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Benchmarking: Seeking Best Practice

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ABSTRACT

Best Practice Benchmarking (BPB) is a legitimate and rigorous evaluation methodology for organizations that aspire to become learning organizations who demonstrate best practice in products, services, and processes. The focus of this article is to describe BPB as a knowledge sharing evaluation methodology that offers a structured and methodical approach to comparing existing products, services, and processes. The approach to reasoning is deductive as there is a hypothesis; for example, is our product contemporary? Or unique? Or do we have a competitive advantage? As evaluators and evaluation operate in the tactical arena, it makes sense that evaluators would value and take a formal approach to benchmarking by adopting BPB as one methodology. On another level, when evaluators are drawn into the policy design space, policy borrowing is an appropriate activity to inform strategy. Policy borrowing is an extension of benchmarking as it moves benchmarking into the policy domain, where the product under comparison is a policy. Policy borrowing is where knowledge sharing (identifying best practice policy implementation) leads to knowledge transfer (contextual implementation of best practice policy). Grounded in the real-world experience of the authors as internal evaluators, this article describes the BPB methodology and outline where this methodology is appropriate for both the tactical (evaluation) and strategic (policy) levels

1 | Benchmarking: Seeking Best Practice

This article outlines the value of BPB as an evaluation methodology, illustrates how BPB can be applied to strengthen the program, service, and process design, and provides insight into when and where to adopt this methodology at a tactical level. Here, the term methodology is defined as the overarching research conceptualization to which various data collecting methods subscribe (Avison and Fitzgerald 1999; Halaweh et al. 2008). This article also describes how BPB may influence policy design through "policy borrowing," where knowledge sharing can lead to knowledge transfer. Connecting BPB with policy borrowing shows its value as a deductive reasoning methodology at a strategic level.

1.1 | Benchmarking Foundations

BPB is "a continuous systematic process for evaluating the products, services and work processes or organizations that are recognized as representing best practice for the purpose or organizational performance" (Spendolini 1992, 1). BPB addresses the evaluation research question about relevance. For example, within program or policy design, relevance is described as consideration across the life cycle of the program or policy, including both design and implementation (OECD 2019). When applying BPB as a comparative analysis methodology, consideration of the relevance for the beneficiary and stakeholder's needs, context, quality and design across a period of time is important.

In its broadest terms, benchmarking examines a predetermined set of variables through a structured, rigorous, replicable, and comparative approach. The variables are usually indicators of quality and when compared lead an organization to identify best practice within themselves or other organizations. Benchmarking methodology can be formal or informal, with formal further categorized into performance or best practice (Mann 2015; Mann et al. 2010). These variables are defined in Table 1.

TABLE 1 | Benchmarking definitions.

Formal benchmarking	Performance benchmarking	Describes the comparison of performance data obtained from studying similar processes or activities. For example, the comparison of financial measures.
	Best practice benchmarking	Describes the comparison of performance data obtained from studying similar processes or activities and identifying, adapting, and implementing the practices that produced the best performance results.
Informal benchmarking		An unstructured approach to learn from the experience of other organizations; therefore, not following a defined process. It refers to the type of benchmarking that everyone does at work, often unconsciously, involving comparing and learning from the behavior and practices of others (Mann 2015, 135)

This article focuses solely on formal BPB (Bogetoft 2013; Cook et al. 2004; King et al. 2008). Readers interested in informal benchmarking are directed to Adebanjo et al. (2010) and Bencheva and Tepavicharova (2016). Consistent with its roots in manufacturing (Fong et al. 1998), the focus of enquiry within BPB is products, services, and processes. Within evaluation, which often deals with social interventions and problems, these foci are translated to mean program design, offerings, and implementation processes. Moreover, BPB is introduced in this issue as a stand-alone methodology. However, it may also be incorporated into other methodologies where comparison of existing products, services and processes is one of a number of methodologies at play.

1.2 | History of Best Practice Benchmarking as a Methodology

The origin of a benchmark emerged from the discipline of land surveying in the early 20th century, where it was defined as "a bench mark is a fixed point of reference, the elevation of which is known" (Clark 1923, 306). However, this methodology emerged from the quality assurance discipline in the Japanese automobile industry (Zairi 2010). The move to the business discipline was documented in the 1980s through the prolific work of Robert C Camp, who undertook a "search for industry best practices that lead to superior performance" (Camp 1989, 1992, 1993, 1998). At the time, the United States of America's manufacturing industry found that its current internal quality assurance mechanisms failed to consider external data from various sources, including competitors. In searching for alternative methodologies, Camp adopted BPB and designed a ten-step process to guide its implementation. He went on to undertake over 200 benchmarking activities at Xerox.

An early indicator of best practice inspired Camp (1989, 1992, 1993, 1998) to adopt BPB. When he compared the production cost of a ream of paper by his company, Xerox, against the competition in Japan, Xerox found they were not competitive. The base cost of a ream of photocopy paper from Japan was significantly lower than the base cost at Xerox. This simple comparison of cost started Camp's journey of 200 benchmarking activities. Camp was not the only person interested in searching for best practice examples in the industry to compare internal products, services, and processes against those of other organizations. Spendolini also advanced foundational knowledge in BPB.

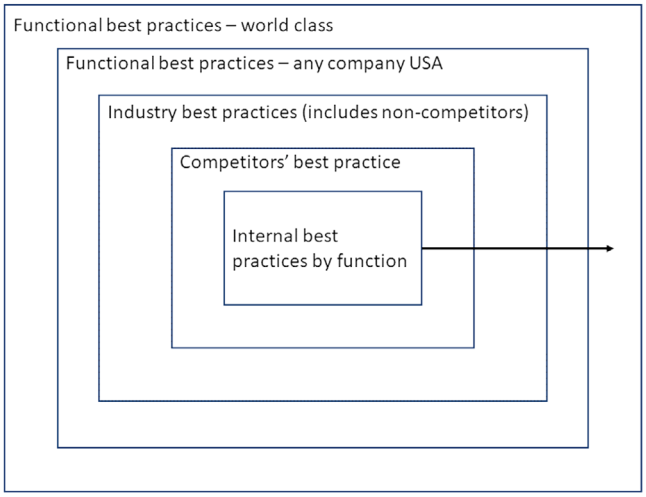

FIGURE 1 | Thinking out of the box. *Source:* Spendolini (1992, 23). Thinking "Out of the Box."

Spendolini anchored his work in the concept of thinking "out of the box." Spendolini's (1992) idea of thinking out of the box suggests organizations need to move beyond internal self-reflection to a comparison between internal and external practice. For example, by exploring their own internal best practices by function, and then moving to compare with competitors' best practices this assists an organization to test their working assumptions about the quality of their product. Do we exhibit best practice in this space? Spendolini goes on to challenge organizations to then broaden out to national business best practice and further again to world class functional best practices (see Figure 1). Therefore, benchmarking enables an organization to understand their internal practice driving their products, services, and work processes before moving toward a structured understanding of their competitor's (and non-competitors) external practice.

Thus, the internal and external viewpoints provide an organization with comparison points that may lead to best practices and even a competitive advantage. There may be clear evidence to confirm or challenge the currently held working assumptions. Spendolini's (1992) model best illustrates how BPB has influenced business practices over the last three decades. Derived from this definition, BPB compares processes and performance metrics between businesses to locate industry best practices for products, services, or processes. Although quality, time, and cost are the

TABLE 2 | Types of benchmarking.

Classification	Type	Meaning
Nature of referent other	Internal	Comparing within one organization about the performance of similar business units or processes
	Competitor	Comparing with direct competitors, to catch up or even surpass their overall performance
	Industry	Comparing with company in the same industry, including non-competitors
	Generic	Comparing with an organization which extends beyond industry boundaries
	Global	Comparing with an organization where its geographical location extends beyond country boundaries
Content of benchmarking	Process	Pertaining to discrete work processes and operating systems
	Functional	Application of the process benchmarking that compares particular business functions at two or more organizations
	Performance	Concerning outcome characteristics, quantifiable in terms of price, speed, reliability, etc.
	Strategic	Involving assessment of strategic rather than operational matters
Purpose for the relationship	Competitive	Comparison for gaining superiority over others
	Collaborative	Comparison for developing a learning atmosphere and sharing of knowledge.

Note: Source: Fong et al. (1998, 410).

most common dimensions measured in benchmarking, access to data is the most critical element. In the twenty-first century, this methodology is further enabled by greater access to data in a digital form (Mann 2015). As discussed later in this article, publicly available data is of great advantage to the application of BPB.

1.3 | Benchmarking Methodology Terminology

Benchmarking as a methodology could be considered a typology as it contains several types (see Table 2). Anand and Kodali (2008) identified 11 individual benchmarking models developed during the 1990s, and each model had between 3 and 12 classification points. For example, Codling's (1995) classification included internal, external and BPB (see Table 2). Regardless of the differences in classification labels, benchmarking as a methodology remains consistent in its intent, structured in its approach, and offers the opportunity to improve products, services and processes through knowledge sharing. Evaluators are well placed to facilitate and build upon this knowledge sharing at the tactical level leading to knowledge transfer at the strategic level. This will require that evaluators are explicit about the type of benchmarking used to avoid confusion.

The benchmarking methodology has gained traction over the last three decades. A journal, *Benchmarking: An International Journal (2024)*, and a professional association, Global Benchmarking Network, are dedicated to this area of interest. The journal aims to assist organizations to become leaders in their sector through the theoretical and application to benchmark their performance and identify the best practices in organizational management. The Global Benchmarking Network is a non-profit organization that believes "Benchmarking is a relentless strategic discovery process" (Global Benchmarking Network 2024, 1).

1.4 | High-Level Overview of Best Practice Benchmarking Methodology

The basic philosophical steps in BPB include:

1. know your operation;
2. know the industry leaders or competitors;
3. incorporate the best; and
4. gain superiority (Camp 1989, 1992, 1993, 1998).

During the 90s, Camp would have operated in an environment with digital tools to manage data. However, most data would have required manual data gathering, which was a direct resource impost for both time and cost.

Camp's (Mann 2015) 10 steps for benchmarking implementation are outlined in Table 3. These steps look relatively simple to execute and, as shown in the case example presented in this article, do not reflect the resources and time commitment required for success. It is worth noting that Steps 3 and 4 can be highly time-consuming, and, as the case example describes, this is where the majority of resources are needed. Additionally, achieving maturity in successful outcomes requires the executive to be constant in their support throughout the activity (Mann 2015) and for BPB to be embedded in organizational practice.

TABLE 3 | Camp's ten steps to benchmarking.

Stage	Step	Camp model
Planning	1	Identify what is to be benchmarked
	2	Identify comparative companies
	3	Determine data collection method and collect data
Analysis	4	Determine current performance "gap"
	5	Project future performance levels
Integration	6	Communicate benchmark findings and gain acceptance
	7	Establish functional goals
Action	8	Develop action plans
	9	Implement specific actions and monitor progress
	10	Re-calibrate benchmarks
Maturity		Leadership position attained. Practices fully integrated into processes

Note: Source: Mann (2015, 132).

1.5 | BPB in the Context of the Australian Higher Education Sector: A Case Example

Disciplines or sectors where information is held in the public domain, like the Australian higher education sector, lend themselves to this methodology (Mann 2015; Mann et al. 2010). As mentioned earlier, the emergence of digital data, data repositories, and data sharing agreements offers enormous opportunity to support the adoption of BPB. This is relevant in Australian higher education where policies and program curricula are required to be made available for public consumption and as data for the application of the BPB methodology. This, in turn, makes this data available and an excellent source for national sector comparison.

The case example presented below is provided from the Australian higher education sector meets the BPB principles (Camp 1989, 1992, 1993, 1998):

1. *know your operation*—the case example has emerged from the authors' practice;
2. *know the industry leaders or competitors*—Australian universities;
3. *incorporate the best*—by including all universities in the higher education sector in Australia, this includes the best; and
4. *gain superiority*—by conducting a sector wide benchmark, the university is well placed to make evidence-based strategic decision-making.

In the Australian context, benchmarking has been adopted by the higher education sector with particular emphasis on its ability to improve current practice and strive toward best practice. In 2000, 36 out of 38 universities developed a Manual for Benchmarking Universities, with 67 benchmarks described (McKinnon et al. 2000). Although the original Manual for Benchmarking Universities was developed through a strong collaboration among Australian universities (McKinnon et al. 2000), the higher education sector did not adopt it. There was a failure to launch as there were no levers or mechanisms to entice or require the sector to adopt and implement this manual by independent universities. This coincided with establishing the Australian Universities Quality Agency (2007), an external agency with a remit to conduct quality audits from 2002 to 2012. During this period, the Australian higher education sector was self-regulating who were required to respond to audit recommendations.

Since 2012, the Tertiary Education Quality Standards Agency (TEQSA) has been the external regulator for the Australian higher education sector (Australian Government 2023). The regulator reviews each institution on a 7-year cycle and requires universities to seek external reference points and the BPB is offered as a valued evaluation methodology (TEQSA 2019). This legislative requirement and the application of the benchmarking methodology across the last two decades are made possible through a brokered data-sharing arrangement through Universities Australia. As Universities Australia represents all universities, many datasets are available for data gathering to provide a robust set of comparable digital data points to inform BPB. The fact that appropriate data is readily available in a digital format reduces the time and resource impost for this methodology. The barriers to the application of BPB are discussed later in this article.

1.6 | The Case Example: Competitor Tracking to Inform Strategic Decision-Making

In 2019, the University of Southern Queensland (UniSQ) established an internal Evaluation Methodologies team to support strategic curriculum decision-making. This team is responsible for conducting evaluations across all academic disciplines, both internal to the university and external to the national sector. One of the reports this team produces internally is the Curriculum Structure and Models Report.

In practice, the Evaluation Methodologies team receives a request from a university executive to provide a Curriculum Structures and Models Report on a type of program, for example, Bachelor of Business. The benchmarking request may focus on

admission requirements, program structure, domestic or international offerings, duration, or program level. Regardless of the focus, the purpose of this report is to:

(i) support executive strategic decision-making around the curriculum structure of individual programs on offer, or to be offered, at the university (the decision),

(ii) identify the program (the product) market trends and market share across 5 years of the Australian higher education sector (the competitors),

(iii) identify potential areas for growth (the demand), and

(iv) give due consideration to the investment of resources, improvement of the quality, discontinuation of the program, or deeper investigation of a program (the next step).

This Curriculum Structures and Models Report is developed through a manual search of 41 Australian university public-facing websites and includes a breakdown of curriculum structures across these programs. The overall detail includes the number of core courses, the number and discipline name of all majors, and the number of electives in any program with a similar or exact same naming convention. For example, a Bachelor of Business (Accounting) and a Bachelor of Accounting would be considered the same program, and the graduate outcomes are similar.

The following UniSQ case example is mapped against Camp's 10 steps to benchmarking in Table 4. The BPB focuses on key program data identified during the initial scoping for the activity. These reports are then built from publicly available datasets, including university websites, handbooks, and University Australia data. Over the past 3 years, the resources devoted to each report have been carefully maintained. It may take between 40 h for a basic report, such as Pathway Programs with 15 relevant offers, and 180 h for a more highly complex report, such as Bachelor of Arts with over 300 variations of educational offerings across 39 out of 41 universities.

1.7 | How the Case Example Helps Describe the Value of BPB for Evaluators

As described above, BPB provides a competitive advantage for organizations that invest in this methodology (Jarrar and Zairi 2001). In a 2001 global survey of 277 organizations representing 32 countries and seven different sectors, the results strongly emphasized the quality assurance, process improvement, and setting of standards benefits of this methodology. The highest benefits in organizations included: "influencing the strategic decision-making process," "allowing more effective deployment of resources," and "process improvement" (Jarrar and Zairi 2001, 910).

There is a direct connection here to process and impact evaluations. The outcomes from this global survey on benchmarking have very similar benefits (outlined above) to process and impact evaluations, where continuous improvement leads to a continuous learning organization (Alderman 2022). There is a natural symmetry between BPB and other methodologies found within the evaluator's toolkit. For example, the Curriculum Structures and Models Report case example highlights how the BPB methodology assists the University of Southern Queensland in meeting its regulatory requirement for external reference points and benchmarking (TEQSA 2019).

1.8 | Limitation for Best Practice Benchmarking as a Methodology

BPB requires the availability of comparative products, services, or processes. Where BPB is applied, and similar products, services, or processes are absent, BPB is not recommended. On the other hand, there is also an opportunity space available through BPB. The discovery of the absence of any products, services, or processes may document that the artifact under investigation is unique, which may provide evidence of competitive advantage (Zairi, 1994). This would allow an organization to definitively state that their program was "unique" and perhaps indicative of being cutting-edge in that sector.

1.9 | Barriers to the Success of the Best Practice Benchmarking Methodology

Success in this methodology is not necessarily guaranteed by simply adopting and implementing the above mentioned steps. It takes key stakeholders' buy-in to ensure the benchmarking activity is successful (Hong et al. 2012). In addition, BPB requires comparable products, services, and processes to this methodology to have utility. Where there is no data in the public domain or data-sharing arrangements, this means negotiating data-sharing agreements as part of the BPB activities. This will take time and requires organizations to trust others with their data. Extant research (Hong et al. 2012) has also documented several barriers, including:

(1) "Uncooperative sources: Without key stakeholder buy-in improvement will not be possible.

(2) Strained personal relationships: The tenor of the relationship between the manager and the expert is critical to success.

(3) Internal competition: Is where different sections of the organization may be territorial and working against the change.

(4) Overemphasis on innovation: If copying is considered of lesser value to innovation, then this places a barrier to change from benchmarking.

(5) Cranky copiers: Those implementing the change need to be amenable to change rather than resistant to change." (Hong et al. 2012).

These concerns were further supported by a global survey on business improvement and benchmarking in 2008 with 452 participating companies and organizations from 44 different countries (Global Benchmarking Network 2010). Participants were asked their opinion and practice experience with respect to the adoption and implementation of different business improvement methodologies (including benchmarking). The concerns around the adoption of BPB were:

(i) "lack of availability of training in the methodology;

TABLE 4 | UniSQ case example: Curriculum structures and models report.

Stage	Step	Camp model	Curriculum case example
Planning	1	Identify what is to be benchmarked	A program of study, Bachelor of Communication and Media
	2	Identify comparative companies	All Australian universities
	3	Determine data collection method and collect data	Publicly available data including Australian Bureau of Statistics, Universities Australia data sharing agreement content, university websites
Analysis	4	Determine current performance "gap"	Compare the programs offered by university as a national dataset, through geographic analysis by State and Territory and by affiliations.
	5	Project future performance levels	Through analysis of five-year historic trends, trends which are available to suggest future performance levels. This is of particular relevance when programs emerge or discontinue.
Integration	6	Communicate benchmark findings and gain acceptance	A report is prepared to provide analysis of historic performance together with comparison of curriculum structures.
	7	Establish functional goals	All programs offered by Australian universities are bound by the Australian Qualifications Framework and Higher Education Standards Framework.
Action	8	Develop action plans	UniSQ conduct annual, interim, and comprehensive reviews of programs each year. The program team is required to analyze program data packs together with Curriculum Structures and Models report and prepare an action plan. This action plan is implemented the following year.
	9	Implement specific actions and monitor progress	The program action plan is implemented the following year. All annual action plans are then consolidated into an annual program quality report which is reviewed by university governance committees.
	10	Re-calibrate benchmarks	UniSQ have implemented a suite of sentinel indicators to ensure that the learning and teaching ecosystem is in balance. These are reviewed regularly to determine if further data sets have emerged and to ensure the current sentinel indicators continue to have value.
Maturity	Leadership position attained. Practices fully integrated into processes		Within the Australian higher education sector, leadership position is about offering programs of study that continue to be relevant, meet student and industry needs and fulfil our obligations as a university. After 5 years of embedded practice, this benchmarking process continues to deliver value to the university through the support of evidence-based strategic decision-making.

(ii) projects often did not follow a protocol or steps;

(iii) lack of project brief or scope;

(iv) many of the organizations either did not locate best practice or did not implement best practice findings; and

(v) it was difficult to identify the cost and benefits analysis at project completion" (Global Benchmarking Network 2010, 8).

A number of these concerns can be addressed through the establishment of an appropriate project management mechanism and associated timeframes and milestones. Also, it may be that the outcomes that emerged from the 2008 survey (Global Benchmarking Network 2010) may well be influenced by the barriers identified within the review of the international journal (Hong et al. 2012). This would go some way to explain the limited success in implementation of change. For example, if the executive management and operational staff are not invested in the change process, then the environment is not amenable to BPB. Another example is where the managers tasked with the implementation of change are resistant to change, then there is little to no chance of the BPB activity being successful.

1.10 | Can BPB Be Used to Evaluate Policies?

Until this point in the article, BPB has been restricted to program products, programs and processes. However, it is not uncommon for evaluators to also be asked to evaluate other evaluands, like policies. This brings up the question of whether BPB is appropriate for policy evaluations. We believe it is appropriate, and policy borrowing is one way to do so.

Policy borrowing, in our view, is an extension of benchmarking. It moves benchmarking from the tactical into the strategic policy domain where the product under comparison is a policy. Policy borrowing is where knowledge sharing (identifying best practice

policy implementation) leads to knowledge transfer (contextual implementation of best practice policy). With respect to the development of policy, there is a body of literature within the education discipline called "policy borrowing" where policy is not developed in isolation; instead, it is knowledge sharing leading to knowledge transferred from elsewhere. For instance, it is possible to trace the migration of national quality assurance policy from the United States of America to Europe, through the United Kingdom and eventually down to Australia (Dale 1999). One term used is "policy migration," however, Halpin and Troyna (1995) call this mechanism "policy borrowing." For example, educational policy development is borrowed or knowledge shared, which leads to knowledge being transferred from one context to another (Dale 1999; Halpin and Troyna 1995; Steiner-Khamsi 2006, 2014, 2016).

Before policy borrowing can occur, it is important to understand where best practice policy is occurring and in which context the policy was successfully implemented. Consideration must also be given to the timing and economics of the policy implementation (Steiner-Khamsi 2006, 2014, 2016) and the synchronicity between systems under review, for example, education systems (Halpin and Troyna 1995). Understanding the original context in which a policy was successful is imperative to the successful borrowing and determining what adaptations need to occur for successful implementation in the new context (Lingard 2010; Lingard and Garrick 1997). Therefore, when policy borrowing offers policy decision-makers an opportunity to build on best practices, this is where BPB as a methodology is useful. Without this as an additional step added into the BPB process to contextualize a policy to suit the new context for implementation, the policy implementation can fail.

The following example demonstrates how BPB can, and does, influence policy through locating international best practice policies, borrowing them, to then contextualizing them for implementation in a local environment. The notion of establishing a national government policy to guide public governance, performance, and accountability for the expenditure of public funds is not a new idea and nor was the notion developed in isolation. For example, enacted in 1993, the United States of America's Government Government's Performance and Results Act (GPRA) was designed to improve program management throughout the Federal government. Agencies are required to develop a 5-year strategic plan outlining its mission, long-term goals for the agency's major functions, performance measures, and reporting results. The GPRA was in turn adopted as a source document for the design of the Australian PGPA Act (Morton and Cook 2018).

In 2013, the Australian context, the *Public Governance, Performance and Accountability Act 2013* (PGPA Act) set the scene for all Commonwealth entities to improve performance information and therefore strengthen lines of public accountability (Department of Finance 2022a, 2022b). When the United Nations named 2015 the *Year of Evaluation*, one element of the PGPA Act was the development of the enhanced Commonwealth Performance Framework 2015 (Morton and Cook 2018). This framework required Commonwealth entities and companies to have a non-financial portfolio (narrative) to support their financial portfolios with a requirement to engage in evaluation activities. More recently, the Australian Federal Government established funds within the federal budget for an Australian Centre for Evaluation within the Department of Finance (2023). The Australian Government's position on evaluation across the last decade signals an ongoing interest and value placed on evaluation research and activities.

Subsequently in 2016, the Canadian government borrowed elements of the Australian PGPA Act when designing their Policy on Results (Government of Canada 2016). This practice is called policy borrowing with BPB as the foundation methodology to inform the design of a domestic policy (Steiner-Khamsi 2016). The authors consider this example from policy transfer from the United States of America to Australia through to influence the Canadian policy environment to be a relevant example of BPB leading to successful policy borrowing.

2 | Conclusion

BPB is a structured, well-known methodology recognized across multiple disciplines that is complementary and has symmetry within evaluation practice. For organizations aspiring to become a learning organization and to demonstrate best practices in products, services, and processes, BPB is a legitimate and rigorous deductive reasoning methodology. As mentioned at the beginning of this article, BPB answers the question of "relevance" with respect to the OECD evaluation criteria. In addition, even though it is a deductive reasoning approach, it can also be incorporated into inductive reasoning methodologies such as environmental scans, rapid reconnaissance, and strategic environmental assessment. For evaluators who are drawn into policy design where knowledge sharing can lead to knowledge transfer, BPB is a legitimate and rigorous methodology to include within your evaluator's toolkit. Evaluators do need to be reminded that when there are no products, services or processes available for BPB you may find that you are in an emergent space and may need to consider other methodologies that are cognizant with knowledge brokerage (creating new knowledge).

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