Benchmarking case study: Cardiff University Library

Cardiff University Library has actively used benchmarking over the past 4 years to lobby for an increase in its Information Resources budget. The Library had suffered from many years of static information resources allocations, which had put severe pressure on the budget and led to significant cuts in order to cope with inflationary pressures. Between 2006 and 2010 the Library had made over £600k worth of subscription cancellations, as the ‘purchasing power’ of the budget was eroded.

In response to this, the Library undertook a number of benchmarking studies including:

1. Analysis of key SCONUL statistics to establish whether Cardiff was falling behind, or had a significantly different pattern of information resources expenditure to other Russell Group institutions.
2. Analysis of feedback from National Student Survey and other national surveys to identify areas of particular dissatisfaction.
3. Review of RAE 2008 results against information resources investment on a subject-by-subject basis to establish whether any trends in research performance could be established against library collections availability.
4. Comparison of selected journal/database holdings of other Russell Group institutions against recently cancelled titles at Cardiff.

The benchmarking exercise commenced in 2010, and has continued since then, currently being used as an annual exercise to establish the Library information resources budget for the following financial year.

Data sources

The Library used the following SCONUL statistics in order to build a case for further investment in the information resources budget:

- **Overall expenditure on information resources provision** – we established that this was substantially lower than that of many other Russell Group institutions.
- **Spend on information resources per student FTE** – we established that this was significantly lower than for many other Russell Group institutions (comparing with the Russell Group mean average). Cardiff’s spend per FTE had hardly changed since 2000.
- **Number of printed books in stock per FTE** – Cardiff’s was significantly lower than many other Russell Group institutions, who had seen significant increases over the past decade, indicating a greater level of investment in information resources.
- **Number of print books added to stock** – Cardiff was lower than many other Russell Group institutions.
- **Inter-Library Loan applications made** – we established that Cardiff University was the highest user of inter-library loans across the entire Russell Group, indicating that our collections may be weaker than those of other Russell Group institutions.
- **Total loans** – this figure indicated that our stock tended to work harder than that of many other Russell Group institutions, as there were 2.1 million loans in 2009/10 compared to a Russell Group average of 1.3 million loans.
• **Total number of current journals subscriptions** – again, for Cardiff, this was lower than the Russell Group mean average.

The Library also used data and feedback from the National Student Survey; which indicated that satisfaction levels for library resources were lowest in the Arts, Humanities and Social Sciences subjects – with specific concerns consistently being raised about limited access to multiple copies of items on reading lists, out of date stock, poor coverage for research topics and limited access to journals.

We also analysed RAE 2008 data which indicated that there might be some correlation between lower-scoring disciplines and investment in information resources, although the connection was tenuous and difficult to evidence.

A comparison of our journal and database holdings with those of other Russell Group institutions indicated that many of our recently cancelled titles (high impact factor) were still being taken by at least two thirds of Russell Group Libraries.

In 2013/14 we have also explored benchmarking against the information resources spend of other Universities in the Times Higher Education Supplement World University Rankings. Cardiff University has set a new target to enter the top 100 Universities in these rankings. The Library attempted to benchmark against the top 91-100 Universities. This was less successful, as the data is not in the public domain so each institution had to be contacted separately to volunteer to share their information. Not all institutions responded, and for those that did, it was then difficult to compare 'like with like' – eg: size of the institution, subject profile etc.

**Outcomes**

The outcomes of the benchmarking exercise were presented to our Academic Information Forum (an academic-led Committee established to have oversight of the information resources expenditure), and following this, a case was made to the University senior management for increased investment in the information resources budget. This resulted in an increase in the budget of 4.4% in 2011/12, 3.9% in 2012/13 and a 9.4% increase in 2013/14.

The 9.4% increase was intended to bring the budget into line with the Russell Group median spend (excluding Oxford and Cambridge). The Russell Group median spend is now established as the main benchmark for setting the information resources budget, and we hope there may be support from the University in future years for a more ambitious target which would bring us into the 2nd quartile of spend for the Russell Group.

**Considerations**

SCONUL data is readily available for use, and the tools on the SCONUL website can easily be used to make comparisons, so this type of benchmarking can be undertaken relatively quickly and effectively.

Comparisons of journal and database holdings can often be done through interrogating other Libraries’ websites and the COPAC database, although this can be time-consuming and it is necessary to carefully check holdings statements to ensure that subscriptions are still current.
SCONUL data does not provide information on expenditure at subject level. We have frequently been asked to benchmark at the subject level by Schools who would like to build a case for additional investment in their specific subject areas. It is difficult and time-consuming to get hold of this more granular data, as we are reliant on co-operation from other institutions which may or may not be willing to share their data with us. This data can often be meaningless if you do not also have other key comparators (eg: spend per FTE). Likewise, it was difficult to compare with international Universities where the data and other key comparators are not publicly available. It's important to manage the expectations of your academic stakeholders in undertaking such comparisons.