

Organizing a Successful Workload Analysis Project

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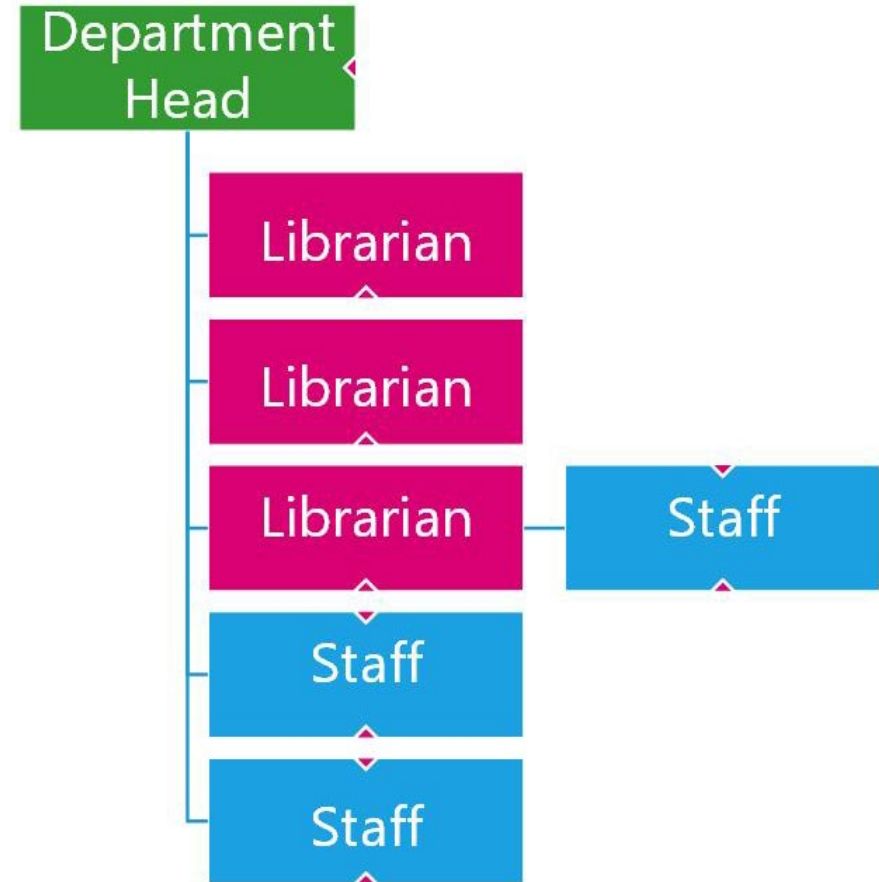


Outline

- 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)

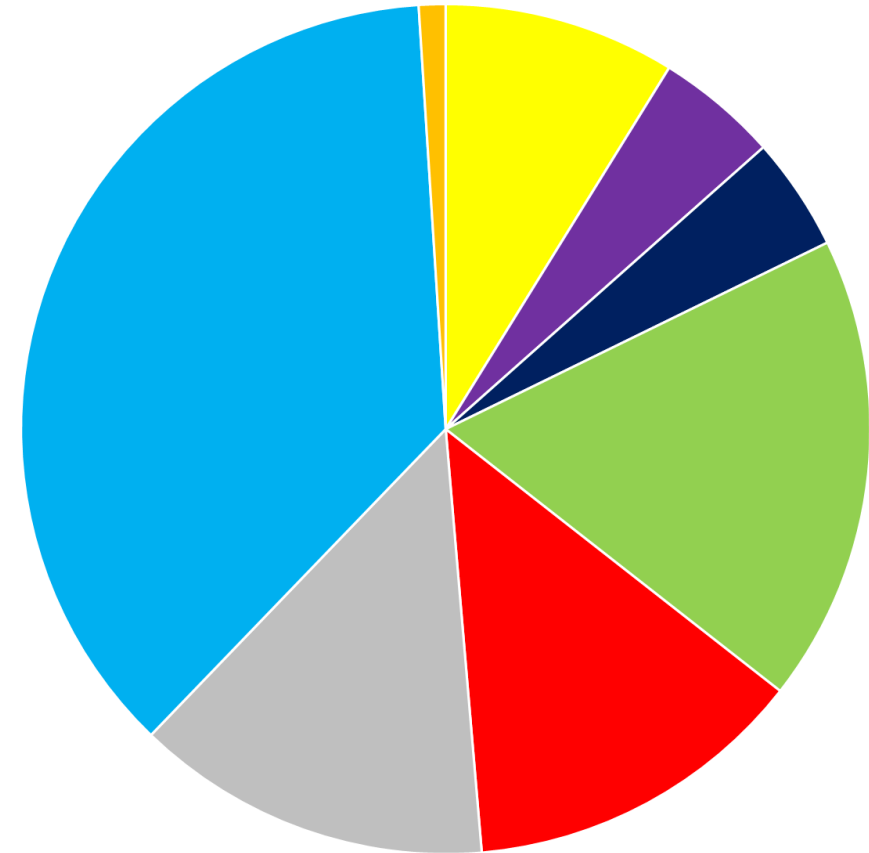
| |
|--------------------|
| Regular Cataloging |
| Unusual Cataloging |
| Meetings |
| Administrative |
| Scholarship |
| Service |
| Email/Teams |
| Other |

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 |
|------|-----|---------------|----------------|------------------|
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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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