

# 2024 Training Programme

Designed for the housing sector and  
delivered by our housing and data experts

Improving skills and unlocking the potential of your people

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# Introducing Housemark's Training Programme

Having access to the skills and tools to unlock data-driven insights has never been more important for social landlords. Housemark's Training Programme is designed specifically for housing professionals, with courses delivered by our housing and data experts.

We have a range of courses in 2024 to develop your skills and confidence and make the best use of your valuable data. All of the courses are based on real social housing data and include active participation and discussion of current analytical topics and challenges.

**We look forward to welcoming you to a Housemark training course soon.**

## Unlock the potential of data across your organisation

- Designed specifically for housing professionals using housing-related data.
- Delivered by housing experts who are passionate about what data can deliver for the sector.
- Benefit from practical, hands-on learning to gain skills and techniques you can put into action straight away.

## Courses

- **Excel in housing**  
Part one (fundamentals), part two (essentials) and part three (advanced analytics). Our Excel programme is designed as a three-part programme, however we also welcome participants who fulfil the necessary requirements onto individual courses.
- **Power BI in housing**  
Parts one, two and three. Our Power BI programme is designed as a three-part programme, however we also welcome participants who fulfil the necessary requirements onto individual courses.

### Course requirements

Individual course entry requirements are listed on the relevant pages. Maximum benefit is derived from completing each three-part programme in full and in order. Learners wishing to complete individual courses (parts two or three) will be required to have either completed the preceding course, or be confident they have sufficient skills and experience of using MS Excel/Power BI.

## Delivery

Our data training courses will be delivered online over one or two half days (see specific course information). All courses are designed for maximum participation and include presentations, group and individual exercises, and discussions. Extensive materials will be sent to participants in advance of all courses.

### Bespoke and in-house training

We are also able to deliver dedicated courses for your organisation either online or at your premises – please contact us for more information.

### System requirements

Participants will need to use their own laptop, pre-loaded with any software required for the course.

This should be of sufficient power to run the application and the video conferencing software simultaneously.

**Please note that Power BI training requires a high-performance laptop and two screens.**



## Our Trainers



### Excel in housing

#### Emma Ratcliffe

Emma is a Research Analyst at Housemark with over seven years' experience as an analyst using Excel in the social housing sector. She has built on her own skills using a combination of formal education and self-taught learning and now uses Excel every day to investigate large datasets, find trends and create effective data visualisations. She has also used Excel's programming language, VBA, to automate and improve process, and create tools which drive efficiencies. Emma is passionate about learning, sharing knowledge and solving data analysis problems.



### Excel in housing

#### James Jervis

James is a Product Manager at Housemark, specialising in Data Science, and has over 15 years' experience in analytical and research roles within the social housing sector. Previously he managed a Data and Insight team at a large housing association in the Midlands, and has undertaken a variety of data related services, from building analytical tools, through to spatial analysis, data modelling and data visualisation. Along the way he has developed a strong understanding of how to effectively manage, model and present data for a variety of audiences.



### Power BI in housing

#### Ade Oladimeji

Ade is a Data Business Partner at Housemark and first began exploring and using Power BI in 2015, due to its robustness and intuitive user interface. Prior to working at Housemark, Ade was an early adopter of Power BI in the two organisations she worked in and helped her teams understand and benefit from the end-to-end-process, analytics and collaborative capabilities of the tool.

# Excel in housing part one – fundamentals

This half-day course is aimed at people who have little or no experience of Excel, or who want to refresh their existing knowledge.

The course will provide you with the knowledge to understand the purpose of spreadsheets and the confidence to make simple calculations relevant to the social housing sector.

## Course content

This course will cover:

### Getting Started

- Navigating Excel and its functionality
- Basic formatting
- Sorting and filtering

### Formulas in Excel

- Formula structure
- Copying formulas
- Relative and absolute references
- Useful functions
- Simple charts

By the end of the course, you will be able to:

- Understand Excel fundamentals and terminology
- Create and format spreadsheets
- Use simple calculations with confidence
- Copying formulas
- Relative and absolute references
- Useful functions
- Simple charts

## Who is this course for?

This course is aimed at people working in social housing at any level who have little or no experience of using Excel spreadsheets, or those who are self-taught and have some knowledge of Excel but require a foundation to help cement their understanding.

## Entry requirements

There is no prerequisite for this course.

## 2024 dates

11 January  
8 May  
12 September

## Price

### Three-part programme

£750 + VAT (Housemark members)  
£950 + VAT (Non Housemark members)

### Individual courses

£220 + VAT (Housemark members)  
£290 + VAT (Non Housemark members)

We can also deliver dedicated courses for your organisation either online or at your premises – please contact us for more information.

## Excel in housing part two – essentials

This one-day course (delivered over two half days) picks up the basics of the beginner course and builds on your ability to use Excel as a data analysis tool in the social housing sector. It can be completed as a standalone course or as a follow-up to the part one course.

“Emma was very engaging, delivering the training in an informal, friendly way. I have increased confidence using Excel and learned some very useful shortcuts. I have also increased my understanding of elements of Excel I have not used before. The group size was perfect and the course materials clear and very useful.”  
**Laura Johnson**, Torus

### Course content

This course will cover:

- Excel fundamentals refresher
- PivotTables and PivotCharts

Using Excel functions

- Logical functions
- Mathematical functions
- Statistical functions
- Look ups

Effective visualisation

- Conditional formatting
- Charts
- Data tools

By the end of the course, you will be able to:

- Create and use PivotTables and PivotCharts
- Use formulas to bring data together from multiple sources
- Use formulas to carry out analysis
- Visualise your data using charts, formatting and basic dashboards

### Who is this course for?

This course is aimed at people working in social housing at any level who know Excel at a basic level and are looking to skill-up.

### Entry requirements

This course requires completion of the part one course or knowledge and experience of content covered in part one. We recommend that you've practised and embedded your learning from part one before taking part two.

### 2024 dates

6 and 7 February  
 4 and 5 June  
 12 and 13 November

### Price

#### Three-part programme

£750 + VAT (Housemark members)  
 £950 + VAT (Non Housemark members)

#### Individual courses

£335 + VAT (Housemark members)  
 £420 + VAT (Non Housemark members)

We can also deliver dedicated courses for your organisation either online or at your premises – please contact us for more information.

“Some of the most relevant Excel training I have received – working with housing datasets makes it much easier to relate what is being taught to how to utilise it in the real world!”

**Rhiannon Davies**, North Kesteven District Council



# Excel in housing part three – advanced analytics

In order to ensure that you are making the most efficient use of your data for reporting purposes, it is vitally important to understand the fundamental concepts of how best to extract, structure and manipulate it.

This one-day course (delivered over two half days) takes Excel in housing to a new level. Using real housing data, it covers the disciplines and logic needed to manipulate large datasets, in order to effectively present the information to a range of audiences.

“Taught at a very good pace and they assisted with troubleshooting any issues anyone on the course had.  
Will Poray, Housing Solutions

## Course content

This course will cover:

- How to effectively approach data analysis
- Extracting, Transforming and Loading (ETL) a range of data using Power Query
- Considerations when structuring data for analytics
- Data modelling concepts
- Using Power Pivot with large datasets (including an introduction to DAX)
- Developing dashboards and KPIs using a data model

All working with large, UK housing datasets

By the end of the course, you will be able to:

- Manipulate and analyse large or complicated datasets efficiently
- Correctly structure data for effective reporting and analytics
- Understand the concepts and associated benefits of adopting a data model approach

## Who is this course for?

This course is aimed at people working in social housing where data manipulation and analysis is a key part of their role – in particular, when building analytical reports containing large and complex data.

## Entry requirements

This course requires completion of the part two course or knowledge and experience of content covered in part two. We recommend that you've practised and embedded your learning from part two before taking part three.

## 2024 dates

19 and 20 March  
16 and 17 July  
10 and 11 December

## Price

### Three-part programme

£750 + VAT (Housemark members)  
£950 + VAT (Non Housemark members)

### Individual courses

£335 + VAT (Housemark members)  
£420 + VAT (Non Housemark members)

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## Power BI in housing – part one

Social landlords are looking for better ways to visualise their data to support decision making and provide greater insight. Microsoft Power BI is data visualisation software that can help bring data to life and reveals the stories behind the numbers – via live data dashboards, interactive reports, charts, graphs, and more.

This one-day course (delivered over two half days) is aimed at those with no previous experience of Power BI. The course will cover the components of Power BI and provide you with the knowledge to understand how to leverage Power BI to build reports and dashboards with interactive visualisations.

### Course content

This course will cover:

- Power BI and its components
- How Power BI compares to other tools such as Excel
- What you can do with Power BI
- Connecting to Excel data sources and creating tables
- Understanding the Power Query entity
- Transformation (e.g. data types, creating columns, replacing values)
- Visualisation – charts, tables
- Building and sharing reports

By the end of the course, you will be able to:

- Describe the business value and features of Power BI
- See how Power BI works and looks from a user's perspective
- Easily build and share reports and dashboards

*Ade really knew her subject and was clearly passionate about Power BI.*  
Louise Hunter, North Devon Homes

### Who is this course for?

This course is aimed at people working in social housing at all levels who are new to Power BI and have no experience of creating reports using Power BI.

### Entry requirements

There is no prerequisite for this course.

### 2024 dates

12 and 13 March  
11 and 12 June  
1 and 2 October

### Price

#### Three-part programme

£1085 + VAT (Housemark members)  
£1320 + VAT (Non Housemark members)

#### Individual courses

£435 + VAT (Housemark members)  
£520 + VAT (Non Housemark members)

We can also deliver dedicated courses for your organisation either online or at your premises – please contact us for more information.

*Really good introduction to Power BI and some really useful tips to help me start to build my own reports. Came away feeling able to have a go on my own confidently. I've already started to use what I learnt for my own reports and the training has really helped me with this.*

Louise Cassin, Sheffield City Council

## Power BI in housing – part two

This one-day course (delivered over two half days) is aimed at data analysts who need to work with multiple data sources. The course will develop your skills in getting data from multiple sources and understanding the concept of data modelling in Power BI concept, with an additional focus on data cleansing and transformation.

### Course content

This course will cover:

- Overview of Power BI licencing and the end user perspective
- Connecting to data sources e.g. SQL, SharePoint, and other online sources
- Overview of M query
- Preparing facts and dimension tables for modelling
- Data transformations: Merge, Append, Group By, Pivoting and Unpivoting techniques
- Data modelling in Power BI: Relationships
- Concept of Measures and Calculated Columns
- Report design: layout, formatting, best practice
- Overview of the Power BI service UI
- Concept of dashboards, datasets, workspaces and reports
- Gateway concept and report refresh

By the end of the course, you will be able to:

- Build, publish and share reports and dashboards for them and others to use
- Connect to and model data
- Analyse and visualise data
- Share insights

### Who is this course for?

This course is aimed at people working in social housing at all levels of reporting and analysis who work with multiple data sources and wish to develop their understanding of the capabilities of Power BI as well as gain an insight into some of the more advanced features.

### Entry requirements

This course requires completion of the part one course and/or good understanding of how to navigate Power BI desktop, basic transformation in Power Query and creating visuals, or knowledge and experience of content covered in part one. We recommend that you've practised and embedded your learning from part one before taking part two.

### 2024 dates

16 and 17 April  
9 and 10 July  
5 and 6 November

### Price

#### Three-part programme

£1085 + VAT (Housemark members)  
£1320+ VAT (Non Housemark members)

#### Individual courses

£435 + VAT (Housemark members)  
£520 + VAT (Non Housemark members)

We can also deliver dedicated courses for your organisation either online or at your premises – please contact us for more information.



## Power BI in housing – part three

This one-day course (delivered over two half days) is aimed at analysts who want to do more with their organisation's data and understand the concepts of DAX and M query.

The course will focus on how Power BI works seamlessly with other tools to create an end-to-end solution, and how it can be deployed as an enterprise tool for data and analytics.

On completion of all three Power BI courses, you and your organisation will benefit from near real-time reporting and analytics, improved consistency across reporting, and time saved in data transformation.

### Course content

This course will cover:

- Using parameters
- Basic and Advanced text analytics
- Manipulating M in advanced editor
- Time intelligent function
- Performance analyser
- Model view design
- Themes
- Summarise/GroupBy
- Creating/managing workspaces
- Managing datasets
- Creating dataflows
- Implementing row-level security RLS
- Paginated reports

By the end of the course, you will be able to:

- Understand advanced Power BI functionality to improve reporting
- Use Power BI to manage models to ensure end user experiences are not impacted
- Understand security and governance of reports and datasets
- Take-away some DAX capabilities

### Who is this course for?

This course is aimed at people working in social housing responsible for collating data ready for analysis and wanting to do more with their organisation's data. They may be database specialists or advanced data analysts.

### Entry requirements

This course requires completion of part two course or knowledge and experience of content covered in part two. Also required is a good understanding of how to navigate Power BI desktop, use the Power Query component and Power BI service (cloud), plus basic understanding of the O365 product suite and cloud computing concepts such as Azure. We recommend that you've practised and embedded your learning from part two before taking part three.

### 2024 dates

14 and 15 May  
3 and 4 September  
3 and 4 December

### Price

#### Three-part programme

£1085 + VAT (Housemark members)  
£1320 + VAT (Non Housemark members)

#### Individual courses

£435 + VAT (Housemark members)  
£520 + VAT (Non Housemark members)

**We can also deliver dedicated courses for your organisation either online or at your premises – please contact us for more information.**

# Booking information

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## Payment

Payment for all training courses can be made online via debit or credit card. Invoices can also be arranged on receipt of a Purchase Order (PO). Bookings will not be confirmed until payment or a PO/PO number has been received.

## Online requirements

It is the attendee's responsibility to check that they have access to a laptop and sufficient internet connection to be able to access the online course, download all relevant course materials and run applications simultaneously. Housemark cannot be held responsible for any technical problems attendees encounter during an online course.

## Cancellations and amendments

All cancellations or amendments to bookings must be made in writing.

For cancellations received more than 10 business days before the event, an administration charge equal to 50% of the full price per delegate will be charged.

For cancellations received less than 10 business days before the event, an administration charge equal to the full price per delegate will be charged.

Bookings may be transferred to other colleagues at any time.

Bookings cannot be transferred to other course dates at any time.

Housemark reserves the right to postpone or cancel training courses if required.

## Copyright and Data Protection

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For more information about these data training courses or other Housemark events, please contact [rose.buckle@housemark.co.uk](mailto:rose.buckle@housemark.co.uk).