

# HEIDI Stakeholder Group minutes

Wednesday 4<sup>th</sup> March 2015

HESA, 95 Promenade, Cheltenham



## Present:

Amanda Watson	The University of Sunderland
Giles Carden (Chair)	The University of Warwick
Julie Leeming	St George's, University of London
Laura Watson	The University of St Andrews
Mike Wilson	Bangor University
Kate Leader	Cardiff University

## Apologies:

Alison Hartrey	The School of Oriental and African Studies
Gary Drake	University of Plymouth
Nathalie Mortimer	The University of Nottingham
Sue Holmes	Oxford Brookes University
Stephanie Neave	Equality Challenge Unit
Prashant Desai	De Montfort University
Andrew McConnell	The University of Huddersfield
Lesley Donnithorne	Universities Human Resources

## In attendance:

Adrian Crossley	HESA
Hannah Lloyd	HESA
Jonathan Waller	HESA
Nicola Phelps	HESA
Dorota Sikorska	HESA
Abu Syed	HESA

## 1. Welcome and introductions

Giles introduced Kate Leader who replaced Rob Wyn-Jones from the University of Cardiff to the group.

## 2. Minutes from previous meeting

The minutes from the previous meeting were formally approved with updated provided in correspondence with their Actions:

Previous action 1: A further project update to be provided at the next meeting of the Stakeholder Group seeking further input from members - This is the subject of paper HSG\_15\_01\_04.

Previous action 2: HESA to inform users of the discontinuation of HEMS from November 2014 - It has been communicated to the heidi user community that the most recent HEMS data release was the last one.

Previous action 3: HESA to consider including data on user log-ins within the usage statistics - There has been no progress with the production of data on user logins to be included in the usage statistics as yet. We will aim to include this in the paper for the October 2015 meeting.

Previous action 4: HESA to include further details of the specification of the data as an agenda item for the March meeting.(Unistats data) - Support from the group was received for the deferment of Unistats currently with the intention to add this to heidi-plus.

Previous action 5: HESA to consult the 16 institutions concerned with regard to how they use this data and report back to the group - The FE data usage levels have dropped to 9 providers in 2014.

**Action 1: HESA will survey these institutions and report back to group to help inform the decision as to whether FE data will be discontinued in heidi.**

Previous 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 - It was reported that HESA have successfully built text guidance into data release news articles as a way of notifying Local Administrators that standard reports have been made available for their users.

Previous action 7: The user group will be asked for their comments and potential questions for the survey beforehand - The heidi user survey will be discussed in this meeting as an agenda item.

### 3. Matters arising

UUK Patterns charts have previously released two tranches. The group were informed that there was now a new strategy for their release whereby charts would aim to be released within 2 weeks of their corresponding data set release as it was for Student this year.

### 4. Heidi User Survey

Nicola presented the draft heidi user survey and asked for feedback specifically on a recommended time for its delivery and any further questions or revisions.

The group suggested an optimum time for its delivery be after the Easter holidays (mid to late April 2015). It was agreed the survey would remain open for two weeks and it would be clear in the email sending out the survey that it will take only 10 minutes to fill out. Giles commented it would be useful to include a strap line about the intention of this survey to shape the future of heidi as a Business Intelligence tool. Further comments for consideration included:

1. Adrian: Would like it asked whether users would recommend heidi along a Strongly agree/Strongly disagree continuum.
2. Mike: suggested surveying the uses of heidi would be useful offered alongside a defined list with suggestions including Market research, Financial benchmarking, Performance benchmarking, Internal Quality Assurance, and Other\_\_\_\_\_
3. Mike: suggested the addition of a training question surveying what training has been used may help to assess support overheads.
4. Giles: asked for question 19, (What other data not currently in heidi (if any) would you find useful?) to be made more specific. Possibly use the term 'which Government data sets'? The group agreed this approach would be less leading and offer themes instead. In addition, this section could be moved to the 'Future heidi development' section.

5. Myles: Suggested removing the 'Don't know' option from Question 22 (Are you aware of the HESA and JISC BI Project, which aims to replace the current heidi service? A website has been established at [www.business-intelligence.ac.uk](http://www.business-intelligence.ac.uk))
6. Myles: Question 23 (In relation to the department you work in, are there any business questions you like to be able to use heidi to answer which you currently cannot?) Does the wording need to mention "departmental"?
7. Laura: After a query over what chart types referred to it was agreed in the group to remove question 16 (Are there any chart types that are currently not available in heidi that you would like to see included?). Tableau offers prescribed data visualisation possibilities.
8. Giles: Can we provide a non-technical explanation of the API within the survey?
9. Adrian: Can the wording of question 12 be reconsidered? (Do you know about the introduction of heidi's API?). The API is not a recent addition to heidi. In addition, a link to the API guidance should be included.
10. Laura: Can we add "Registry" into the option list offered in question 2 (Which department do you work at in your organisation)?
11. Myles raised the question whether the survey should include market research for the future of heidi as a Business Intelligence tool to avoid market fatigue.

**Action 2: Jonathan to take the task of incorporating Market Research questions offline with Myles and make a final decision on the basis of all comments, update the survey accordingly and send out for final comment to members of the group.**

#### 5. Heidi data usage review

In line with current policy Nicola introduced the heidi data usage statistics at this March's meeting.

It was confirmed that HEMS data had been produced for the last time this year. They would not be migrated (for any years) into the new heidi service.

It was identified there is low usage of GTTR and CUKAS data. Julie noted that these datasets are by their nature of interest to a small number of providers. It was decided that proportionately 4 institutions using CUKAS data is significant enough to warrant this data be left in heidi.

HEBCI part A data is alphanumeric and will be retained for now but will be high on the list for review when it comes to migrating this to the new service.

**Action 3: HESA to investigate whether HEBCI part A is required for audit purposes by providers.**

FE data is being used by 9 institutions in heidi and will be reviewed (**See Action 1**).

EMR actual and estimate data was discussed. The group proposed the reason for low usage may be a reflection the user community are unsure of what these flags mean.

**Action 4: HESA to discuss the use of EMR actual and estimate flags with AUDE and make a decision to continue including these or not.**

A general discussion ensued about how to more effectively make decisions regarding potential discontinuation of data in heidi. The group agreed it would be useful for recommendations to be made alongside the positive additions these may enable.

## 6. Service levels, training and usage statistics

The system usage statistics were reported positively as continuing to follow the trends of previous years. Performance against service standards had all continued to improve.

Jonathan updated the group on the planned training arrangements for heidi-plus. Support was received from the group for training for heidi-plus to be interactive rather than demonstration only, and that these would be run on a cost recovery basis. A request for training venues was made by HESA. Amanda suggested that there may be opportunities for providers to group together to provide a local training venue.

**Action 5: Group members to ask their universities/local universities for possible training venues for heidi training. Requirements would include a room for 10-12 people with 1-2 per PC.**

## 7. Roundtable for Stakeholder group members:

Group members were asked to update the group on their feelings about the new heidi service;

**Kate Leader:** Cardiff University are very excited about the new service and hope this will feed into their BI project.

**Julie Leeming:** As the main heidi user for her provider she is particularly interested in using the new service for swot analysis.

**Mike Wilson:** Is interested in using the new service to help in planning and improve their current benchmarking, in particular, against national data.

**Amanda Watson:** The timing of this project is good for them as they are a new team who currently do a lot of their work in Excel.

**Giles Carden:** The API saves their university a lot of time and must continue with the new service.

**Laura Watson:** Their team have found the API difficult and time consuming to use. They are holding off using the API until the new service is released when the data structures will change again. Currently they use heidi to extract data into Excel and then into their BI tools.

It was agreed round the table that the HESPA conference has been significant in raising awareness of the new heidi service.

## 8. HESA and JISC Business Intelligence Project Update

Jonathan presented the new project website ([www.business.intelligence.ac.uk](http://www.business.intelligence.ac.uk)) and explained the group had a chance to influence the direction of the project. The new heidi service (working title heidi-plus) will attempt to unlock many of the current restrictions in heidi and add more value to data analysis. A few suggestions for useful contacts for Jonathan were made in regards to capturing user requirements for the system:

Mike suggested the Registry and Planners meet on the 20<sup>th</sup> March in Swansea as a useful event.

**Action 6: HESA to discuss with Mike Wilson the possibility of attending the Swansea event on 20<sup>th</sup> March**

Amanda suggested the BME group has a lot of Qlikview users there who could add value to direction of the project.

**Action 7: Amanda to contact Jonathan with further details of this group**

Myles explained the concept of heidi-lab, the branch of the new project that is JISC lead. Essentially this is a research and development project and therefore risk accepting. Other data sources will be bought into heidi-lab and any which is considered to have a high demand may be migrated into heidi-plus. Initially this area will be available on an invitation only basis. Jonathan disclosed how work in heidi-lab will establish a data capture mechanism where institutions can upload and share their professional services costs data on a 3 level taxonomy. The level at which they use is up to them. There will be no fixed loading schedules and light quality assurance. Hopefully this work will generate a new scope for benchmarking as an alternative to other services. Professional service cost benchmarking is planned to be piloted in February 2016 and its sustainability will be looked at in relation to its success. The pilot will include two cognate groups with different areas of focus.

Myles explained that the AGILE method of working is a good fit for heidi-lab and will be implemented. Laura commented they have used this and have had a lot of support for it as a very useful method to focus on the output and not lose sight of the business.

The roles and areas for the stakeholder group to assist in the development of the new service were presented. These included the configuration of the tableau environment which will have a bearing on how people can share work, data protection input as tableau prevents rounding; data structures; testing of training materials; piloting of benchmarking area; and alpha testing. It is envisaged the heidi stakeholder group will be involved in the alpha testing of the system when available later this year. Contacts were nominated for data warehousing advice, Mike and Amanda were both happy for their teams to be involved in testing.

**Action 8: HESA to email suggested contacts and members of the group separately and ask for their recommendations.**

**9. Papers for publication on heidi information website**

The group agreed all papers can be published.

**10. AOB**

Adrian asked how many year worth of data the group thought should be migrated into the new heidi service. Arguments for both 5 and 10 years were made with a general agreement that a higher level aggregate would suffice for older data with the most recent 5 years being full. It was confirmed that the REF data is available in heidi.

**11. Date of next meeting: 7<sup>th</sup> October 2015**