

Organizing a Successful Workload Analysis Project

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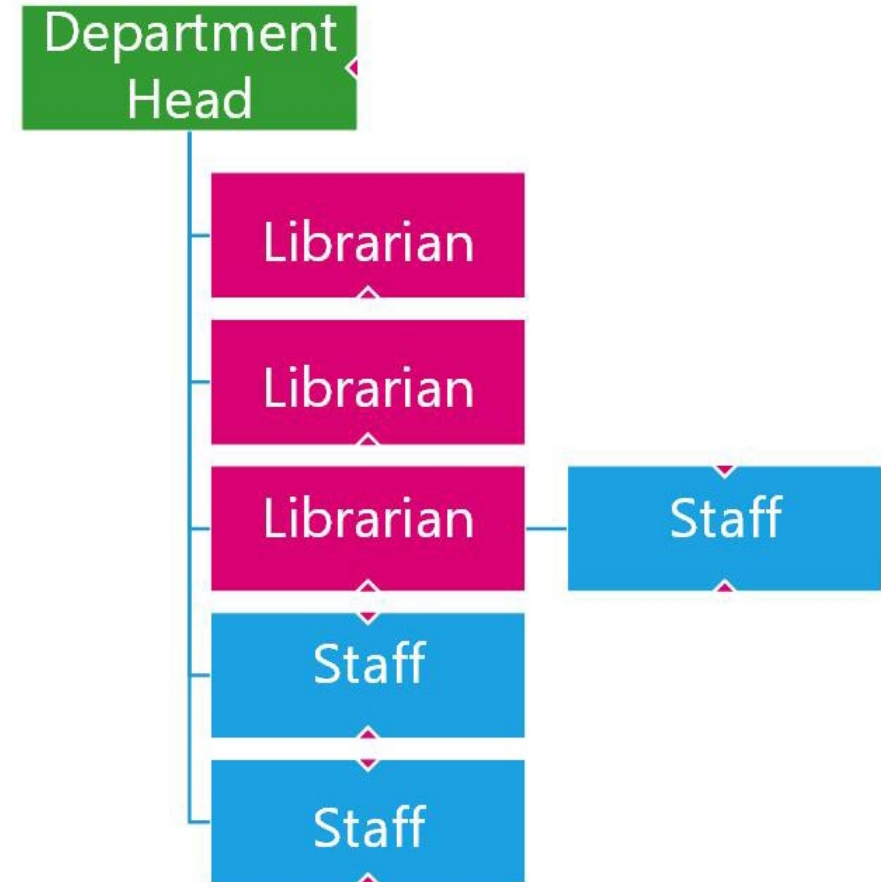


Outline

- Overview
- Goals
- Initial planning
- Pilot study
- Conducting the project
- Analyzing the data
- Results
- A more basic study

Overview

- University of North Texas
 - Carnegie R1 Institution
 - 45,000 students
- Cataloging at UNT Libraries
 - Decentralized
- Cataloging and Metadata Services Department
 - 1 Department Head
 - 3 Librarians
 - 3 Staff



Goals

- What kind of work was being done?
- Who was doing the work?
- Was the work evenly distributed?
- Would a redistribution be necessary?

Initial Planning

- Involve the department from the outset
- Instill trust - Make sure it goes both ways
- Not a *Department Head* project, but a whole *Department* project
- Make it learning project
 - It is OK if the outcome is “Everything stays the same.”
- Be sure to choose the most “normal” month to run the project

Pilot Study

- Goal: Collect data for one week on how we spent our time
- Reporting format: Word or Excel
- Categories: Whatever!
- Results
 - Variety of categories (narrow to broad)
 - Influenced the choice of reporting format and categories for the study, selecting those that would be easy to apply and analyze

Conducting the Project

- Goal: Collect data for one month on how we spent our time
- Reporting format: Excel spreadsheet with categories and color coding
- Reporting by hours and minutes (down to 0.25 hour)

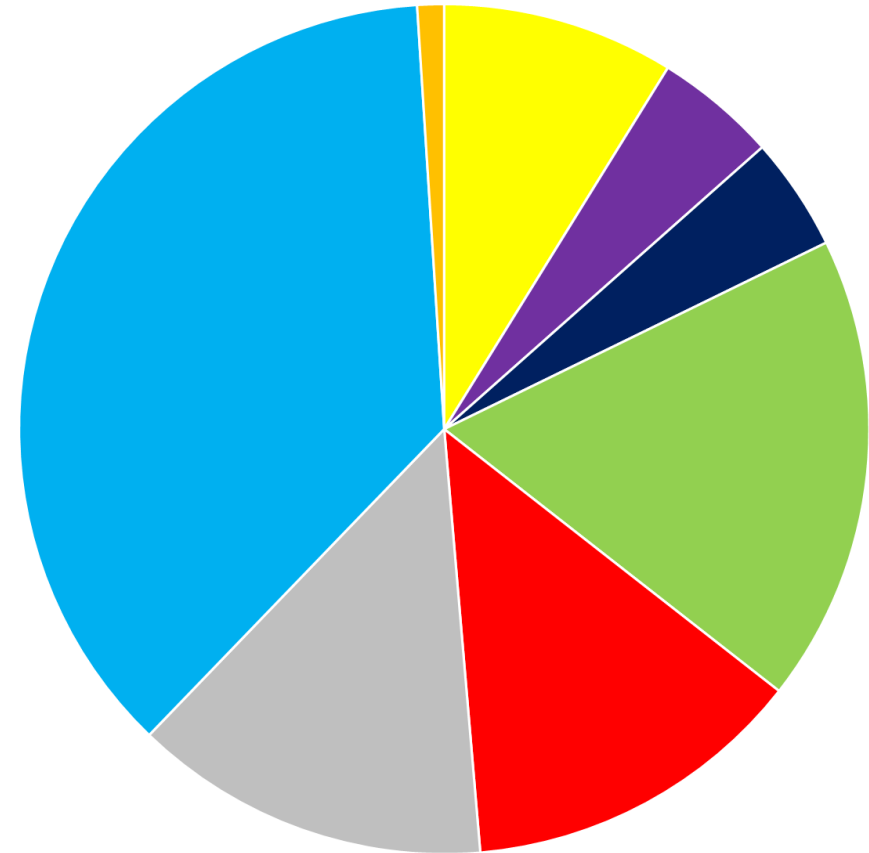
Regular Cataloging
Unusual Cataloging
Meetings
Administrative
Scholarship
Service
Email/Teams
Other

Analyzing the data

- Collect all the raw data
- Look it over and see basic patterns
- Work with your people to help standardize the raw data as needed
- Use a “parking lot” to put ideas for next time
 - Defining meetings vs. training
 - Full days off

Results

Regular Cataloging	30.63%
Email/Teams	14.82%
Other	11.29%
Meetings	10.89%
Administrative	7.34%
Scholarship	3.86%
Service	3.59%
Unusual Cataloging	0.85%



A more basic study...

- **Phase 1**: Define overarching tasks
 - Shelving, pulling holds, cataloging, shelf-reading, email, and so on
- **Phase 2**: Record data
 - 15-minute chunks

2018	Monday, Jan 1	Tuesday, Jan 2	Wednesday, Jan 3
8 :00	✓		
8 :15			
8 :30			
8 :45			
9 :00			
9 :15			
9 :30			
9 :45			
10 :00			
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1 :00			
1 :15			
1 :30			
1 :45			
2 :00			
2 :15			
2 :30			
2 :45			

A more basic study...

- **Phase 3**: Incorporate other data
 - Hourly gate counts
 - Library visits
 - Circulation
 - Hours open
 - Holds pulled
- **Phase 4**: Calculate ratios and compare
 - Visits per hour / gate count
 - Average circulation per staff, per hour
 - Items handled per branch
- **Phase 5**: Make decisions and implement changes
 - Can patrons pull their own holds?
 - How many staff at the desk?
 - Move staff between branches
- **Phase 6**: Further study (if warranted)

Thank you!



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