The university has received the following questions (below) from vendors. The corresponding department has provided answers for the questions provided within the allocated time to respond. The questions and answer should be considered incorporated as part of the Request for Proposals. Please see below:

- **Question: RFP Section 1.3 Compensation** - Please define the criteria for "satisfactory delivery and acceptance by the University" to allow payment on received invoices.

  *Answer: Satisfactory delivery and acceptance by the University is established through verification by Special Collections that invoiced work has been completed.*

- **Question: RFP Section 1.4(a) Definitions** - How does TAMU-CC Special Collections define "Acceptable Quality Level - the level of performance of requested services below which the contract will not be paid or damages may be assessed" for the processing and selective digitization of archival collections? Can you please provide specific criteria and detailed specifications of Acceptance Quality Level?

  *Answer: Damage to or loss of collections materials could result in reductions in payment. We require description of the entire collection, with areas of more or less detailed description to be identified in consultation. We require the establishment of series and the physical rearrangement of collection to reflect those series. We expect no errors to be introduced during the transfer of existing descriptive data to the new platform, and we expect a low degree of spelling and grammatical errors in descriptive data created by the vendor. We expect the finding aid content to accurately reflect the collection and its administrative data.*

- **Question: RFP Section 2.1 (f) Extent and Condition of the collection** - Can you provide an estimated number of realia within the collection?

  *Answer: 343 as of a count made 1/22/16*
• **Question:** RFP Section 2.1 (g) Processing History of the collection - What does "calendar the papers" mean in the context of work previously done on the collection?

**Answer:** The term calendar was used to mean listed and described at the item level.

• **Question:** RFP Section 2.2 (b) Deliverables, Point 3 - Can the cost of required supplies for rehousing, be proposed as an estimate, with a condition that supplies will be invoiced at cost?

**Answer:** As a fixed contract, rather than a proposed estimate, the costs of supplies should be quoted as “not to exceed.”

• **Question:** RFP Section 2.2 (b) Deliverables, Point 4 - Please provide further information on the expected volume and types (e.g. textual, audio, film, etc.) of material that should be digitized in the first year of the contract.

**Answer:** Types of materials include photographs, audio/video files, textual materials, and possibly film. The volume would be determined in consultation as the project unfolds. At a minimum, there would be need to be a quantity and variety that allows for the project and collection to be discoverable and marketable.

• **Question:** RFP Section 2.2 (b) Deliverables, Point 4 - Must digital objects and associated metadata created through digitization conform to the University of North Texas digitization standards (http://www.library.unt.edu/digital-projects-unit/standards)

**Answer:** Digital objects must either meet the UNT standards OR the FADGI three- or four-star performance rating for all objects, with documentation (e.g., Golden Thread evaluation results) supplied by vendor.

• **Question:** RFP Section 2.2 (b) Deliverables, Point 4 - Should metadata for digital objects be captured exclusively at the item level for all types of material (textual, photos etc.)?

**Answer:** Yes, every digital object is an item and should have item level metadata, even if minimal. If the item falls within a hierarchical structure, such as a series, that information also must be captured.

• **Question:** RFP Section 2.2 (b) Deliverables, Point 5 - Please confirm that only one Omeka exhibit is required, and public access should not be provided to the underlying Omeka catalog.

**Answer:** Only one Omeka exhibit is being required. The expectation is that items in the exhibit can be found by the public. We are not clear on the statement that “public access should not be provided to the underlying Omeka catalog,” and can therefore not answer that at this time.

• **Question:** RFP Section 2.2 (b) Deliverables, Point 5 - Is the Omeka instance to be hosted locally by TAMU-CC or can a hosted version (http://Omeka.net) of Omeka be used for the exhibit deliverable?
**Answer:** The intention is to host this locally, but we have not come to a final determination. The decision will be based on costs and recommendations from both on campus IT professionals and external experts.

- **Question:** RFP Section 2.2 (c) Timeline - Section 1.2 states that the initial contractual term is 1 year beginning April 1, 2016; Section 2.2 (c) indicates that the work is to be completed within 18-24 months after contract award. Please clarify if the intention is that all work is to be completed in 1 year (Section 1.2), or if there will be provision for at least one renewable period (as defined in Section 1.2).

**Answer:** The intention is to have a one year contract with up to 4 renewable years. The structure will be dependent upon the proposer’s timeline, keeping in mind that the initial phases, keeping in mind the processing should be completed by the end of the first year and an introductory Omeka exhibit is needed by September 1, 2016. Further digitization can be/may be completed in subsequent years.

- **Question:** RFP Section 2.2 (c) Timeline - Is it expected that the first Omeka exhibit deliverable will be continually refreshed and updated as processing and digitization continues throughout the first year and during potential follow on contracts? If so, will the contractor be responsible for updating the exhibit and how frequently?

**Answer:** It is not our expectation that the initial exhibit will be updated continually. The contractor will be responsible for updating the exhibit, but this can be done incrementally or entirely after processing is complete, as agreed upon in consultation.

- **Question:** RFP Section 2.2 (d) Work Activities - There is no further definition of work activities for the digitization or Omeka Exhibit tasks beyond Section 2.2 (b) Deliverables. Please provide more details of specific work activities for these tasks.

**Answer:** We are expecting the vendors, either based on their own experience or through consultation with sub-vendors, to propose this to us, as we do not have digital exhibition experience.

- **Question:** RFP Section 2.2 (d) Work Activities - The required processing activities described in 2.2 (d) require a higher level of effort than the professional standards for Minimal Level Processing (such as those published by the University of California or the Smithsonian Archives of American Art) or More Product, Less Process (Greene & Meissner). Is the successful bidder expected to comply with all activities defined in 2.2 (d) across the entire collection, or propose a hybrid approach as eluded to in the introduction in section 2.2 Scope Of Work?

**Answer:** We expect a hybrid process to be proposed.

- **Question:** RFP Section 2.2 (d) Work Activities - Per 6.g., should all photographs receive item level description?

**Answer:** Yes. It is our expectation that individual photographs will be identifiable and discoverable. Where we have existing item-level metadata for images, that should be
included. Where we have none, a convention should be established to create item-level metadata based on a higher-level container’s metadata plus a numbering system.

- **Question: RFP Section 2.2 (d) Work Activities** - Per 7.b., please confirm that *all* paper clips, rubber bands, and staples should be removed, not just those that pose the most risk (i.e. are rusty).

  **Answer:** Our expectation is to strike a balance between MPLP (minimal processing) and the older expectation that all fasteners be removed. We can train student workers to remove fasteners over the course of time. Fasteners should be removed by the vendor for items that are to be digitized and, as mentioned, where they pose most risk.

- **Question: RFP Section 2.2 (d) Work Activities** - Per 7.c., does TAMU-CC Special Collections have a humidification chamber onsite for flattening of folded documents?

  **Answer:** An onsite humidification chamber may be made available if required.

- **Question: RFP Section 2.2 (d) Work Activities** - Per 7.g., will the original newspapers be discarded once preservation photocopies are made?

  **Answer:** If the newspapers being referred to are those in which Dr. Garcia flagged an article but retained the entire issue, the answer is yes, the original can be discarded. If the question refers to the Forumeer, we would retain those and originals should not be discarded.

- **Question: RFP Section 2.2 (d) Work Activities** - Per 7.j., does TAMU-CC Special Collections have appraisal criteria for determining historic or intrinsic value of material?

  **Answer:** No, we do not have specific appraisal criteria for determining the historic or intrinsic value of material.

- **Question: RFP Section 2.2(e)** - What percentage of contractor staff should be certified archivists in order to qualify as a "sufficient number" as defined in the RFP. Does this requirement extend to contractor staff assigned to digitization efforts and the creation of the Omeka exhibit?

  **Answer:** Staff assigned to digitize and to create the Omeka exhibit do not need to be certified archivists. Archivists making strategic decisions about arrangement and description should be certified. Staff executing their instructions under their supervision do not need to be certified. We see this more as related to their role in the project than as a percentage issue.

- **Question: RFP Section 2.3 Performance Tracking** - How will performance monitoring and work review occur if the collection is processed and digitized onsite? Conversely, how will performance monitoring and review happen if the collection is processed and/or digitized at a vendor site? (e.g. Frequency of review, accuracy percentage, quality, level of productivity, etc.)
**Answer:** Performance will be reviewed against the timeline and procedures proposed. The expectation is that a project manager will be assigned to the project by the vendor and that this person will provide updates to TAMU-CC and will answer questions. A frequency and format can be suggested by the vendor and established once a contract is awarded.

- **Question:** RFP Section 2.3 Performance Tracking - Please acknowledge that acceptable industry standards, custom and practice shall be mutually defined and agreed upon prior to contract award.

  **Answer:** Yes, we agree to this.

- **Question:** If processing is to occur onsite, how many contractor archivists can the Special Collections accommodate?

  **Answer:** We can accommodate two in our processing space, which is an isolated set of offices. We can also accommodate one to two in the Special Collections reading room if that is acceptable to the vendor.

- **Question:** Is there sufficient space in the Special Collections for digitization activities? If so, what is the maximum number of scanning technicians the space can accommodate?

  **Answer:** That will depend on what type of equipment is being used and if the equipment has to be shielded from each other’s light. At a minimum, we could put one is each remaining section of 218 (that would make the answer two technicians) but only if we are not also hosting processors. There is not room for both scanning personnel and processing personnel.

- **Question:** Does TAMU-CC have any digitization equipment that may be made available to the contractor for use during the project?

  **Answer:** We have the BookEye4 when not in use by the Blucher project and the Epson Expression 11000XL flatbed when not in use by SC staff to fill patron orders. We have nothing that could be dedicated fully to the Garcia project.

- **Question:** Which marketing communications or business objectives is TAMU-CC looking to drive with this project?

  **Answer:** TAMU-CC is trying to make this valuable and important part of history, particularly Mexican-American history, civil rights history, and south Texas history, discoverable by and available to researchers everywhere. The University is also wishing to practice and demonstrate good stewardship of such an important historical collection.

- **Question:** Given these objectives, how do you think the University will measure the success of this project?

  **Answer:** Success will be measured by how discoverable and accessible the collection is to researchers. This will be measured quantitatively and qualitatively, including, among other things, numbers of hits, numbers of requests, number of news stories, etc.
• **Question:** Are there ways that TAMU-CC plans to or might want to leverage the work on the project across other projects or communications?

**Answer:** This is a stand-alone project and is not currently tied to other University projects or initiatives.

• **Question:** Can you share your thoughts about the overall vision for this project and how TAMU-CC is building this shared understanding? What do you see as some of the potential challenges doing this?

**Answer:** The shared vision for the project is to have a rich historical collection documenting Mexican-American and south Texas history available beyond the confines of our Special Collections walls. The goal is to share the fact that this collection exists and is as important as it is with the world beyond our campus community. This will shine a bright light on Dr. Garcia’s legacy, Corpus Christi, and TAMU-CC. Potential challenges lie in getting all stakeholders to understand that digitizing a collection does not entail digitizing every item in the collection but rather selectively digitizing various items.

• **Question:** There are often many stakeholders in a project like this ranging from folks on the project teams to university leaders, board members, community members, or others who will want their views incorporated. Who do you see as some of the key stakeholders that need to be involved? Which do you see as most critical?

**Answer:** Key stakeholders related to this project include Special Collections staff, Bell Library administration, TAMU-CC administration (including the President, the Provost, and the CFO), TAMU-CC faculty and other researchers, and community members, particularly those related to the Garcia family and/or foundation (especially Mrs. Cecilia Ackers-Garcia and Mr. Jim Ackers, one of Dr. Garcia’s daughters and her husband). The stakeholders that will be involved and are most critical are Ann Hodges, the head of Special Collections at TAMU-CC, and Catherine Rudowsky, Bell Library Director.

• **Question:** Are there priorities in terms of the constituencies you are trying to reach? If you think about the top 3, how would you like this project to impact them and help the company? Any implications if the deliverables don’t exceed these expectations?

**Answer:** Our top constituencies are TAMU-CC students, scholars of the Mexican-American experience and civil rights, and the local community. The project should make the collection easier for them to use and raise the profile of the university. Implications of low performance are the continued invisibility and inaccessibility of the collection, resulting in less scholarship based upon the collection and less fruitful exposure of TAMU-CC students to the resource.

• **Question:** Are there timeless stories or “cornerstones” that will anchor the messages and deliverables?
**Answer:** Discrimination experienced by returning Mexican American WWII veterans; founding of American GI Forum; Longoria Affair; Dr. Garcia’s service to the community; Dr. Garcia’s political influence.

- **Question:** Are there “pot holes”, issues, or events that need to be avoided?
  
  **Answer:** Not that we are aware of. There are no known skeletons.

- **Question:** Are there opportunities for the themes and messages of this project to compliment or drive other marketing, branding, or project objectives?
  
  **Answer:** Please see answer above related to marketing and leveraging the work.

- **Question:** Sometimes initiatives such as TAMU-CC’s already have a budget specified and appropriated. Can you share the status of budget appropriation, and if a specific budget range has been allocated for the work?
  
  **Answer:** A specific budget range has not been allocated, as we do not have clear expectations regarding the cost. However, the project is of extreme importance for the University, the community, and the scholarly universe, and the intention is to move forward with the project. The appropriate of money will be determined when the award is made.

This Document Shall be attached to and become a part of the contract documents for this project. The Addendum shall be signed for acknowledgement that you have received the Addendum # 1 and return within your proposal.

COMPANY NAME: _______________________________________________________

STREET ADDRESS: _________________________________________________________

CITY/STATE: _____________________________________________________________

TELEPHONE AND FAX: ___________________________________________________

SIGNATURE: _____________________________________________________________

DATE: ___________________________________________________________________