



UNIVERSITY OF SOUTH CAROLINA

AMENDMENT NO. 1 TO SOLICITATION

TO: ALL VENDORS
FROM: Caleisha Hayes, Procurement Manager
SUBJECT: SOLICITATION NUMBER: USC-RFP-3304-CH
DESCRIPTION: PROVIDE CONSULTING SERVICES FOR STATEWIDE SHARED ACADEMIC LIBRARY
DATE: June 13, 2018

This Amendment No. 1 modifies the Request for Proposal only in the manner and to the extent as stated herein.

Vendor Questions and Answers

Exhibit 1 has been revised/modified.

THE DEADLINE FOR RECEIPT OF PROPOSALS HAS BEEN EXTENDED TO JUNE 18, 2018 AT 3:00 PM.

OFFERORS SHALL ACKNOWLEDGE RECEIPT OF AMENDMENT NO. 1 IN THE SPACE PROVIDED BELOW AND RETURN IT WITH THEIR RESPONSE TO THIS REQUEST FOR PROPOSALS. FAILURE TO DO SO MAY SUBJECT THE RESPONSE TO THIS REQUEST FOR PROPOSALS TO REJECTION.

Authorized Signature

Name of Offeror

Date

USC-RFP-3304-CH

THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR A:

1. Page 16—Specification D says that the Contractor will visit 3 consortia in the Fall, 2018; however in Exhibit 1 under the timeline for Fall, 2018, it says that the visits do not include the consultant. We need clarification on that, as it impacts the budget.

ANSWER: *We would now like the vendor to visit the consortia with the team. See revised Exhibit 1.*

2. Page 16--Specification E indicates that PASCAL staff will collect and compile the data. Does that mean that they will be completing the surveys for the libraries, or work with the libraries to complete the surveys? Should the contractor be providing the survey software, e.g. Survey Monkey, or will PASCAL be providing the survey software?

ANSWER: *PASCAL has SurveyMonkey and LibAnswers software and can help the consultant create the survey and disseminate it to member libraries. PASCAL will also answer any member library questions and collect and compile the responses. The consultant is responsible for formulating the survey questions and will include the survey results in their final report.*

3. Planning Committee: Who specifically is on the planning committee? What is their role in decision making?

ANSWER: *The Common Collection Committee (CCC), an existing PASCAL committee made up of representatives from its membership, serves as the grant's planning committee. The CCC includes representatives from the diverse member institutions. Member institutions include research institution libraries, large and small public institution libraries, large and small private institution libraries, single-gender institution libraries, historically Black college and universities, and two-year technical college libraries. Additional CCC members will be invited to participate, including an HBCU representative; Nelson Rivera, manager of the USC Library Annex; Rick Moul, Executive Director of PASCAL; and Rebecca Gettys and Miranda Bennett, the Principal Investigators on this project. This committee meets monthly via ZOOM, an online meeting service.*

The mission of the PASCAL Common Collection Committee is to provide oversight of, and recommendations for, PASCAL common collection planning, programs, practices, strategies, and assessment. The range of responsibilities includes, but is not limited to the following:

- *investigates, recommends, and reviews strategic collaborative collection management activities and initiatives for PASCAL member libraries*
- *contributes to the strategic planning and oversight of PASCAL collaborative collection initiatives in close consultation with PASCAL staff and the Program Committee as well as other relevant committees and task forces*

- *contributes to evaluating projects, programs, and practices centered around collaborative collection efforts for PASCAL member libraries*
- *as necessary, provides liaisons and maintains close communication with committees and task forces charged with oversight of other programs that require input from the Common Collection Committee or whose activities might affect collaborative collection activities and initiatives*

The members of the current standing committee (some members will rotate off, and others will come on in July):

<i>Janet Ward (Chair)</i>	<i>Limestone College</i>
<i>Derrick Wilmott (Chair-Elect)</i>	<i>Clemson University</i>
<i>Natalia Bowdoin</i>	<i>USC-Aiken</i>
<i>Lori Hetrick</i>	<i>Spartanburg Methodist College</i>
<i>Katie Miller</i>	<i>Aiken Technical College</i>
<i>Timothy Simmons</i>	<i>USC-Columbia</i>
<i>Wade Woodward</i>	<i>Converse College</i>
<i>Amy Trepal</i>	<i>PASCAL (staff liaison)</i>
<i>Mary Daubenspeck</i>	<i>South Carolina Information & Library Services Consortium</i>

The committee would work with the planning consultant and the principal investigators to accomplish its mission.

4. **Timetable:** How much flexibility is there in scheduling the regional meetings in light of the delay in initiating the project?

ANSWER: *We would like to stay as close to the timetable as possible. See revised Exhibit 1.*

EXHIBIT 1 (as revised)

MELLON ACTION PLAN GRANT REFERENCE NUMBER 1801-05232

Grant Timeline

July/August 2018	A consultant will be engaged and will hold an initial meeting with the CCC via Zoom and begin the evaluation and survey process.
September 2018	The consultant will make site visits to the USC Annex, PASCAL and Clemson University's Library Depository. During the same visit the consultant will join the PI, the co-investigators, and the CCC at three regional meetings within South Carolina to meet with PASCAL member libraries to assess their interest in participation, assessment of materials they would like to include in shared storage, and evaluate reclaimed space and ideas for its reuse.
October 2018	PASCAL will deploy the survey developed in collaboration with the consultant and begin consortia visits [Consultant will accompany five members of the CCC to a total of three consortia (Emory/Georgia Tech, OhioLINK, and Five Colleges) to learn best practices regarding their collection policies, governing and funding structures, and implementation process].
November 2018	Finish consortia visits and collect survey data with the assistance of PASCAL.
December 2018/ January 2019	The consultant will draft a comprehensive report of findings and recommendations from her/his research, regional PASCAL meetings, survey responses, and visits to other consortia.
February 2019	Report reviewed by member libraries.
March/April 2019	After approval of the report by member libraries, marketing materials would be developed to secure funding for the implementation of the shared storage facility.

Grant Activities

June 2018

Hire a consult through the USC bid process who will be selected based on the following criteria:

- Work plan
- Reputation in the field
- Financial stability
- Cost

July/August 2018

PASCAL's Common Collection Committee (CCC) will take on the responsibility of serving as the grant's planning committee. The consultant will meet with them initially via Zoom.

The consultant will develop a survey, with PASCAL staff collecting and compiling the data to assess:

- the linear feet of materials housed at their institution

- the quantity and format of materials the institution would like to move to a shared storage facility
- the institution's interest in participating in shared storage, and ability to share in the cost of operating the facility
- the terms of how shared storage oversight should be structured
- the immediacy of the need to move collection materials in order to make space for new library services
- the ideas the institution has for repurposing space made available by moving materials to offsite, shared storage

September 2018

The consultant will make an initial trip to South Carolina and visit three specific sites:

- PASCAL to learn about shared collections and services and plans for a shared Library Services Platform
- The University of South Carolina's existing Annex facility, which would be the site of the new, permanent shared storage facility, to determine how the Annex's structure, services, and organization may be incorporated to enhance the planned addition
- Clemson University's Library Depot, the other high-density library storage facility in the state, located in a converted plastics factory

While the consultant is in South Carolina, PASCAL will coordinate and host three regional meetings in the Upstate, Midlands and Lowcountry for its membership to discuss the plans for a shared storage facility and best practices for collaborative collection management and repurposing space within their facilities. These sessions would feature presentations and open discussions with noted experts and practitioners including the consultant. Support for these events will be provided by USC Libraries and PASCAL staff.

October 2018

The consultant in collaboration with PASCAL will deploy the survey to member libraries.

Visits will begin with the consultant and teams of 5 CCC members including a USC representative, a PASCAL representative, and three additional committee members will visit:

- The Library Service Center (Emory/Georgia Tech)
- OhioLINK, Columbus, OH
- Five-College Library Repository, Amherst, MA

November 2018

Visits to the consortia will conclude and survey data will be collected by PASCAL.

December 2018/January 2019

The consultant will draft a final report detailing:

- an estimate of the capacity needed for the shared storage facility
- a plan for oversight and ownership of the collection
- a business model for operation of the facility
- a proposed suite of shared services such as scan and deliver

- survey results regarding the amount of space that will be available in member libraries for repurposing, and potential uses for these reclaimed spaces

February 2019

PASCAL member libraries will review and approve the report.

March/April 2019

Marketing materials and a website will be developed to secure funding for the implementation of the shared storage facility.

July 31, 2019

Final Report due to Mellon Foundation.