

Project Brief: Analytics Platform Development Project

Document Information

Project Name:	Analytics Platform Development Project
Date:	2 November 2021
Author:	Kate Davis Director, Strategy & Analytics
Version:	1.0

Key Project Information

Project Sponsor:	Mark Sutherland Executive Director
Program:	Analytics Portfolio
Project Start Date:	September 2021
Project End Date:	March 2022
CAUL National Office Contact:	Kate Davis Director, Strategy & Analytics kate.davis@caul.edu.au
Project Management Group:	Analytics Portfolio Review Working Group chaired by the Director, Strategy & Analytics
Related Projects:	<ul style="list-style-type: none">• Analytics Platform Development Project• Communities of Practice Review
Key Documents:	<ul style="list-style-type: none">• Membership List – Analytics Portfolio Review Working Group• Terms of Reference – Analytics Portfolio Review Working Group

Project Approval

CAUL Board of Directors:	17 November 2022
---------------------------------	------------------

Project Overview

Background & Context Historically, CAUL Statistics Services have focused on collecting and presenting data from university libraries in Australia and New Zealand, for the purposes of cross-institutional benchmarking, demonstration of value and impact, and provision of sector-level aggregate data to profile libraries in Australia and New Zealand.

At its 9 September 2020 Meeting, the CAUL Board approved a proposal to establish the position of Director, Strategy & Analytics in recognition of a need to focus on a broader analytics service for CAUL, effectively establishing analytics as a portfolio of work including CAUL statistics. With the establishment of the broader Analytics Portfolio, there is a need to undertake a review of CAUL's

current statistics and analytics activities and to articulate a future direction for the Portfolio.

The infrastructure supporting collection of and access to the CAUL statistics is currently hosted and maintained by CAVAL Ltd. who are also responsible for the annual collection and publication of data from members. CAVAL is also responsible for the provision of a limited number of top level summary statistical and trend reports. CAVAL has provided this service since 1992, initially in print form but online since 2006.

The infrastructure is outdated and does not support modern data analytics practices. To deliver better value for Members, CAUL needs to implement a contemporary analytics stack that facilitates the collection, storage, transformation, analysis and presentation of data. A modern statistics stack has the potential to reduce the support overheads for data collection, automate the production of summary statistical trend reports, and automate data quality alerts to support quality control work.

A more robust, contemporary analytics stack will also support the expansion of the Analytics Portfolio. Since the appointment of the Director, Strategy & Analytics, CAUL now has the staffing capacity to support further development of analytics services and products but lacks the analytics infrastructure required to allow optimal use of the considerable longitudinal data CAUL holds in the current statistics platform.

Objectives:

1. Implement a modern, scalable, robust and interoperable analytics stack to support the ongoing collection and management of CAUL statistics and the expansion of CAUL's analytics products.
2. Develop procedures and documentation to support collection of CAUL statistics from the 2021 data collection period.
3. Ensure expenditure on the Analytics Portfolio delivers value for money.

Brief Description of Project:

This project will establish systems and processes for the CAUL National Office to assume responsibility for collecting and providing access to the CAUL statistics from 2022. This includes:

- Migrate CAUL statistics to a modern analytics environment hosted on a cloud platform.
- Set-up and customisation of the new analytics environment.
- Development of processes for statistics collection including quality control processes.

This phase of work will position CAUL to undertake the collection of 2021 statistics (i.e. those collected in 2022) on the new analytics platform, administered by CAUL National Office.

As part of this work, the following activities will be undertaken:

- Review and clearly articulate the purpose of the CAUL statistics.
 - Review the timelines for statistics collection with a view to improved timeliness in the provision of statistics.
 - Identify and map key elements from the historical dataset to the new database schema.
 - Develop an initial set of dashboards that present insights related to key metrics, particularly expenditure on scholarly content.
 - Develop processes and user documentation to support the 2021 statistics collection.
-

Benefits:	This project will deliver	
	<ol style="list-style-type: none"> 1. scalable, robust and interoperable infrastructure to support the expansion of CAUL’s analytics products 2. a significant improvement on return on investment in terms of expenditure on statistics 3. increased capacity to deliver insights from data in a timely manner 4. increased capacity to combine and transform datasets to generate new insights 5. improved data quality and reliability 6. improved user experience for Members. 	
Scope:	In scope: CAUL statistics and other analytics activities.	
Anticipated Deliverables:	<ul style="list-style-type: none"> • A modern analytics stack that supports capture, transformation, storage, analysis and reporting on CAUL statistics. • Procedures to support collection of the 2021 CAUL statistics. • Report for the Board on project outcomes. 	
Anticipated Timeline:	<ul style="list-style-type: none"> • Establish Analytics Portfolio Review Working Group – November 2021 • Undertake targeted consultation on business requirements to inform initial Tableau development – November 2021 • Consultants undertake database setup, data migration, Tableau Prep workflow development – November to December 2021 • Develop front end for 2021 statistics collection – January to February 2022 • Develop procedures and documentation to support 2021 statistics collection – January to February 2022 	
Resource Requirements:	Personnel:	This project will be led by the Director, Strategy & Analytics. An Analytics Portfolio Review Working Group will be established to provide advice and assist with undertaking the project work. It is anticipated that the workload will vary across the life of the project, but the workload for CAUL Member institution staff will not exceed approximately four hours per month.
	Project management:	The project will be managed by the Director, Strategy & Analytics.
	Budget:	A budget is provided at Appendix 1.
	Other:	N/A
Key Stakeholders:	<ul style="list-style-type: none"> • CAUL Member institutions • CAUL Board • Analytics Reference Group • Chair, Content Procurement Committee • Director, Content Procurement Services • Interworks (consultants) • CAVAL 	
Key Risks:	<ul style="list-style-type: none"> • Inadequate resources available for the project. • Budget slippage • Impact on CAUL’s ongoing relationship with CAVAL. 	

Appendix 1: Budget

Project costs

Item	Hours	Hourly rate (USD)	Cost (AUD)
Consulting			
Snowflake Rapid Start	40	\$235	\$9,400
Tableau Prep Development	80	\$235	\$18,800
Knowledge Transfer & Documentation	40	\$235	\$9,400
Total ongoing costs			\$37,600

Ongoing costs

Item	Unit cost (USD)	Annual cost (USD)
Snowflake		
Capacity	\$25 per month	\$300
Compute time 100 hours per year; 200 credits	\$4.05 per credit	\$810
Total		\$1,110
Tableau Online		
Creator licenses (3)	\$630 each per year	\$1,890*
Explorer licenses (3)	\$378 each per year	\$1,134
Viewer licenses (58)	\$135 each per year	\$7,830
Total		\$10,854
Formsite		
License	\$719.40 per year	
Total		\$719.40
Total ongoing costs		\$12,683.40

* Two Creator licenses will commence in November to allow the project work to start.