HEIDI Stakeholder Group minutes

Wednesday 15th October 2014

HESA, 95 Promenade, Cheltenham

Present:

Amanda Watson	The University of Sunderland
Andrew McConnell	The University of Huddersfield
Christine Couper	The University of Greenwich
Gary Drake	University of Plymouth
Giles Carden (Chair)	The University of Warwick
Julie Leeming	St George's, University of London
Laura Watson	The University of St Andrews
Lesley Donnithorne	Universities Human Resources
Stephanie Neave	Equality Challenge Unit
Prashant Desai	De Montfort University

Apologies:

Alison Hartrey	The School of Oriental and African Studies
Mike Wilson	Bangor University
Nathalie Mortimer	The University of Nottingham
Sue Holmes	Oxford Brookes University

Absent:

Rob Wyn Jones	Cardiff University

In attendance:

Adrian Crossley	HESA
Hannah Lloyd	HESA
Jonathan Waller	HESA
Nicola Phelps	HESA
Sophie Haworth	HESA

1. **Welcome and introductions**

   Giles introduced Gary Drake as Kyla Morgan's replacement from the University of Plymouth and passed on apologies from Kate Leader who replaces Rob Wyn-Jones from the University of Cardiff.

2. **Minutes from previous meeting**

   The minutes from the previous meeting were formally approved and no further comments were added.

3. **Matters arising**

   Jonathan confirmed the implementation of the data maintenance policy which was agreed upon in the previous meeting. heidi API usage statistics have also been included within the Service levels, training and usage statistics paper as requested.

The group were also informed that the 2nd tranche of the UUK Patterns charts were planned to be released in November 2014. It was confirmed that the release dates for these charts would be further brought forward during 2015 to align with the release of the corresponding dataset in heidi.

4. **Update on HESA and Jisc Business Intelligence Project**
Jonathan provided an update on the HESA and Jisc Business Intelligence Project. He stated that Jisc and HESA were developing an agreement setting out and the key aspects of the project including the deliverables and the division of responsibilities and asked for the groups continued support. The key milestone dates for the project had also been revisited since the last discussion at the Heidi Stakeholder Group.

Discussion focused on the two phases of the project;

Phase 1: heidi-Plus (working title) - a significantly enhanced replacement to the current heidi offering via a commercial business intelligence (BI) tool. Phase 1 is led by HESA.

The group asked if providers were to be involved in the selection and design of the new tool. Jonathan confirmed that previous advice from the stakeholder group would be taken into consideration and thanked those members that had already been involved in the preparation of a new requirements matrix for the tender invitation for the new tool. It was confirmed that the requirements matrix is available to view by members of the group on request. The two project co-designers from the HESPA Executive would also be closely involved with the selection process.

Laura asked if members of the group could share the paper presented. Jonathan responded that at this stage HESA would prefer to lead on the communications regarding the new service but would let the user group know when the paper could be shared.

Phase 2: Heidi-lab (working title) - an experimental area allowing cross institutional analysis of potential new data sources with the intention of producing visualisations to answer key business questions for the sector, as well as the development of other new features. Successful developments would potentially be migrated into heidi-plus. Phase 2 is led by Jisc

Within phase 2 is the development and inclusion of a voluntary professional service costs benchmarking service employing the taxonomy of professional services costs, which has resulted from a recent UUK project. Giles highlighted this as a necessary demonstration to government that the sector is proactively addressing the issue of improving efficiency. Jonathan confirmed that providers can decide who they wish to share their data with once submitted, and to what level of detail.

JW agreed a 'coding manual' supporting users in interpreting and capturing data based on the taxonomy will be required and there may be opportunities for the brokering of outside consultancies to assist institutions with this.

The basis on which the professional services cost benchmarking feature might become a long term sustainable service would depend on a number of factors and it was stated that the HESA-Jisc project included a work package aimed at assessing the sustainability options towards the end of the project period.

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The group highlighted that the users of heidi-lab would potentially be very different and not necessarily heidi users. This may have an impact on the required structure of the stakeholder group going forward. It was agreed the structure of the current stakeholder group would remain relevant for heidi-plus.

Action 1: A further project update to be provided at the next meeting of the Stakeholder Group seeking further input from members.

5. **Roundtable for Stakeholder group members**
Group members were asked to update the group on their provider's recent experiences of using heidi;

Prashant: Explained that they are using the heidi front end less than previously due to their use of Tableau server to create their own data warehouses and Alteryx as their front end which is very good, but costly.

Andrew: Promoted a general discussion which confirmed whilst there are now many more institutions using their own systems to store and manipulate data, there are still many who do not have the available resources to do so and for which the new heidi service will bring significant benefits.

Stephanie: Raised her observation through her work with institutions and the Athena Swan awards that there appears to have been a disconnection between collectors of data and users. A potential training opportunity with HESA around this was recognised.

Lesley: Provided feedback from the HR community (Universities Human Resources). They use heidi infrequently so stressed the importance of the new heidi user platform being intuitive and appealing

Amanda: The University of Sunderland are at the beginning of their journey with implementing BI tools but their vice chancellor is very keen to support this.

Gary: Asked when the multiple years function for the new API was going to be released. Jonathan confirmed that this will not be released in the current heidi system but will be considered for inclusion in the new heidi API.

Comments sent in from absent members:

Nathalie: Would like a less limiting heidi interface from the new service.

Alison: Resourcing limitations has meant that the API usage at The School of Oriental Studies has not developed but there are plans to re-establish their BI project which may encompass using the heidi API.

6. **Heidi data maintenance policy – Consideration of HEMS**
The stakeholder group was asked to consider the discontinuation of the HEMS statistics from heidi due to low usage, in line with the heidi data maintenance policy. Nicola presented the usage

statistics over a 2 year period. The group fully supported their removal and it was agreed that the next release of HEMS data (due in November 2014) would be the last. All existing HEMS data, along with their accompanying definitions, will remain in heidi. A note of caution was registered for decision making going forward to ensure that usage statistics are not wrongly interpreted as the data not being useful when in fact the user community may not be fully aware of the content of a dataset.

Action 2: HESA to inform users of the discontinuation of HEMS from November 2014.

7. **Service levels, training and usage statistics**
   This regular paper was presented to the group, containing updates on subscriptions, system usage, performance against service standards and training.

   The latest usage statistics showed the use of charting in heidi has diminished further. The group agreed this was further evidence for a need for a replacement system more in line with current technologies.

   The API usage statistics were included for the first time in the usage statistics for the last two quarters. These were received positively by the group and there appears to be a good uptake.

   Laura suggested that it would be more useful to include number of log-ins rather than active users as a more accurate measure of usage.

   Action 3: HESA to consider including data on user log-ins within the usage statistics.

   Sophie updated the group on heidi training activity. Due to the intention to replace the current heidi service HESA have changed their previous schedule of quarterly training events, replacing it with bespoke and regionally held events which are more cost effective to Providers. In November HESA intend to mention the new heidi service formally at the ECU seminar in Liverpool. Furthermore, a new training post will be created with the specific purpose of developing a range of training mechanisms and media for the new service.

8. **Current heidi issues**
   Nicola introduced the three current issues within this regular meeting paper.

   Nicola asked the group to approve the deferral of the inclusion of Unistats until after the new heidi service has been rolled out. No key date as yet was proposed but HESA intends to do this as soon as possible. The group were happy to agree if it means the data will appear in heidi in a more meaningful way.

   Action 4: HESA to include further details of the specification of the data as an agenda item for the March meeting.

   The group were asked to consider the removal of FE data in heidi in line with the decision made for other HESA publication material. The usage statistics show 16 institutions use this data. Mike registered his objection to this decision before the meeting stating there are cases whereby a substantial part of an institutions activity involves FE and the removal of this data would negatively distort ratios regarding resources and cost centres. Jonathan made the point that

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benchmarking this data in heidi is becoming meaningless as more institutions are not reporting FE data. Furthermore there are other sources for viewing one's own data other than heidi.

Action 5: HESA to consult the 16 institutions concerned with regard to how they use this data and report back to the group.

The group were asked to consider whether the Local Administrator should inherit the task of deciding which standard reports are seen by which roles.

Action 6: HESA to send a reminder email every 6 months to Local Administrators to tell them users will not be able to see standard reports until they grant them permission.

9. **Heidi development update**
Nicola provided an update on current heidi development.

The API has been positively received within the heidi community despite a slight delay in its release. It has been decided to delay the integration of heidi with the single sign on service until the new heidi service is up and running.

It was reported that the 2013 National Student Survey data release had been delayed and was now due for release in October. Nicola confirmed that HEFCE has agreed that the future release date of this data in heidi can be bought forward, and that the 2014 National Student Survey data would be released in November 2014.

Nicola informed the group that this data and the supporting staff contextual data will be released on heidi on 18 December 2014, on the same day as the embargo is lifted.

10. **AOB**
The group enquired about the heidi user survey, previously these had always been released bi-annually. Jonathan informed the group that Jisc was going to conduct an assessment of the BI maturity of the HE sector which would have replaced the need for a survey, however as this is not happening a user survey would be circulated in January 2015.

Action 7: The user group will be asked for their comments and potential questions for the survey beforehand.

The group bid farewell to Christine Couper who is leaving the heidi stakeholder group. She was thanked for her extremely valuable contribution to the wider heidi project, including chairing the Stakeholder and User groups for many years.

11. **Date of next meeting: Wednesday 4th March 2014**

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