

CARLI
I-Share Cataloging and Authority Control Team
and
I-Share Acquisitions and Serials Team
Spring Forum
April 30, 2009

Resources for workflow analysis:

Library of Congress Working Group on the Future of Bibliographic Control
(<http://www.loc.gov/bibliographic-future/>)

CARLI Technical Service Workflow Seminar held September 10, 2008

The Quality library: a guide to staff-driven improvement, better efficiency, and happier customers, by Sara Laughlin and Ray W. Wilson. Chicago, American Library Association, 2008.

Blog: Designing Better Libraries (<http://dbl.lishost.org/blog/>) "The goal of this blog is to provide information, news and ideas that librarians can use to design a great library user experience for their communities."

Reasons for conducting a workflow analysis: Resourceful, Resilient, Ready

Identify and eliminate any unnecessary tasks

Identify and eliminate duplicate processes

Identify and eliminate busy work

Identify and eliminate inefficiencies in the library's workflow

Verify that there are back-up personnel for all key library functions.

Ensure that all library processes add value to the faculty and students

Identify any positions to be re-tasked

Identify new tasks to be undertaken by any position

Process

Understand the institution, the patrons, the technology and the perceived constraints on the institution. Later you may challenge those constraints, but it is important to understand current perceptions.

Observe the real workflow. Where does the overlap occur? Who is the hub? Where is the bottleneck?

Brain-storm or visualize new processes and services. Don't be afraid to let go of a process or a service. Ask the tough question: Is this process or service essential for the library to function?

Evaluate and refine the proposed new processes or services. No idea is so good that it can't be improved upon. Solicit input from within the library, from within the institution, from the patrons. Evaluate what works and what doesn't, what services or processes confuse people, what they seem to like, and incrementally improve the processes or services.

Implement the new processes or services.

Sample staff questionnaire for workflow analysis:

What are your primary responsibilities?

Who do you interact with as part of your primary responsibilities?

What tools do you use?

What percentage of your time is spent on each primary responsibility?

What road blocks, or problems do you routinely encounter?

What are your ideas for eliminating the road blocks, or solving the problems?

Who is your back-up?

How can bibliographic services/circulation add value to the library/university?

Questions/comments contact:
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