

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. Technology and markets

- 2.1 This project is being led by a SCONUL working group, the Technology and Markets Strategy group. This group works closely with stakeholders to develop and articulate a shared understanding of the development of library infrastructure based on member needs, including identifying areas where those needs are not being met fully and working with partners to address these.
- 2.2 The group also shares information on emerging technology and on innovative ways of using existing systems and kit; highlights concerns about individual commercial performance where appropriate; monitors competitiveness in individual markets; and considers emerging markets as appropriate.

3. Objectives

- 3.1 SCONUL is seeking consultancy support to aid in the development of a regular survey of our members' use of current and emerging technologies across their library services.
- 3.2 We expect this survey to enable:
 - a. SCONUL to identify areas of library activity in which there is a lack of competition and / or shared perceptions of poor value
 - b. SCONUL to identify individual providers with which there are concerns about performance and / or value across the SCONUL community
 - c. individual members to identify potential suppliers in key areas of library activity, and to easily assess how their performance and value for money is viewed by others
 - d. SCONUL and our members to identify emerging areas of library activity and

to identify which technologies are being employed to meet these requirements, if any, and to assess their suitability

- e. SCONUL and our members to identify adoption of emerging technologies and new uses for existing technologies.

4. Deliverables

- 4.1 The appointed consultant will be asked to deliver:
 - a) a report for the SCONUL Board on key considerations in developing and delivering the survey biannually and guidance on the potential uses for the data generated
 - b) a draft set of survey questions
 - c) guidance notes for members on responding to the survey
 - d) a plan and criteria for monitoring and evaluating the success of the survey.
- 4.2 We anticipate tendering separately for the regular delivery of the survey.
- 4.3 The respondent will be asked to take part in a virtual workshop launching the survey for SCONUL members.

5. Project management

- 5.1 The project will be overseen by the four project contacts identified below. Ann Rossiter and Fiona Greig will be the primary contacts 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. Anna Grigson and Gareth Owen will be involved in regular fortnightly catch ups and the key decisions at each stage of the project as set out below.

Ann Rossiter Executive Director SCONUL, 94 Euston Street, London, NW1 2HA t: 020 7387 0317 e: ann.rossiter@sconul.ac.uk
Fiona Greig Director of Library and IT Services University of Winchester t: e: Fiona.Greig@winchester.ac.uk

Anna Grigson
Assistant Director (Library)
Royal Holloway, University of London
e: Anna.Grigson@rhul.ac.uk

Gareth Owen
Deputy University Librarian and Assistant Director, University Library Service
Cardiff University
e: OwenG12@cardiff.ac.uk

- 5.2 The successful consultant will be asked to report a minimum of twice to the SCONUL Technology and Markets group at virtual meetings with (a) interim proposals and (b) draft final deliverables.

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. This should include how the respondent will approach the categorisation of areas of library activity.
- 6.2 We note that libraries work in partnership with other functional areas within their institutions in many areas of service delivery. E.g. IT services; student help points/support services; estates and facilities; graduate school and/or research support; information compliance and records management. We suggest that areas of library activity should be broadly rather than narrowly defined by respondents.
- 6.3 We encourage respondents to respond creatively and critically to this brief and to make recommendations based on our core objectives and their expertise.
- 6.4 We have made a number of operating assumptions in developing this brief. These include that the survey will run biannually; that the survey may require separate approaches to capture the use of current technologies and the use of emerging technologies and practices; and that the data can be made openly available. Respondents to this brief are invited 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. While the majority of our members are universities, many are not. Our members also operate across the nations of the UK and Ireland. We expect the survey to have utility across the breadth of our membership.
- 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 be published under a CC BY licence.

6.6 SCONUL will be responsible for the design and production of the final report.

7. Project costs

The project should be costed at no more than £15,000 (including VAT and all internal and external expenses).

8. Timetable

Stage	Action	Timing
Tendering process	Project brief advertised	w/c 29 November 2021
	Deadline for receipt of completed submissions	5pm on Monday 10 January 2022
	Shortlisting carried out	w/c 10 January 2022
	Interviews with shortlisted consultants held	w/c 17 January 2022
	Consultancy awarded	Monday 24 January 2022
Research process	Phone briefing with SCONUL team and work commenced	w/c 24 January 2022
	Interim briefing on progress at SCONUL Technology Strategy Group meeting	March (meeting being arranged)
Publication and presentation	Final written outputs submitted to SCONUL team	13 June 2022
	Briefing on final outputs at the SCONUL Technology Strategy Group meeting	June (meeting being arranged)
	Final report agreed	4 July 2022

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 phone or skype 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 SitMui.Ng@sconul.ac.uk to arrange a phone call.

1 December 2021