

DISCUSSION AROUND FTE – SECOND PROPOSAL

15 JANUARY 2019, 10:00
CONFERENCE CALL

Present:

Andy Breeze, OfS
John Britton, Cardiff University
Chris Carpenter, Loughborough University
Christine Couper, The University of Greenwich
Suzie Dent, HESA
Judith Dutton, Open University
Jeanne Farrow, HESA
Rachel Fuidge, HESA
Debbie Grossman, The University of Greenwich
Liz Heal, HEFCW
James McLaren, HESA (at the end)
Hazel Miles, HESA
Daniel Norton, Loughborough University
Emma Thomas, Open University
Hoa Tu, Open University
Ruth Underwood, HESA

ACTION POINTS FROM LAST CALL

ACTION: OfS / HEFCW to consider if this approach would work for them. Would providers need to submit all their future module data?

OUTCOME: Second proposal reached, so this has been considered

ACTION: HESA to include a derived field for the last three reference periods of FTE values.

OUTCOME: HESA is still considering the options here.

ACTION: HESA to communicate FTE proposals to colleagues working with League tables, to make them aware.

OUTCOME: this has been done.

COMMENTS FROM PROVIDERS AS TO WHETHER OR NOT THIS APPROACH WORKS

OfS: took us through the excel spreadsheet they sent around this morning. This shows test data from Greenwich calculated using different methods. OfS will not use the planned FTE as a prediction of the futures, it will only be used retrospectively in case the student drops out.

Action: OfS to recirculate the spreadsheet with the worked examples with a bit more detail than was currently contained in it.

Providers were then given the opportunity to ask questions on the second proposal.

Greenwich:

This proposal makes sense to us. We are likely to return data using the planned FTE approach.

The sector will need some clarity over the definitions.

Loughborough:

Having a hybrid model helps us and sounds good. However, we need to be clear what we're calculating them off in the different circumstances – is it Course Session or Student Course Session dates?

We would go with planned FTE approach.

Cardiff:

We are used to using Module data here, so are more comfortable looking at FTE load in year. Be aware that Easter will move some of the dates around. I would suggest pushing others down a Module approach, as we've always done it like that and it works.

Open University:

We are happy with the new proposal, as we can return reference period FTE which is what we'd prefer to do.

Next, we opened up for some general questions from anyone.

OU: is this proposal for all nations?

HESA: Not yet, but HESA want to talk to Northern Ireland and Scotland after this to see if it will be possible to align a bit more. Especially given this hybrid approach does encompass the approaches they are currently taking anyway.

OU: how will reference period FTEs be used by OfS and HESA? How does it relate to STULOAD? Especially as a Student course session year could touch up to 4 reference periods.

OfS: we are starting to use FTE more now: in terms of setting subscription rates, considering whether providers are eligible for University title, and considering the requirements for TEF etc.

If you take all the reference periods that a Student Course Session covers, and sum up the FTE of those, then that should sum up to the STULOAD of the student. There may be a situation to consider when a student drops out (e.g. student E in the spreadsheet), and would you amend planned FTE, or would STULOAD be the most accurate? or not and then would the FTE be calculated from that.

Would HESSES recreations be done off STULOAD, rather than planned FTE? Might be an issue for providers in England.

What would HESA use in their publications now? Expect it might be based off reference period FTE, though this hasn't been looked at yet.

HESA: colleagues who not in the room need to help with this, so I'll take that action.

Action: HESA to consider how we would use this data, STULOAD or FTE?

Need to be aware of continuity between the current record and data futures and the affect this could have on the time series.

Action: HESA and OfS to consider the impact on continuity

OfS: We will give our best guess on how to resolve these issues, but please be aware that we may have to work through some of these later, especially through Beta. It's difficult to work out the unknown unknowns!

Loughborough: Could you have a look at doing a best guess of reference period FTE based on migrated data?

OfS: we have tried this, but the dates aren't all there to create anything meaningful enough to make it worth doing.

Greenwich: Agreed, we don't think this would be possible.

Loughborough: what about PGR students? Are we predicting FTE, as we won't necessarily have Modules for them?

Greenwich: aren't we sending dummy modules?

OfS: Discussions are happening at HESA soon, but we think you will have to return some dummy modules in order to fit into the data model structure. So, you would end up putting in a predicted FTE.

Loughborough: this is similar to what we're doing now anyway.

We are having some discussions in the beginning of February with all Statutory Customers, and hopefully with some providers too soon.

Please send us your problems and questions on PGR students, and HESA will incorporate it into the paper that is being drafted for that meeting. Examples of atypical study paths and not just the typical ones would be useful as well.

Action: providers to send any questions / problems on PGR students

HESA: what happens if providers want to combine methodologies?

OfS: I would anticipate this happening, if the student does something different and their normal methodology simply didn't work (e.g. in the student E example).

There needs to be clarity over what takes precedence over what. Communication on this needs to be clear for providers. Not thought about the validation for FTE yet.

HESA: would STULOAD be returned by providers to confirm the planned FTE, or is it calculated for them?

OfS: if planned FTE was updated when a student leaves, it kind of becomes STULOAD in the final reference period anyway. We wonder if it is worth having it returned anyway, just to help with data quality initially.

Greenwich: we would prefer to return STULOAD for now, whilst we get to grips with the new methodology. Others agreed with this.

Therefore, assume that all providers need to return STULOAD for now.

HESA: This proposal isn't utilising the MIPROPORTION field, so perhaps the field needs to be removed from the spec now?

OfS: I will need to check with colleagues as they are currently using it for the price group calculation: $STULOAD \times MIPROPORTION \times \text{price group proportion}$.

Action: OfS to confirm if they need the MIPROPORTION field

HESA: In the proposed derived field specification, I'm not sure we can identify resits in the data futures model. This is where they are resitting the exam only (not retaking the full module).

OfS: we're not sure if that matters or not. Will need to consider it properly.

Action: OfS to consider if this is a problem.

HESA: APEL is only captured for Wales at the moment. Did you need these excluded as well?

OfS: No, that's ok for us.

HEFCW: if we are calculating FTE at a specified date, that might lose some modules that fall between those dates. Should it be students who are active between two dates instead (basically the reference period dates)?

HESA: yes, it should be a range.

Need to consider where we might not have all the dates too.

Action: HESA to amend the FTE derived field to be a range of dates.

Action: HESA / OfS / HEFCW to consider where we might not have all dates, and whether this is a problem.

HESA: Did OfS use HESA's derived field methodology in the Greenwich examples?

OfS: Yes, it's pretty much that, but with a range of dates used.

Greenwich: STUALOD v planned FTE. Note: FTE will be higher if they start later, whereas STULOAD will cover the entire year.

OU: STULOAD is returned at end of the course session, so over maximum of a 12-month period. If STULOAD needs to be returned at the end of the reporting year, we may not have a STULOAD for all students?

OfS: STULOAD and FTE fit in with the student's year not the reporting year anymore. So, you return it at the end of the Student course session, which isn't just in July. In the scenario of a student starting in January for a year, you would return the STULOAD the following January when their Student course session has ended. We will use the reference period FTE to match it against current reporting period if it is needed like that.

Loughborough: is the expectation that a provider will use only one approach, or that a provider could use multiple approaches for groups of their students?

OfS: we anticipate that they are likely to use different methodologies depending on what is best to use in each situation. That isn't a problem.

Loughborough: it might be helpful to have some guidance on what approach might be good to use for the different students we have, i.e. a flexible course or PGR students.

Action: HESA add some guidance to suggest what approach you could use for different types of students.

Loughborough:

Thanks to OfS for coming up with a new approach and listening to what providers have said to them.