

1. Introduction

Concerns have been expressed by members for some time about the approach being used by The Tribal Group when assessing university libraries as part of their cost benchmarking service to institutions. SCONUL has been engaging with Tribal over this issue, and has been invited by the company to propose an alternative set of benchmarking categories.

Following discussion with Tribal and with SCONUL Board members, we proposed a number of changes to their categories. In doing so, we have been working with a number of limitations, including Tribal's own methodology, which requires a very limited number of categories for benchmarking purposes. The categories outlined here are aligned with those they use to evaluate IT and other university services.

Tribal uses two main sets of categories – those relating to staff costs and non-pay costs. For each category, we proposed guidance for the company and for members as to what should be included to ensure transparency and comparability. The descriptions of what activities or costs should be included is not meant to be fully comprehensive, but instead aim to cover the main areas of library activity and costs. Tribal also use a denominator to assess library costs in relation to the number of users in an institution. – currently limited to undergraduate students on campus. We proposed that they replace this with a denominator which takes account of distance learning students, academic staff and others as set out below.

For more information on their approach, please see www.services.tribalgroup.com/content.jsp?page=127.

2. Benchmarking categories for staff costs

Tribal have been using a set of categories for staff costs which were based on staff roles. These are: (a) Library services management, (b) middle management / librarians, (c) senior information / resource assistants, (d) information / resource assistants, (e) administration and (f) shelvers.

We proposed the following categorisation, based on functions which would bring their assessment of libraries in line with their approach to IT and other functions within the institution.

	Main category	Guidance on staff time to be included within that category where these costs are associated with the library
1	Collections management (physical and e-collections)	<ul style="list-style-type: none"> special collections art and museum collections archives preservation interlibrary loans subscription and licence management e-resource management packages resource acquisition and loading resources into the Institutional Repository cataloguing admin to support collections management
2	Liaison and academic support/guidance	<ul style="list-style-type: none"> information literacy support copyright and licensing guidance handling APCs (article processing charges) and open access support services research support resource / reading list support admin for academic support and liaison
3	Leadership and management	<ul style="list-style-type: none"> staff management and internal HR training management and development of library buildings and facilities general administration support for these functions

	Main category	Guidance on staff time to be included within that category where these costs are associated with the library
4	Front-line support	shelving and stock circulation desk and roving support outreach activities including communications and marketing dealing with enquiries service evaluation induction admin associated with frontline support
5	Library systems	library management systems resource discovery systems institutional repositories handling maintenance and hosting costs print and copy services associated admin

3. Benchmarking categories for non-pay costs

Tribal categorises non-pay costs as (a) books, (b) periodicals / newspapers, (c) equipment / consumables, and (d) other costs.

We proposed the following minor modification of their approach:

	Category	Included within that category
1	Books	books, ebooks and ebook databases

	Category	Included within that category
2	Journals	journals (print and electronic) and journal databases
3	Other resources	content other than books and journals licences interlibrary loans APCs
4	Equipment, consumables and systems	print/copy services library management systems resource discovery systems institutional repository running costs maintenance agreements
5	Other	outreach materials including publicity and promotion materials training and internal advocacy materials

4. Denominator

Tribal have been using students based on campus as a denominator for evaluating the cost effectiveness of library spend. Instead, we proposed that they use:

“All students on campus and off campus at a partner centre in the UK or overseas, or on a designated and dedicated campus in UK or overseas or as distance learners on all campuses, plus academic staff.”

5. Tribal's response

For benchmarking staff costs, Tribal have responded to say that will use the set of codes we have proposed, plus an additional code for general administration.

For non-pay costs, Tribal have stated that they will continue to use their existing categories.

On the demoninator, they have stated that they will use "student and academic FTE" as a default option, although institutions will have the choice of using the following categories instead:

- total student FTE
- on-site student FTE
- university total income.

6. Conclusion

We hope that SCONUL's intervention will prove helpful for members in that the changes that Tribal appear to be adopting will reflect more accurately the work of our member libraries.

We would be keen to hear feedback from members who work with Tribal in the future to understand how their new approach is working on the ground, and we would be happy to feed back to Tribal any further comments.