

Minutes

Date	23 January 2012
Subject	Software Supplier Group
Location	Cheylesmore House, Coventry
Time	12:30-4pm
Publication intent	PUBLIC DOCUMENT

Item 1. Welcome and minutes of the last meeting

Item 2. Future development of FE data

- 2.1 John Perks, the Head of *the information authority*, gave the group an overview of where he sees the FE system data collections moving to. John pointed out that although 2012/13 will be fairly stable, both the Department for Education and the Department for Business, Innovation and Skills have made clear that 2013/14 will be the year their simplified methodologies will be introduced. Therefore, we can expect significant changes. John is making sure that the departments and funding agencies are well aware of the system development lead in times, so that the sector has time to prepare for 2013/14.
- 2.2 John's aspiration is to move to a stable set of data to be collected that is independent of policy. The thinking being that any new policies developed would have to fit in with data that is available in that dataset. He also stressed the importance of collecting attributes and using them, along with other data sources, to generate derived variables. There has been a tendency in the past for there to be ILR fields that refer only to specific policies. John particularly wants to challenge the need for those fields.
- 2.3 John acknowledged that a realistic approach is needed. He said we must ensure that there is some scope for flexibility. He said that the single ILR in XML with a logical structure provides a good starting point for this.
- 2.4 John was asked whether *the information authority* will wait for funding policy to be announced before gathering the information requirements for 2013/14. John said that if he did that it would be too late. John is working with the funding agencies to make sure that they are aware of key milestones and recognise the implications of not making decisions in good time. If necessary, he will ask *the information authority* board to put down key markers, to make

clear that if policy is not decided by a particular time, then assumptions will have to be made regarding their information requirements.

Item 3. Data Service update

- 3.1 Ian Tress, Project Team Leader (Data Collection Systems), gave the group a presentation on their system development plans for the next few years. Further information and key dates are available in the presentation slides.
- 3.2 Ian said that they expect to release a couple of versions of the LIS in the next month or so. The first release will include bug fixes, the latter version will include shadow funding calculations. The group asked if they could see a list of what specifically will be fixed. Ian thought he should be able to provide that information

Action: Ian to provide the group with a list of the forthcoming LIS changes.

- 3.3 There was a discussion about the benefits of developing LIS as an interface tool. At present, there is a lot of duplication going on where software writers and some learning providers replicate the validation and other functions available in the LIS. There was even a suggestion that software writers and others in the sector could work collaboratively with the Data Service to help create a LIS that could be plugged in to all MI systems.
- 3.4 Ian suggested that there should be a longer agenda slot for this project at the next Software Supplier group meeting (on 14 May 2012) and that system architects and other key figures involved in developing the data collection systems should attend.

Action: Paul to include this on the agenda for the May meeting.

- 3.5 The Data Service's Trevor Watson spoke to the group. He thought it would be useful to highlight some of the common errors he sees on the data collection system so that software suppliers can ensure their customers do not make similar mistakes. The common issues included:
 - Transmission numbers – some providers revert back to 1 each month, others are increasing by hundreds at a time and run the risk of running out of submission numbers. There was a discussion on whether for 2012/13, a date and time stamp could be generated instead of using transmission numbers. Another suggestion was for the Data Service to generate a receipt number. *The information authority* and Data Service will give these ideas further thought.
 - Duplicate elements in learner fields – commonly these are seen in source of funding and FAM areas. Unfortunately the reports for some of these errors are not very clear.
 - Poor understanding of A and B files.

- 3.6 The group really appreciated getting this sort of feedback and asked if it would be possible to get more specific feedback on their individual systems.

Action: Trevor will progress this to see what information in this area is easily accessible and could legally be shared with software suppliers. Paul will update the group in due course.

- 3.7 There were a couple of issues raised regarding the publication of Success Rate methodology. Software suppliers are often asked by their customers to build success rate reports into their systems so that providers are aware how well they are performing. However, they are limited in what they can provide because the methodology is typically published well into the academic year. There was also a query regarding how success rates will be calculated now that there is a single ILR. **Post meeting update:** These queries have been put to the Agency. They will be communicating a message to the sector on these issues in the next few weeks.

Item 4. ILR – current issues and plans for 2013/14

- 4.1 Lisa Macdougall, *the information authority's* Data Specification Manager, gave the group a presentation on changes made to the 2012/13 ILR since the group last met in November 2011. Further information is available in the presentation slides.
- 4.2 Lisa encouraged the group to read the new employment status information in the specification in detail. If any clarification is needed, please let Lisa know urgently so that she can review the wording before version 2 of the 2012/13 ILR is published.
- 4.3 There was a discussion about the need to track learners that change employers. The guidance is clear that the Skills Funding Agency does not need to know if a learner changes employer in year. However, the business process of a learning provider will be to update their system with the current employer. Lisa was unclear whether the funding calculation would ignore new employer information and agreed to look into this. It was also suggested that the wording could be made stronger, perhaps using terms such as 'do not' rather than 'need not'.
- Action: Lisa to check whether employer data can be changed in year and consider strengthening the wording as suggested.**
- 4.4 Lisa has been working with the Skills Funding Agency on further guidance around the data requirements to support Job Outcome Incentive Payments. More information and a news item on this should be published soon.

Item 5. YPLA update

- 5.1 Alex Cook from the Young People's Learning Agency took questions from the group. He was asked when they were likely to hear more about their simplified funding methodology. Alex's response was that there were several clear assumptions in the consultation document, such as plans to fund at programme level. In terms of timescales and next steps, the YPLA will need to wait for political decisions to be made following the consultation. These decisions are expected in the Spring 2012. In the meantime, the YPLA has already started thinking about possible implementation issues in advance of ministerial decisions, working on things that were taken as read in the consultation and assumptions around things that were more open.
- 5.2 The group stressed to Alex how important it is for them to know what scale of change is planned and what the implementation timescales are. Without this knowledge, it is very difficult for them to run their businesses and plan

resources. The follow on question from that was whether the YPLA has any internal key milestones that it is working to and, if so, whether Alex could pass those on to the group. **Post meeting update:** There are no internal dates being worked to, although some of the development work has started (as outlined in 5.1). Alex will be invited back to the next Software Supplier Group meeting in May to provide a further update.

Item 6. Learning Records Service – System Roadmap

- 6.1 Mike Coulson and Carole Morley from the Learning Records Service gave the group an overview of the services that the LRS offers and a summary of what is planned for the next few years. Further information is available in the presentation slides.
- 6.2 Items discussed included the development of a 'learner passport'. This would enable citizens to access their Personal Learning Record (PLR) online securely without needing a learning provider to carry out an ID check. The group commented that this sort of service would really benefit learning providers, if it meant that they would not have to carry out identification checks. It was suggested that the LRS should take a more business focused approach to the services it offers and really push the services that have clear benefits.
- 6.3 Geoff Russell, the Chief Executive of the Skills Funding Agency, has invited the LRS to his meetings with large Awarding Organisations (AOs) with a view to persuading them to use the LRS's services. The large AOs have since agreed to take part in a trial use of the PLR. Initially the trial will only cover QCF data, but Carole is confident that this is a really positive step that will help the LRS gain the trust of the large AOs. There are already 52 AOs working directly with the LRS to populate PLRs.
- 6.4 Several members of the group commented that, for providers in the sector to see the benefits of the LRS's work, young people's General Qualification achievement information must be available to learning providers before the enrolment process begins. The group also pointed out that the LRS should prepare its systems for this. Currently the system can only handle requests for achievement data one learner at a time. For this to work, learning providers would need the ability to systematically download batches of prior attainment information.
- 6.5 Carole and Mike reminded the group that the LRS offers a test environment for software suppliers to try out their systems. The LRS can also offer software suppliers confidential advice on the development of their systems to make best use of the LRS's services.
- 6.6 Carole informed the group that the LRS is looking to set up a group to work with the LRS to actively embed the ULN in schools and FE management information systems. Areas they will address include exception handling, maintaining ULNs and ID verification. This work will run alongside the A2C work but align closely with it. If you are interested in joining this working group contact Carole.Morley@learningrecordsservice.org.uk

Item 7. Skills Funding Agency update

- 7.1 Nick Chomyk spoke to the group about some of the funding policy issues they are working through just now. There are some 2011/12 issues that should be addressed in forthcoming releases of the LIS. The main problem is that the large employer discount is not being applied in all cases. Nick's advice on this is simply to make sure that the employer data submitted by learning providers in the ILR is correct. If the discount is not applied, the Agency will have to take responsibility for that. He said that providers should not try to make manual adjustments themselves using the Proportion of funding remaining (previously ILR field A51a).
- 7.2 Nick is working on the 2012/13 shadow funding calculation. The expectation is that the LIS will generate a spreadsheet which providers can use to get a good indication of what their future funding will be. The spreadsheet will be at learner and aim level. Therefore, it should be straightforward to aggregate that data to get high level numbers. The group asked for a draft version of this spreadsheet if at all possible.

Action: Nick agreed to check with the Agency whether he is able to share an early draft version with this group.

- 7.3 Nick described some of the challenges they face having moved to the single adult budget. For example, ER and LR provision has different age definitions, the ER and ALR rates are currently weighted / unweighted depending upon whether an employer contribution is expected and achievement dates are recorded differently too.
- 7.4 At the previous meeting in November 2012, Nick had indicated that he thought field A51a would go. However, having looked at this in more depth, there seems to be a continuing need for this sort of function. For example, to deal with learners returning from agreed breaks in learning.
- 7.5 Nick is looking into the feasibility of having a single employer reference numbers for large employers. He also highlighted some of the difficulty they have in setting up a model to fund unlisted qualifications such as Skills for Life provision.
- 7.6 The Agency must ensure that its future funding system is fair for learners taking out loans. Nick suggested this means learners will have a fixed value of funding based on the rate that was in place when they start their course.

Item 8. ISB Supplier Special Interest Group (SIG)

- 8.1 Adrian Kilburn spoke to the group about the ISB Supplier SIG. Further information is available in the presentation slides.
- 8.2 Adrian highlighted some of the system compatibility issues that the group wants to see addressed. The example given is the way that names are recorded and stored differently.
- 8.3 The group will use a 'huddle' tool to arrange meetings, share papers etc. Adrian strongly recommended that all software suppliers on *the information authority's* group should sign up to the huddle tool. He encouraged more group members to attend the ISB SIG meeting on 6 February 2012. If group members want further information, please email adrian.kilburn@capita.co.uk

Item 9. Course information standards

- 9.1 Paul Kelman reminded the group that *the information authority* is taking over ownership and governance for the Skills Funding Agency's Course Directory data specification, starting with the 2012/13 specification. The Data Service will begin collecting this from 1 August 2012.
- 9.2 Paul explained that the limited timescales mean that 2012/13 will see very little change. Therefore, the 2012/13 specification should be published by the end of March 2012.

Action: If you are aware of any current issues or flaws in the current specification that you think need to be addressed, please email details to paul.kelman@theia.org.uk

- 9.3 Longer term, from 2013/14 onwards, *the information authority* aspires to define a single set of course information standards that can be used for many purposes in the FE system. In addition to the Agency's requirement for course information, learning providers may well have to generate course information for their own website / course prospectus, 16-18 Common Application Process and third party Course aggregators. The HE sector is working on XCRI data standards in this area too and so they will need to be looked at. Future requirements may also need to include public information to give employers and prospective learners more detailed information. This may well include success rates, loan costs, destination data etc. The intention is to work collaboratively with the sector to develop a standard dataset in this area.
- 9.4 The group welcomed this approach. There were several volunteers to get more involved with this project in the next few months.

Item 10. Date of meetings in 2012

Monday 14 May

Thursday 29 November

Meeting Attendees

Name	Organisation
Adrian Kilburn	Capita Education Services
Aidan Hall	Monterpoint Ltd
Alex Cook	YPLA
Andy James	Corero Systems Ltd.
Andy Pointin	Monterpoint Ltd
Brian Mann	Capita Education Services
Carole Morley	Learning Records Service
Darren Guy	Ecordia
David Young	Data Service
Elly Scantlebury	Mindset
Ian Selwyn Smith	Perspective UK
Ian Tress	Data Service
John Davis	Birmingham LEA (Aqua)
John Perks	<i>The information authority</i>
Kevin Atkins	Tribal
Khushnood Khan	Perspective UK
Lisa Macdougall	<i>The information authority</i>
Luke Fitzgerald	Pellcomp (PICS)
Mark Trinick	eTracker
Mike Coulson	Learning Records Service
Mike Davies	Unit4 Business Software
Nick Chomyk	Skills Funding Agency
Nick Swift	Seetec
Paul Kelman	<i>The information authority</i>
Paul Mann	University for Industry
Pete Hutchinson	Active Data Systems
Peter Adams	Pellcomp (PICS)
Richard Elmes	Perspective UK
Robin Joinson	University for Industry
Sandylen Mootoo	Tribal
Sharon King	<i>The information authority</i>
Ste Millington	Compass
Steve Goacher	PDM Data
Steve Rash	Tribal
Sue Kinch	Corero Systems Ltd.
Tim Lyth	eTracker
Tony Howarth	Cognisoft
Trevor Watson	Data Service
Wayne Neely	University for Industry