HEIDI Stakeholder Group
Wednesday 15th October 2014
HESA, 95 Promenade, Cheltenham

Introduction   HSG/14/02/01

1. Background

At the last meeting of the Heidi Stakeholder Group (5th March 2014) Paper HSG/14/01/03 introduced a collaborative project between HESA and Jisc in the area of business intelligence. This project was seen as providing the opportunity through collaboration for HESA to achieve greater benefit with lower cost (through funding support) in our Heidi development plans whilst also contributing positively to Jisc's programme objectives in improving business intelligence for the benefit of HE providers. Members of the Heidi Stakeholder Group expressed support for the project subject to some concerns raised about pace of the project, sustainability of deliverables and the need for an ongoing focus on the requirements of the user community. The group also agreed to take an active role in the project, advising HESA and Jisc on the development and implementation of project objectives and continuing to represent the interests of the Heidi user community. Giles Carden had agreed to become a 'co-designer' for the project thereby ensuring a close relationship between the project and the Stakeholder Group.

This paper provides an update on progress with this project since the last meeting.

2. Desired Outcome

The Heidi Stakeholder Group is asked to review the information provided and to raise any observations, concerns or questions, continuing to act in an advisory capacity to help ensure a successful outcome for the current and potential Heidi user community.

3. Discussion

Project objectives
The objectives, deliverables and milestones of the project have been refined since March and the Project Specification document contains the most up-to-date written description of these. A copy of the specification is provided in Annex A.

Agreement between Jisc and HESA
Under the grant funding arrangement Jisc and HESA have recently signed an agreement which sets out the conditions of funding, the nature of the project with specific deliverables and milestones and the resulting ownership of those deliverables with a view to onward sustainability.

Project communications
A project communications strategy is under development and as part of this a project microsite is being constructed for launch in early November. A particularly key element of the communications is to inform the current heidi user community about the project. An information note is being finalised for this purpose and will be circulated in the next week or so following the Stakeholder Group meeting.

Web home-page articles will also be released announcing the initiative on the Jisc and HESA websites. Project representation is planned for a number of the annual HE conferences and events during 2015.

Procurement of the BI/data explorer tool

HESA and Jisc have prepared an invitation to tender (ITT) document that has been circulated as a restricted tender to eleven software vendors. The ITT includes a detailed requirements matrix drawn up by the Jisc/HESA project team with input from Giles Carden and a number of other members of the Heidi Stakeholder Group. The deadline for tender submissions is 27 October 2014 with shortlisted bidder interviews to be held 19-21 November, selection of successful bidder on 28 November and contract agreed by 15 December 2014.

Annex A - Project Specification for JISC – HESA Business Intelligence Project

Project duration:
Start date: 1 July 2014
End date: 31 December 2016

Summary of project
Phase 1: To replace the software platform for the Higher Education Information Database for Institutions (Heidi) and enhance its functionality as a business intelligence (BI) tool, serving a wider range of staff roles and supporting BI capability improvement across the sector. The working title of this will be 'Heidi-Plus'.

Phase 2: To build a developmental area which will provide an environment within which new features can be developed and tested including a data capture and integration service for professional service cost benchmarking. Successful features being migrated to Heidi-Plus or elsewhere to be agreed between Jisc and HESA, Unsuccessful features will be discontinued. The working title of this development area will be 'Heidi-Lab'. This area will facilitate cross-institutional collaborations in the identification, design, development and testing of new features.

Phase 1
Phase 1 comprises replacing the Heidi software platform to deliver enhanced data resources, BI functionality and visualisations. It will be delivered using a commercially-available or open-source data explorer tool in place of the current Heidi interface.

HESA work packages
1.1 Selection and procurement of data explorer tool

    Milestone: Phase 1 tool selected and procured by end December 2014

1.2 Establishment of phase 1 and 2 technical infrastructure

    Milestone: Functioning data warehouse and load processes end April 2015

1.3 Population and quality-assurance of data resources for Phase 1

1.4 Design and production of suite of training and support materials for Phase 1.

    Milestone: Delivery of training events by end January 2016

1.5 Design, production and quality-assurance of analyses and visualisations for Phase 1

1.6 Review of access policy and contractual terms for Heidi-Plus and Heidi-Lab

1.7 Launch and review of field testing, beta (Heidi-Plus and Heidi-Lab) and production (Heidi-Plus) versions

Milestones: Field testing (to include Jisc and staff involved in cross-institutional projects), HESPA and Heidi Stakeholder Group – completed end May 2015 Beta version released end July 2015 Production version released end November 2015

1.8 User migration to Phase 1 service and decommissioning of existing Heidi

Milestone: Decommissioning of existing Heidi service end November 2016

1.9 API redevelopment Milestone: Release of Heidi-Plus API end November 2015

Deliverables for provider work packages

1. A new software platform for Heidi that delivers current Heidi data sets as a minimum through a new data explorer tool. To include functionality for users to create their own data tabulations, analyses and visualisations.

2. A community-generated priority list of key business questions requiring insight.

3. A range of analyses delivered through Heidi-Plus to address the key business questions, including visualisations and contextual supporting information (e.g. narrative of intended application) for safe onward use developed in collaboration with relevant professional associations representing a range of HE staff roles.

4. An updated Application Programming Interface (API) to facilitate automated data extraction from Heidi-Plus.

5. A suite of training and support materials to enable best use of the service, analysis techniques, understanding data content and using it effectively.

Phase 2

It is intended that Heidi-Lab will include the following features, with other opportunities to be identified and agreed by HESA and Jisc during the course of the project:

1. Inclusion of a wider range of data sets than currently available from Heidi exploring other data sources beyond HESA and those already included in Heidi. New candidate datasets will be approved by both HESA and Jisc taking into account quality and reputational considerations and subject to appropriate licencing terms.

2. A data capture and integration service for professional service cost benchmarking. This will enable Higher Education Providers to upload cost data conforming to a taxonomy developed by the Universities UK led 'Delivering efficiency through effective benchmarking' project. Such data will undergo basic quality assurance by HESA before being disseminated through Heidi-Plus to a group of users which the submitting institution has selected.

3. New user interface / experience features. Such user interface/experience features may include aspects such as greater interactivity between users and those developing new tools, services or visualisations and may include greater signposting to other useful resources outside the environment of the Heidi system.

4. Production of training and support materials to help ensure end users are able to maximise the benefit from Heidi-Plus and Heidi-Lab.

5. Jisc and HESA will explore the effectiveness, demand, barriers and viability of offering new analytics based services through Heidi-Lab, e.g. Learning Analytics.

Provider work packages

2.3 Heidi-Lab content acquisition and load

2.4 Selection and procurement of data capture tool(s) for phase 2 professional services costs benchmarking

Milestone: Data capture tool(s) procured – end November 2015

2.5 Deploy phase 2 - professional services benchmarking data capture tool and establish service processes.

Milestone: Functioning tool and processes ready for pilots end January 2015

2.6 Pilot testing of phase 2 professional services costs benchmarking data capture tool with HE providers.

Milestones: Launch of professional services costs benchmarking pilots early February 2016 Launch professional services costs benchmarking beta early April 2016

2.7 Develop and deliver professional services costs benchmarking training materials
Milestone: Training materials ready for pilots – end January 2016

Deliverables for provider work packages

1. A delivery mechanism for Heidi-Lab which may include an 'instance' of the software tool selected for Heidi-Plus (or may share a single instance with Heidi-Plus) alongside some capacity within the data warehouse that will host new data sets.

2. Documented options for new data sets for Heidi-Lab initially with the expectation that, if successful, these will likely migrate to Heidi-Plus as soon as is reasonably practical.

3. A functioning data capture and integration service for professional cost benchmarking.

Jisc work packages

2.1 Commission and run cross-user institution based projects (to support Phase 2 - Heidi-Lab)
2.2 Develop and deliver Heidi-Lab training materials
Milestone: Provide training materials to project – end May 2015

Deliverables for Jisc work packages

1. Documented options for user interface/user experience features and enhancements.

2. A suite of training and support materials aimed at assisting in BI uptake and maturity enhancement.

3. Documented options for new analytics based services such as Learning Analytics.

General Jisc work packages (covering phases 1 and 2)

G.1 Communications
Milestones: Launch of agreed project electronic communication mechanisms via microsite end October 2014
Quarterly news letters to key stakeholders October 2014 onwards

G.2 Market research for sustainability options including baseline analysis of current state of maturity of BI in UK HE and HE in FE.

Milestones: Baseline report of UK capability - March 2015
Landscape study of related initiatives, user needs and gap analysis March 2015
Impact measurement and sustainability options report May 2016
Recommendations paper June 2016
Selection of preferred sustainability option agreed July 2016.