an existing code into two new values
- The adoption of externally proposed aggregation hierarchy or specialist vocabulary
- A request to pro-actively review an entire subject area, affecting around 30 codes
- The deprecation of a term, aggregation hierarchy or specialist vocabulary
- Requirements for subject matter expert input
- Material impacts on key outputs
- Invalidation of previously-classified data
- Changes to the Management Guide or the Implementation Guide
- An administrative change which the Management Office judges raises broader issues of policy or practice requiring the attention of the Advisory Panel or Governing Body.

If any of the above statements is TRUE, then the proposed change is *substantive*. If the proposed change is a substantive change, the Management Office will assess whether it is minor or major. The distinction between minor and major is the extent to which the DLSG would need

to commit additional resources in excess of the prevailing agreed resourcing for the Management Office, in order to pursue the proposal. A minor change may have far-reaching impact, but not require significant resources. A major change will require a resourced project plan sponsored by the Governance Body to achieve the desired outcome.

#### 5.6 Initiation of major substantive activity

When it is determined that the request is a major-substantive change, then this will be taken to the Governing Body to approve further research and activity to take place. Typically this would include any planned major reviews of subject areas that requires significant consultation and orchestration. If further research is to take place, a scope would be agreed and the necessary resources secured. It is expected that the pre-planned and scheduled review activity which is recorded as part of the development roadmap, would fall under this category.

As part of the general management and oversight of HECoS, the Governing Body should be kept appraised on a regular (normally annual) basis about the lower-level changes taking place, and on any issues, which may precipitate a requirement for further research. In order to comply with the UK statistics code, the Governing Body should seek general user feedback on the standard approximately every five years, and allow for a substantial re-appraisal of HECoS and CAH on a ten-year cycle. This does not preclude the Governing Body taking action out of cycle where it believes such action is necessary. There will be a post-implementation review of HECoS during the 2020/21 academic year.

## 5.7 Document proposal

The change request will detail the change that is required and the actions that need to be taken such as an update to a HECoS terms definition. A member of the Management Office will be responsible for the implementation of the change. For any substantive change a proposal document will be created, and this will contain an impact assessment and an implementation plan.

When a substantive change is requested then it is anticipated that this will usually result in subject experts needing to be consulted with. As part of the change request form, information may have been submitted on communities/experts that could be consulted on this change. The Advisory Panel are the principal resource available for consulting on these changes, but their professional expertise may need to be supplemented with domain knowledge from the subject discipline in question. The information collected from subject experts/Advisory Panel will need to be included as part of the proposal. The change request will be updated to reflect any actions that will be/have been taken.

## 5.8 Impact assessment

Requesters of change to HECoS and CAH are required to perform an assessment of the impact of change on the coding frame and its uses, taking into account the Principles in this document. This will be evaluated by the Management Office. Evaluation will be thorough, and should take into consideration the anticipated cost and scale of the change against its understood benefits.

When assessing the impact of a change, we will consider two main facets: the impact on the HECoS coding frame itself, and also the impact on the Common Aggregation Hierarchy.

It is important to note that each principle is valid in its own right and there is no hierarchy within these. (i.e. stability does not override consistency by default). Where two or more principles are in conflict a justification will need to be made for which principle is adhered to. This will be a case by case judgement.

#### PRINCIPLES FOR MAKING DECISIONS ABOUT HECOS AND CAH

The following principles are divided into three categories, those that deal with:

- a) coverage and scope, prefixed with a "C"
- b) statistical properties, prefixed with a "S", and
- c) data quality and availability, prefixed with a "Q"

## 6.1 Coverage and scope

- C1 In HECoS, subjects are persistent areas or branches of knowledge or learning that are studied in higher education.<sup>6</sup>
- C2 HECoS and CAH should take account of the context of the subject at the provider, ensuring that coding strikes the correct balance between the recognition of logical distinctions between subjects, and the intention to represent similar subjects together in aggregations and public information sources
- C3 Changes to HECoS and CAH will conform to an evidence-based and robust process, recognising best practice in the production of statistical information. Details of the change process should be published for the benefit of providers and other users or interested parties.
- C4 HECoS and its CAH is a UK-wide standard. It will be applicable to HE provision across the whole UK, and be understandable in a UK-wide context.
- C5 HECoS subjects and terms must be defined with sufficient rigour for clear and auditable distinctions to be made about whether provision accurately reflects the subject code. The use of scope notes is encouraged where potential ambiguity is identified.
- C6 The audience for much of the information represented using or mediated through HECoS and CAH may in the main be regarded as an interested and motivated lay-audience, including:
  - prospective students and their advisers

<sup>&</sup>lt;sup>6</sup> Definition developed using (Cambridge English Dictionary, 2018; Chambers, 2014; Collins English Dictionary, 2018; Oxford Dictionaries, 2018; various, 2017)

- readers of the general press
- UK and international statistical users
- elected representatives of the people

The goal is to represent subjects and groups of subjects intelligibly and with rigour in these non-specialist contexts.

C7 HECoS and CAH will not be comprised of "administrative" subjects or groupings such as "subjects not elsewhere classified", or codes which attempt to represent non-subject classes of information such as funding or regulation characteristics as if they were subjects. Organisations requiring specific implementations of HECoS that contravene this implementation guide should discuss their requirements with the Management Office in the first instance.

## 6.2 Statistical properties

- As far as possible, subject terms should attempt to delineate observed similarities in the subject characteristics of provision such as courses, qualifications or modules, between providers. Where a subject only occurs in a singular circumstance (such as at a single provider) it is unlikely to be suitable for inclusion.
- S2 Proposals for new or changed codes must demonstrate the existence of a gap, inconsistency, unhelpful ambiguity or overlap in the standard, and make a case that considers the positive and negative impacts of the change. Arbitrary or technocratic distinctions will be avoided except where these exceptionally demonstrate substantial value and enhanced meaning for the main audiences for HECoS- and CAH-mediated data.
- S3 HECoS codes and CAH groupings should normally have longevity and a continuity of statistical properties observed over time.
- S4 The CAH will be a comprehensive aggregation of the entirety of HECoS at each hierarchical level, where a "parent" node at a higher level always comprises the full set of HECoS codes represented by related "child" nodes below it.
- Subject groupings (represented as nodes in the CAH) are not the same as subjects (represented by HECoS codes) even in cases where a CAH label is identical with a HECoS term.
- Where a higher-tier node is the parent of a single node at the next lower tier, they must share a title.
- Where a higher-tier node is the parent of more than one node at the next lower tier, they may not share the same title.

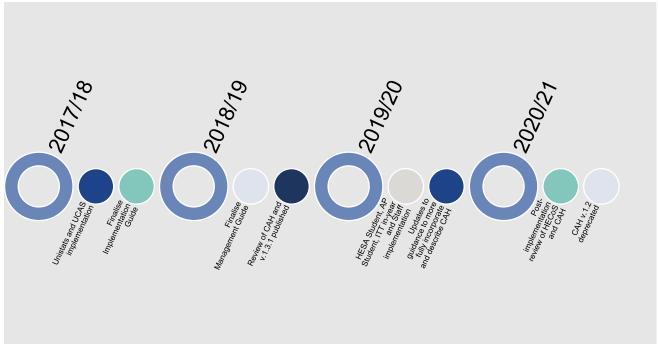
## 6.3 Data quality and availability

- Q1 HECoS is the standard for classifying subjects in higher education and CAH is the standard for grouping them, for all data collections and transfers within the purview of the DLSG's goals and code of practice.
- Q2 The Management Office will be responsible for ensuring HECoS and CAH are made available online using a suitable open licensing arrangement.
- Q3 Data coded as belonging to a subject must accurately represent the features of that subject as delineated in the HECoS subject term, definition, and scope notes.
- Q4 HECoS and CAH are intended to be stable standards, which support longitudinal analyses. Adaptations to the standard must take this principle into account, and arguments for change must be compelling and widely supported.
- Q5 Where a HECoS code (or a node in the CAH) has not been used for three years, it will become a candidate for deprecation.
- Q6 HECoS and CAH will be version-controlled separately.
- We are not prescriptive about the use of an Oxford or serial comma (a comma placed before the final conjunction in a list of three or more items, as in "We provide statistics about students, staff, and universities"). It should be used in HECoS and CAH when it helps the sense of a label, term, description or scope note.

#### 7. IMPLEMENTATION PLANNING PROCESS AND ROADMAP

For any substantive change it will be necessary to propose an implementation to agree the feasibility of delivering the change. This should include a proposed release schedule. Where a programme of work or multiple stages of development are proposed, a roadmap giving indicative timescales for priorities will be produced.

Figure 3: Current roadmap for development of HECoS and CAH



#### Recent work during 2019/20 includes:

- Improving the information about and definition of the CAH in the Implementation and Management Guides for HECoS
- 2) Improving the process for making proposals for change
- 3) Improve processes for managing requested changes and getting wider feedback on them

#### Future work in 2020/21 includes:

- 1) Working with around forty proposers who have been in contact with the Management Offices to develop ideas for change to the standard that have been received in outline over the previous two years, including new HECoS codes and a proposal for "CAH-zero" a very high-level set of subject grouping nodes.
- 2) Consulting on all well-developed changes
- 3) Undertaking a post-implementation review of HECoS and CAH
- 4) Developing proposals for the next update to the standard, tentatively expected to be published in early 2021, for adoption in summer 2023.

# 7.1 Publish proposal/announce change

All changes will be notified publicly, and change proposals will be consulted on in a manner that complies with the UK Statistics Code. As an example, the proposed change(s) will be published on the HECoS website/HECoS hub. This is currently at <a href="https://hesa.ac.uk/innovation/hecos">https://hesa.ac.uk/innovation/hecos</a> but may be changed administratively by the Management Office in future. An email will also be sent to the <a href="https://hecos.juscult.new.org/lecos.">HECoS JISCMail group</a> and to mailing lists of users held by relevant Advisory Panel member organisations to alert them of this. The stakeholder that requested the change will also be contacted to confirm the implementation of the change.

For administrative changes, a guide to when the change will be implemented would normally be included, as this type of change does not require feedback to be sought. It is suggested that when a number of administrative change requests have been received that these are processed and announced together, to reduce the need for multiple communications.

All changes should have a transparent and published lead time and implementation schedule. For any changes that affect the HECoS codes or the CAH then a period of at least one year from announcement to implementation will be maintained in order to allow sufficient times for stakeholders to adapt. Where possible, this period will be expanded to two years, to permit legislative users time to update Statutory Instruments and systems as part of their routine cycles. Consideration must also be given to the business cycles of organisations using HECoS for operational purposes, and any major data development projects relating to HECoS underway at the time.

#### 7.2 Stakeholders feedback (substantive changes only)

Feedback will be sought from stakeholders on the proposed change; an email can be sent out on the HECoS JISCMail group to notify the sector. In addition it is suggested that all known users of HECoS/CAH are emailed about the proposed change. A minimum of four weeks should be allowed for feedback to be provided.

# 7.3 Review feedback (substantive changes only)

Once the deadline for feedback has passed, then all received feedback will be reviewed and any subsequent actions/amendments made.

If there are no actions following feedback then the proposal will be presented to DLSG for approval.

# 7.4 Update document proposal (substantive changes only)

The document proposal will need to be updated based on the feedback received. It will need to be decided if further consultation is required; if so then this will need to go back to the 'Publish Proposal' stage, for further feedback to be sought.

# 7.5 Governance Body approval (substantive changes only)

The document proposal needs to be signed off by the Governance Body.

If sign off is not achieved, then the feedback from the Governance Body will be reviewed and necessary actions taken - this will need to go back to the 'Document Proposal' stage.

#### 7.6 Implement change

HECoS/CAH will be updated with the change and a new version released on the HESA website.

A release schedule will be defined and managed by the Management Office and implemented changes will be allocated into a planned release. This is important to bring predictability to the updating of the standard, but also to allow consideration to impact on capacity of users to adapt to change.

The release schedule will be published through the development roadmap, and in general minor substantive changes that are raised and progressed will be scheduled into the most appropriate release. This means that changes can be raised and processed at any time, but implementation into the standard itself will be controlled by the release schedule.

All HECoS artefacts will be version-controlled using HESA's version control methodology. A full change history will be made available.

#### 7.7 Inform

Once the change has been implemented then the website can be updated so that the change is moved from the 'Planned changes to HECoS' section to 'Implemented changes to HECoS'. An email will be sent to the HECoS JISCMail group to notify them that a new version of HECoS has been released and details of the change.

The Governance Body will also be informed that the change they agreed has now been made.

#### 7.8 Close

The change request can be updated once implementation of the change is complete, then closed.

# 8. COMMISSIONED REVIEWS

While it is expected that a large amount of change presented for consideration will be raised externally to the Management Office, it is likely that over time themes of change will become apparent or that areas of the standard will require a review to ensure continued fitness for purpose.

The initial ideas for these reviews can come from anywhere, however the Management Office would expect to triage these and usually initially present them to the Advisory Panel for advice then the Management Office would prepare a proposal for the Governance Body to commit to the work being undertaken as a planned activity. This activity would be considered to be a major-substantive change for the purposes of governance.

#### **REFERENCES**

For completeness and rigour, we utilised the following dictionaries and encyclopaedias in developing the definitional term found in the "Principles" section, above:

"In HECoS, subjects are persistent areas or branches of knowledge or learning that are studied in higher education."

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