

Vendor Evaluation Procedure for Copy and Original Cataloging for PINES

No vendor will be evaluated for PINES cataloging unless it first has a potential client library within PINES. Initial contact with the PINES Cataloging Specialist concerning the potential vendor must come from the PINES library and not the vendor.

See [Outsourcing Policies](#).

- Once a PINES library informs the PINES Cataloging Specialist of a new vendor to be approved and provides the vendor's cataloging contact person, the Specialist will contact the vendor to start the evaluation process.
- Currently, PINES approves cataloging outsourcing for three formats: books, sound recordings, and visual materials. The PINES cataloging Specialist will first send over all PINES cataloging policies and procedures for the vendor to review. Once the vendor agrees to those policies and procedures, the Specialist will do the following:
- For copy cataloging, the Specialist will send the vendor matching exercises for the formats the PINES library is intending to contract with the vendor for service. The Specialist will evaluate the vendor catalogers' answers to the exercises for accuracy.
- For original cataloging: vendor needs to send the Specialist three new records for each desired format to check.
- After the Specialist has checked the vendor's work and has evaluated the quality and accuracy of the work for copy or original cataloging, the Specialist will inform the library of the outcome.
- If the vendor is approved for cataloging for the PINES library, the head cataloger of the library system will be responsible for training its new vendor on how to use OCLC and Evergreen. The Specialist will assist in vendor training if needed.
- OCLC requires the completion of a third-party agreement form for a new vendor to use the client library's OCLC authorization to the OCLC cataloging utility. The Specialist can help both the library and the vendor with the paperwork once the cataloging evaluation is completed and the vendor is approved.

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