

HEIDI Stakeholder Group minutes
Wednesday 7th October 2015
HESA, 95 Promenade, Cheltenham



Present:

Amanda Watson	The University of Sunderland
Andrew McConnell	The University of Huddersfield
Gary Drake	University of Plymouth
Giles Carden (Chair)	The University of Warwick
Helen Ellis-Jones	University of Hertfordshire
Julie Leeming	St George's, University of London
Laura Watson	The University of St Andrews
Mike Wilson	Bangor University
Stephanie Neave	Equality Challenge Unit

Apologies:

Kate Leader	Cardiff University
Nathalie Mortimer	The University of Nottingham
Prashant Desai	De Montfort University
Sue Holmes	Oxford Brookes University

In attendance:

Abu Syed	HESA
Adrian Crossley	HESA
Emilie Beale	HESA
Hannah Lloyd	HESA
Jonathan Waller	HESA
Nicola Phelps	HESA

1. Welcome and introductions

Helen Ellis-Jones was formally welcomed to the group as a new stakeholder member.

2. Minutes from previous meeting

The minutes from the previous meeting were formally agreed by the group.

3. Matters arising

Following a review of the actions from the previous meeting, the group agreed to the discontinuation of HESA Student FE data from heidi. In addition, FE data would not be made available within Heidi Plus.

HESA are yet to assess the discontinuation of EMR Actual and Estimate flags from heidi and shall contact AUDE to discuss this and how we may represent EMR data in Heidi Plus.

Action 1: HESA to discuss with AUDE representation of EMR data in Heidi Plus.

HESA reported that they were still trying to find a suitable training venue in Wales.

Action 2: HESA training to continue discussions with members of the group to help identify suitable venues.

4. Heidi Plus development update (including demo and feedback from stakeholders)

The group were provided with an overview of Heidi Plus development to date, and also a demonstration of the Beta version of Heidi Plus.

The group asked further clarification about Heidi Plus data analysis being data source based, and therefore the inability to analyse together multiple data sources. It was felt that there was a fundamental need to be able to undertake analysis that included more than one data source, as heidi currently allows users to do. HESA agreed to undertake analysis as to what extent current heidi users are creating reports using more than one data source and look at the possibility of creating cross-data source datasets to including commonly used combinations of data.

Action 3: HESA to undertake analysis of usage of multiple data sources in heidi reports.

Action 4: HESA to explore options for cross-data-source analysis in Heidi Plus.

It was noted that there were some significant differences between the functionality available within Tableau Server (the software used for Heidi Plus) and Tableau Desktop (a desktop version of the Tableau software), with a better range of functionality available within the desktop version. HESA confirmed that as the Tableau Server software functionality develops over time, this new functionality would be made available to users. Jonathan explained that HESA are only made aware of the Tableau development roadmap a short while in advance of new features being made available, and Nicola added there is a major release of Tableau Server every 6 months.

Jonathan confirmed that sharing of dashboards was a HESA only function within Heidi Plus presently. The group discussed the HESA dashboards currently available and ideas were suggested for new dashboard ideas. The group felt the publishing of HESA dashboards would promote good practice and widen the appeal of Heidi Plus.

Stephanie raised a concern regarding how Heidi Plus would deal with incomparable data. Jonathan explained that the underlying data warehouse structure would deal with some time series issues but that HESA are relaxing the somewhat restrictive business logic that was present in the current Heidi system. Tableau doesn't include such functionality anyway, but generally HESA felt that the best way forward on this is to provide good quality and comprehensive information about changes in data over time and trust users to make appropriate decisions on conducting analysis using that information.

Questions were raised about whether subscription costs would differ between different types of subscribing organisation. Jonathan confirmed Heidi Plus would be provided on the same subscription basis as current heidi.

The group considered the user levels within Heidi Plus and felt that all, including bronze user access (access only to pre-created HESA dashboards), would be useful for user organisations.

The group discussed the Heidi Plus application process, and concerns were expressed that the Heidi Plus Lead Contacts may not have necessarily completed all paperwork in time to access Heidi Plus by the end of November. HESA confirmed that organisations do not need to have completed the application process by this time and could complete the process at their own pace.

The group discussed dashboard design further, including the facility to tag dashboards. Giles suggested HESA may like to investigate 'colorbrewer' to help enhance visualisations and Stephen Few was cited as a good example of visualisation best practice.

The accessibility of Heidi Plus was discussed, in particular the use of colour to assist colour blind users. HESA should ensure this is a consideration when designing new HESA dashboards. Helen highlighted that dashboards ought to include associated notes and definitions so data users were clear about relevant exclusions and filters applied.

Jonathan commented that due to the functionality currently available within Tableau Server, users cannot create dashboards themselves but they can create visualisations and hoped Tableau would consider this development in future.

It was noted that Heidi Plus allows more flexible and diverse data capabilities. For example, users can now analyse some data sources by average age and average tariff, functionality which is not currently available within heidi.

Finally, Jonathan confirmed to the group that the new name for the service would be 'Heidi Plus'.

Action 5: HESA to investigate ways to enhance HESA dashboards following the feedback from the group.

5. Update on Heidi Lab

Jonathan updated the group on heidi lab developments include the Business Intelligence maturity Survey. The group were supportive of this work.

6. Professional services cost benchmarking

Jonathan introduced the Professional Services Costs Benchmarking element of the HESA and Jisc Business Intelligence Project. He explained that the first pilot of the Professional Services Costs record collection was planned for February/March 2016.

Jonathan stated that the sustainability of the collection service would be dependent on the levels of provider engagement and relevance to the sector.

Jonathan updated the group on the proposed options for data capture.

The first would be the use of a data capture tool. HESA have spoken to various vendors to facilitate the work. It was noted this would be potentially expensive, but not ruled out.

The second option suggested was to use an online survey tool, however work would need to be undertaken to see how elements such as validation could be built in.

HESA explained a coding manual would be created to complement the taxonomy and details of the approach to costing for the data collection. HESA were also investigating whether consultancy support could be provided at the initial pilot stage and training made available, however HESA cannot fund data capture.

Action 6: HESA to investigate alternative approaches to data capture for Professional Benchmarking in the sector.

Action 7: HESA to continue to develop data capture plans and support for providers taking part in the pilot.

7. UCAS update

Jonathan briefed the group on the provision of data for heidi and Heidi Plus by UCAS. It was reported that UCAS have decided not to provide data on the grounds that the definitions are no longer meaningful, data protection issues and the fact that UCAS make more data available now than when the original decision to host UCAS data in Heidi was made.

The group agreed that it was a great shame UCAS could not supply this data as it was very well used. There was uncertainty as to the precise nature of the data protection issues that had been cited.

8. 2015 Heidi User Survey

Hannah informed the group of the results of the heidi user survey. The group had no further comments and agreed for the heidi user survey to be published.

9. Service levels and usage statistics

Nicola presented the paper and highlighted the reduction of support enquiries due to the lack of development work in current heidi. Three additional organisations have subscribed to heidi and there was an increase in calls to the heidiAPI.

10. Papers for publication on heidi information website

The group approved all papers to be published with the redaction of annex 1 from the heidi paper HSG_15_02_01.

11. AOB

Giles re-affirmed the terms of reference for stakeholder membership to the group and stated that there has been a natural turnover of members. HESA are looking to fill 3 vacancies, of which Helen Ellis-Jones has filled one and we are now seeking to appoint a member of NUS to the group and HESA are currently awaiting a response.

Action 8: Pursue with NUS the appointment of a new stakeholder member.

Date of next meeting: Tuesday 12th April 2016