Organizing a Successful Workload Analysis Project

Kevin Yanowski
Department Head

Catherine Sassen
Principal Cataloger

Sian Brannon
Senior Associate Dean

University of North Texas
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)

<table>
<thead>
<tr>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Cataloging</td>
</tr>
<tr>
<td>Unusual Cataloging</td>
</tr>
<tr>
<td>Meetings</td>
</tr>
<tr>
<td>Administrative</td>
</tr>
<tr>
<td>Scholarship</td>
</tr>
<tr>
<td>Service</td>
</tr>
<tr>
<td>Email/Teams</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Cataloging</td>
<td>30.63%</td>
</tr>
<tr>
<td>Email/Teams</td>
<td>14.82%</td>
</tr>
<tr>
<td>Other</td>
<td>11.29%</td>
</tr>
<tr>
<td>Meetings</td>
<td>10.89%</td>
</tr>
<tr>
<td>Administrative</td>
<td>7.34%</td>
</tr>
<tr>
<td>Scholarship</td>
<td>3.86%</td>
</tr>
<tr>
<td>Service</td>
<td>3.59%</td>
</tr>
<tr>
<td>Unusual Cataloging</td>
<td>0.85%</td>
</tr>
</tbody>
</table>
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
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!

Kevin Yanowski  
Department Head,  
Cataloging and Metadata Services  
Kevin.Yanowski@unt.edu

Catherine Sassen  
Principal Cataloger  
Catherine.Sassen@unt.edu

Sian Brannon  
Senior Associate Dean,  
Collection Management  
Sian.Brannon@unt.edu

Click here for a blank Workload Project template