

Minutes

DG/18/M2

Data Group meeting

held on 25 June 2018 at UCAS, Cheltenham

Chair:	Daniel Farrell	University of St Andrews
Present:	Alex Ingold	The London School of Economics and Political Science
	Amy Butterworth	University of Bristol
	Caroline Low	HESPA
	Jo Hamilton	University of Exeter
	Lisa Machin	Nottingham Trent University
	Louise Hussain	University of Manchester
	Wendy Webster	University of Dundee
Apologies:	Andy Fidler	Keele University
	Christine Giles	University of Portsmouth
	Judith Davidson	University of Huddersfield
	Paul Ashby	University of Birmingham
	Richard Bartlett	University of Cambridge
	Steve Walsh	Aberystwyth University
UCAS in attendance:	Clare Cozens	Technology Relationship Manager
	Fraser Nicoll	Lead Strategic Product Manager
	Georgina Venman	Provider Engagement Coordinator
	Mike Spink	Enterprise Data and Applications Architect
	Peter Derrick	Head of Admissions and Service Delivery
	Sarah Barr Miller	Head of Insight Sales

A1/18/01 Welcome and apologies

The Group was welcomed, and apologies were noted. The Group introduced themselves and welcomed Caroline Low to her first meeting.

A1/18/02 Minutes and action log from previous meeting

The minutes were circulated prior to the meeting, and the Group agreed they were an accurate reflection of the previous meeting.

Action log:

DG111 – Daniel Farrell followed this up, but no further information was forthcoming. This action was closed.

DG120 – UCAS wanted to use consumer reference data from the Department of Education. The Group would like to see this dataset stored in the central system. UCAS to circulate the list after the meeting. This action remained open.

DG122 – Communications were sent out before Jo Hamilton had completed this. This action was closed.

DG128 – This action remained open while Andrew Harrison investigated breaking down domicile reports further.

DG130 – The HECoS task and finish team at UCAS was putting data together with colleagues from Analysis & Insights. UCAS wanted to look at the observed model and compare. Once confirmed, the time series would be discussed. This action remained open while the work was ongoing. If data were going to switch from UCAS JACS codes to HECoS, then the Group said they would need to have early warning.

DG131 – This item was included on the agenda, so the action was closed.

DG132 – This action was closed; a new action was created to include a Technology Group update at the next meeting. It was agreed that the Data Group would routinely receive reports from the Technology Group, as and when per meeting. GV DG139

DG134 – UCAS held seminars, webinars, and released guidance notes in response to requests for information regarding the General Data Protection Regulation (GDPR). Georgina Venman would send the GDPR guidance notes and presentation to the Data Group. This action was closed. The link to guidance notes: GV DG140

www.ucas.com/providers/services/news/general-data-protection-regulation-gdpr-0.

A1/18/03 Efficiencies list

Requests were sent to Peter Derrick after the last meeting, who confirmed that the efficiencies list was split into two – as the Group requested. Peter explained the purpose of the list was to identify areas for improvement, and he requested continuous

feedback from the Group. Daniel Farrell proposed to go through the list line by line, and the Group proceeded.

Fee status:

FSQ data collection: Some providers requested FS calculation service as well. By default, current immigration status data is also collected.

- Jo Hamilton suggested that recommendations should be sent to providers, not the applicant. Peter Derrick confirmed it would be covered for all UK domiciles in the future. UCAS wanted to do this up-front, and a specification would be developed if the Group supported this. The Group confirmed its support. PD DG141

International applicants:

Previous study in the UK: UKVI compliance, data collection on previous visas, and UK study.

- This was included in the new PG application management service (PG AMS), and would be considered during the development of the UG AMS, due to launch for the 2021 admissions cycle. Peter confirmed this was available in the test and training environments, and invited the Group to test it and feedback. This efficiency was closed pending feedback.

Applicant information – criminal convictions:

Criminal convictions: more details data collection, sensitivity, requires further discussion.

- Peter asked if there was more the Group wanted from the enhanced question. The Group had no further comments. The efficiency was closed.

Applicant information – disability:

Disability information: more details data collection, sensitivity, requires further discussion.

- This efficiency was delivered, and Peter asked for any further feedback from the Group. Jo Hamilton said some students were uncomfortable releasing information about disabilities pre-offer. Peter clarified that in PG AMS the disability questions were separated, to emphasise and reinforce the support drive. This efficiency was closed pending feedback.

Fraud service:

Extend current detection service and include option for online look-up for providers.

- This efficiency was delivered on the old and new admissions platforms. The Group was content, and the efficiency was closed.

Qualification verification:

English language verification – should include as many English Language providers as possible, not just UKVI approved.

- Daniel Farrell said he liked the idea but could not see how it would work in practice. Group members commented that many students used TOEFL which could not be verified, but many used IOPs. UCAS would have to work with the UKVI to achieve this. It was confirmed that documents could be uploaded in PG AMS, and this functionality would be developed for the new UG AMS.

Courses subject to approval:

In course finder, service for publishing courses subject to approval and collecting registered interest – for action once approved.

- This efficiency was partially delivered. Expressions of interest were still on the Search Tool development backlog. Some providers found the information for potential applicants useful – but some used their own means to contact them. This efficiency was closed, but a new one proposed to obtain live data insight from Search Tool. Sarah Barr Miller would update the Group at the next meeting.

SBM
DG142

Monitored data/equality data/ protected characteristics: Offer compliant data collection and monitoring service:

- Peter Derrick asked if there was any data missing. Work was ongoing with HESA to keep definitions consistent. The efficiency was closed pending feedback.

Applicant information – financial:

Scholarship and funding – expanded service to include intention to apply for national/ international scholarships and funding.

- A URL was provided to direct applicants to the correct information. Wendy Webster said it was more about asking the applicant if they were going to apply for funding. It was suggested that the questions in this area should be enhanced. The Group was asked for ideas about how they would use the data to help in the rewording.

All DG143

Qualification verification:

For PG AMS – results service for degree level qualifications on the list.

- This was still on the ‘wish list’ of things UCAS wanted to do. The efficiency remained open.

Qualification verification:

Extension of qualification verification for UG service to include more school and further education level qualifications:

- The reformed GCSEs were piloted in Northern Ireland in 2018. Peter proposed that the Group should consider the impact of implementing these GCSEs into their domicile, and evaluate the positives and negatives at the next meeting.

All DG144

Visibility of applications in PG AMS:

Show where else the applicant has applied to.

- Visibility rules were published for the PG AMS, and worked in a similar way to UCAS Undergraduate. There were nine active providers using the new PG AMS, and 40 had shown an interest. This efficiency was closed.

Application expression of interest:

Pre-application research proposal service allows those interested in postgraduate research (PGR) to submit a research proposal, to see if a provider could support it; much 'slimmed down' submission prior to full application – to limit the number of speculative full applications.

- UCAS wanted to improve the wording to make PG AMS more PGR friendly, and intended to give providers the ability to switch off some questions, to allow lighter applications from early 2019.

Data services – UCAS Postgraduate:

Offer Application and Decision Tracker for UCAS Postgraduate.

- The item was included on the agenda, and the efficiency was kept open pending feedback.

Schools data set:

Further development of schools/colleges data set, to include mechanisms for gatekeeping Apply centres and data set.

- An agent functionality was being developed for PG AMS, and was intended to be available late 2018 – early 2019, to support agents create multiple applications, and monitor them in one place. To comply with GDPR, a notification would go to the applicant for verification once the agent submitted an application. The applicant could sign in and withdraw permission at any time, or they could grant permission back. To use the facility the applicant had to enter an email address. This functionality would be incorporated into the first live version. It was acknowledged that an agent could enter a 'false email'. UCAS would try to discourage this behaviour, through communications.

Development of agents and partners data sets and portal(s):

To include mechanisms for gatekeeping centres and data set, and ability for agents and partners to control and view their applications.

- This efficiency was closed.

A1/18/04 Corporate Strategy update

Peter Derrick discussed 'Future Focus' – UCAS' corporate strategy refresh to 2020. The document had been circulated prior to the meeting. Its core purpose was to provide a successful and trusted undergraduate admissions service. Postgraduate services aligned very closely with this, so these services would also be advanced. It was confirmed that

UCAS had decided not to continue with the UCAS Progress service, as it was not in line with its core purpose. UCAS' corporate values had also been refreshed.

Peter Derrick invited questions from the Group, which was content with the update.

A1/18/05 Data Futures update

Mike Spink gave the Data Futures update on behalf of Judith Davidson, who could not attend the meeting. UCAS was in conversations with HESA, to clarify what data was needed for the upcoming beta pilot. UCAS would increase its provision of data to HESA from once a year, in line with HESA's goal of collecting data continuously. It was important for UCAS to determine how it could help with the HESA in-year data returns. Jo Hamilton said they had experienced a lag between updates and the pilot with Tribal – an update to the latest version of SITS (version 9.5) was needed to fulfil tasks.

When Data Futures started, discussions would be had with HESA about the future of star files. UCAS was committed to delivery of Star J file transactions, and some providers were heavily reliant on it. Conversations had been initiated with HESA to align data definitions, and UCAS was keen to understand how it could support the sector. The beta pilot initiative would be an iterative process, and the Group was asked what UCAS could do to help.

Caroline Low said the first return required in the alpha pilot of December 2017 needed a lot of information that may not have been complete or correct. The data that students submitted on enrolment may be different to what was provided on the Star J file. Peter explained this could have been due to applicants entering different information on their application, compared with what they provided at registration. UCAS was doing what it could to help.

Daniel Farrell said it would be useful to have a list of terms from UCAS, to share what specifications of data it sends. UCAS would prepare a draft, and an update would be included on the agenda for the next Data Group meeting.

PD/MS
DG147
GV DG148

A1/18/06 Service Catalogue and Data Catalogue

The Service Catalogue was circulated to the Group prior to the meeting. Fraser Nicoll attended the Data Group meeting to gather feedback.

The final page allowed the provider to see what was included in their capitation fee, which was what had been anticipated by the Group. The Group agreed this was a useful reference and easy to use. Jo Hamilton said she still did not know to contact at UCAS

	Action
for each service, and requested visibility of relevant staff in each team alongside information of who to contact if something needed to be escalated.	FN DG145
The organisational structure at UCAS had changed so frequently over the past three years that it was difficult to keep tabs on new areas of business focus. Sarah Barr Miller suggested inviting David Best from Analysis and Insights to the next meeting, to understand what his team were working on.	GV DG146

Data Catalogue

Sarah Barr Miller presented the Data Catalogue to the Group. The document was circulated with the agenda prior to the meeting. The data products were not initially invested in by UCAS, but considered valuable tools for providers, which had prompted UCAS to expand this area.

It was commented that the blue and red difference had not been picked up initially, although it was more noticeable when it printed out. The wording and product naming would be revised to help users understand each of the data services. It was suggested that using contextual questions to lead into a product could help people understand. The Group was asked to send any comments or questions to Sarah Barr Miler at s.barrmiller@ucas.ac.uk

Jo Hamilton expressed a need for transparency regarding the pricing of products. It had been decided to leave this off the initial page, but it would be fed back to the team.

It was hoped that the two catalogues would be linked in the future. Currently there were not any scenario-based products, but there was an intention for UCAS to develop this in future.

A1/18/07 New data product update on Tracker

On 8 June, Fraser Nicoll and colleagues attended the Russell Group Admissions Forum. They discussed the issue that there was no 'central source of truth' in postgraduate admissions, unlike undergraduate admissions. UCAS intended to import historic data, expanded to show alongside search analytics, and explore ways to share individual data, and link data, with UCAS Undergraduate AMS.

The Group raised the following questions:

- Data collection – how would UCAS securely and easily collect data?
- Data presentation – how would UCAS display that data?
- Cost – what would this cost the provider?

In the first instance, UCAS would use MOVEit to collect data, and engage with a steering group (which Fraser would discuss later) to find how the data would be structured. In MOVEit, UCAS would collate the data and replay it using Tableau software for data visualisation. The product would enable providers to download data and view their competitors' numbers against their own – it provided a market share and allowed a monthly view to recognise trends.

Fraser presented to the Group on how the product would look. It would allow a provider to compare its performance against the sector, and against six competitors. The cost would be split at two levels: one price for a data sharing partner, and another price for a reporting view only. As a data sharing partner, a customer could access the sector-wide view for £1,500 per year, and the additional six competitors for £3,500. This was a non-exclusive higher education tool, so it would only be available within the HE sector. This pricing structure meant that if a provider chose not to share its data, it could still purchase the reporting view only package, but at a higher cost of £10,000 for the first set and £15,000 for both sets.

The Group was asked if any of them would be interested in being a part of the steering group and product launch. It was clarified that, currently, the product was not linked to AMS, but may be linked in the future.

It was confirmed that the HE sector could use this product to gain insight into postgraduate applications. To date, ten providers had signed up for the steering group, and Fraser was confident they would purchase the product.

It was asked why this had been developed by UCAS. It was confirmed that it would be in line with 'Future Focus' and provide efficiency in the HE sector. It was commented that the UCAS proposal was the most developed, but there was still another competitor undergoing development. The UCAS product aimed to be the only one, and to provide the most effective way of sharing and collecting this data.

In response to concerns made by the Russell Group, it was clarified that nobody outside the higher education sector would have access. Anyone from the Group who would like to know more, or join discussions was asked to contact Fraser at f.nicoll@ucas.ac.uk

A1/18/08 Information tools for students proposals

A paper by Rebecca Bale was circulated to the Group prior to the meeting. Rebecca was unable to attend the meeting, therefore Peter Derrick explained the proposals for information tools for students. The tools were at a conceptual stage, and the product team wanted to gather feedback before moving forward. The tools were advisory only, and were targeted at 16 – 18 year old pre-application students.

Two of the advisory tools the team focused on dealt with these questions:

1. Where had students with a similar qualification profile studied?
2. What qualifications do students hold who studied the HE subjects you are interested in pursuing at university?

The Group was asked to share any comments after looking through the proposals.

It was commented that it was a good idea to show students these different pathways and options, however it could be limiting as not all courses would be included in the search tool (e.g. new courses).

UCAS did not want to limit options for applicants, and it was reiterated that it was about finding a balance between media and advice.

A Group member commented that they did not think the tool would be subtle enough to deal with the contextual information required to deliver effective advice. Implementation would be crucial to deliver this effectively, so that it 'lands correctly' with stakeholders. It was suggested that, rather than look at peer matches, the tools could look at matching interests.

A1/18/09 Undergraduate Tracker

It was confirmed that Application and Decision Tracker was being replaced. What customers enjoyed about the product would be transferred into the development of the new product, but feedback would be considered during development. It would not be launched for at least a year, and in the meantime the cost for the current product had been lowered to £4,500 for the gold package.

UCAS wanted to engage with intensive users, to aid the development process.

A1/18/10 Update on new data products

A presentation was given to the Group in two sections:

1. Update on products and services roadmap
2. Data consultancy/advisory product shaping

It was reiterated that this area was relatively new for UCAS. The existing data offer included EXACT, conversion analysis, decision reports, track surveys, STROBE matching services, market scan, and Application and Decision Tracker. The exploratory roadmap included untapped geographies, sensitivity analysis, Clearing forecast, portfolio

management, events propensity, student journey, outreach analysis, student profiling, and subscription data.

A few of the products were active:

- Untapped geographies – UCAS wanted to link the untapped geographies to schools. Its aim was to inform providers of regions they weren't receiving many applicants from.
- Sensitivity analysis allowed providers to foresee what would happen to the pool of students if competitors changed their Entry Profiles (e.g. dropped their entry requirements).
- Clearing forecast predicted conversions by looking at attainment. Insight would be available from the second week of July. It also showed where Clearing applicants were from. It looked at timescales, applicants, and competitors on a day-by-day basis.

Daniel Farrell asked what happened to Scotland on the untapped geographies report. This concern had previously been raised with the Analysis and Insights Team at UCAS, as Scotland was currently not included. It was commented that the lack of Scottish visibility was an unfortunate omission, especially as some of the larger providers attracted high percentages of A level offer holders.

The subscription data offer, which allowed providers to request up to three data sets per day included in the £5,000 fee, revealed different behaviours from providers. Some took advantage and requested three a day, others only dipped in occasionally – but all exceeded the value. The goal of this service was to provide equal access to data.

Jo Hamilton expressed her disappointment that, at the last meeting, the Group was told UCAS did not know the cost for the EXACT data access, but a week later the costs were published. The cost was thought to be surprisingly high, and this was felt to be an example of how the purpose of the Data Group was undermined. Sarah acknowledged the sudden release of cost information after the last Data Group meeting, but the representative from that team would not have been at liberty to disclose that information. She apologised for the lack of visibility.

The Group was asked what pricing structure they preferred from ten tickets for a set fee, quarterly subscription, or annual subscription.

Bristol had not taken part in the pilot, because the budget had already been allocated. It would not necessarily take part in future either, as finding £15,000 annually would be difficult.

There would be disadvantaged providers who could not afford the fee, and the lateness of the service release meant that most would have planned their budget for the next cycle already. It was suggested that UCAS could lower the cost for the immediate cycle, and then set the cost for the following cycle. It was added that, by using a special offer initially, providers would be more easily engaged, and would try the service to observe the benefits. It was agreed this would be a good idea, however UCAS would have to consider the value of the data.

It was questioned what would happen if the service was offered for a free trial initially. UCAS explained that the capitation fee would have to be raised if this were to be offered.

The Group was asked to send any more thoughts or feedback to Sarah Barr Miller, and she would keep them informed.

Data consultancy:

Sarah Barr Miller presented the principles of consultancy and UCAS' areas of focus:

- recruitment and admissions strategy
- portfolio management
- widening participation

UCAS was working with providers to develop tools and data functions to help higher them recruit. The aim of the consultancy service was to help providers create strategies to recruit by using the data. It was thought that the service would be very useful, as UCAS could act as an impartial voice. Although the idea was appealing, the cost was an issue, and it would be interesting to see if this could be flexible.

Transparency was encouraged regarding what the providers would get for their money. The Group said UCAS would be at an advantage in this area with the data access it held, and this could aggravate competitors. It was clarified that because UCAS sold the data it legitimised the consultancy service. As a charity trying to provide efficiencies for the sector, it was supported.

A1/18/11 Future of the Data Group

A draft of revisions to the Terms of Reference was distributed to the Group at the meeting. Peter Derrick suggested that the Group remit should be reviewed, to link it to the commercial data products, and broaden its scope. It was suggested that a version DG149 with tracked changes should be sent to the Group, and members agreed to consider the revisions at the next meeting.

A1/18/12 Any other business and close

Wendy Webster raised the timestamps. Her provider recently went live with PG AMS, and the timestamps were changed during the transition from UKPASS. The timestamps caused a long delay, because they received many applications during the transition that did not have an accurate timestamp attached. It was confirmed that in the transition to new internal servers the timestamp was reset. The issues were noted and 'go live' briefings would be made clearer to customers. The timestamps would only change when the records were updated (but data migration appears to be an instance of record updates). ABL reference data would be updated every year. If data had been updated, then the timestamp would also be updated.

It was later clarified that database fields with document links in them were set to 'NULL' – i.e. empty - during the transition from UKPASS to PG AMS, because the FTP server they linked to was decommissioned, and the links would no longer be valid – a new repository was deployed for PG AMS. The 'NULL' value triggered an update to the 'last updated' timestamp, which is used by most providers' student record systems to identify new or updated applications for import. The update was applied to all existing applicant records, both current and historic, and led to existing records at affected providers to be overwritten with data held by UCAS.

In the case of historic applications, this data may have been updated on local systems and the import would have reverted this data back to that held by UCAS. For example, if a student had changed their address since they made their application and the local system updated accordingly, the update would have reverted it back to the one entered in their application. It was clarified that this scenario would not happen when the UCAS Undergraduate scheme was migrated to AMS, as it did not currently hold links to documents. However, there were many other data fields that could trigger an update to the 'last updated' timestamp if they are changed, which would result in a similar impact. This would have been noted in the PG AMS lessons learned.

The date of the next meeting was confirmed to be Monday 19 November, at UCAS.