

# Project Brief: Analytics Portfolio Review Project

## Document Information

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<b>Project Name:</b>	Analytics Portfolio Review Project
<b>Date:</b>	2 November 2021
<b>Author:</b>	Kate Davis Director, Strategy & Analytics
<b>Version:</b>	1.0

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## Key Project Information

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

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## Project Approval

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<b>CAUL Board of Directors:</b>	17 November 2022
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## 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

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

This project will overlap with the Analytics Platform Development Project, which will develop and implement a modern analytics platform for CAUL. This project will take a broader view of CAUL's Analytics Portfolio and will set the future direction for the portfolio.

**Objectives:**

1. Articulate the aims, objectives and purpose of the Analytics Portfolio.
2. Address needs for data capture and analysis in specific areas of the CAUL business, including Content Procurement.
3. Explore opportunities to improve benchmarking approaches.
4. Develop a suite of analytics products that are published by CAUL on a regular basis.
5. Develop guidelines and approaches to support analytics activities including surveys and those initiated as part of strategic program projects.
6. Develop a governance model for the Analytics Portfolio.

**Brief Description of Project:**

This project will develop and articulate the aims, objectives, purpose and future directions for the CAUL Analytics Portfolio as a whole.

The project will also develop a governance model for the broader Analytics Portfolio based on its revised aims and objectives and refined foci, including the need for a reference or advisory group and/or a related community of practice. In this regard, the project will intersect with the Communities of Practice Review, which will be undertaken concurrently.

The project will begin by undertaking needs analysis:

- Determine Member needs with regard to analytics products.
- Determine needs for data and analysis across other key business areas, particularly Content Procurement, and how these needs can be met moving forward.
- Investigate the sector's need for client surveys that gather qualitative data (e.g. client satisfaction surveys) and how CAUL can support the sector's needs in this space.
- Investigate the appetite for, and feasibility of producing, new sector-level analytics products based on annual surveys (e.g. trends survey).

Consultation activities will include surveys of

- University Librarians or equivalents
- library staff involved in the collection of the CAUL statistics
- library staff responsible for evidence based practice, quality, impact and planning at their institutions
- Content Coordinators.

Additionally, workshop-style focus groups will be held with University Librarians and library staff responsible for evidence based practice, quality, impact and planning at their institutions.

**Benefits:**

This project will deliver

- an expanded set of services and products related to analytics that will make better use of CAUL's datasets and meet Members' needs
- increased capacity to deliver insights from data in a timely manner
- improved user experience for Members
- improved quality of surveys leading to more useful data.

<b>Scope:</b>	In scope: CAUL statistics and all other analytics activities.	
<b>Anticipated Deliverables:</b>	<ul style="list-style-type: none"> <li>● A statement of the aims, objectives and purpose of the Analytics Portfolio.</li> <li>● Articulation of a suite of analytics products including dashboards, reports and regular surveys that will be produced or administered by CAUL on an ongoing basis to meet the needs of Members and key CAUL business areas including Content Procurement.</li> <li>● A governance model for the Analytics Portfolio.</li> <li>● Guidelines for <ul style="list-style-type: none"> <li>○ consent arrangements for surveys conducted by CAUL or on CAUL email lists</li> <li>○ ethics approvals for CAUL projects.</li> </ul> </li> <li>● A support model for informal surveys conducted via email lists, including storage of and access to findings and reports, as well as guidelines for conducting surveys.</li> <li>● A recommendation regarding a complexity index, which may include a methodology.</li> <li>● Project report.</li> </ul>	
<b>Anticipated Timeline:</b>	A detailed project timeline will be developed in Q1 2022.	
<b>Resource Requirements:</b>	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 CAUL National Office.
	Budget:	If complex business needs are identified (particularly to satisfy Procurement needs), a consultant may be needed to support database development and workflow design.
	Other:	N/A
<b>Key Stakeholders:</b>	<ul style="list-style-type: none"> <li>● CAUL Member institutions</li> <li>● CAUL Board</li> <li>● Analytics Reference Group</li> <li>● Chair, Content Procurement Committee</li> <li>● Director, Content Procurement</li> <li>● Interworks (consultants)</li> </ul>	
<b>Key Risks:</b>	<ul style="list-style-type: none"> <li>● Inadequate resources available for the project.</li> <li>● Timeline slippage due to conflicting priorities.</li> <li>● Timeline slippage due to large scope of work.</li> </ul>	