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 Conference
May 20, 2021
Background
Background

- 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
Remote Cataloging Workflow

CMRS receives and processes ordered items

CMRS delivers items to Circulation (placed on cart "pending cataloging")

CMRS sends Circulation list of cataloged items

CMS runs daily Sierra report to identify items ready for processing

CMS processes pending items

Circulation barcodes, stamps, affixes spine label, checks in, and RFIDs items

Items are available for patron use
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)
- 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
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

- 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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