Homeward Bound: How to Move an Entire Cataloging Unit to Remote Work

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Homeward Bound
How to Move an Entire Cataloging Unit to Remote Work

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ULA Annual Conference
May 21, 2021
Background
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- Early 2019:
  - USU’s Cataloging & Metadata Services Unit Head approved for a sabbatical in 2020
  - Asked Andrea and I if we would be willing to be Temporary Co-Heads for the six month’s she was on sabbatical

- Mid 2019 – Early 2020:
  - Planning, divvying up duties, transferring administrative powers
  - Finishing up certain administrative duties before the regular unit head started her sabbatical (e.g. Annual workplans and evals)

- February 24, 2020 – August 24, 2020:
  - We are temporary co-unit heads
COVID-19 Remote Work Timeline

**Workplans**
March – April 2020

**Phase 1**
May – August 2020

**Phase 2**
August – December 2020

**Phase 3**
January – Present 2021
Phase 1

May – August 2020
Phase 1 – Red Level, 100% remote

- **Individual workplans**
  - Modified for remote work

- **Remote work responsibilities**
  - Coding project, digital collection metadata, professional development, transcription, EAD guide remediation, and ArchivesSpace ingest

- **Purchase on Demand Cataloging**
  - Airtable Form (May-July 2020)
    - Filled out by Collection Management Staff
    - Populated a spreadsheet used information to catalog the item
    - Collections Management and Resource Sharing Unit (CMRS) decided this was unsustainable
Phase 1 – Red Level, 100% remote

- **Remote Cataloging Workflow** *(Planned out but not implemented before phase 2 – will be implemented if needed)*

  • ISBNs in ILS order records
    ▪ Enough info to catalog most materials remotely
    ▪ Sustainable, permanent workflow modification
  • ILS reports to identify new acquisitions
    ▪ Cataloged remotely - email identifying cataloged items
    ▪ CMRS to Circulation for physical processing and check-in
Phase 2

August – December 2020
Phase 2 – Orange Level, 75% remote

In.Library responsibilities

- Quarantine system (internal, at least 24-hours)
  - Drop-off forms
    - Indicate date/time dropped off in CMS and from CMS to Circulation

- Weekly shifts (some catalogers & student workers)
  - Shared online calendar (TeamUp)
  - Primary responsibility
    - Item tracking
    - Catalog time sensitive items (rush = POD, DDA, Hold)
Phase 2 – Orange Level, 75% remote

- Airtable Tracking
  - Added information to assist with remote cataloging (complex cataloging)
    - ISBN
    - Publisher
    - Publication Year
    - Publication Location
    - Pagination, Illustrations? and height
    - Optional: photographs of items (e.g., title page, title page verso)
  - Complex items assigned to at-home cataloger, placed on holding shelf and processed later
Phase 2 – Orange Level, 75% remote

Remote work responsibilities

- Cataloging assigned items, batch processes
- Digital collection metadata (includes remediation)
- ArchivesSpace
- Scholarship and professional contributions
Phase 3

January – Present 2021
Phase 3 – Yellow Level, less than 75% remote

- Improved quarantine system (internal, 24-hour)
  - Drop-off forms with rotating quarantine carts
    - AM and PM responsibilities

- Increased shifts (more catalogers & student workers)
  - Primary responsibilities
    - Time sensitive items (rush = POD, DDA, Hold)
    - Other items

- Continued Airtable tracking and use of holding shelves, other remote projects
Lessons Learned
Lessons Learned

- Communication
  - Frequent updates and transparency
  - Multiple methods more effective (Email, Slack, Zoom)
  - Extra care, consideration, sensitivity

- Health and Wellness
  - Social hours (optional)
  - Fun Slack channels
  - Administration
    - 2.5 hours health and wellness time per week
Lessons Learned

Flexible workflows
  • Can re-implement at any level, if needed
Thank You!

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