Minutes

DG/19/M1

The Data Group meeting

held on Friday 5 April 2019 at University of Dundee

Chair:	Daniel Farrell	University of St Andrews
Present:	Alex Ingold	The London School of Economics and Political Science
	Amy Butterworth	University of Bristol
	Paul Ashby	University of Birmingham
	Wendy Webster	University of Dundee
Apologies:	Caroline Low	HESPA
	Carolyn Charlton	Keele University
	Jo Hamilton	University of Exeter
	Judith Davison	University of Huddersfield
	Lisa Machin	Nottingham Trent University
	Louise Hussain	University of Manchester
	Richard Bartlett	University of Cambridge
	Steve Walsh	Aberystwyth University
UCAS in attendance:	Georgina Venman	Provider Engagement Coordinator
	Peter Derrick	Head of Service Delivery (Operations)
	Sarah Barr Miller	Head of Insight Sales
UCAS in attendance via Skype:	Finlay Willicott	Product Executive
	Fraser Nicoll	Service Lead (Information and Advice)
	Helen Puerta-Terron	Product Owner

A1/18/01 Welcome and apologies

The Group was welcomed to the meeting, and the apologies were noted.

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

The minutes were circulated prior to the meeting. The minutes were accepted as an accurate reflection of the meeting.

The continuous improvement strategy for the collection tool was being worked on. UCAS wanted to understand what users wanted from this tool. The collection tool was being moved out of the programme increment planning used in the SAFE agile methodology for the development of AMS. Instead, continuous improvements would be worked on in accordance to the developing strategy and sprint releases. There was a challenge when looking at data standard and completion rates in the collection tool. UCAS was looking at moving from reminding providers what to do each year, to two-way reporting in the hope to drive up completion rates. At the next meeting in June,   DG DG164 Kate Westmacott, UCAS' Service Delivery Manager (Collection and Search) would join the group to discuss changes in the Collection Team, and a larger item on collect would be included. It was noted that a roadmap would be useful, and feedback was welcomed at any time. It was suggested by the Group that the sequencing of adding provider questions in the collection tool could require rework, as a course must be open and published before questions could be attached. This lead to some applicants potentially not being asked the provider question.

The Group was interested in how surveys were delivered by UCAS. It was confirmed UCAS distributed surveys at key milestones throughout the cycle – the plan would be   SMB circulated with the minutes. Surveys were another form of commercial income for   DG165 UCAS Media, and could be delivered in partnership with commercial organisations, for example, a survey was delivered with Knight Frank about accommodation.

Action log
DG120 – The list of schools from the Department for Education (DfE) was identified, but wasn't yet included in the reference data for the application management service (AMS), and would be circulated in due course. It was planned for the end of July, and the Group could be updated at the June meeting.

DG128 – The domicile breakdown would be included, moving forward, for other reports. The action was closed.

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DG137 – Transparency data guidance could be found here: www.officeforstudents.org.uk/media/534d3e67-7e23-4a75-87c5-d6e987aad9f3/ofs2018_52.pdf

DG147 – UCAS couldn't finalise the proposals as Data Futures was changing. It was included on the agenda but would remain open.

DG152 – This would be delivered by the end of July 2019. The action remained open.

DG154 – Under investigation and remained open. Could be included in discussion at the next meeting.

DG155 – UCAS would not change how they worked with UniStats.

DG156 – This action remained open, and UCAS would follow up.

DG157 – This action was kept open so Group members could send questions.

DG158 – This action remained open for feedback.

DG159 – A webinar was delivered, and more would occur in between meetings. The Group would be kept informed, and the action remained open.

A1/18/03 Issues with Star J supply 2018, and support for Data Futures

Star J
There was an error in the Star J presentation. The Qualent 3 coding for International A levels, and some other qualifications, were incorrect. This was due to changes being noted, but not made, in the derivations in the Star J production. The values were re-ran through the test environments to make sure the changes were identified. It was re-ran through the live system and timestamps were updated. UCAS apologised that the error occurred, and the process of logging changes to values was reviewed. These errors should not occur in the future.

It was noted by the Group that the emails about Star J went to different addresses and weren't consistent. The Head of Service Delivery would follow this up with the Technology Relationship Manager. The data had disappeared before it could be tested –this was a decision made at UCAS to align data quickly, and in future it would be considered. There was a tight schedule to ensure all testing was done before Confirmation and Clearing. The test environment could be accessed through the xml-link, but not odbc-link. When users moved over to APIs, all activity could be viewed and tracked.

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HESA Data Futures

Data Futures was delayed for a non-determined amount of time. HESA didn't want it to be delayed for more than a year. UCAS would continue to support the Data Futures work, and would supply Star J in the current format. It would be broken down to three items of work:

- Supporting Star J on legacy
- Supporting Data Futures on legacy
- Supporting APIs on the application management service

It was suggested that a webinar could be conducted for data future requirements.   PD DG166

UCAS was aware the current timings of Star J would not work for Data Futures. Currently it was handled by student information teams, and providers would appreciate getting them involved in the webinar. Members of the Group were concerned about when the changes would happen, and how their data inputs would have to change. It was asked whether providers would prefer only raw data instead of derivations. Previously there was a mixed response on this, and UCAS decided if some providers found it useful, they would continue to provide the support. Receiving data item by item was suggested. Parity for all applicants, undergraduate and postgraduate, should be provided in Data Futures.

A1/18/04 Discussion on data releases from UCAS, and their context

For a future meeting, Richard O'Kelly, UCAS' Head of Analytical Data, would join the   DG DG167
Group to further discuss data releases.

Deadline data releases

There was a discussion on POLAR data, in particular POLAR 4, and why providers would move from POLAR 3 to 4. Paul Ashby, University of Birmingham, agreed to speak to   PA DG168
UCAS regarding the inconsistencies in the end of cycle reporting. It was also agreed that GCSEs needed to be included in EXACT.

Transparency around data content

It was noted that the primary legislation described what transparency conditions had to be in place, which was difficult to work with. The transparency data document could be found here: www.officeforstudents.org.uk/media/534d3e67-7e23-4a75-87c5-d6e987aad9f3/ofs2018_52.pdf

Members were invited to feedback to UCAS if they had any further comments.

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Unconditional offer-making

UCAS' approach was that the best route forward was to publish unconditional offer data in collaboration with providers, to include context. A good practice document was produced, and, on reflection, it could have been pitched as a wider piece on offer-making. The next time UCAS worked on this, it would be broadened to cover other forms of offer-making.

Unconditional offer data used to be available through EXACT, but due to sensitivity, it was removed. It was viewable on provider level, but a more detailed view couldn't be requested through EXACT on unconditional or conditional unconditional offers. A member was concerned that this change wasn't communicated well enough, as they received Freedom of Information Act (FOIs) requests since the data released incorrectly referred to EXACT, not knowing they couldn't get this data through EXACT. UCAS' Head of Insight Sales confirmed that it was a challenge to identify channels to communicate changes, because providers didn't like to disclose what they used EXACT for. How to make it visible was difficult to determine, as it was hard to navigate the system unless you were already familiar with it. The Group suggested a change to the sign in on the website was needed, with a way of pushing it to users.

Some members of the Group received a PDF preview, which was slightly different to their own records. In the draft report, they contested some of the figures and interpretations, including the conversion rate, and had not received a response. Reporting at a national level, the more intricate provider level messages were lost. The Group agreed the context was important, and should be drawn out further.

A1/18/05 Information and advice, and data collection

Fraser Nicoll, Service Lead for Information and Advice, and Finlay Willicott, Product Executive, joined the meeting via Skype.

The Group was shown historical images of the UCAS website since 1998. Ucas.com had become crowded with information, and it could be difficult to find what was needed. UCAS wanted to create an easier way for applicants to collect personalised information through a dashboard. The focus was broadening the horizons of applicants, and help applicants make better-informed decisions.

The presentation would be circulated with the minutes. A webinar recording was available on ucas.com here: GV DG169
www.ucas.com/sites/default/files/ucas_information_advice_personalisation_search-mar-19.mp4

The dashboard was demonstrated to the Group. Initially, questions were asked of the user, to collect information:

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- When did applicants want to study (2020, 2021, 2022 and after)?
- Level of study, with tick boxes for apprenticeships and conservatoires.
- Where applicants lived (country and region if within the UK), with the opportunity to add a postcode.
- What interests applicants had (including an opt-in for UCAS Media) related to subjects.

This information would generate their personalised dashboard, and a tutorial would introduce them to how it could be used. The dashboard was a visual experience with widgets. The dashboard included widgets for exploring course options, dates and deadlines, events and a tariff calculator. There was a notepad for users to enter additional information which was suggested by students and advisers. The 'got a question' widget was tailored to what information the user had entered. What the user entered in their course shortlist and personal statement builder could be fed directly into Apply. The apprenticeships, widget which was included to keep options open for applicants, was also shown to the Group.

Applicants could refer to a to-do list to aid their research and application.

It was confirmed all the content was previously on ucas.com, but was now in one place. There was an intention to improve subject guides and provision for Scotland on the website, down the line.

It was clarified that users would have to sign up with their first name, last name, email, and password. They would be asked to verify their email, then they would be pushed onto the onboarding questions. It was intended that applicants would only have to have a single account for UCAS services.

It was noted that UCAS intended to develop a mobile application for the information and advice product, and the first prototype was in development. This wasn't ready to be shared.

It was also asked if agents and advisers could use this on behalf of applicants, and how this would work. It was explained that the adviser functionality from the adviser portal could be linked, so advisers could see who was engaged with the tool. The same would be considered for international students and agents.

UCAS wanted to be transparent about any information collected in the tool, and the user could manage that information so they can alter their personalised dashboard, should they change their mind.

Bell review - Career Explorer

In response to the Bell Review, HESA, Jisc, UCAS, and Prospects joined together to collaborate on a new service – the career explorer.

There were scaled questions about the user's preferences, skills and interests. This would generate a profile with information about jobs that may be interesting to them. There would also be a degree explorer to help applicants choose a course that will help them reach a career. The user could then enter their A Levels to populate a list of providers that offered the degree with suitable entry requirements.

The data set would not be the same as the one in the offer rate calculator. It was at degree level, and the accuracy was being tested against results. A member said the problem before was it showed the user's similarity to others, but couldn't respond to pre-requisites. Contextual offers from providers were changing year-on-year, so by being based on historical data, could populate different results. Fraser clarified it was not a decision-making tool, but could be used in conjunction with other information and advice tools, like the new dashboard.

It was confirmed that the Scottish qualifications combined with A Levels issue was still being investigated.

Career explorer would be included as an agenda item at the next meeting.   DG DG170

A1/18/06 Search and explore, the use of data to drive course searches

Helen Puerta-Terron, Product Owner, joined the meeting via Skype.

Search

Search by location would be embedded in the search tool by the end of April 2019. UCAS delivered a webinar about the changes. More webinars would be pre-recorded and shared to gather feedback from staff who work outside of admissions, for example, data staff.

Accelerated degrees would be integrated as a filter to pull through courses selected in the collection tool adhering to this requirement, for the academic year 2019 onwards.

Improvements were made to marketing of courses for franchise and college group locations. If TEF ratings differed, they wouldn't both be displayed. UCAS was looking to make changes to the course details pages, to allow franchises to brand certain courses.

New widening participation entry requirements for Scotland were included in the new features. Scottish providers could add a minimum entry requirement.

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Entry requirements for entry points other than year one – some students transferred between providers and courses, so additional requirements could be added for different entry years.

Numeric scores for Cambridge English tests would be included.

ATAS messaging would appear on the course details page.

Search for 2020 courses would be available from 7 May, and the Apply link would go live on 21 May (submission would be available in September).

Key information data sets would be displayed, how this would work best on the course details page was being explored. UCAS was looking at taking off the widget and including static pieces of data on the page.

The course details page design would be updated.

It was confirmed that UCAS was going to link through to the Unistats pages, so the data wasn't without context.

Clearing adverts work would be picked up down the line.

In the course management tool, providers could enter information into a free text box titled 'entry requirements for advanced entry (i.e. into year two and beyond).' Potentially, qualification drop downs could be integrated, and it would be linked through to the application management service to prevent applicants from applying to the wrong entry year.

A member asked if research courses and subject areas that fell under ATAS could be generally flagged. It was explained how subjects were categorised against the ATAS flag was being worked on, and this would be investigated.

Scottish widening participation entry requirements weren't yet in the test environment.   HPT DG171

The default view on the search tool was grouped by provider from A – Z. Within the provider view, it was sorted by the relevancy of the search subject. If a location was added to the search tool, this would be considered. There were stop words, for example, university, which wouldn't be considered as relevant to the search. An option was available to view search results by course, which would display results based on the relevancy to the search name, then by provider name A – Z. Applicants and advisers fed back that they wanted to view courses by provider, which is why UCAS chose to group search by provider first.

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The Chair asked if the functionality of synonyms had been lost, for example, divinity over theology. It was confirmed the functionality was still there, but it may need to be added to the collection tool. The synonym and stemming list would be circulated to the HPT Group.

Explore

UCAS was creating an explore tool with integrated subject guides to provide a high level of information. The user could use filters to narrow down the information. When looking at providers, the tool could push users to the individual providers websites directly, to make access to information easier. On the tool, the user would be able to see key information, including average graduate salary and student satisfaction rating (from Unistats) for providers. It was explained this would initially only be available for undergraduate courses, but would be developed for other schemes. A photo would be displayed on the card, and applicants could favourite options.

DG172

The Chair asked how frequently the team was picking up the Unistats statistics. It was confirmed that it was a live API, and the specific time would be confirmed.

FW DG173

It was asked how the tool would surface data for providers. This was still being worked out, regarding what can be included in the capitation fee or as part of a paid data package, how it would be presented and what the providers would want to see.

A1/18/07 Tracker

Application and Decision Tracker would not work on the new application management service being developed, so a new tracker tool was being developed.

The current service included free data, competitor picture, benchmarking, and weekly updates.

The new system would be a visual dashboard, with different ways to interact with the website. UCAS wanted to take this forward with single sign-on. Providers could set permissions to allow access on an individual basis for application management, course management, Tracker, etc. Through this, providers could link to the UCAS Media digital experience platform.

UCAS' Head of Insight Sales showed the Group screenshots of the standard home screen, and the enhanced version of the home screen. Tiles for reports would include a short description of what the report provided. It wasn't clear how the visuals, for example, graphs, could be implemented into documents. The intention to make it moveable. There would be a list of dimensions sent to the group. Statics would be able to be downloaded.

SBM DG174

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It was asked if there was data cleansing between collection and presentation of data. It was confirmed that there wasn't a process for this, but there would be standard UCAS disclosure controls applied.

UCAS wanted to achieve a cleaner look and feel, with greater graphical representation of data. Other features would include direct to Clearing reporting, and reporting at country level for your competitors. There would be more flexibility to build reports providers wished to see.

The functions wouldn't change (with the exceptions of small enhancements) but the experience would be improved. Once pricing was decided, it would be confirmed.

A1/18/08 Round table

It was asked if others were moving to Polar 4. UCAS had moved to Polar 4's data set. A member said Polar 4 was surprisingly different and didn't have a lot of overlap. Another member was moving to Polar 4 but needed to check with Tribal if they were able to facilitate.

Clearing
Self-release into Clearing would be included for this cycle. This would be monitored closely. It wouldn't be heavily advertised to applicants, but advisers and providers would be well-informed. Appropriate advice and guidance would be available, and steps were in place to prevent people self-releasing for the wrong reasons.

Pushed offers and the 'I'm still looking' flag would be included when the application management service launched.

RPAs would be replaced by Fasttrack, and webinars had been provided.

A1/18/12 Any other business and close

Inconsistencies
The Group highlighted that they hadn't received the codes for postgraduate, but they did for undergraduate in the xml-file. Instead, they received a translation – this would be taken forward for APIs.   PD DG175

ABL release
A member said they were testing ABL and wasn't sure if receiving all the results was adhering to GDPR. UCAS had approved the process and would be happy to continue this, but the release would be reviewed. What providers did with the data was up to them, as long as it was in line with the sharing agreement.

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HEP3 testing environment
A member had application ID and applicant ID, but they lost the application ID. It was confirmed that the application ID was now globally Unique Identifier – a non-humanly readable string value.

In HEP1 and HEP2, they set up courses separately and requested data for some courses. In HEP3, they couldn't differentiate between undergraduate and postgraduate data. UCAS would follow up availability of applicant test data in HEP3. It should be a mirror of the current collection tool. **PD DG176**

Membership
The memberships list was circulated including the date a membership term ended. The Chair was concerned that a lot of experience in the Group would be lost by October 2019. He also said a broader range of roles would be an improvement.

Daniel Farrell, University of St Andrews, and Wendy Webster, University of Dundee, were thanked for their contributions to the Group.

The Chair received an expression of interest from a representative at University of Stirling. It was suggested that areas of specialism could be added to the matrix.

Date of the next meeting
The date of the next meeting was scheduled for 17 June 2019. It was suggested that the meeting could run from 10:30 until 14:30 on this occasion, and the Group was content with this. **GV DG177**

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