

# 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

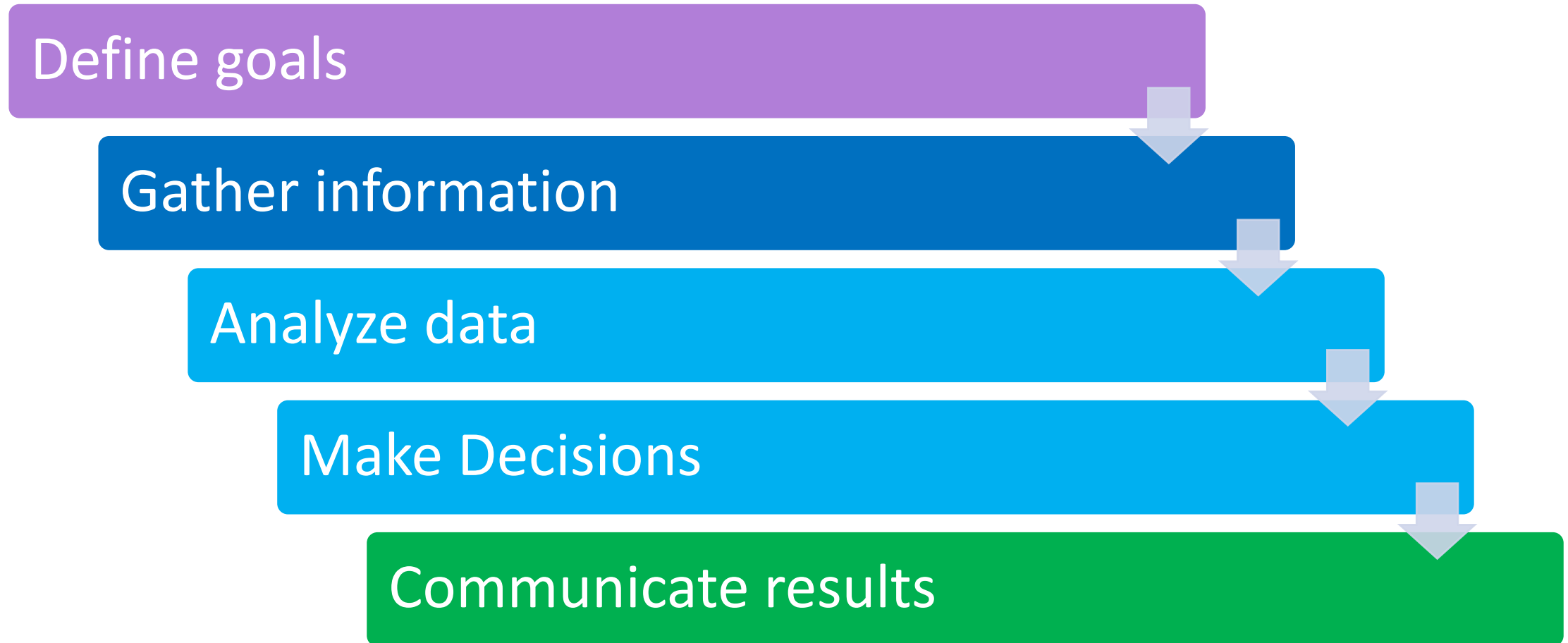
Mayo, Diane, and Jeanne Goodrich. 2002. *Staffing for Results : A Guide to Working Smarter*. Chicago IL: American Library Association.



# 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





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

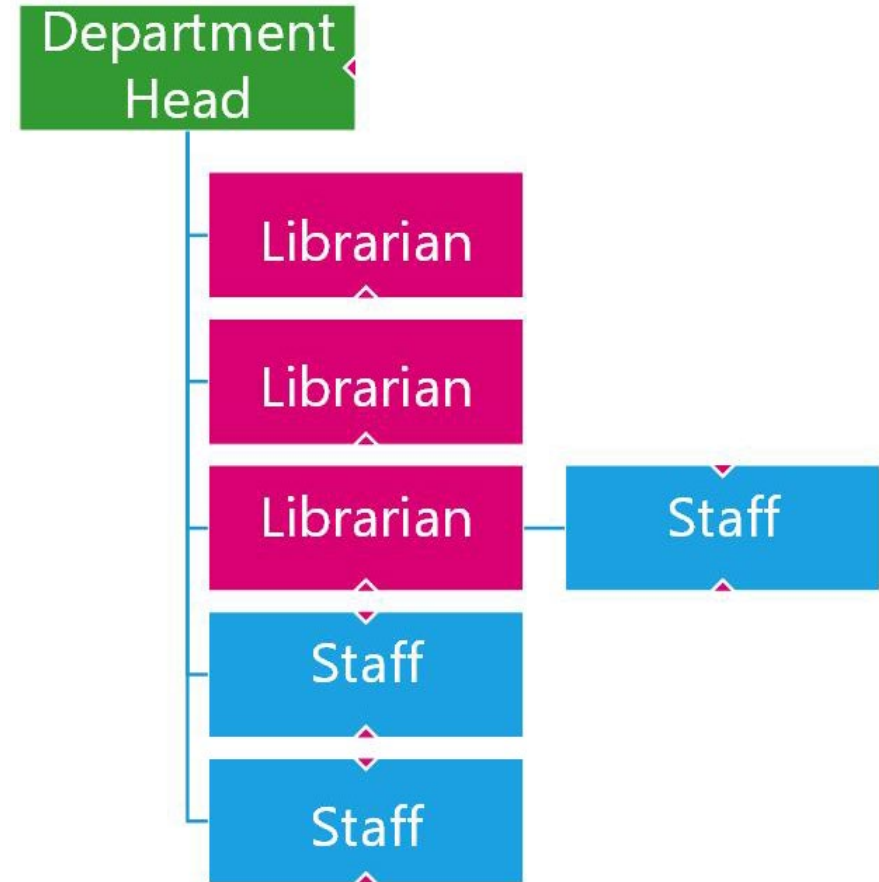
New or changing workflows

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)

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



# POLL

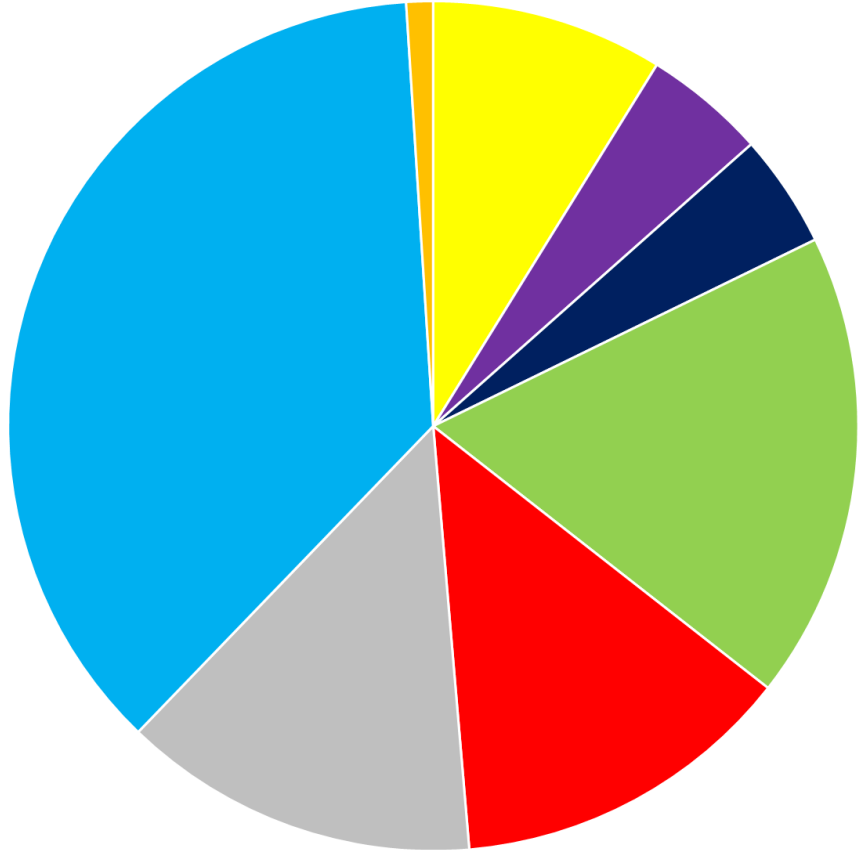
Where did CMS spend most of its time?

- A. MEETINGS
- B. CATALOGING
- C. EMAILS/TEAMS
- D. OTHER



# 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%







# POLL

How does this compare to your institution or department?

- A. SIMILAR
- B. NOT-SIMILAR
- C. UNSURE

# How CMS gathers statistics

- Cataloging Statistics Workbook

	October								
	CATALOGING (incoming)						WITHDRAWALS (outgoing)		
RESOURCE CATEGORIES	Regular Copy Cataloging	Original/Complex Cataloging	Overlaid / Recataloged	Added Copy	Other (added volumes,	TOTAL	Deleted / Discarded	Lost/Missing	TOTAL
Books	183	13	0	6	209	411	0	1	1
Cartographic resources	0	0	0	0	0	0	0	0	0
Classed serials	1	0	0	0	0	1	0	0	0
Computer discs	0	0	0	0	0	0	0	0	0
Databases	10	0	0	0	0	10	0	0	0
Electronic resources - individual	0	0	0	0	0	0	0	0	0
Kits	0	0	0	0	0	0	0	0	0
McNaughton lease books	0	0	0	0	0	0	0	0	0
Microforms	0	0	0	0	0	0	0	0	0
Motion pictures/videorecordings	0	0	0	0	0	0	0	0	0
Non-projected graphics	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0
Periodicals	0	0	0	0	0	0	0	0	0
Slides	0	0	0	0	0	0	0	0	0
UNT theses/dissertations (current	12	0	0	0	0	12	0	0	0
Websites	0	0	0	0	0	0	0	0	0
3-D Objects	0	0	0	0	0	0	0	0	0
TOTAL	206	13	0	6	225	431	0	1	1

# How CMS gathers statistics

- Tracking E-Resources Workbook

Collection Name (910)	Subcollection	Number of Records	Number of Records Loaded	Date Loaded	Loaded by	Bib Record Start	Bib Record End
Kanopy	10/23/23	825	11	24-Oct-23	Aretha	b7727877x	b77278884
Books at JSTOR Open Access Collection	October 2023	102	102	31-Oct-23	Cher	b77281822	b77282838
Kanopy	11/6/23	829	4	6-Nov-23	Aretha	b77285712	b77285748
Oxford Bibliographies	September 2023	14	14	6-Nov-23	Dolly	b77285578	b77285700
Synthesis Collections (Springer)	2023	475	475	6-Nov-23	Elvis	b77285827	b77290562
ACS symposium series ebook	October 2023	2	2	8-Nov-23	Ringo	b77291803	b77291815
Recent Researches In Music Online	October 2023	9	9	13-Nov-23	Sting	b77312168	b77312247
SpringerLink eBooks	October 2023	211	211	14-Nov-23	Tina	b77316873	b77318973
Docuseek2	missing record	1	1	14-Nov-23	Aretha	b7731900x	b7731900x

Instructions **New Records** Overlaid Records Withdrawn Records Calen ... (+) ◀ ▶



# 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!

2018	Monday, Jan 1	Tuesday, Jan 2	Wednesday, Jan 3
8	✓		
9			
10			
11			
12			
1			
2			

# 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

6:45am		12:45pm	check in
7:00am		1:00pm	check in
7:15am		1:15pm	shelving
7:30am		1:30pm	shelving
7:45am		1:45pm	shelving
8:00am	opening duties	2:00pm	shelving
8:15am	check in	2:15pm	break
8:30am	pull holds	2:30pm	circ desk
8:45am	pull holds	2:45pm	circ desk
9:00am	circ desk	3:00pm	pull holds
9:15am	circ desk	3:15pm	pull holds
9:30am	circ desk	3:30pm	closing duties
9:45am	circ desk	3:45pm	closing duties
10:00am	break	4:00pm	
10:15am	shelving	4:15pm	
10:30am	shelving	4:30pm	
10:45am	shelving	4:45pm	



# 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

Mayo, Diane, and Jeanne Goodrich. 2002. *Staffing for Results : A Guide to Working Smarter*. Chicago IL: American Library Association.

--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



# Links

Workload  
Project  
Template



<http://tinyurl.com/54k2tbbu>

Cataloging  
Statistics  
Template



<http://tinyurl.com/bdfxjk6s>

E-Resource  
Tracking  
Template



<http://tinyurl.com/u43xzjdj>

# Thank you!



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