To: Heads of higher education institutions in Wales

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2005 HE-business and community interaction (HE-BCI) survey

I am writing to let you know the arrangements for the 2005 annual survey of interactions between higher education institutions (HEIs) and business and the wider community, and to ask for your help in ensuring that the survey is completed fully and on time. The survey will be available online by mid April, and **responses are due by Friday 20 May 2005**. (Details, when finalised, will be sent to the agreed contact in your institution.)

This will be the fifth such survey conducted on behalf of all UK higher education funding bodies, and the second using the improved format introduced last year.

Data from previous surveys have already been used – by the Assembly Government in Wales and, on a UK-wide basis, by the Department for Education and Skills and the Department of Trade and Industry/Office of Science and Technology (DTI/OST) – to demonstrate the contribution that HE makes to the economy and society, supporting the case for investment. The HM Treasury document 'Science and innovation investment framework 2004-14' also drew extensively on these data.

The Council has also signalled the importance it attaches to the HE-BCI survey as it develops its third mission funding arrangements and all institutions were required to append a copy of their return to last year's survey to their third mission strategies submitted in autumn 2004 (**CircularW04/36HE** refers). Future returns will be used to help evaluate institutions' progress in implementing their third mission strategies and in work associated with the implementation of the Assembly Government's Nexus Report to establish a basket of metrics to measure the contribution of HE to economic development in Wales. HEFCW will also make use of HE-BCI survey data in developing the formula to be used in the next three year third mission funding cycle, which begins in 2007/08. Similarly in England, HEFCE has indicated that the next round of allocations under its Higher Education Innovation Fund (HEIF) will be substantially by formula and that HE-BCI data will be used in the formula being developed with the OST.

It has also been agreed by the HE-BCI survey stakeholders group – of which HEFCW is a member - that all 2005 survey data will be made publicly available once the final survey report has been published. It is therefore important that the HE-BCI survey data are complete and returned on time. (For Welsh HEIs, providing such information to enable the Council to exercise its functions is a condition of grant under their financial memorandum with HEFCW).

Every effort has been made to limit the burden of data collection while maximising the usefulness to HEIs and other stakeholders. The survey process for 2005 remains unchanged from last year. The survey will be available on the HEFCE extranet, in two parts. Part A is an online database with questions relating to institutional strategy and capacity. These data are relatively stable and need be updated only where changes have taken place – thus minimising the administrative burden. However, we will extract the information for publication at the end of the academic year so it is important that all updates have been made by Friday 29 July.

Numerical and financial data, based on the academic year 2003-04, should be returned in Part B, a Microsoft Excel document. In order to improve data quality and develop a meaningful time-series, the stakeholders group has strictly limited changes to the questionnaire. However, in response to feedback from the sector we have amended a handful of questions to remove some perceived ambiguities.

Some business and community activities have been under-represented in the survey. We have therefore developed some questions relating to social, community and cultural activities into Part B. The questions have been developed to improve HEIs' and stakeholders' understanding of these activities which, while central to Government objectives (both within Wales and on a UK-wide basis), are not as readily measured by proxies as activities that are primarily wealth creating.

Appendix A provides information about using and accessing the HEFCE extranet. The extranet keys that apply to your institution are as follows:

hesainst	Extranetkey	Region	Sort

If you have any queries about the survey, please contact Adrian Day.

Thank you for your support and co-operation.

Yours sincerely

PHIL GUMMETT
CHIEF EXECUTIVE

Accessing and using the HEFCE extranet

1.   The HE-BCI 2005 survey is available for completion by institutions through the HEFCE extranet, an encrypted and authenticated web-site, https://extranet.hedata.ac.uk.

Logging in
2.   You can log in to the HEFCE extranet using either Athens Single Sign On – SSO (if this is available at your institution) or an e-mail address that has been registered on the site.

3.   If you wish to log in using an Athens SSO account:
   a.   Follow the 'Log in via Athens SSO' link on the login page.
   b.   Log in to Athens as normal (if you have not already done so).
   c.   When Athens has authenticated you, your browser will be directed to the HEFCE extranet resources page.
   d.   Use the 'Join a group' button to access the designated page for these data. (The group key is given in paragraph 5 below.)

4.   If you do not have an Athens SSO account, and have used the HEFCE extranet before, log in with a registered e-mail address:
   a.   Use the login page to enter your e-mail address and password. If you have forgotten your password, click the 'Request a new one' link and another password will be sent to you by e-mail. You will then need to change this new password before you can log in fully.

5.   If you do not have an Athens SSO account, and have not previously used the HEFCE extranet, you will need to register:
   a.   Follow the 'Register' link on the login page.
   b.   Enter your e-mail address, and choose a password (at least eight characters, containing both letters and numbers).
   c.   Enter the organisation key and group key:
      Organisation key: <<insert key here>>
      Group key: H299-35EF9A6C
   d.   Click the 'Register' button.
   e.   If registration was successful you will be able to follow a 'Login' link to the main login page, where you will be able to log in.

Completing the survey
6.   When you have logged in, click the HEFCE resources link, and then the Business and Community link.

7.   The survey is available in two parts:
   a.   Part A   An online survey relating to institutional strategy and capacity.
   b.   Part B   An Excel document containing questions on numeric and financial outputs in the academic year 2003-04.

8.   To update part A, click the HE-BCI data collection (part A) link, and work through the questions. Any amendments that you make to the data are automatically loaded into the survey database.

9.   To download part B of the survey, click the HE-BCI data collection (part B) link, click the 'Download' button on the left of your screen, and select 'Save' when prompted. Save the zip file

(compressed folder): HE-BC03_package_____.zip (where the suffix identifies the institution) in a location on your network where you can access it later.

10.   The zip file/package contains two files:
        a.   hebc03_XXXX.xls (where XXXX identifies the institution)
        b.   Instructions.doc

11.   To complete the return, you will need to unzip the package. Windows XP and Windows ME can perform this task without a third party tool. Other operating systems will need an additional program. Go to the <u>Online help</u> (under 'Links' on the right hand side of your screen) for links to web-sites to obtain one of these programs.

Submitting the completed survey
12.   When you have completed the return, and are ready to submit it, log in again using your e-mail address and password. Click the 'Upload' button and then 'Browse' to find the location of the file. Then **click the 'Upload file' button**.

13.   Submitting the files may take a few minutes, depending on how busy the server is. Click the '<u>Status</u>' link to refresh your screen and see if your transaction is:
        a.   Queued – the figure in brackets shows the position in the queue.
        b.   Processing – data are being transferred.
        c.   Completed – the processing is complete and you can download your results package.

14.   When the submission process is complete, click the 'Results' button and save your results package on your own network.

15.   At the bottom of the web-page there is a section labelled 'History of HE-BCI 2003-04 submissions', which gives details of all files uploaded and processed for your institution. This information will remain on the page as a record for the duration of the exercise, but can be printed if you require a hard copy record of the files submitted.

16.   If at any time you forget your password for the HEFCE extranet, click the '<u>Request a new one</u>' link and another password will be sent to you by e-mail. **You will need to change this password before you can log in fully.**

17.   If you have any difficulties in downloading or uploading your files, please contact Rachel Nickels (tel 0117 931 7118, e-mail r.nickels@hefce.ac.uk).