

## HEIDI PLUS STAKEHOLDER GROUP MEETING MINUTES

TUESDAY 28<sup>TH</sup> FEBRUARY 2017  
HESA, 95 PROMENADE, CHELTENHAM

### Present:

Alan Roberts	National Union of Students
Andrew McConnell	The University of Huddersfield
Florentina Taylor	Equality Challenge Unit
Giles Carden (Chair)	The University of Warwick
Joanna Brooks	Roehampton University
Julie Leeming	St George's, University of London

### Apologies:

Amanda Watson	The University of Sunderland
Gary Drake	University of Plymouth
Kathryn Heywood	Durham University
Laura Knox	The University of St Andrews
Mike Clark	The University of Brighton

### In attendance:

Alex Mantle	HESA
Beth Magovern	HESA
Emilie Beale	HESA
Jonathan Waller	HESA
Myles Danson	Jisc
Neil Richards	HESA
Nicola Phelps	HESA

## 1. Welcome and introductions

Florentina Taylor was formally welcomed to the group as a new stakeholder group member.

Giles Carden raised the issue that the quorum was not being met at the meeting due to apologies and that going forward he proposed to look at increasing the number of members. The group agreed with this proposal.

Jonathan Waller asked the group if relocating the meetings to London might be preferable to the current Cheltenham office, however the group felt that the idea of rotating between venues would be best.

**Action 1: HESA to look at increasing the number of group members in time for the next meeting.**

**Action 2: HESA to investigate other locations for future stakeholder meetings.**

## 2. Minutes from previous meeting

The minutes from the previous meeting, 12<sup>th</sup> April 2016, were formally agreed by the group. An update on the actions from that meeting was presented. It was highlighted that after discussions with AUDE colleagues on the deployment of EMR data and visualisations in Heidi Plus that there appear to have been little interest in the visualisations. HESA are planning to explore with AUDE if there is appetite to develop further dashboards within the Analytics Lab framework. Members of the stakeholder group expressed an interest in the project and possible opportunities for collaboration.

Regarding the action for HESA to develop a strategic 2-year dashboard roadmap, this is being developed in light of the dashboard feed from Analytics Labs, and this was further discussed later in the meeting.

All remaining actions were either complete or were to be discussed during the meeting.

## 3. Matters arising

No matters were reported.

## 4. Heidi Plus update

Nicola Phelps presented an update on the Heidi Plus implementation progress and areas that are in development for the service. The group were asked for their feedback and approval on several topics relating to Heidi Plus.

### Heidi Plus application process update

The group were interested in the ratio of user types at HE providers, noting that the majority were gold users and that some providers did not have bronze users. Jonathan Waller stated that as

providers were migrating their Heidi users to Heidi Plus that gold users would be a high priority for user organisations, however it is likely that the number of silver and bronze users would increase over time. The group felt that there might be a marketing opportunity here to broaden the user base.

#### Heidi Plus development update

The group were given an update on an action from a previous meeting: to design rounded data tabular dashboards for access by all users. It was reported that 12 dashboards have been created and these have seen high usage so far. The issue was raised that currently these dashboards can only be downloaded by users as an image or PDF, not as an Excel file. HESA's vendors have stated that the functionality to download rounded tables as Excel files is not currently available. HESA proposed to utilise the Tableau ideas forum to post a suggestion to gather support from the user community in the hope of raising the profile of this requirement with Tableau. Users would be invited to vote for the suggestion which, given enough engagement and backing, might prompt Tableau to add the functionality. The group agreed this proposal in principle but did raise concerns about expectation and to make clear in communications to users that a suggestion with high numbers of votes would not guarantee positive action from Tableau.

**Action 3: HESA to add Excel format download suggestion to Tableau ideas forum for rounded data tabular dashboards and invite users to vote.**

#### Heidi Plus API Update

The group were reminded that the Heidi Plus API has not yet been developed. HESA currently has no available resource for developing the API which means the work will need to be outsourced but there isn't a budget available until August. This will result in a break in service from April, when Heidi is decommissioned along with the Heidi API. There are currently 9 organisations accessing the Heidi API and the number is dwindling. Communications have been sent to users to inform them that there will be a break in the API service and only two users have commented so far. The group were asked for their views as to the relative importance of the development of a Heidi Plus API against other priorities. The group noted that the API was utilised by HE providers with advanced BI maturity and that there would likely be more demand for it in the future as other HE providers continue to advance. The group enquired about the duration of the break of service and Jonathan Waller informed them that the API could be delivered either winter this year or spring next year, depending on the development of the new HESA Data Warehouse. The group felt that the delay into spring next year would be acceptable given the circumstances and current demand for the API.

**Action 4: HESA to determine if other users are content with a potential spring 2018 Heidi Plus API release.**

#### Heidi Plus Training Update

Beth Magovern presented details to the group of the Heidi Plus training delivered over the past 10 months. There have been 83 events during that time with positive feedback. The Heidi Plus essentials course has now been CPD accredited and an online lead contact refresher course has been launched with advanced Heidi Plus seminars planned to go live in April.

Beth provided an update on action 2 from the previous meeting: HESA to discuss with Aberystwyth University about possible training venues in Wales. As there had been a lack of demand and

suitable venues it was decided events would not be run in Wales, however providers could still arrange for bespoke courses to be run. The group enquired if any of the training was mandatory and Beth confirmed that Lead Contact training was mandatory, but that this was completed remotely.

## **5. Roundtable discussion**

The group gave feedback on their experiences of Heidi Plus and the migration from Heidi.

It was reported that a gold user had stated that there aren't enough fields in data sources which is restricting analysis. Jonathan Waller explained that HESA look to the group for advice on the level of granularity of data within Heidi Plus. With Heidi, the initial specification of data had been determined with reference to existing data publications, but since launch of the original system the range and depth of data content in the service has expanded considerably. Further increasing the granularity of data would incur additional resource requirements and therefore costs. The group agreed that in this case of a request from a single user with no evidence of a widespread demand for more granular data, the user should be advised to purchase the additional data they require through HESA's bespoke data service.

One institution remarked that there had been a lot of positive feedback around Heidi Plus. One challenge that had been raised was around access to UCAS data. Jonathan Waller reminded the group of the decision made by UCAS to withdraw their data from the service.

An institution enquired whether an advert for the Heidi Plus training could be included on the HESPA website. The training team agreed to investigate this request.

### **Action 5: Training team to investigate possibility of advertising Heidi Plus training on HESPA website.**

Alan Roberts reported that the National Union of Students (NUS) are currently finalising their permitted uses so that they can access Heidi Plus.

The Equality Challenge Unit (ECU) are excited to access the service and felt that an Equality Charter dashboard would increase engagement. The ECU was advised to contact Myles Danson at Jisc to discuss taking this idea forward with the Analytics Lab.

There was also interest in involvement in Analytics Lab by other group members.

### **Action 6: Jisc to contact Paul Johnstone at the University of Warwick to see if he wishes to connect with the Analytics Lab team working with Staff data.**

Another institution remarked that the Data protection training provided by lead contacts is not onerous to provide and that the related forms and ID system are easy and quick to deal with, allowing for a smooth migration.

## 6. Heidi Plus User Survey

Nicola Phelps presented the group with a draft of the Heidi Plus user survey which proposes to acquire feedback on the impact, usage and improvements of the service. The group were invited to comment on the current draft as well as suggest new questions for inclusion in the survey. The group asked for question 14 (what datasets not currently available in Heidi Plus (if any) would you find useful) to be made clear that it refers to both HESA and non-HESA datasets.

The option of including a question around why HE providers will or will not increase user numbers was raised but the group ultimately felt that it wouldn't be an effective question as HE providers each have different strategies which inform their decisions on this matter.

All other questions in the survey were agreed by the group.

**Action 7: Question 14 of Heidi Plus User survey to be updated to make clear that it refers to both HESA and non-HESA datasets.**

## 7. Heidi Plus additional services

Jonathan Waller presented an update on the follow-up actions from the April 2016 paper on Heidi Plus additional services.

### Additional service 1: Creation of bespoke dashboards, visualisations and analyses for individual HE Providers

Jonathan stated that Tableau Version 10 had been released, allowing users to create dashboards for themselves via web-editing. As such, a more comprehensive design service is now seen as being a function of the Analytics Lab.

### Additional service 2: Mechanisms for HEPs to share dashboards with other HEPs

Jonathan made the point that HESA would have to act as a global administrator for this service and highlighted the impact this might have on resources. Another option was mentioned whereby material might need to be shared amongst a restricted subset of user organisations, for example, for benchmarking purposes. Either way this would be a chargeable service, possibly publicised through a service catalogue.

### Additional service 3: New dashboards of user metrics for lead contacts

Jonathan reported that going forward HESA would look to utilise dashboards to provide organisational usage statistics as this would be preferable in the long-term.

### Additional service 4: Creation of metrics, KPIs and benchmarking groups for specific HEPs

Jonathan noted that this would be a relatively easy service to implement as the mechanisms are already in place at HESA and should also be a chargeable service publicised through a service catalogue.

### Additional service 5: Facility for HEPs to upload their own data to Heidi Plus

Jonathan advised that this could be a very valuable service to HEPs but does pose some data protection challenges. As HEPs would be uploading their data to the Heidi Plus service, HESA would become the data controller of the items, which would create issues of data ownership.

Jonathan informed the group that the chargeable services are ready to be included in a service catalogue and that there is no cost to HESA to offer these services now. The group felt that there would be a benefit to including questions in the Heidi Plus user survey regarding these additional services.

**Action 8: HESA to include question(s) in the Heidi Plus User survey related to the Heidi Plus additional services.**

## **8. Analytics Lab update and presentation**

Myles Danson led a presentation highlighting the progress of the Analytics Lab (renamed from Heidi Labs). Myles reported that Heidi Labs had proven the data sharing concept and that Jisc had increased the funding to broaden the appeal of the project. HESA and Myles are now putting together a business case to approach Jisc for further funding. When shown the breadth of participation from the sector-to-date, the group remarked that it was a fantastic range of HE providers that covered a wide diversity of types of provider. Myles also introduced league table dashboards which could potentially save up to 15 person-days of analyst time a year per HE provider.

Nicola demonstrated a dashboard - 'Analytics Lab Higher Education Business and Community Survey' which had been created by a Heidi Labs team and published on Heidi Plus. Nicola noted that the dashboards credit teams that create them and HESA is looking to include an 'About this Dashboard' page in future to credit developers and to include information on how users should interact with the dashboard.

Myles also spoke about governance, advising the group that he is looking for specialists in Finance, Library and General to form a governance group. The stakeholder group felt that if stakeholder membership numbers were increased that they could provide a governance function as part of their duties.

## **9. Professional services cost benchmarking [Redacted]**

## **10. Prioritisation of new data for Heidi Plus**

Nicola Phelps presented to the group a record of additional data content requests from users. Members of the stakeholder group were asked to prioritise the importance of each request spread across three categories.

### Requested additions to existing data sources

After reviewing the list, the group felt that it was difficult to prioritise these tasks without knowing the relative complexity of including the additions to the existing data. The group suggested that a voting system hosted on the Heidi Plus website to record requests and allow for user votes would be a better system. This would enable community interaction whilst providing a steer to the group on which additions are most desirable to the user base.

**Action 10: HESA to put together proposals for a voting mechanism on the Heidi Plus website to capture user's requests for new data additions to Heidi Plus.**

#### Requests for the inclusion of historical data that is not available within Heidi Plus but is available within Heidi

The group were asked for their views on the relative importance of historical data in Heidi Plus and to give a steer on the priority of this work compared to the development of new data sources and dashboards. The group identified that Student, Staff, Finance and DLHE historical data were all high priority and that there was little requirement for the remaining historical data. They felt that these should be prioritised over new data as the existing datasets in Heidi are going to be withdrawn imminently, however, annual updates to existing data sources were highest priority of all. They agreed that these four core datasets should go back to 01/02 (02/03 for DLHE) with Finance data being the highest priority. It was also agreed that, due to high numbers of user comments, the structure of the HESA finance data in Heidi Plus should be reviewed.

#### **Action 11: HESA to request users with an interest in Finance data to join a working group looking at the best structure for HESA Finance data within Heidi Plus.**

HESA agreed to take forward the development of the historical data agreed above using an agile approach, working on these when resources become available.

#### Requests for additional new data sources to be included within Heidi Plus

Jonathan Waller informed the group that the Transparent Approach to Costing (TRAC) Development group had approached HESA to discuss the inclusion of TRAC data within Heidi Plus. The group were asked to consider whether the proposal was supported and if so, the relative priority of the development work compared to new and historical data additions. The group agreed that the inclusion of TRAC data was a low priority compared to maintaining the core data in Heidi Plus. They decided that this should be set as a second-tier priority and reviewed in six months.

#### **Action 12: HESA to inform group via correspondence of progress of the addition of TRAC data to Heidi Plus before next stakeholder group meeting.**

### **11. Papers for publication on HESA website**

It was agreed that the agenda and papers from the meeting could be published except for HSG\_17\_01\_04 Professional services cost benchmarking. The provider level user table from HSG\_17\_01\_01 Heidi Plus update would be redacted and the final version of HSG\_17\_01\_02 Heidi Plus User survey would be published after amendments.

### **12. AOB**

Jonathan Waller informed the group of an upcoming collaborative event for Heidi Plus, Analytics Lab and HESPA which will showcase new features and be open to all communities (principally to Planners). The event will be publicised through the HESPA website.

#### **Action 13: HESA to provide feedback on Heidi Plus/Analytics Lab/HESPA event at next Stakeholder group meeting.**



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