

Current issues

HSG/14/01/04

The heidi Stakeholder Group is invited to provide feedback on the following heidi current issues.

1. Funders Forum Metrics

The Funders Forum Metrics (FFM's) are a set of 16 financial indicators; developed by the funding councils to monitor institutional sustainability (a full list is available in appendix 1). They were provided to HESA by HEFCE and published on heidi from 2001/02 to 2009/10. From 2010/11 onwards, HEFCE no longer produced these indicators and therefore the data stream was discontinued from heidi.

The FFM's were derived from the HESA Finance Return, HESA Staff return and EMS return, and therefore theoretically could still be produced by heidi users, or centrally at HESA.

For consideration: The Group are asked to consider whether there is a requirement for such indicators to be pre-calculated for heidi users, with HESA taking ownership of the new indicators. This is being raised now as HESA has received a request from one user regarding this. If the group believes that the Funders Forum Metrics should not be maintained centrally by HESA in their original form, are there other recognised sets of metrics covering similar areas that might be utilised instead?

2. Maintenance of UUK Patterns charts on heidi (including the Security Index)

The UUK Patterns charts have been published in heidi since 2006/07. These 38 charts replicate those originally published within part B of the 'Patterns and trends in UK higher education' report, published by Universities UK (a full list of the charts is available in appendix 2). They were intended to provide a means for HEI users to further explore data and visualisations appearing in the UUK report through changing parameters or coverage.

Data for the charts was initially provided to HESA by UUK shortly before the Report was published as part of the production process. However in recent years the production processes used by UUK have changed and their desire to provide the data and charts through heidi has lessened somewhat. Additionally the structure and content of the UUK report has evolved and changed. This has placed more responsibility on HESA to take an active role in determining the shape and timing of Patterns-related content in heidi with a slightly unclear requirement amongst users. In practice, HESA has continued to publish the set of charts used in the 2009/10 edition in order to maintain some stability, with a growing divergence from the published UUK report.

An additional consideration is that the UUK report no longer includes the Security Index patterns chart which is considered to be a very useful resource within the sector. The index provides a basis for analysing aspects of institutional provision against a single measure of financial security and an assessment of comparative financial security among institutions. HESA is able to reproduce this analysis and publish it on heidi.

For consideration: The Group are asked to provide a steer on whether heidi should now seek to align with the content of the UUK report, which may change and evolve over time, or whether heidi users would prefer stability in content (as we are currently doing) which might continue to diverge from the UUK report over time. One benefit of maintaining a stable content over time would be earlier release of data and charts since these would not be dependent on content decisions made later in the year by UUK.

Appendix 1 – List of Funders Forum Metrics 2009/10

1. Gearing ratio (total external borrowing/total discretionary reserves)
2. Net liquidity ratio (days ratio of net liquidity to expenditure (less depreciation))
3. Total income per academic FTE (£s)
4. Research income per academic FTE (£s)
5. Percentage of permanent academic staff aged 55 and over
6. Total value of externally sponsored research (£000s)
7. Externally sponsored research as a percentage of total income
8. Total actual capitalised expenditure on equipment (including Residences and Catering) (£000s)
9. Total expenditure on major and minor works including Residences and Catering (capital) (£000s)
10. Total expenditure on repairs and maintenance (recurrent) (£000s)
11. Proportion of buildings (% GIA) in condition C and D (residential and non-residential)
12. Cost to upgrade buildings in condition C and D to condition B (residential and non-residential) (£000s)
13. Proportion of buildings (GIA) with poor functional suitability (Grade 4) (residential and non-residential)
14. Total GIA (residential and non-residential) (metres squared)
15. Total income per square metre (£s)

Appendix 2 – List of UUK Patterns Charts 2011/12 published on heidi

- Chart 1: % of postgraduate students by institution 2011/12
- Chart 2: No. of postgraduate students by institution 2011/12
- Chart 3: Number of undergraduate students by institution 2011/12
- Chart 4: % of other undergraduate students by institution 2011/12
- Chart 5: % of part-time students by institution 2011/12
- Chart 6: No. of non-UK domiciled students by institution 2011/12
- Chart 7: No. of non-EU domiciled students by institution 2011/12
- Chart 8: No. of EU (excluding UK) domiciled student by institution 2011/12
- Chart 9: % of mature full-time undergraduate students by institution 2011/12
- Chart 10: % of male students by institution 2011/12
- Chart 11: % of UK domiciled first year ethnic minority student by institution 2011/12
- Chart 12: % of full-time first degree student from NS-SEC 4, 5, 6 & 7 by institution 2011/12
- Chart 13: % of young full-time, first degree students from state schools by institution 2011/12
- Chart 14: Average tariff of entrants to FT UG courses by institution 2011/12
- Chart 15: % of first-class degrees awarded by institution 2011/12
- Chart 16: % of first & upper second class degrees awarded by institution 2011/12
- Chart 17: % of UK-domiciled first degree full-time graduates not unemployed 2011/12
- Chart 18: Number of cost centres of which academic staff are employed 2011/12

Chart 19: % of female academic staff by institution 2011/12
Chart 20: % of ethnic minorities among academic staff by institution 2011/12
Chart 21: Surplus/deficit as a % of income by institution 2011/12
Chart 22: Days ratio of net liquidity to total expenditure (excluding depreciation) 2011/12
Chart 23: Days ratio of total funds to total expenditure by institution 2011/12
Chart 24: % ratio of total long-term borrowings to total income 2011/12
Chart 25: The Security Index 2013
Chart 26: % ratio of total funding body grants to total income 2011/12
Chart 27: % recurrent teaching grants from fund. Bodies to income 2011/12
Chart 28: Funding of research through dual support system (£000) 2011/12
Chart 29: Fund of research through dual system as % of tot income 2011/12
Chart 30: Research grants as a % of funding council research grant by institution 2011/12
Chart 31: Income for other services rendered (£000) by institution 2011/12
Chart 32: Income from non-EU student fees (£000) by institution 2011/12
Chart 33: Income from non-EU student fees as a % of total income 2011/12
Chart 34: Ratio of staff payroll costs to total income by income 2011/12
Chart 35: Administrative expenditure per FTE student (£) by institution 2011/12
Chart 36: Academic departmental costs per FTE (£) 2011/12
Chart 37: Total academic services expend per FTE student (£) 2011/12
Chart 38: Premises expenditure per FTE student (£) by institution 2011/12