



## Getting Started with R2 Consulting LLC

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

To the extent possible, we like to collect organizational documentation and transactional data before we arrive in the library. This preparation helps us to be more efficient as we meet and talk with the staff. Please know that we are happy to receive documents regardless of format or condition; we can accept these as email attachments, faxes, and/or bundles of paper.

If available, we're interested in having:

1. Library's strategic plan and annual report
2. Top three to five issues facing the library
3. Organizational charts; library-wide and departmental
4. High level departmental charges, policies, flow charts, and annual reports
5. Cataloging policies
  - a. Single or multiple records for e and p
  - b. Extent of local cutting
  - c. Perspective on duplicate call numbers
  - d. Classification or accession# for DVDs/Videos
  - e. Approach to authority control
6. Date and extent of the last print serials review
7. Annual expenditures by format (i.e., print monographs; eBooks; print serials; electronic journals; databases; standing orders; microfiche/film; audio visual; etc.)
8. Fund structure – list of fund codes with annual allocations and expenditures
9. Read-only username and password to your primary materials vendor system(s)
10. System and module info; ILS? ERM? Link Resolver? eReserves/ILL/Documents Delivery systems? Course Management System? Institutional Accounting System? Other?
11. Contracts with and/or status reports from third parties (like OCLC)
12. Project descriptions and reports – ongoing and special projects within library departments/divisions, including proposed projects and those "on the back burner" because of time and other constraints

13. Annual (or monthly) acquisitions/cataloging/processing statistics
  - a. # of monographs purchased (sorted by vendor, by language, and format)
  - b. # of credit card orders
  - c. # of gifts considered and added
  - d. # of print subscriptions
  - e. # of eJournal subscriptions (including packages)
  - f. # of print issues checked in
  - g. # of standing orders
  - h. # of titles cataloged (090, 050, original)
  - i. # of bindery units (periodicals and monographs)
14. Average "dock to shelf" time frame for new monographs
15. Average number of days from selection to order placement
16. Size and age of backlogs.
17. Overview of the library's consortial partners/arrangements.
18. Names of three peer libraries.
19. Description of the library's digital initiatives; Institutional Repository.
20. Description of the library's archiving strategies; physical and digital; potential partners.

And while onsite we will continue to ask for additional documents and data!