



## Getting Started with R2 Consulting, LLC

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[www.r2consulting.org](http://www.r2consulting.org)

To the extent possible, we like to collect organizational documentation, transactional data and answers to specific questions before we arrive in the library. This preparation helps us to be more efficient as we meet and talk with staff. This list is not definitive, nor is it exhaustive. If the information we request is not readily available, we can easily work without. If there are important documents/reports that we have not requested but which the library deems helpful to our project, please send them along. All should be sent to:

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### **General**

1. The library's strategic plan/mission statement
2. The college or university's research/teaching/learning mission/strategic plan
3. Size and composition of the user community
4. The number of resources available to users:
  - a. Databases
  - b. E-journals
  - c. Print books
  - d. E-books
  - e. Government Documents
  - f. A-V resources
5. Notable areas of strength within the organization
6. The top three to five issues facing the library

7. Administrative and departmental organizational charts – including open and part-time positions and job titles
8. Overall number of MLS librarians and paraprofessional staff.
9. Charges and membership for important interdisciplinary, ad hoc, and/or project related teams or committees
10. Indications of capacity or lack thereof, for example:
  - a. Where do bottlenecks or backlogs exist? When do they occur?
  - b. Are there specific kinds of expertise that are either missing or in short supply?
  - c. What is not getting done or not getting done in a timely way?
11. How is departmental performance evaluated?
12. What are the primary methods of internal communication?
13. How are decisions made within the library?
14. An overview of the library's consortial memberships
15. Three to five peer libraries and/or aspirational peers
16. Major projects pending – such as new construction, new ILS, branch closings, offsite storage, etc.

### **Public Services**

17. High-level departmental charges, policies, project lists and annual reports
18. Five years of activity measurements, including:
  - a. Gate counts
  - b. Circulations and circs per enrolled student
  - c. ILL borrowing and lending
  - d. Document delivery
  - e. Print and e-reserves
  - f. Reference consults
    - i. Walk-in
    - ii. Scheduled
    - iii. Online Chat
  - g. Bibliographic instruction sessions

19. What is the library's approach to stacks management? When was the last full-inventory completed? Does shelf-reading occur routinely? How does the library gauge shelf-capacity? What percentage of the shelves is full?
20. A description of staffed service points: How many are there? How are they staffed? Are they function or format specific? Etc.
21. A statement of the library's philosophy/mission regarding information literacy. What tools/technologies/methods are used to support this mission? For example: online tutorials, videotools, LibGuides, course specific instruction, in-library classrooms, etc.
22. What is the library's role regarding the university's course management system?
23. Collection Development policies – overall and subject specific. These might include statements about:
  - a. Format preferences e/p
  - b. Intended or acceptable duplication
  - c. Acceptable replacements and substitutions
  - d. Subscription renewals
  - e. General orientation towards gifts-in-kind
  - f. The print reference collection
  - g. Faculty and student participation in the selection process
  - h. Shelf space; offsite storage; de-accessioning strategies
  - i. Cataloging priorities
  - j. Digitization priorities
  - k. Buy or borrow decisions
  - l. Article pay-per-view v. subscription?
  - m. Preferred eBook platform?
  - n. Free web resources
  - o. Government documents – depository library?
  - p. Preservation and repair
  - q. Binding
24. A description of collection development methods and tools for print, electronic, monographic and serial decisions. Who participates? How are new resources identified? How are acquisitions decisions made? How are these decisions communicated to technical services?
25. How are licenses for e-resources managed?
26. How and how well does the library respond to e-access problems? Are specific tools used to report and track outages, fixes, alternate pathways, etc?
27. What are all the ways in which library resources are brought to the attention of users?

28. What are all the components of faculty outreach?
29. Description of the library's digital initiatives/institutional repository
30. What are the ways in which the library is entering non-library domains? For example: Facebook, Twitter, iGoogle, Wikipedia, smartphone apps, university web pages.
31. Is user behavior being monitored in specific ways?
32. How much of the library's space is dedicated to student and group study space as compared to stacks, etc.?
33. How is the library regarded by students, teaching faculty, and/or university administration? Has the LibQUAL+ survey tool been used?
34. What are the most popular (sought after) patron services?
35. Are there specific user expectations that the library fails to meet?

#### **Technical Services**

36. High-level departmental charges, policies, project lists and annual reports
37. Operational flowcharts – work patterns – etc.
38. Cataloging policies
  - a. Planned adoption of RDA?
  - b. In addition to MARC, what formats are use to describe library resources?
  - c. Single or multiple records for e and p
  - d. Extent of local cutting; perspective on duplicate call numbers
  - e. Classification or accession #s for DVDs/Videos
  - f. Approach to authority control
  - g. Is there a preferred access path to full text? If yes, please describe it. If not, please describe the various access paths. (MARC Records, link resolver, Google Scholar, etc.)
39. Annual production data
  - a. Cataloging
  - b. Physical processing
  - c. Binding
  - d. Repair

40. Average dock to shelf time frame for new monographs
41. Date and extent of the last serials review
42. Annual expenditures and/or units acquired
  - a. By format – e-journals, databases, e-books, print books, print serials, fiche/film, a-v
  - b. By vendor
  - c. By language
  - d. By fund code
43. System and module information for:
  - a. ILS
  - b. ERM
  - c. Link Resolver
  - d. Proxy server
  - e. A-Z list
  - f. eReserves/ILL/Doc Delivery
  - g. Course management
  - h. Institutional Accounting
  - i. Vendor interfaces like GOBI, Ebsconet, etc.
44. A description of major contracts/agreements with third party service providers like OCLC, Serials Solutions, MARCIVE, etc.
45. Retrospective cataloging projects?