

HESA



Software Suppliers Remote Workshop – Data Futures Update

21 May 2020



Programme Update

- Working with Jisc as our delivery partner in the new approach to developing the HESA Data Platform (HDP)
- Alignment of delivery to Discrete Collections
- Release of v1.0.0 Data Model
- Clarifying implementation year for Data Futures
 - Annual Retrospective in 2022/2023
 - In-year reporting in 2023/24
- Sharing of Business Requirements

Programme Vision

- The Data Futures transformation project will deliver a new HESA Data Platform (HDP) to facilitate in-year collection, assurance and dissemination of HE data, beginning with student data. The HDP will provide data three times a year for Statutory Customers, whilst maintaining data quality levels, increasing operational efficiencies, and enhancing data utility. This will support more timely decision-making with respect to UK HE on behalf of the Statutory Customers.
- The project will also deliver a more efficient system for HE providers to submit and quality assure their data, reducing the transactional burden inherent in the current system.

Discrete Collections

- Discrete collections can be categorised by three core dimensions:
 - Nature of the data: returned to reflect the status at a point in time, in this case the end of the reference period.
 - Nature of the collection: in a discrete approach, each collection operates independently from any others.
 - Scope of data: each dissemination requires the full coverage of the record to be returned, i.e. for each student all that is known about them at the time and relevant to the reference period is supplied.

Programme Benefits

- **Greater data utility**
 - Timely, high-quality data to support effective regulation and decision-making in relation to the UK HE sector.
 - Improved management information for HE providers.
- **Statutory data efficiencies**
 - More efficient data return and quality assurance process for HE providers.
 - Better alignment of regulatory and statutory data returns through a single model that connects with the increasingly diverse range of administrative business processes in HE providers.
- **Maintaining data quality**
 - Ensure appropriate data quality for national statistics products.
 - Providing fit for purpose data for regulation and statutory purposes.

Data Model

- V1.0.0 of the Coding Manual is live
- Completion of the model has been a product of extensive work with Statutory Customers, HE Providers and sector bodies
- Needs to be able to flex and change alongside policy requirements, but Model is structured so these should not require fundamental changes
- Data Futures: specification overview page lists any areas of uncertainty and any upcoming consultations
- Regular updates to Guidance are expected to begin on a monthly cadence from May 2020



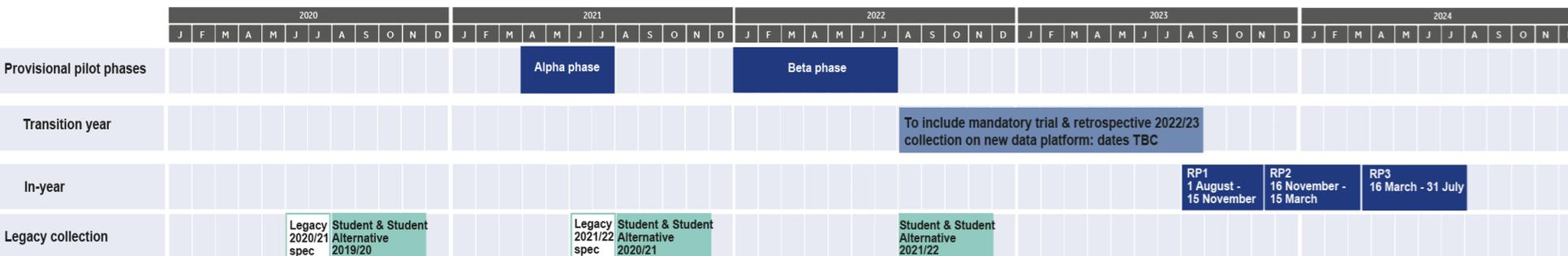
Transition Year and Beta Assumptions



Delivery Timescales

- Annual Retrospective in 2022/2023
 - Using the new platform and the new model and currently expected return deadline late summer / early autumn
- In-year reporting in 2023/24
 - Using the new platform and new model to the Reference Period 1 dates:
 - *Collection of data relating to activity in the period between 1 August 2023 and 15 November 2023 – for submission by 14 December 2023 with a Dissemination point of 15 December 2023*

Proposed Timeline



Testing and Transition

- Current assumptions are:
 - Running a reduced Alpha phase during summer 2021
 - Running a Beta pilot during 2022
 - Minimising dual running with current Student Collections where possible
 - Transition Year planning is ongoing to help ease this time for HEPs.
 - Have been seeking feedback from Provider Forum on various approaches
 - The concept of a 'Mandatory Trial' will be required as part of the transition to assure readiness
 - Expect to have the full transition plan drafted for the autumn and will be able to provide more information towards the end of the year.

Beta Assumptions

- Current working assumptions are:
 - Expect Beta to commence at the beginning of 2022
 - Software Suppliers to be engaged with Beta testing from the start
 - Running a minimum of 2 reference periods during the pilot
 - Will be using Real data in submissions
 - Will have completed Data Migration of historic data
 - System fully functional for Start of Beta
- *Will you be able to support this based on your current roadmaps?*
- *What do you need from HESA when in order to meet this?*

Transition Year

- Multiple approaches being discussed –
 - completing 3 reference periods but with relaxed sign-off periods
 - Completing 3 reference periods but only RP3 is signed-off and outputs used
 - Complete a Mandatory Trial then go into a retrospective Collection
- *What are your thoughts on these options or any other suggestions?*



Supporting Information

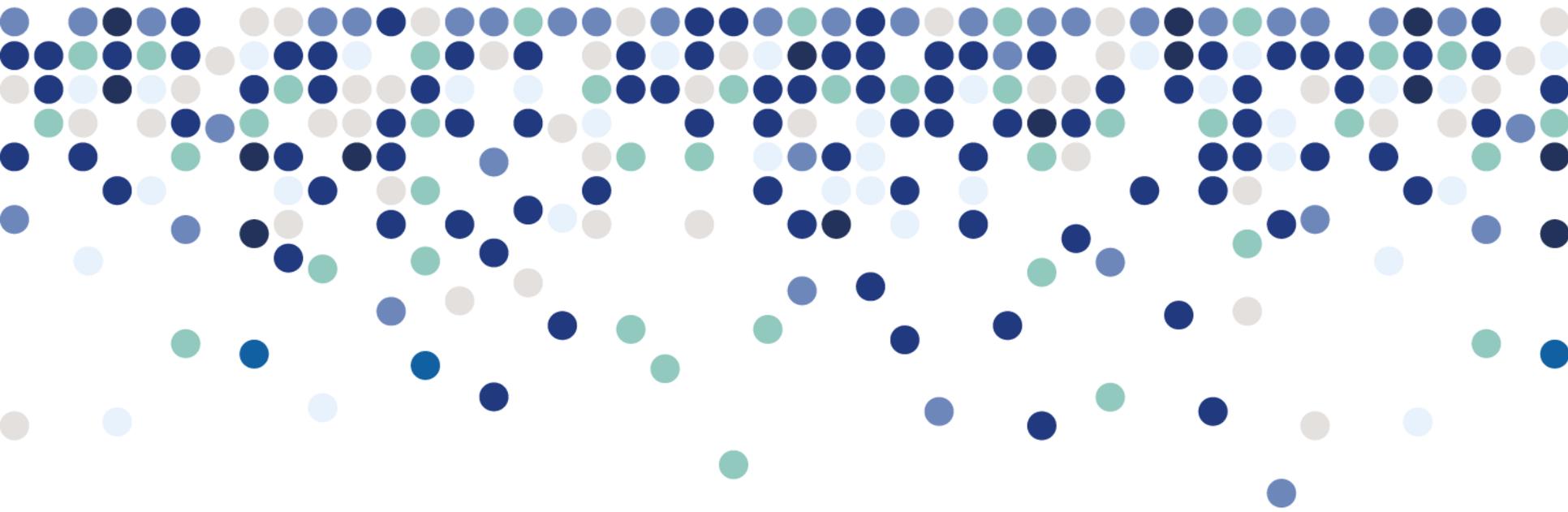


Communication and Engagement

- Current approach on engagement with the Sector as a general principle:
 - Due to unprecedented times we are living in engagement will be limited
 - Conscious not to add more work onto HEPs at this time - we still intend to provide updates where we have information available but with no expectations for action to be taken
- Have continued to have closer engagement with Statutory Customers to meet their requirements, with work underway on validations and derivations
- Expectation that Software Suppliers / In-house providers want to engage with the project now

Upcoming Updates

- Updates to the website:
 - Updated timeline
 - Inclusion of presentations from external workshops / meetings
 - Inclusion of recordings from recent Knowledge Share sessions with Statutory Customers
 - Governance Updates
- Updates to the coding manual:
 - Monthly updates to the Specification – to include additional guidance updates
 - Draft Quality Rule Specifications of Plain English Descriptions
 - List of rules used in current collections that will not be used in Data Futures and a description
 - Draft Derived Field Specifications
 - Backward Mapping Document



Continued Engagement



Cadence of meetings

- Due to the unprecedented times we are under we do not anticipate having a face to face meeting any time soon
- Suggest having monthly meetings on a specific topics via Teams
- Approx. an hour / an hour and half
- Use Teams to canvas for topics ahead of the meeting

- *Are there any other suggestions or thoughts?*

Proposed Next Topics

- Data Model
- Data Migration
- System Overview / Personas

- *What else would you like to cover in more detail?*

HESA



Thank you

