



# SAN JOAQUIN VALLEY LIBRARY SYSTEM

ADMINISTRATIVE HEADQUARTERS  
2420 Mariposa Street, Fresno, CA 93721

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April 4, 2024

## **ADDENDUM NO. 2 TO RFP 24-004 Original Cataloging Services**

The San Joaquin Valley Library System is issuing an addendum to RFP 24-004 to clarify the current cataloging workflow and new cataloging workflow that would result from this contract, and to provide answers to questions about the RFP submitted in writing or asked during the vendor teleconference on Wednesday April 3, 2024.

### **CHANGES TO CATALOGING WORKFLOW**

Currently, cataloging by SJVLS member libraries are divided into two categories: Cat Centers and non-Cat Centers. Three SJVLS members act as Cat Centers: Fresno County, Kern County, and Merced County, although currently, only Fresno catalogs on behalf of non-Cat Center libraries.

Cat Centers have a trained cataloger on staff who focuses on cataloging most of their time at work. Cat Centers are allowed to create and update bib records in our shared catalog. Non-Cat Centers do not have a cataloger on staff, and typically are not allowed to modify or create bib records, unless for a specific purpose, like adding an ISBN to facilitate an acquisitions import. If they need a record, they send a request to a Cat Center to locate and import a record on their behalf. If a record cannot be located, the non-Cat Center has the option to pay a Cat Center to create a record.

In June 2023, Fresno County announced they would no longer provide cataloging services for other libraries. After discussing possible options, SJVLS's Automation Committee and Administrative Council decided to change our model of cataloging to allow all SJVLS member libraries to perform their own copy cataloging, and to contract with an outside vendor to create original records when they're needed.

### **CURRENT WORKFLOW FOR NON-CAT CENTERS**

1. Library buys an item.
2. Staff search the catalog to locate a record for the item using:
  - a. ISBN/UPC search
  - b. Title search
  - c. Author search
3. If a record isn't found, they send a request to a Cat Center to import a record from OCLC.
4. Cat Center staff search OCLC for a record.
  - a. If a record is found, it's imported into the catalog.
  - b. If a record cannot be found, the requesting library can either wait for a record to be uploaded to OCLC, or they can request to have a record created from a Cat Center.

### **NEW WORKFLOW FOR NON-CAT CENTERS**

1. Library buys an item.
2. Staff search the catalog to locate a record for the item using:
  - a. ISBN/UPC search
  - b. Title search
  - c. Author search

Coalinga District · Fresno County · Kern County · Kings County · Madera County  
Mariposa County · Merced County · Porterville City · Tulare City · Tulare County



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3. If a record isn't found, staff search OCLC for a record.
    - a. If a record is found, staff modify the record according to SJVLS's standards, and import it into our catalog.
    - b. If a record cannot be found, the requesting library can either:
      - i. Wait for a record to be uploaded to OCLC.
      - ii. Send a request to our cataloging vendor to have a record created.

## TELECONFERENCE QUESTIONS

### **Q1: What languages are expected to be included in this project?**

Answer: Materials will be pre-dominantly in English and Spanish. Here's a list of other languages of material we may need records for on a less frequent basis:

- Portuguese
- Hindi
- Chinese (Mandarin)\*
- Japanese\*
- Korean\*
- Vietnamese\*
- Russian\*
- French
- Arabic
- Punjabi
- German
- Basque/Euskara
- Tagalog
- Gujarati

\* - Typically, Fresno County is the only member purchasing materials in these languages. With their cataloger retiring soon, it's unknown if the person hired to replace them will have the same language experience. The languages were included in the event our member libraries no longer have a cataloger that can catalog in those languages.

### **Q2: Special Requirement, Section 14, page 7: How would you like us to address providing 'a Material Safety Data Sheet for each product, which contains any substances on "The List of 800 Hazardous Substances ..." for cataloging?**

Answer: This is standard RFP template language for Fresno County – SJVLS's Fiscal Agent. It is not applicable to this procurement.

### **Q3: Pages 3 and 24 instruct us to send our proposals via email. Page 4 instructs us to send a hardcopy in a sealed envelope. Please confirm which you require?**

Answer: Please submit proposals via email. The instructions to provide a hardcopy in a sealed envelope on page 4 were missed when SJVLS updated the RFP template to accept electronic submissions. Addendum NO. 1, issued on April 4, corrects the submission requirements on Page 4.



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**Q4: Scope of Work, page 26 and Section VIII, page 29: Would you like us to answer line by line or may we summarize?**

Answer: SJVLS would prefer a summarized answer to the Scope of Work sections. There is no need to answer line-by-line.

**Q5: Will the same OCLC symbol be used for all cataloging?**

Answer: Originally, SJVLS's idea was to have the requesting member's OCLC symbol be used for the records they request. So, up to 10 different OCLC symbols could be needed, depending on how many SJVLS members request original records. However, we're open to suggestions about best practices.

**Q6: Will all materials be cataloged according to the same project specifications?**

Answer: At this time, yes, they will be cataloged according to the same specifications.

**Q7: What source data will be provided? Actual items or surrogates? If actual items will be supplied:**

- Where will they be shipped from?
- Where should they be returned to?

Answer: To reduce shipping costs for our members, SJVLS would like to provide digital surrogates of the items. In this case, scans of the cover, back cover, title page, and any other pages needed to create an original record.

SJVLS is willing to provide source data in the manner that works best for the vendor. If that means shipping materials, they would be shipped from the headquarters of our member requesting the record and would be returned to that member's headquarters. A list of addresses can be provided prior to work commencing.

**Q8: What is the anticipated frequency of sending materials for cataloging?**

Answer: Under our current model, our members request records on an as-needed basis. There's no set frequency for sending in cataloging requests. If there's a submission frequency that works best for a vendor, for example, only sending requests on the 3rd Wednesday of the month, or sending a request once every two weeks, they can specify it in their response. We are willing to work with any submission guidelines needed by a vendor.

**Q9: May it be assumed that every item sent to the chosen vendor for original cataloging has been searched for copy cataloging and confirmed to require original cataloging?**

Answer: Yes. Our member libraries will verify that a record does not exist in SJVLS's catalog, and in WorldCat by searching ISBN, UPC, Title, Author, Title & Author, prior to submitting a request for original cataloging. The databases to search are SJVLS's bibliographic database, and OCLC's WorldCat. SJVLS is willing to work with any other searching requirements prior to submitting a request for original cataloging.

The only situation SJVLS is unsure how to handle are records where OCLC only has a brief place-holder record that does not meet SJVLS's record requirements. In our current workflow, the requesting library has the option to wait for the record to be updated or ask a Cat Center to update the record on their behalf. SJVLS is open to suggestions from respondents on how to handle these types of records.

**Q10: Is it to be assumed that physical processing (e.g., barcoding, spine labeling, etc.) is not required within the scope of this RFP?**

Answer: This is correct. The winning respondent will not have to physically process the materials. SJVLS member libraries will be responsible for those steps.