

## Minutes

DG/18/M3

Data Group meeting

held on 19 November 2018 at UCAS

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Chair:	Daniel Farrell	University of St Andrews
Present:	Amy Butterworth Ben Weston  Judith Davison Jo Hamilton Lisa Machin Louise Hussain Paul Ashby Steve Walsh Wendy Webster	University of Bristol London School of Economics and Political Science (LSE) University of Huddersfield University of Exeter Nottingham Trent University University of Manchester University of Birmingham Aberystwyth University University of Dundee
Apologies:	Andy Fidler Caroline Low Christine Giles Richard Bartlett	Keele University HESPA University of Portsmouth University of Cambridge
UCAS in attendance:	David Best Georgina Venman Jessica Wadey Kate Bevan Kate Westmacott Louise Cyprien Mike Spink Peter Derrick Samantha Sheppard Sarah Barr Miller	Director of Analysis and Insight Provider Engagement Coordinator Data Scientist Product Owner Service Delivery Manager Service Delivery Manager Enterprise Data and Applications Architect Head of Admissions and Service Delivery Product Owner Head of Insight Sales

**A1/18/01 Welcome and apologies**

The Group was welcomed, and apologies were noted.

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

The minutes were circulated prior to the meeting.

The Chair asked if there was an update regarding the 'Information Tools for Students' project discussed at the meeting in June 2018. UCAS confirmed this was being fed into an information and advice (I&A) project, and aimed to provide relevant information for applicants. Work was being continued, and at the next meeting there would be more information that could be shared. It was suggested that Fraser Nicoll should be invited to the next meeting, to talk to the Group about I&A. UCAS suggested including the I&A work being done for pre-applicants, and the relevant data captured, under this item.

GV DG150

A member of the Group asked for an update on the schools' data list – UCAS had requested this to be sent out. In the New Year, the adviser portal would be launched, and could be used as an opportunity to migrate data into the CRM platform (Salesforce). The list would have to be modified to include historic schools, and it would feed into the AMS products and CRM. Two data sets would be used during the migration period. UCAS said it would try to keep the data sets in line using a sync function, and manual processes. The Head of Admissions and Service Delivery said it wasn't an ideal solution, but it would avoid issues that would arise by switching off Apply. UCAS welcomed any questions or comments from the Group.

The adviser portal would include the concept of a registered centre, and people who were attached to that centre. Users' sign ins wouldn't have to be annually recreated, and the time saved would be invested in making sure the contact data was up-to-date. Separating the data sets would allow relevant data to be used for different functions.

For postgraduate students in the postgraduate solution, a list of recognised universities was received from the National Academic Recognition Information Centre (NARIC). UCAS acknowledged there were universities not on NARIC's recognised list, however, this would be a step towards improving the data quality. UCAS would find out the correct date for moving over to a new data set, for universities in the postgraduate system.

The Chair suggested highlighting schools data separately in the efficiency list.

**DG120** – Peter Derrick had asked for this to be circulated, and would follow up. The action remained open until this was confirmed.

**DG128** – Peter Derrick would follow this action up with Andy Harrison, and circulate before Christmas.

**DG130** – Peter Derrick clarified that, in the future, UCAS would use the HECoS hierarchy for the application Tracker product. For one year only, two years of data would be provided, rather than three. For new courses without a JACS code, an observed data model was developed to map a HECoS code back to a JACS code. (The observed model was not published because HECoS was a HESA project, and UCAS didn't want to be custodians of the data mapping.) The analytical cycle reporting would be used as well. The End of Cycle Report would be under principle groupings of JACS.

UCAS' Enterprise Data and Applications Architect shared information about how the HECoS codes were being used. Of the undergraduate courses that were being collected, over 50% had one code, 40% had two. There were about 27% of HECoS codes that weren't used for undergraduate courses. All undergraduate courses would have to have a HECoS code, but this would not yet be required for postgraduate courses. A member of the Group asked if there was a reason to use HECoS codes to drive course searches. An item on whether the search tool should use HECoS would be added to the next agenda.

**DG137** – UCAS was in conversation with the Office for Students (OfS) about how best to support providers in meeting the requirements of the transparency condition. The OfS was due to publish guidance on this imminently, and UCAS will continue to explore how GV DG153 it might offer further support. The original guidance would be circulated with the minutes, and the new guidance would follow when it was ready.

**DG138** – EXACT publications were being released earlier every time, this action was closed.

**DG142** – This was on the aspirational delivery list and UCAS' Head of Admissions and Service Delivery was open to feedback. This action was closed.

**DG145** – It was suggested to put an update from Fraser Nicoll, on the service catalogue, on the next agenda.

**DG147** – This was on the agenda, the draft list would be circulated, but not as a definite.

**DG149** - The terms of reference changes were circulated to the Group prior to the meeting, and the new terms of reference would be signed off at the next meeting. Any comments could be sent to [groupsandforums@ucas.ac.uk](mailto:groupsandforums@ucas.ac.uk), by the end of December 2018. A list of the members, and their term dates, for the next meeting would be sent to the Group with the terms of reference and minutes. GV DG151

### **A1/18/03 The collection tool update**

Kate Bevan and Kate Westmacott attended the meeting to discuss the collection tool. Originally, the UCAS Postgraduate collection tool was launched in 2016, and, in early 2017, the UCAS Undergraduate version was first launched with the postgraduate tool. Clearing 2018 was the first time the data had been collected and seen through an entire cycle. It was feeding the legacy services and the new UCAS Postgraduate admissions service. The Product Owner said the tool fulfilled the functionality, but the course data management features could be improved. Features looked at, to make it easier to use, included a new advanced search facility. There was always the ability to filter courses, but the new advanced search feature would allow users to gain a more holistic view of courses. When this had gone live, UCAS would like to hear back from users about their experience with the tool. The Team was looking into developing the fees area, and they were interested in hearing from providers about which data areas needed updating, to align better with the launch for the search tool. The Team was building a way to notify users when data was out of date, a way to view those courses, and a guided process to roll them over quickly.

Key elements of course management were identified, including additional requirements, deferred entry, English language requirements, fees start data, undergraduate qualification requirements, and vacancy status. These could all be bulk managed in the tool. A member of the Group asked if they could search courses that were going to be closed soon in the vacancy status, and flip them quickly. UCAS would investigate the possibility of this. Other suggestions were, a combination of vacancy and publication status, and a department flag. UCAS said the filter for department was there, but it could take time to familiarise users with how to use this for bulk management. KB DG154

A member of the Group said that it would be interesting to group courses with, for example, the same entry requirement, disregarding the other categories where they differed. It was confirmed they were looking into how they could separate course features, to make them easier to find from an applicant's perspective.

UCAS commented that study mode was currently set at either full-time or part-time. It was suggested the additional features, for example, a year in industry or foundation year, could be used to group them together to allow bulk management. Splitting study

mode would be explored in 2019. For the 2020 cycle, the Group was asked whether accelerated courses would come under this area, and it thought that would be appropriate. UCAS said they would have to consider other options, for example, second year entry for students moving courses. A member of the Group said it would be more related to credit transfer, rather than qualification transfer.

The Product Owner said they would be using webinars to keep customers informed about the changes, and to provide an opportunity for feedback.

Other areas intended for development included, a statistics page to compare courses that collected data in the past, next to the current year, and would separate them into UCAS Undergraduate, UCAS Postgraduate, and UCAS Conservatoire schemes.

UCAS confirmed they were looking at improving the course download function. The Group found this tool useful, but they were used to using the UniStats transfer file. UCAS would investigate whether the 2019 UniStats files would be pushed to providers, or whether providers would need to retrieve the files.

PD DG155

It was the aspiration to allow course imports or a two-way flow of importing data. Providers that only used the user interface were the majority, so the need to invest in the creation of an API, to bulk manage courses between two databases, was questioned. The investment needed from student record companies had to be around applicant data APIs, who had to move over their data. It was clarified that it wasn't off the table, but it wasn't prioritised over applicant data. The Chair said that there was a lot of room for error, and the time taken to complete manual data imports was excessive. It was suggested there was a link between HESA, the Student Loans Company, and UCAS, that could be explored to solve this, but solutions wouldn't be developed until the more urgent application management service improvements were completed. Other members of the Group expressed concern with the room for error and risk of low-quality data.

#### **A1/18/04 ABL documentation**

UCAS talked through what was available. On the main provider website there was a section on ABL, which was updated throughout the year. The website shown at the meeting was not yet updated for 2019. Anything sent to providers in the bulletin was also posted on this page. It was clarified the ABL guide was produced year-on-year, and UCAS tried to make sure the change control was updated when new versions were released.

The ABL test data (HEP2 environment) allowed providers to request test data through the ServiceNow portal, to perform practice runs for the summer.

The post-results service covered potentially amended qualifications.

It was advised that planning had begun for the next year. Every entry to the exam board was matched with applicants on UCAS systems. What the applicant declared was compared with what the awarding body had received, and applicants could be contacted if there was a mismatch. The main files were presented to UCAS, who then distributed them accordingly. Gathering subject codes was a reoccurring issue, and often in the field of BTECs.

The Chair asked, at what stage were software suppliers involved in the process. UCAS confirmed that the technology relationship managers notified suppliers when new reference data was available, and they could access the information on the website as well. A member of the Group, who also was on the Technology Group, said they had not found any problems with this. Another member of the Group said they couldn't match up data, because it was not aligned by qualification. The member asked for a list of qualifications, with one row on the spreadsheet per qualification, so they could match it up with their own information. Head of Admissions and Service Delivery said that this would be fed back. The list that was currently provided by UCAS includes historic and current qualifications, which the Group member remarked, might be separated to help users. UCAS said breaking them up into one qualification per line was the most sensible solution, and that this idea would be fed back. Some members of the Group manually reviewed their reference data, but it could be pulled in by Star files which were always updated, and lived in odbcan and xml-link. UCAS agreed to circulate how to get to reference views, and also to follow up on the question of historic grades inclusion, and confirmation of whether providers would receive a new code for the BTEC anomaly.

PD GV156

UCAS fed back strong comments to Pearson about the RQF BTEC publication day, and voiced the struggle that providers experienced with these results because they were still under embargo. It was considered Pearson may have done this for publicity purposes, but UCAS was not sure what would happen for next year. It was requested that the Group should send any comments directly to Pearson, and advised that UCAS was not making any changes.

## **A1/18/05 Analysis and insight update**

David Best, UCAS' Director of Analysis and Insight, attended the meeting to provide an update.

45 data scientists were recruited over the past five years, to work on new Analysis and Insight (A&I) products. David confirmed there were approximately 2.4 million data

points a year published in PDF or CSV files, and the department had reviewed the functions of A&I.

It was explained they wanted to improve their qualitative research to support the charity activity, and the quantitative data service. They wanted to explore insight, and links between applicants and their entrance to higher education. Goals for the department included:

- moving from data to insight
- to be powered by wider data
- to produce linkage to show progression through time

A&I was moving towards data explorers online, rather than PDF publishing. The aim was to create a more interactive view where users could manipulate the view for their uses. (Internally) data was usually produced in lists of four or five factors.

Data science and professional development was a focus for the department to ensure common standards were used, and to develop ways artificial intelligence and machine learning could be implemented. Measures were being reviewed to consider a wider context, for example, school quality, as well as school type.

EXACT improvements were made, and there was a new annual subscription data service, which Sarah Barr Miller, UCAS' Head of Insight Sales, discussed in more detail later in the meeting.

The Team looked at additional marketing audience selection filters and channels, for example, postcode sector, drive time, and qualification type.

Historically, UCAS didn't make a lot of changes to data science, but the need for data services had driven UCAS to make improvements and developments in this area. It was confirmed that it was important for UCAS to be transparent about data releases.

### **Insight and consultancy**

Students would not receive more than seven surveys, to avoid bombardment, but the undergraduate survey programme was extended to collect more data, to enrich insights. Surveys had shown that providers weren't always aware of what students prioritised, when choosing a university, so the A&I Team were investigating what drove their decision-making.

An investigation into how students used social media showed that they chose different social media channels for different purposes. For example, they used Facebook, Instagram and YouTube for finding offers, but Facebook, WhatsApp and Snapchat for chatting to friends/family. Facebook came out on top, overall, and Twitter was used the

least. A member of the Group said only 50% of students opened a notification from them via Facebook, whereas more opened notifications sent via Instagram. Another member of the Group said it was important to be aware that students used different platforms for different functions, and they had conducted their own qualitative research to identify these uses. UCAS commented that students appreciated paper mailings as well.

UCAS' Director of Analysis and Insight highlighted that the consultancy services were available for any provider, and the Head of Insight Sales talked about this later in the meeting.

UCAS was visualising data using Tableau, which increased the ease and interactivity of data.

UCAS was also visiting providers to identify areas that were lacking, and had already started work with Scottish providers to establish gaps in their services.

A member of the Group said that the 'landscape' always changed, and they wanted a channel to display these. It was suggested the annual student survey would be a good source for finding answers, and members of the Group should think about questions they would like to see in next year's student survey. UCAS said they wanted to work with providers to identify the 'burning questions', which would allow them to focus their work, to make solutions for relevant issues. A member of the Group said they would appreciate the raw data earlier, rather than wait for analysis before it was released. Concern was expressed that the time taken to conduct the survey, during the cycle, could heavily impact the results.

ALL DG157

It was asked when Scotland would have visibility and input, equal to England? said it was confirmed the Team was aware of the issue, and had already begun conversations with Scottish providers to find a solution, and Wales would then follow. It was also confirmed that executives at UCAS had a strong commitment to this.

## **A1/18/06 Technology update**

The Technology Group covered the following issues and points:

Infosys had started going on visits to providers with the technology relationship managers.

In the past, embargo breaches were sometimes down to CRM failures, however, in 2018, more breaches were due to human error. UCAS was hearing more about the breaches, and providers were, generally, complying with the procedures. There was a



workshop at UCAS on 20 November 2018, for providers who breached. Providers who breached more seriously received a visit from a member of the UCAS' Executive Team.

Confirmation and Clearing were discussed at length. UCAS sent 900,000 emails on A level results day, and the click-through rate was about 33%. During Confirmation and Clearing, the Customer Experience Centre experienced fewer calls than in previous years.

The Technology Group had a conversation about the testing and training environments. HEP3 was being developed with APIs for UCAS Postgraduate, and then for the UCAS Undergraduate application management service (AMS). The Technology Group shared their views on how they wanted this to work.

The development of the UCAS Undergraduate AMS was discussed, and they concluded the change shouldn't affect technology or data staff significantly. There would be a document upload feature, and they discussed how many documents (on average) an applicant would submit, and what was the average size. UCAS wanted to know if there were any restrictions providers had for this feature. It was reiterated that this would be ALL DG158 useful information, and confirmed that proof of identification – for example, a passport – would only need to be uploaded once by an applicant. It was suggested that the Data Group should find out the average number of documents applicants uploaded for undergraduate and/or postgraduate applications, and the size, type, and any restrictions put in place by the provider. This information should be emailed to [groupsandforums@ucas.ac.uk](mailto:groupsandforums@ucas.ac.uk).

The Technology Group also discussed UCAS' maintenance windows. UCAS wanted to set up a regular maintenance window, and were interested in when it could do this that would cause the least interference to providers. The last Thursday of every month, at 19:00 until 21:00, with a notification in the bulletin day before, was suggested.

#### **A1/18/07 Data futures update**

UCAS was continuing to liaise with HESA about the specification for data futures. They were discussing matching up data items that were in data futures, and split the work into phases. Phases included the support of the adoption wave, which covered how StarJ could be modified to support changes, the support of full data futures on legacy platforms, and how to support data futures on new platforms.

UCAS was keeping up to date with HESA, and would be looking to put together the confirmed steps it would take. UCAS was committed to supporting providers through all three stages. The current StarJ file would not be compatible because it was delivered too late, and a member of the Group asked if it could be delivered earlier. UCAS said it was investigating how it could provide the StarJ information for an applicant at the

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appropriate moment in time. UCAS was working with HESA to make sure the data sharing agreement was correct, and that the data was helpful for them and providers. Currently the StarJ was sent as a batch file, but this would be reviewed. UCAS said it would be eager to hear any thoughts about this. It was suggested that UCAS should attend SROC in April 2019, and it was suggested UCAS would be happy to attend, should the invitation be extended.

The beta pilot was due to start, but there was an issue with the software, so it was postponed. The platform wouldn't be ready for January 2019. A member of the Group was concerned about receiving mixed messages from HESA about the pilot.

A draft list of UCAS relevant data future elements was to be sent to the Group.

PD DG147

### **A1/18/08 Future of data services**

New data products and services were being developed.

Sarah Barr Miller explained UCAS were exploring applicant behaviour, particularly what they did during Clearing. This work was being launched in phases.

#### **Student Journey**

For February 2019, a piece would be launched. Jessica Wadey attended the meeting to present this tool to the Group. It was presented in Tableau to show, in a user-friendly display, how a provider performed during Clearing. It revealed who accepted, and who was released. This could be compared to previous years, and in a sector-wide view. In a demonstration of the tool, UCAS showed how a user could compare their results to their competitor group, and see which providers took some of their applicants, and who the user took from. The Team looked to input survey information onto the interface as well. Student qualification data was not included, and a member of the Group said this would be useful to see. A member of the Group found the Clearing label confusing, because it included more than that. Snapshots would be shared with the Group so they could think about it further.

GV DG159

The Group was asked if the next meeting would be a good time to see how further UCAS engagement in the digital space could be explored for the Data Group.

PD / SBM  
DG160

#### **Postgraduate application insight service**

This service intended to fill the gap in reporting. Onboarding sessions for this product would commence from April 2019.

Data would be sent to UCAS every month, and a sector view and competitor view (chosen by the provider) would be sent to the provider from this data. The tool was displayed in Tableau online.

The Group was shown how the results would be displayed. Dashboard one showed applications year-to-date, and the user could select a total view or average view. Dashboard two displayed benchmarking, trends in the sector, and the competition view. This used month-to-month analysis to reveal any gaps. Dashboard three was the historical data view, to compare current data to previous years. Dashboard four showed domicile and nationality (where the cohort came from), with a month-to-month view.

The tool was live, and UCAS said this was a project developed on what providers needed, and UCAS worked with the Russell Group, and other postgraduate providers, to develop it.

A member of the Group said it was something they had wanted to see for years.

There were 11 participants already using the tool, with varying degrees of data functionality. A member of the Group said it gave an informed starting point for strategic discussions. Another member of the Group, who was part of the Steering Group for the tool, said it was better to have the information than not, and to see how they could use it over time.

UCAS confirmed this was not going to be shared outside of the sector, and the Group could contact the Head of Insight Sales with any further comments.

### **Data Consultancy**

The data consultancy service would be launched at the Annual Provider Update at the end of November. The service would provide bespoke, actionable recommendations, based on data through a detailed project report.

Some members of the Group were concerned about the cost of these services, on top of other purchases. It was clarified UCAS wanted to be self-sustaining, and to use UCAS Media to fund innovations, rather than just to keep core services running.

### **EXACT**

The Group was shown the roadmap for EXACT. The Team was working on integrating course length – for example, part-time or full-time. It was also developing degree type and EPQ. A webinar to discuss this further was conducted during the first two weeks of December 2018.

The Group was asked questions regarding pricing:

1. Would you want, broadly, the same cost, year-to-year, in order to budget?
2. Would you support tiered pricing for different variables?
3. Would you want to be able to self-serve to get the cost (and/or the data itself)
4. What are your thoughts about ad hoc discounting – effectively ‘sale’ pricing?
5. If we were to change the subscription service, what are your thoughts on:
  1. One output a day (as-is)
  2. One output a week
  3. One output a month
  4. One output a quarter (etc.)

Pricing would be further discussed during the webinar in December, but the Group could contact UCAS’ Head of Insight Sales with any comments.

A pricing structure around data bundles was being explored, and these would continue to be explored regardless. A member of the Group said they would need to know how much it would cost in October or November, for the next cycle, rather than in July for the current cycle. Tiering cost to the size of the organisation was suggested by a member of the Group. Another member of the Group suggested a services open day. It was raised that the marketing or operations staff members were usually the ones to engage with UCAS about buying data products, and data colleagues didn’t have visibility over these decisions. GV DG161

The slides would be shared with the minutes.

#### **A1/18/09 Residential category assessment development**

It was still an ambition to improve the residential category. The form was designed to be more intelligent, but further work was in progress. A webinar about the process and flows was suggested, and UCAS agreed to look at dates for a webinar. PD DG162

#### **A1/18/10 Any other business and close**

##### **Expressions of interest for a Data Group representative to attend the Technology Group meetings**

Expressions of interest were made for representing the Data Group at the Technology Group meetings, and feedback should go to [groupsandforums@ucas.ac.uk](mailto:groupsandforums@ucas.ac.uk).

##### **Admissions form**

Inconsistencies were observed when names were not completed correctly, or an applicant didn’t tell UCAS about middle names. It was asked what guidance was given to applicants about filling in their name on the form. It was confirmed that UCAS

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advised applicants to use the name stated on official documents, and those they registered with awarding organisations (who also ask for names to be given as on legal documents).

#### **UCAS Teacher Training**

There were no further updates about UCAS Teacher Training, but discussions were ongoing, and a representative from the Department for Education (DfE) attended the UCAS Teacher Training annual provider update. If providers had concerns, they should feed them directly to the DfE from senior staff.

#### **Mike Spink**

Mike was changing role, and this would be his last Data Group meeting. The Group thanked him for his contributions.

#### **Data of the next meeting**

Dates were suggested for 19 March 2019, and an invite would be sent to the Group with the minutes. The meeting would take place at a host provider, rather than at UCAS. It was later decided that the meeting would be held on 5 April at University of Dundee.

GV DG163

For the summer meeting, 17 and 24 June 2019 were suggested, and later the 17 June was decided.