1. About SCONUL

1.1 The Society of College, National and University Libraries (SCONUL) represents all university libraries in the UK and Ireland, the national libraries and other research bodies. Our members are the institutions themselves and we work closely with those heading library services and their leadership teams.

1.2 We promote awareness of the role of academic libraries in supporting research excellence and student achievement and employability, and represent their views and interests to government, regulators and other stakeholders. We help academic libraries collaborate to deliver services efficiently, including through shared services, and to share knowledge and best practice. Our services include the annual production of a set of benchmarking statistics.

1.3 There is further information on our website: https://www.sconul.ac.uk/.

2. SCONUL statistics

2.1 The SCONUL Annual Library Statistics are unique in the Higher Education environment, providing a detailed picture of a core university service and allowing institutions to benchmark against others. They are important for library leaders in strategic planning and for the wider sector in determining trends.

2.2 Although there have been annual tweaks to questions, including the inclusion of EDI reporting in 2022, the question set has remained largely unchanged for 5 years.

2.3 SCONUL is looking to review both the way in which the statistics are collected and presented and the statistics that we collect. We would like to undertake a full consultation of members to ensure we get the question set right for the future and that we are delivering the statistics in a way that meets the needs of members.

3. Objectives

3.1 SCONUL is seeking consultancy support to deliver a survey of our members’ around their use of our benchmarking statistics and what developments they would like to see over the next few years. We would like to supplement this with some detailed focus groups and interviews. Alongside this, SCONUL will be considering sector-wide uses for our benchmarking statistics, for example in informing negotiations with publishers and other library suppliers.

3.2 We expect this consultation work to enable:

a. SCONUL to identify the core questions required to make the statistics useful now and in the future, bearing in mind developments in the content and open access landscape.
b. SCONUL to understand the changes that might be required to infrastructure to ensure the annual statistics remain accessible and usable by all.

c. SCONUL to identify how the EDI statistics should be collected and disseminated.

d. SCONUL to identify and share areas of good practice in how the statistics are currently used in strategic planning.

e. SCONUL to understand why some institutions don’t make use of the reporting and benchmarking tools and how they could change this.

f. SCONUL to understand what functionality should be free for institutions and what institutions might want to subscribe to premium services and what that premium services might be.

4. Deliverables

4.1 The appointed consultant will be asked to deliver:

a) a report for the SCONUL Board and the Statistics Task and Finish group with an analysis of the survey and focus group results and some potential use cases. The T&F group will then take this work forward

b) a survey of members, drafted and undertaken in conjunction with the Statistics Review Task and Finish group

c) a number of focus groups that encompass all sections of the SCONUL community, including by size, mission and geography.

4.2 We anticipate any changes to the statistics questions will be dealt with by our Statistics consultant and any technological changes will be tendered separately.

5. Project management

5.1 The project will be overseen by the project contacts identified below. Lisa McLaren will be the primary contact and will act as the main liaison and point of contact to ensure that the aims and the objectives of the project are met. Ann Rossiter is the key contact for financial and contractual arrangements and is the budget holder. The Statistics Review group (yet to be recruited) will meet regularly and have oversight of the project.
5.2 The successful consultant will be asked to report to the Statistics Review Group on a monthly basis, unless agreed otherwise.

6. **Scope and methodology**

6.1 Appropriate methodologies for carrying out the research should be articulated as part of the response to this project proposal.

6.2 We encourage respondents to respond creatively and critically to this brief and to make recommendations based on our core objectives and their expertise.

6.3 We have made a number of operating assumptions in developing this brief. These include that a survey and focus groups is the best way to get diverse responses to the consultation. Respondents are encouraged to address these assumptions in their response.

6.4 Respondents should bear in mind the diversity of SCONUL members which cover institutions of a wide range of sizes, missions and academic specialisms and covers members in all parts of the UK and the Republic of Ireland.

6.5 Please note that SCONUL will retain ownership of the data collected and all outputs from the research project, in any form of media. The final report will not necessarily be shared more widely than the Executive Board, SCONUL office and the Statistics Task and Finish group and is not intended for publication.

7. **Project costs**

The project should be costed at no more than £15,000 (including VAT and all internal and external expenses). Please consider what you can provide for those costs and be clear in your proposal.
8. Timetable

<table>
<thead>
<tr>
<th>Stage</th>
<th>Action</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tendering process</td>
<td>Project brief advertised</td>
<td>w/c 3rd July 2023</td>
</tr>
<tr>
<td></td>
<td>Deadline for receipt of completed submissions</td>
<td>5pm on 31st July 2023</td>
</tr>
<tr>
<td></td>
<td>Shortlisting carried out</td>
<td>w/c 31st July 2023</td>
</tr>
<tr>
<td></td>
<td>Interviews with shortlisted consultants held</td>
<td>w/c 14th August 2023</td>
</tr>
<tr>
<td></td>
<td>Consultancy awarded</td>
<td>Tuesday 29th August 2023</td>
</tr>
<tr>
<td>Research process</td>
<td>Phone briefing with SCONUL team and work commenced</td>
<td>w/c 4th September 2023</td>
</tr>
<tr>
<td></td>
<td>Survey and focus group design agreed, and participants recruited</td>
<td>w/c 18th September 2023</td>
</tr>
<tr>
<td></td>
<td>Survey and focus group undertaken</td>
<td>By 29th December 2023</td>
</tr>
<tr>
<td>Publication and</td>
<td>Final written outputs submitted to SCONUL team</td>
<td>By 31st January 2024</td>
</tr>
<tr>
<td>presentation</td>
<td>Final report agreed</td>
<td>By 16th February 2024</td>
</tr>
</tbody>
</table>

9. How to respond to this brief

9.1 Consultants are expected to provide a proposal for the completion of the project within the defined timescale and budget noted above.

9.2 As part of your responses, please:
   a. provide evidence of a track record in conducting research of this type
   b. provide details of your proposed methodology
   c. provide a rationale for the methodology that you have proposed
   d. provide a fully costed project plan, showing hourly rates, inclusive of VAT and any travel or other external expenses
   e. provide details of the anticipated scale of the work that can be carried out within the project budget and timescale
f. provide any commentary on the project objectives, approach and timescale you feel would be helpful for us to consider

g. identify any risks that you anticipate to the success of the project and how you plan to mitigate these

h. provide evidence of having successfully employed the chosen methodology in previous projects

i. provide the CVs of all those who will be working on the project along with a statement of the role they would fulfil

j. provide confirmation of your ability to complete the work to the proposed timescale.

9.3 Selection will be based on an evaluation against the criteria above and the response to the brief, taking account of the cost effectiveness of the proposed approach.

9.4 A Zoom interview will be scheduled to discuss the brief and the approach proposed by shortlisted consultants.

10. Questions and clarifications

For any questions or clarifications, or to have an informal briefing on the background to our requirements, please contact the SCONUL Office on 020 7387 0317 or at lisa.mclaren@sconul.ac.uk to arrange a phone call.

29th June 2023