SAN JOAQUIN VALLEY LIBRARY SYSTEM

February 9, 2026

ADDENDUM NO 1 TO RFP 2026-003 INTERGRATED LIBRARY SYSTEM

The San Joaquin Valley Library System is issuing an addendum to RFP 2026-003 to provide answers to questions about the RFP received in writing or asked during the vendor teleconference held on Thursday, February 5, 2026.

RFP BACKGROUND INFO SHARED DURING TELECONFERENCE

SJVLS is one of California's 9 cooperative library systems, and our members include the public libraries in the Central Valley from Kern County in the south to Merced and Mariposa Counties in the north. We provide our members with a shared technology platform they use to provide library services to their communities. Since 2003, SJVLS has hosted the Horizon ILS in our data center, and previous ILS instances were also hosted in the data center. The shared ILS provides efficiencies for library service and facilitates resource sharing amongst our members. One benefit is patrons registered with any SJVLS member can use library services at any other member library branch without registering for a separate library card. Items checked out from any member library branch can be returned to any other branch, and we take care of sending it back to the home location.

While our members share borrowers and catalog records, SJVLS endeavors to give our members flexibility to set their own circulation rules and policies. As a result, SJVLS desires to have the ILS apply circulation rules based on the location an item was checked out from, and to ensure materials of a similar type – such as a DVD – use the circulation rules of the location where it's checked out, regardless of which jurisdiction it came from.

TELECONFERENCE QUESTIONS AND ANSWERS

Q1: #17 & 18 (secondary environment) - Can you provide examples of how you have used this kind of environment for troubleshooting in the past? In lieu of automatic updates of the secondary environment, would on demand updates be sufficient?

A1: The test environment has been used in the past to troubleshoot problems that occur during the workday where the lost information cannot be re-created in the production database. Some examples include: staff accidentally deleting patron requests, accidentally overwriting bibliographic records, and determining who an item was checked out to after previous borrower information is lost.

To elaborate further on specifics, we've had situations in the past where staff accidentally delete a patron's request and cannot remember the patron's position in the request queue. If the request wasn't placed today, staff can login to the test database and determine where the patron was in the queue and put them back in the appropriate position.

In the scenario where a bib record is accidentally overwritten with an incorrect title, staff can login to test and export the previous version of the record and import it into the production database.

In the scenario where previous borrower information is lost, this happens rarely, but can be really difficult to troubleshoot. We've had staff accidentally check in materials, for example a TV Show with multiple DVDs when a disc is missing. The check in triggers filling a hold request, and to prevent the item from filling the hold, staff check out the material to themselves and then check the item in as damaged. Because we do not

retain circulation history, any information about the previous borrower of the item that lost the disc is lost, and the only way to get it back is to use test to see who had it checked out.

The problem with on-demand updates is we do not always know when we need a refresh, and we wouldn't want to be in a situation where we need access to information and it's not available. We have concerns about how long it would take to relay a request for a refresh when library branch staff discover a problem.

The secondary environment has also been used for training newly hired staff. They use the secondary environment to practice borrower registrations, and practice other circulation functions. It saves the trainer the step of cleaning up after the training and deleting the practice accounts. Also, if there's another training class scheduled the next day, the refreshed secondary environment is ready to go without any additional effort by the trainer. Lastly, doing practice and training sessions in the secondary environment avoids artificially inflating registration statistics, because they won't be counted in the production environment.

Lastly, the secondary environment provides a sandbox for SJVLS staff to test changes to the ILS configuration. For example, trying to modify an import source to remove subject headings from schemas that are not a part of our bibliographic record standards. SJVLS can make changes and see the impact, and if the testing goes awry, we can stop and try again the next day with a fresh slate.

Q2: #62 - (Differentiation between in-person versus unseen renewals) - Would the ability to run a report on in-person versus unseen renewals be sufficient to meet this requirement?

A2: This requirement relates to being able to configure circulation rules in a way where a patron could renew an item in-person with the material but cannot renew an item through the OPAC, or telemessaging. The main use-case for this is being able to create a circulation rule that allows technology and equipment (laptops and hot spots) to be renewed in-person, giving staff the opportunity to see the item before extending the due date.

Q3: #180 (Acquisitions - interface between the ILS and acq vendor sites) - Please provide additional information about the desired interface between the ILS and vendor sites. Do you want to be able to automatically download selected records from vendor carts into the ILS? Is there other functionality related to this interfacing that you would expect to see?

A3: Automatic download and import of vendor carts to populate PO Lines is sufficient to say the functionality is met. In an ideal scenario, SJVLS would like to also see the ability to automatically import/receive order responses and updates, and invoices, as well, but those are not required to be able to say the functionality is met.

Q4: Regarding Trial Access to Demo/Test Systems (RFP pg 40): Is the schedule for the Demo test/sandbox flexible? In our experience, providing access to a sandbox is most effective after a presentation of our solution, so evaluators have context for what they're seeing and how best to explore it. We're also mindful of the time and resources required to set up a sandbox and typically reserve that level of preparation for the finalist stage. We'd appreciate it if we could discuss how best to align the timing so it's valuable for everyone involved.

A4: Unfortunately, our turnaround time from presentations to making a final recommendation is tight. As a result, we do not have time to move trial access to after presentations, as staff would not have time to test before compiling scores. The final vendor presentation is scheduled for Friday, March 20, and SJVLS member

scores are due to SJVLS on Monday, March 23. SJVLS must post the agenda for the Automation Committee meeting to make a final recommendation on Tuesday, March 24, for a meeting on Friday March 27. SJVLS has already sent presentation dates to member library staff, and it would be very difficult to change those dates at this time.

SJVLS understands the challenges with providing test access and understands if it's not feasible. The reason we asked for test access before presentations was to give staff a chance to do very basic tasks and see the system in action so they could ask meaningful questions during presentations.

Providing a testing environment is not a scored component of bids, and respondents will not be penalized if they're unable to provide access. Staff will evaluate and score the response based on the written proposal and presentation.

Q5: Regarding Access to a Training Testing Environment that is updated nightly (RFP pg 5 - Administration): Would SJVLS consider a quarterly update? How important is it that we provide a nightly refresh, given that it would affect annual costs?

A5: Like our answer to question 1, a nightly refresh of the test environment is an important feature we offer our members. It provides efficiencies when testing configuration changes, makes troubleshooting issues more streamlined, and allows us to train staff without needing to clean up afterwards or artificially inflate statistics.

If you'd like to quantify the additional cost of a nightly refresh, you could list the additional cost of a nightly refresh under section 3.

Q6: Is the test and training environment two separate environments, or are they the same?

A6: Historically, test and training environments are the same instance. They do not need to be separated. The test environment is a secondary copy of the production database, running on the same database server, using the same infrastructure as the production environment. Currently, we use a script to refresh the test environment that restores the test database using the nightly backup of the production database. We do not see a need to separate functionality into separate environments.