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Notes on Operations

Falling In and Out of Love

The Impact of Moving to a Remote Location on Cataloging Workflow

Jean Dickinson, Charity K. Martin, and Margaret Mering

As academic libraries undergo renovation and building projects, various technical service operations are frequently moved out of the main building and housed in an off-site location. The aim of this research was to discover, by means of a questionnaire, what the impact of such a move is on the workflow of professional catalogers. The researchers concluded that a positive experience on the part of the catalogers depends upon detailed planning, thoughtful administrative support, and an element of luck. However, some problems are unavoidable in moving catalogers away from the main collection.

In the fall of 1999, renovation began on the fifty-eight-year-old south wing of the University of Nebraska-Lincoln's (UNL) Love Library. Love Library is the main library and, along with its nine branches, makes up the UNL Libraries. Since the building remained open to the public during the project, the library's administration decided that, of all library departments, the technical services staff and operations (Cataloging, Acquisitions, and Binding Departments) could most easily be moved off-site and with the least disruption. Also, because Love Library was to be renovated floor by floor, a staging area was needed for ongoing relocations of various departments and materials. Therefore the technical services units, including all cataloging operations, moved from UNL's main library to a warehouse on the edge of campus, renovated for temporary use by the libraries.

This temporary move necessitated a reevaluation of the professional catalogers' day-to-day work practices. An integrated workflow was already established for the catalogers to create records and deal with items for the university's branch libraries, but no system was in place for catalogers dis-

tant from the main collection and its reference tools. The authors, all professional catalogers at UNL, determined that the move provided an excellent research opportunity and decided to examine the phenomenon of being located away from their institution's main collection. At UNL, the Cataloging Department is responsible for monograph and serials cataloging in all formats, authority control, and maintenance. It is staffed by five professional catalogers, three managerial professionals, and 25.5 office service staff and is coordinated by a department chair, also a professional cataloger. Making allowances for the many different configurations of academic library cataloging departments, the UNL Cataloging Department was felt to be fairly representative. Thus, the authors believed the conclusions drawn from their research might be applied profitably to others' situations.

The main purposes for researching the impact of distance between collections and their catalogers were: (1) to determine what effects moving original cataloging operations away from the main library had on workflow, and (2) to identify possible trends across

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libraries. The results of this survey could be useful in determining what changes and problems catalogers moving off-site could expect to experience.

Research Development

Original catalogers were chosen for the study due to the nature of their positions, which require them to utilize the overall library collection in the course of their cataloging. Also, original catalogers often have responsibilities beyond the department, such as involvement in faculty governance and reference duties. Copy catalogers' responsibilities seldom require that they consult reference works beyond their immediate work areas.

Literature searches on the topic of college or university library cataloging operations at remote locations resulted in only a few general articles. Given the lack of research in this area, the authors decided to develop a questionnaire aimed at other catalogers who had recently been involved in a move to a remote site. Developing the questionnaire provided another opportunity to modify and bring the research into focus.

Population Parameters

The first step in developing the questionnaire was to determine the characteristics of the population to be studied. The authors agreed that the study would consist of catalogers who held masters' degrees in library science and held professional level positions at university libraries with at least one branch library. The population would include catalogers who cataloged in all formats and had varying levels of job responsibilities, including catalogers with administrative duties. More than one cataloger from the same institution would be permitted to respond. Catalogers planning to move off-site, but who had not yet done so, would be

excluded from the study. Participants would be catalogers who were currently working away from, or who had worked away from, their library's main collection within the last five years (1997–2001). Given the increasing amount of information available via the Internet, this last qualification would take into consideration the affect of electronic resources on catalogers' workflow. These qualifications were intended to produce the most current, applicable data possible for future decision making by catalogers and administrators researching the logistics of cataloging at a distance. Given the narrow population parameters of libraries that had moved cataloging operations within the last five years and consisting of at least one branch, the authors expected and received a small number of responses.

In retrospect, the parameters may have been too limiting. The resulting sample of fifteen catalogers was small and not statistically significant. A sample consisting of both professional and paraprofessional catalogers might have resulted in a more significant volume of data.

Questionnaire Background

After making a long list of possible questions to ask, we pared down the questionnaire and divided it into four main sections. The first dealt with personal information about the respondents, including information about their job duties, their number of years of experience, and where they were employed. The second section focused on communication and interaction with colleagues and materials at the main and/or branch libraries. The third section dealt specifically with how the catalogers' workflow was affected by the move. The last section asked for specific details of the off-site move. "Off-site" was defined as not being located in the main collection, being apart from other library opera-

tions, and being remote from branch libraries. Telecommuting was not included in this definition.

Once the required university approval for the questionnaire was received, the authors sent a description of the project via e-mail, a consent form, and the questionnaire to the five professional catalogers and the department head at UNL as a pretest. This questionnaire is presented in appendix 1. The authors were included in the sample. After these local questionnaires had been reviewed, a revised questionnaire was designed based upon the pretest. The revised questionnaire is presented in appendix 2.

The questionnaire to be administered to non-UNL respondents differed only in the order of the questions. The questions were reordered to a more natural progression, based on comments from the pretest. The sequence of questions for the pretest was: personal history and job duties, communication and interaction, changes in workflow, and details of the move. The sequence of questions for the second questionnaire, for non-UNL catalogers, was: details of the move, communication and interaction, changes in workflow, and personal history and job duties.

The description of the project and an invitation to participate were posted to the online library discussion lists Autocat, Serialst, MLA-L (Music Library Association), and Libadmin. Some catalogers who worked in departments known to have moved off-site were contacted directly by the authors and encouraged to participate. Other respondents were self-selected by answering the call issued on the various library discussion lists. It should be noted that these self-selected respondents might have had some unreported bias in their response to the survey. Respondents were able to connect directly to the questionnaire by means of a hot link in the e-mail message and were given

one month to send in their answers. Questionnaire responses were sent to the e-mail account of one of the researchers.

Results and Analysis

Of the twenty-four responses to the e-mail, fifteen met the population parameters established by the authors. These fifteen respondents were from six different institutions, including UNL. Since few university libraries moved their technical services operations off-site within the five-year time frame, these six institutions appear to be representative of the population and provide preliminary data for use in analysis. Three of the libraries were Association of Research Libraries (ARL) members.

Details of the Move

All of the catalogers were from institutions that moved their cataloging operations off-site between 1998 and 2001. For thirteen respondents, the move from the main library was to be a temporary situation. One institution's catalogers had already returned to the renovated location in the main library. Two of the respondents reported that their move would be permanent. The authors were aware that the responses of catalogers could be influenced by whether the move was temporary or permanent. A permanent move potentially has a more lasting impact on catalogers and their workflow.

The physical environment of the new locations varied, from good—quieter, having more parking (a perennial issue on campuses), and visually pleasant—to bad—isolated, unhealthy (one respondent said the temporary building was a sick one), and depressing. However, in general, respondents were either satisfied with or neutral about their new locations.

Personal History and Job Duties

The respondents' job responsibilities varied, as did the number of years working in libraries and for their current institution. Table 1 presents respondents' responsibilities. They cataloged monographs and serials in all formats, including cartographic materials, music scores, sound and video recordings, kits, games, and archival record groups. Some cataloged in languages other than English, such as Spanish, Portuguese, and native languages of Latin America.

Participants also had other cataloging-related duties. Three managed cataloging departments, one supervised a serials cataloging unit, and another supervised student workers. Five respondents mentioned that they had training and policy development responsibilities. Three occasionally teach graduate level cataloging classes. Other cataloging responsibilities included coordinating cooperative cataloging programs and serving as a liaison to an architecture slide-cataloging project.

Some of the survey respondents performed a wide range of noncataloging activities. Two of the participants also had collection development responsibilities. A librarian from a small library was also responsible for serials acquisitions and check-in. Three respondents worked at the reference desk. One oversaw a map collection, and another encoded manuscripts for her institution's electronic text center.

Respondents had worked at their current institutions from 1.25 to 37 years, with an average of 11.5 years. Eight of the fifteen respondents had worked at their libraries for 10 or fewer years. Only one had worked at her institution for more than 20 years. The total number of years that respondents had worked in libraries ranged from 6.5 to 43 years, with an average of average of 21.5 years. These totals included professional experience as well as time spent as student and para-

Table 1. Major Responsibilities*

By Duty	No. of Responses
Cataloging	9
Supervising	1
Cataloging and Supervising	5
By Format**	
Monographs	8
Serials	3
Both	3
N/A	1
Other Duties	
Training	3
Reference/Public Services	5
Policy Making	1
Committees	2
Tenure	1
Teaching	2

* (15 respondents)
 ** Other formats listed under monographs or serials were electronic resources, maps, music, videos, and sound recordings.

professional workers. Seven of the fifteen participants had worked in libraries for more than 20 years. Two had 43 years of library experience.

Communication and Interaction

The respondents overwhelmingly reported that there was less contact with staff in the main library after the move, especially personal contact. Overall, survey respondents maintained contact with other staff at the main library via phone, e-mail, or fax, a little less than once a day. The catalogers made an effort to visit the main library in person two to four times a month.

Travel time, for both catalogers and materials, was the issue mentioned most often as a hindrance when people began to discuss their workflow. Having to travel to the main or branch library for problem solving or checking materials was considered to be an unwanted interruption and time-consuming. Time spent waiting for materials to arrive was felt to be too great for some catalogers whose courier services were slow.

Public transportation between the off-site location and the main library existed, but was not ideal. Most of the respondents agreed that transportation between their current location and the main and branch libraries was regular, but even so, waiting for a shuttle was not always convenient.

Instead of using public transportation, catalogers often would drive between locations. When asked about parking, only one respondent indicated that there was not adequate parking at the off-site facility. Many respondents said that the parking at the off-site location was good, but that the problem was finding parking close to the main library, typical of many campus situations.

Another transportation alternative was walking. For two institutions, the distance did not make walking a viable alternative. If a cataloger chose to walk, the time it took to complete the walk did not make it worthwhile. However, for four institutions, walking often was seen as the best option for getting from place to place.

The survey respondents were asked to rank their reasons for traveling to the main library. The options listed were meetings, cataloging (such as gathering information for creating a record), research (for tenure work or for a committee), administrative duties, and other. Overall, catalogers ranked meetings as the number one reason for travel to the main library, followed by cataloging, other (noncataloging reasons), administration, and research. When asked if they waited until they had multiple reasons to go to the main library, the majority of catalogers answered yes.

Workflow

When respondents were asked specifically about the advantages and disadvantages of the new work site, none of the advantages listed had to do with cataloging or workflow. Table 2 pres-

ents the advantages and disadvantages. Most of the advantages had to do with being away from the bustle of the main campus and the traffic of the main library. One person even mentioned "being away from the administrative types" as the greatest advantage. In contrast, most catalogers noted that being away from the main library's reference collection was a disadvantage to their cataloging. Since consulting reference books or gathering information for cataloging records was more difficult, some cataloging problems that would normally have been researched were ignored or skipped over, resulting in a briefer cataloging record. Serials catalogers felt this lack most often. Many of the respondents who worked with serials reported making more educated guesses, especially in terms of title changes and relationships between publications.

The effect of the move on productivity and on the quality of cataloging was revealing. In all cases, the survey respondents stated that the move negatively affected at least one factor, either productivity or quality. The catalogers still cataloged in the same way, but the increased distance tended to affect how many pieces could be cataloged and how well they could be cataloged. If the cataloger attempted to maintain high quality, productivity suffered. If high productivity was maintained, quality suffered. Only one respondent indicated that both quality and quantity fell. Most respondents cited the added time spent consulting reference sources at the main library as the reason for this decrease in the quantity and quality of their cataloging. Some respondents talked about their frustration in trying to communicate to a noncataloger by long distance exactly the type of information they needed to create a record. Many respondents chose instead to invest the time in traveling to the main library rather than using a nonexpert to get the (possibly incomplete or incorrect) infor-

Table 2. Perceived Advantages and Disadvantages of a Remote Site

Disadvantages of Remote Site	No. of Responses
Distance from reference/stacks	7
Distance from colleagues	6
Courier problems	3
Serial titles change issues	3
Travel to main library	2
Advantages of Remote Site	
No advantage mentioned	8
More relaxed atmosphere/better environment	4
Better parking	1
Away from administration	1

mation. Thus, the catalogers did not change their workflow so much as they added time to their existing workflow patterns.

The catalogers who answered the questionnaire were very frank and generous with their thoughts. Thus there were visible trends that could be discerned in both the advantages and disadvantages they felt. Most catalogers (10 of 15) tended to be more positive, citing improved parking, avoidance of construction noise and dust, and the absence of distractions as advantages. A few (5) catalogers described problems with the loss of the university culture, isolation, and longer drive time between home and work.

The benefits and the disadvantages of being distant from one's collection can be broken into five categories. The two disadvantages were work delays/productivity issues and the inability of the Web to completely replace the need for the main library's reference collection. The three benefits were good parking, a more relaxed atmosphere, and fewer interruptions. Only six responded to the "other comments" section at the end of the questionnaire. Comments varied, but the respondents generally expanded upon their answers in other parts of the survey. Overall, there were more positive statements than negative about catalogers' distance from the main library.

In terms of work relationships, most of the respondents felt that the collegial and social situation had suffered. All but two respondents reported less contact with people in the main library; one said it was the same; one said it did not apply to the situation. The greatest disadvantage catalogers felt was that they missed interacting with other librarians and staff. As strictly related to workflow, however, there were fewer interruptions with which to deal.

UNL's Experience

The experiences of the professional catalogers at UNL fell into the same range of themes as those found in the answers from librarians at other institutions. The UNL Libraries administration began preparing for the move a year in advance by planning how it would be conducted, how individual workstations would be set up, and by consulting technical services staff on their ideas and concerns. This planning resulted in a relatively smooth physical transition from one location to the other.

In order to ensure that materials would flow efficiently between Love Library and the temporary site, the courier services used between Love Library and the various branches were evaluated. They were determined to be inadequate for the amount of materials that technical service operations (Cataloging, Acquisitions, and Binding Departments) handle on a regular basis. Therefore, an extra van was commissioned for moving materials, and a half-time library assistant position was created to handle the increase in materials traffic. Another decision that had a positive impact on technical service operations was moving the mailroom along with technical services. This ensured that the mail went directly to the Acquisitions Department, which receives the greatest amount of material.

The libraries' administration studied staff transportation issues and determined that the availability of the campus shuttle and city buses would be adequate. However, the buses were not always regular or frequent enough for some staff. These staff members often chose to walk from the temporary location to the main library. Since the walk took ten to fifteen minutes, this was considered a satisfactory alternative. Another option some staff chose was to schedule their workday in order to find parking close to Love Library.

Before the move, the original catalogers gave careful consideration to the reference sources they utilized most often in order to ensure that these resources would be available at the temporary work site. The Cataloging Department took its own reference collection with it. Even so, the catalogers, especially those responsible for serials, found that they needed to travel to the main library on a regular basis to check reference sources and serial issues.

When finally settled in, the staff discovered that the temporary facilities were comfortable and pleasant. The staff who remained at Love Library had to deal with the inconveniences caused by the work, noise, and smells created by the renovation. The ease of parking at the new location, the quiet environment, the reduced number of interruptions to the workday, and the removal from the busy center of campus all resulted in good morale among UNL technical services staff. Several expressed a desire to remain permanently at the temporary site.

Recommendations

Since the planning and organization of a large-scale move have been proven by the evidence to be successful, given a rational and effective design, the ultimate continuing effi-

ciency of cataloging operations may be predicted. Many perceived factors influence the outcome of relocation and distance from the main collections, and most of them can be taken into account and integrated into a viable workflow. The following recommendations, gleaned from the respondents, can aid in a smooth transition for catalogers and other technical services staff. Even though some problems cannot be avoided, these suggestions will help minimize difficulties.

A reliable and carefully planned courier or delivery system is an essential component for off-site locations. The lack of this vital element was listed several times as a complaint from respondents. The consensus was that these respondents' poorly planned courier services were an inconvenience in the planning and coordination of work. One respondent mentioned that serials maintenance was going to the wrong location (off-site) because staff forgot to change their old work habits. Planning and organizing, including staff education, could have prevented this problem.

Careful consideration should be given to staff transportation issues. Even though the issue of time spent en route to the main library was a big concern, there does not seem to be a solution. Any distance means additional time to be spent traveling, so people chose the alternative that worked best for them, although it was not always ideal. All forms of transportation—walking, using one's own car, campus shuttle, or city bus—were considered to be an acceptable part of the situation.

In preparing for a move, catalogers should consider what resources they regularly use to complete their work. Many tools used by catalogers are kept in their departments and can be moved to a remote location. Other resources may be part of a main library's reference collection or a stack

area. A possible alternative is to use an Internet version of a resource. An earlier edition of a reference work can be taken to the new location. Another option is to purchase another copy of the resource.

Finally, the quality of the physical environment plays a critical role in the success of a move and the morale of the staff. For example, the frequency of janitorial visits and the performance expectations of facility maintenance should be agreed upon before moving to the new location. It is best to have one or two staff assigned to monitor and report on facility concerns.

In addition, the authors believe that the following two recommendations should be added. These recommendations are based on in-depth conversations among the authors and their colleagues at UNL.

Early planning for the move is essential. The libraries that had done early planning had smoother moves and happier staff.

Thoughtful administrative support is essential for a move that is to be relatively free of large unforeseen

problems. The administration also should acknowledge that staff need time to adjust to new surroundings and new group dynamics.

Conclusion

The next possible stage of this research would be to look beyond the experiences of original catalogers to that of copy catalogers and other non-professional staff within cataloging departments. This will result in a larger sample size, which may produce more statistical significant data. Another area of research would be to examine what the differences are between the experiences of cataloging and acquisitions staffs when experiencing a move away from the main library collection.

Moving from the main library to a remote location does affect workflow for catalogers, especially in the realms of transit time and in checking reference sources or previous issues of serials. However, with proper planning, administrative support, and an element of luck, the experience can

be more positive than negative for all involved. Remember, planning is not just at the administrative level. The good organizational skills that are inherent in the life of a cataloger should be called upon as well.

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Appendix 1

Questionnaire Administered to UNL Catalogers

- | | | |
|---|---|---|
| 1. How many years have you worked at your current library? | Once a week | More contact |
| | 2–4 times a month | Less contact |
| 2. How many years have you worked in libraries? (Please include student and paraprofessional experience.) | Once a month or less | Same amount of contact |
| 3. What are your major responsibilities? | | |
| What formats do you catalog? | More than once a day | |
| What are your other assigned duties? | Once a day | |
| 4. On average, how often do you visit the main/branch libraries for your cataloging-related work? | 2–4 times a week | |
| | Once a week | |
| | 2–4 times a month | |
| | Once a month or less | |
| | | 7. Why do you visit the main/branch libraries? (Please number from 1 to 5, with 1 being the most frequent and 5 being the least frequent, in order of frequency.) |
| | | _____ Meetings |
| | | _____ Research |
| | | _____ Cataloging-related work |
| | | _____ Administrative |
| | | _____ Other _____ |
| | 6. Do you have more or less contact with personnel in the main/branch library (libraries) since the move? | |
| | | 8. Do you wait until there are multiple reasons (such as research, |

- meetings, or cataloging-related work) before going to the main/branch libraries?
9. What are the benefits/disadvantages of your department/section not being as near the collection(s) you work with the most?
 10. How has the distance impacted the productivity and/or quality of your cataloging?
 11. When did you move to your present location?
 12. Was the move temporary or permanent?
 13. Is transportation/parking between your current location and the main/branch libraries regular and convenient?
 14. What is the distance between your current location and the primary collection(s) you work with?
 15. Have you moved back to the main library, or is your department/section still at a remote location?
 16. If the move is temporary, has this affected any of your cataloging decisions?
 17. Did all of Technical Services move, or just selected sections?
 18. How did your cataloging workflow change due to the move?
 19. Are there other factors that influenced your cataloging workflow besides the move (i.e., reorganization, outsourcing, etc.)?
 20. Has the move been more positive or negative than you thought it would be? Why?
- Other comments:

Appendix 2

Questionnaire Administered to Catalogers at Other Institutions

1. When did your cataloging operations move off-site?
2. Was the move temporary or permanent?
3. Is transportation/parking between your current location and the main/branch libraries regular and convenient?
4. What is the distance between your current location and the primary collection(s) you work with?
5. Have you moved back to the main library, or is your department/section still at a remote location?
6. If the move is temporary, has this affected any of your cataloging decisions? If so, how?
7. Did all of Technical Services move, or just selected sections?
8. On average, how often do you visit the main/branch libraries for your cataloging-related work?
 - More than once a day
 - Once a day
 - 2–4 times a week
 - Once a week
 - 2–4 times a month
 - Once a month or less
9. On average, how often do you communicate with personnel in the main and/or branch library via telephone, e-mail, or fax?
 - More than once a day
 - Once a day
 - 2–4 times a week
 - Once a week
 - 2–4 times a month
 - Once a month or less
10. Do you have more or less contact with personnel in the main/branch library (libraries) since the move?
 - More contact
 - Less contact
 - Same amount of contact
11. Why do you visit the main/branch libraries? (Please number from 1 to 5, with 1 being the most frequent and 5 being the least frequent, in order of frequency.)
 - _____ Meetings
 - _____ Research
 - _____ Cataloging-related work
 - _____ Administrative
 - _____ Other _____
12. Do you wait until there are multiple reasons (such as research, meetings, or cataloging-related work) before going to the main/branch libraries?
13. What are the benefits/disadvantages of your department/section not being as near the collection(s) you work with the most?
14. How has the distance impacted the productivity and/or quality of your cataloging?
15. How did your cataloging workflow change due to the move?
16. Are there other factors that influenced your cataloging workflow besides the move (i.e., reorganization, outsourcing, etc.)?
17. Has the move been more positive or negative than you thought it would be? Why?
18. How many years have you worked at your current institution?
19. What is the name of your institution?
20. How many years have you worked in libraries? (Please include student and paraprofessional experience.)
21. What are your major responsibilities?
22. What formats do you catalog?
23. What are your other assigned duties?
24. Other comments.