Organizing a Successful Workload Analysis Project

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Outline

• Overview

• Goals

• Initial planning

• Pilot study

• Conducting the project

• Analyzing the data

• Results

• Another study example
POLL

Has anyone done a workload analysis project before?

A. YES
B. NO
C. SORT OF
Work Analysis Methods

• Numeric analysis
  • Time spent on work
  • Outputs produced

• Process analysis
  • Examining workflows
  • Revising steps to improve the process

Top Level Goals

• Collect data needed to make informed decisions.

• Use our resources efficiently and effectively.

• Ensure that our focus is on activities that directly support our library’s goals.
Typical Workload Analysis Project Outline

1. Define goals
2. Gather information
3. Analyze data
4. Make Decisions
5. Communicate results
Why do a work analysis project?

What scenarios would call for this type of project?

Please type your ideas in the chat.
Scenarios

- Staffing changes
- Management needs
- New or changing workflows
- Productivity issues
Overview

- University of North Texas
  - Carnegie R1 Institution
  - 47,000 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)
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
POLL

Where did CMS spend most of its time?

A. MEETINGS
B. CATALOGING
C. EMAILS/TEAMS
D. OTHER
<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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POLL

How does this compare to your institution or department?

A. SIMILAR
B. NOT-SIMILAR
C. UNSURE
# How CMS gathers statistics

- **Cataloging Statistics Workbook**

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<th>Withdrawals (outgoing)</th>
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<th>Discarded</th>
<th>Lost/Missing</th>
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**TOTAL: 183**
How CMS gathers statistics

- Tracking E-Resources Workbook

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So what happened then?

• Combine result data and cataloging statistics data

• Redistribute work as necessary

• Follow up soon after to see how the new work is going

• Analyze cataloging statistics again in six months
Communicating results

• **Internal Communication**
  • Talk to those affected before making changes
  • Talk to everyone about what changes will happen
  • Follow up with everyone to see how the changes are going

• **External Communication**
  • Depends on the scope of the changes
    • Contact points
    • Workflow interactions
  • Other departments might be interested too
Another study...

Efficiently

Effectively
"This is not a critique"

• Employees may be skeptical...
• Communicate reasons why you are doing the analysis
• Be sure to say how the data will be used

• "This is not going to be used to reduce our staffing, but rather to assess where time is spent."
Getting started

• **Phase 1**: Define overarching tasks
  • What are the major activities of each worker?
  • How granular should you get?

  • Shelving
  • Pulling holds
  • Storytime
  • Program planning

  • Meetings
  • Closing duties
  • Required training
  • Email
Tracking time spent

• **Phase 2:** Record data
  • Online templates
  • 15-minute chunks
  • Good for people up and about
  • Consider recording quantities
  ▪ But remember the nuance!
Gathering data

• What does “opening” or “closing duties” entail?

• Does “pull holds” include printing labels, pulling the physical items, updating in the system AND putting them in transit bins?

• Color-code for easy big-picture view
Keep going...

• **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
  • Compare employee shelving times
Make decisions

- **Phase 5**: Make decisions and implement changes
  - How often to pull holds?
  - How many staff at the desk?
  - Move staff between branches

- **Phase 6**: Further study
  - (if warranted)
  - Process analysis
Bibliography


--Includes explanations and instructions for different types of workload analysis projects as well as workforms to use in a project
POLL

Do you think you might engage in a workload analysis sometime in the next year?

A. I'D LIKE TO
B. PROBABLY NOT
C. UNSURE
Thank you!

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