

Present:

Alan Roberts	National Union of Students
Amanda Watson	The University of Sunderland
Giles Carden (Chair)	The University of Warwick
Helen Ellis-Jones	University of Hertfordshire
Jane White	Loughborough University
Julie Leeming	St George's, University of London
Kathryn Heywood	Durham University
Mike Wilson	Bangor University

Apologies:

Andrew McConnell	The University of Huddersfield
Gary Drake	University of Plymouth
Laura Knox	The University of St Andrews
Stephanie Neave	Equality Challenge Unit
Sue Holmes	Oxford Brookes University

In attendance:

Adrian Crossley	HESA
Beth Magovern	HESA
Emilie Beale	HESA
Hannah Lloyd	HESA
Jonathan Waller	HESA
Nicola Phelps	HESA

1. Welcome and introductions

Alan Roberts and Kathryn Heywood were formally welcomed to the group as new stakeholder group members. Jane White represented AUDE (Estates management) in place of Sue Holmes for the meeting.

2. Minutes from previous meeting

The minutes from the previous meeting were formally agreed by the group. Following a review of the actions from the previous meeting, it was agreed that discussions with AUDE will continue in regard to EMR data in Heidi Plus.

The HESA Training team are currently still looking for a venue in Wales and Mike Wilson suggested trying to make contact again with Aberystwyth University to discuss further, as previously agreed. All other outstanding actions are to be discussed during the meeting.

Action 1: HESA to continue discussions with AUDE colleagues on the deployment of EMR data and visualisations in Heidi Plus

Action 2: HESA to discuss with Aberystwyth University about possible training venues in Wales.

3. Matters arising

No matters were reported.

4. Heidi Plus update

The group were provided with an overview of Heidi Plus implementation so far, and upcoming areas for development of the service. In addition, the Group were asked for their feedback on the proposed solutions presented by HESA for a number of current issues.

Data Source linking

The Group felt that the inability to link data sources within Heidi Plus was not a critical issue for users and HESA resources would be best placed to focus on developing the Heidi Plus Dashboards. Training reaffirmed that Heidi Plus users are generally happy with how Heidi Plus data is structured. Jonathan reported that data source linking within Tableau Server appears to be on Tableau's development roadmap meaning that the ability to link data sources may be available in the short to medium term as standard functionality within the service.

Action 3: Heidi Services to liaise with Tableau about roadmap functionality for Heidi Plus in regards to Data blending

Access to Student and Staff data for non-Gold users

The group supported the view which had been expressed by Scottish Planners to HESA that at their organisations, access to Heidi Plus rests mainly within the planning teams and other departments (such as HR) may not be able to justify the need for Gold level access. The supply of data to non-Gold users could be a burden upon planning teams and creating HESA Dashboards containing rounded data about Staff and Students would fill the gap and provide appropriate access to summary staff and student data to non-gold users.

The Group asked HESA to ensure the specifications for any new Dashboards met user needs in order to reduce reliance on Gold users to supply this data. However the group felt the continued development of data in Heidi Plus covering the full range of data in the previous Heidi service was a higher priority than the development of new dashboards to meet this requirement.

Action 4: HESA to gather user requirements for Student and Staff HESA Dashboards

[Partially Redacted]

Geo-mapping

HESA updated the group on the current weaknesses in Tableau Server's ability to deal effectively with UK Region and UK Country/unitary authority geography. HESA have made representations to Tableau on this issue and will update the Group if there is any further improvement in this area

Decommissioning of heidi

HESA explained to the Group that concerns have been raised in some areas of the sector regarding non-Gold users requiring access to rounded student and staff data, and in light of this whether the decommissioning of heidi should be delayed to allow dashboard development to cater for this group of users. The Group agreed that heidi should be kept running approx. 6 months after the previously announced November 2016 but that new data would not be added after July 2016. HESA explained that they are not able to commit to providing the same level of user support service after November 2016 and therefore heidi should be considered an at risk system during the final 6 months. User support service standards for the old service would also be relaxed. HESA will continue to encourage heidi users to migrate to Heidi Plus.

Action 6: HESA to issue communication to heidi users to inform them of the extension to the decommissioning date of heidi and service levels after November 2016

Heidi Plus API

The group were informed that in order to maintain an API facility, HESA would need to re-design this for the Heidi Plus data structure, however this would require resourcing. In the interim, Heidi Plus users are able to download data from Heidi Plus for onward use (adhering to the Heidi Plus contractual agreements).

The group felt it was important to maintain an API facility so Higher Education Providers can integrate Heidi Plus with their BI systems and it would be a retrograde step not to provide any API capability at all. The group reflected on the current uptake of the heidi API and it was agreed this was low, and some Providers do not need this advanced capability. The Group felt that the development of the API would need to be prioritised against other areas of development which would bring benefit to most users.

HESA confirmed that it is likely that there will be a gap in service between the current heidi API being decommissioned and a new API for Heidi Plus being developed. There could be other options available to supply an API facility by means of either a Heidi Lab project or third party.

Action 7: HESA to explore options and timescales for the development of a Heidi Plus API

5. Heidi Plus Training Update

Beth presented to the Group details of the training delivered on Heidi Plus and the positive feedback received. Various training events are now planned between April and July 2016.

6. Heidi Plus Usage metrics

Nicola presented to the Group details of the current usage metrics and further details regarding how Heidi Plus usage could be measured going forward.

Members of the Group suggested the need to measure the diversity of Heidi Plus users, to demonstrate impact on the wider HE sector. Nicola confirmed HESA collect information on the Job Roles of Gold users and Lead contacts, but do not have access to this information for Silver and Bronze users. The group felt these statistics would be of real value to HR departments as this information is not necessarily available in organisations.

It was expressed that this would also be useful in terms of gauging demand for types of dashboards.

Jonathan suggested that HESA could assess diversity through the Heidi Plus User Survey and HESA training mentioned they would be able to capture more information from their seminar attendee records.

HESA then asked for ideas and suggestions on how a user community could be developed to encourage engagement. The group discussed the issue and felt that Heidi Plus was well-placed to attract a wider audience as it was more intuitive than current heidi. The development of dashboards opens up the current user base to marketing departments, for example, and increases confidence in the data to staff not comfortable with manipulating data themselves.

It was suggested that HESA should try to gauge feedback through inviting users to provide live feedback on HESA Dashboards. The group felt HESA needs to take a longer term view of dashboards suites and engage Professional bodies with their compilation. Building an agile approach to development, testing and production of these dashboards and finding a way to measure their success would be required.

The group raised a view that there were many opportunities for HESA to liaise with Providers about what they require. To counter resource issues and initiate discussions, a HE Tableau user group already exists and could be a possible solution. It was felt Equality data and TEF (Teaching Excellence Framework) are also areas for exploration and engagement.

The group asked if Heidi Plus usage metrics could be broken down by Gold, Silver and Bronze users.

Action 8: HESA to discuss options internally on how to capture diversity of users.

Action 9: HESA to develop a strategic 2 year Dashboard roadmap for the next group meeting.

7. Heidi Plus additional services [Redacted]

8. Heidi Lab update and presentation

Myles Danson updated the group on the work progressed so far on the Heidi Lab Project and showcased the 7 dashboards created by the winter teams.

The group felt the Dashboards were very strong and that they would have a high impact in the sector compared to current services on offer. They felt the project model used to develop these dashboards worked extremely well in giving value back to sector organisations.

It was remarked that it was a shame the work could not carry on beyond July 2016 and hoped this activity could be sustained for the future. It was stated that discussions about possible successor services to Heidi Lab were underway and hoped that an announcement on this could be made soon..

The process to migrate the dashboards from the first Heidi Lab development cycle into Heidi Plus would now commence, with HESA exploring the practical implications and requirements such as licencing of external data. This may take up to 6 months to complete. The spring teams are now working

on further dashboards and it would be worth raising awareness of the achievements made by the project.

Action 15: Jisc and HESA to proceed with the migration of Heidi Lab dashboards into Heidi Plus where appropriate.

9. Professional services cost benchmarking [Redacted]

10. Roundtable discussion

The group discussed briefly their experiences of Heidi Plus so far.

One organisation had recently submitted their organisational agreement and were looking forward to the next steps. It was mentioned that the Heidi Plus application process is quite laborious. Legal contract issues and having the necessary security policies in place was also cited as obstacles in the process in some cases.

11. heidi service update

Nicola briefed the group on the service statistics for current heidi and confirmed that although usage was declining, heidi was still being used by a large number of users. It was noted that this decline was expected to continue throughout 2016.

12. Papers for publication on heidi information website

It was agreed that the agenda and papers could be published apart from HSG_16_01_04 and HSG_16_01_05 as further exploration of these issues are required by HESA. It was also agreed that item 3 under header 'Feedback from users and current issues' in paper HSG_16_01_01 would be redacted.

13. AOB

No items were discussed.

14. Date of next meeting: Wednesday 2nd November

The Chair suggested the next meeting should include agenda items covering the future Heidi Plus Strategy and an update on the dashboard feed from Heidi Lab to Heidi Plus.