

Delivering the SCONUL Annual Statistics

Deadline for responses: 5pm, Wednesday 25 April, to be sent to Ruth Stubbings, Deputy Director [ruth.stubbings@skonul.ac.uk]. The full timeline is in section three.

1. Background

SCONUL is a membership organisation which represents academic libraries in the UK and Ireland. Our five employees (four full-time, one part-time) are based near Euston Station in London. SCONUL has delivered its Annual Statistics since 1995.

Production of statistics on library activities is a core SCONUL service, allowing members to benchmark their service against that of their peers, as well as providing a detailed picture of library activity across the UK and Ireland. For example, the longitudinal data has been used to explore trends in [library staffing and roles](#) (2017), [library spaces](#) (2016) and [eBook usage](#) (2015).

The statistics are also used by our strategic partners, for instance, the data is embedded into the HESA (Higher Education Statistics Agency) [Heidi Plus](#) service. In addition, it provided key source data for the [Jisc Business Intelligence](#) pilot.

The Statistics Steering Group provides oversight of the production and dissemination of the Annual Statistics. It is responsible for setting the questions used in the questionnaire, providing guidance documentation to members, evaluating the process and making recommendations for changes. The successful provider will work closely with the group on all the above activities. The Statistics Steering Group is made up of SCONUL representatives and a member of the SCONUL office. The group reports through the Services Steering Group to the SCONUL Executive Board.

The majority of the data is self-reported by our member institutions through our website, though we also draw data from other sources such as HESA (Higher Education Statistics Agency) and OfS (Office for Students). The successful provider will use the online website (questionnaire) to access the data. Data is downloadable in Excel format.

Data is submitted by member institutions twice a year:

- November: Strategic Planning Set⁽ⁱ⁾
- January: Full Data Set

For the 2016/2017 SCONUL return:

- 122 submissions were received for the Strategic data set
- 156 submissions were received for the Full return
- Of the 156 returns, 144 members were contacted regarding queries with their return.

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A private online discussion list is available for member institutions to discuss the submission requirements and any queries they have in relation to the return. The successful provider will be expected to monitor the list and respond to queries. Member institutions can use the SCONUL Reporting Tool available on our website to undertake benchmarking activities.

A PDF version of the questionnaire (the SCONUL Return) with guidance notes is available online. A temporary password can be allocated to access the latest report for the purposes of this tender. Please see section 3 below.

1. Requirements

Methodology and approach

The chosen provider is expected to:

- Use sound and appropriate methodology for collating, analysing, and publishing the SCONUL Annual Statistics.
- Provide clear, consistent advice to members on the submission of data through both the online discussion list and email.
- Sanity check the current data with previous submissions and investigate anomalies.
- Review and where appropriate, tactfully investigate the data and comments submitted by member institutions to ensure they are accurate.
- Meet deadlines for producing and disseminating information to both SCONUL and its members.
- Provide secure data management, including regular back up of data.
- Work according to the mission and ethos of SCONUL in our aim to support academic libraries, librarians and their institutions.
- Adhere to SCONUL policies on the usage, ownership and sharing of the data.

Communications and relationship

The chosen provider is expected to:

- Maintain awareness of ongoing developments in other relevant sector bodies (e.g., HESA, Jisc, OfS, etc.) that will have an impact on the usage and relevance of the SCONUL statistics, and bring such changes to the attention of the Statistics Group where appropriate.
- Develop and maintain an awareness of sector trends on the use of data e.g. learning analytics and benchmarking.
- Raise issues relating to the collection and reporting of data with the Statistics Steering Group and with the SCONUL office where appropriate.

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- Work collaboratively with the SCONUL office and website⁽ⁱⁱ⁾ support to revise the Return (collection tool) and Reporting tool annually if required.
- Practice good communication with the SCONUL statistics networks, including responding to queries on the private online discussion list and via email.
- Communicate regularly with the Chair of the Statistics Group on progress and attend meetings as appropriate.

Outputs

The chosen provider is expected to produce the following:

- Publication of the Strategic Planning Set data tables for circulation to participating institutions.
- Annual Statistics publication, including a short introductory report (an example is available publically here: <http://www.sconul.ac.uk/sites/default/files/documents/Analysis%20Loans%20ebooks%20visits%20June%202015.pdf>)
- Collation of the library question in the NSS, so it can be incorporated into the Annual statistics.
- Data tables for publication on the SCONUL website. The data to be provided in xls or csv format which can be downloaded and used by the membership.
- Revised Return (collection tool) and associated guidance.
- At the request and under the advisement of the SCONUL office, data and analysis for stakeholders and partners.
- Other ad hoc analysis, advice or reports for the SCONUL office, Board, and Statistics Steering Group.

Medium-term sensitivities

- With the introduction of the General Data Protection Regulations (GDPR) in May 2018, we would anticipate that the successful candidate will be conversant with GDPR.
- The SCONUL Reporting Tool is adequate for the current data analysis needs of members, but it may not meet their data expectations in the future.
- There is a growing demand for the sharing of data across the Higher Education sector. SCONUL and its members recognise that it will need to review and agree how and when the SCONUL Annual Statistics can be shared with other parties.

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Regular deadlines

The chosen provider should anticipate working to the following deadlines with a similar pattern for subsequent years.

Return (collection tool) amended and published on website	Fri 17 August 2018
Deadline for institutions submitting their Strategic Planning Set data	Fri 22 November 2108
Strategic Planning Set data circulated to participating members	Wed 19 December 2018
Deadline for institutions submitting their Full data set	Fri 24 January 2019
Annual Library Statistics publication produced	Fri 31 May 2019
Annual Library Statistics publication disseminated to members	Fri 28 June 2019
Data for HEIDI prepared and submitted	Fri 31 May 2019
Data available on Reporting Tool	Fri 28 June 2019

2. Timeline of tender

This process is being undertaken with an aim to having a provider selected in advance of collecting any 2017-18 data. This process begins with the revision of the Return (collection tool) in July; collection of data from members begins in August.

Thu 5 April 2018	Office to send tender document to potential suppliers
Thu 12 April 2018	Potential suppliers to send office any questions related to the tender and the service.
Wed 18 April 2018	Office to reply to all potential suppliers with answers to questions
Wed 25 April 2018	Proposals received by Ruth Stubbings (ruth.stubbings@sconul.ac.uk) by 5pm on 25 April.
25-30 April 2018	Shortlisting by panel
Late May 2018	Panel to meet with potential providers and make a selection
May-July 2018	Transition period
July-August 2018	SCONUL Return revised and made live on the website for collection of the 2017-2018 data to begin

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3. Responding to the ITT

It is anticipated that a contract will be awarded for three years, with the work being reviewed after the first year. If the work is not completed in the first year to the satisfaction of the Executive Board, SCONUL reserves the right to cancel the contract at this point. If the work is completed to the satisfaction of the Executive Board over the full three years, a further two years of work may be awarded.

If your company is interested in providing a response to this ITT, please contact Ruth Stubbings (ruth.stubbings@sconul.ac.uk) for a temporary website account so that you can gain access to the SCONUL Return and reporting tool.

Responses should be sent to **Ruth Stubbings by 5pm on Wednesday 25 April.**

Your response to this ITT should address the following questions in detail:

1. How would you approach the work and meet the requirements as described in section 1?
2. Have you worked on similar, long-term projects? If so, please provide details and examples of outputs if possible.
3. Please describe your business, including the number of employees and use of outside contractors to complete work.
4. Please outline who would be involved in the work and their qualifications and experience for this task.
5. Please provide estimated costings for a single year, with an indication of how rates are likely to change year-on-year.
6. Please provide a short summary of sector wide issues that you believe may be relevant to this work.
7. Please provide three references, preferably from clients with similar needs to our own.
8. Please provide your availability for interviews on the Thursday 24th of May.

Your response will be evaluated on:

- Technical and professional expertise and ability to deliver the Annual Statistics to the SCONUL membership within the timescales. (60%)
- Cost / value for money. (30%)
- Relevant knowledge and experience, particularly related to libraries or the HE sector. (10%)

- (i) The Strategic Planning Set data is a subset of the full data set, which is collected and distributed earlier to allow library directors to use the data for budgeting and planning for the next year.
- (ii) The company chosen to deliver the Annual Statistics will not be expected to provide technical website support or development. This technical work is contracted to another agency. Any interaction the chosen provider has with the SCONUL website will be with the support of the office and the website support provider.