Minnesota Alliance of Local History Museums
Collections Management System
Request for Proposal

Allowable Contract Date: June 1, 2017.
Bids received after April 14, 2017 <u>may not</u> be considered.

Minnesota Alliance of Local History Museums
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612-500-7460

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I. **Introduction**

A. **Overview and Background**

This Request for Proposal (RFP) has been prepared by the Minnesota Alliance of Local History Museums (MALHM), a non-profit organization serving history museum professionals, for the purpose of implementing an online collections management system (CMS). The components of the system to be considered in this RFP include software, migration of existing data, hardware specifications, installation, training, and after sales support.

MALHM nurtures and encourages an appreciation of Minnesota local history by providing the structure to foster collaborative local history projects, communicate curatorial and educational information, and encourage professionalism among local and specialized historical organizations in Minnesota. Minnesota has over 500 history organizations and is only one of five states that have a history organization at the county level for every single one of our 87 counties.

Many of the collections management software used by Minnesota history museums are antiquated, putting organization's collection data at risk through catastrophic failure of software or compounding security issues their current software may not be able to handle. In 2014 a task force of Minnesota-based collection managers and other museum personnel from the historical societies of began to meet, understanding that by working together, the task force could influence the future of collections management systems. The partners deemed the subject important enough to start looking at available alternatives for collections management software and to consider what options to pursue.

Among the solutions investigated and approved by the task force was focusing on an open-source, web-based collections management system. Museums and archives consider collections data "mission critical" to their organizations and the museum community is beginning to embrace the use of open source software (OSS) as part of the mix of available technology solutions. It removes barriers to sharing that are explicitly prohibited under licenses for commercial software, and can lower the cost of migrating, managing, access, and publishing information to today's web-based information platforms.

A pilot program is the necessary next step to ensure that the selected CMS is the right fit for Minnesota history museums. It is critical to have an executable plan and a stable, user-friendly, and well-managed CMS in place if current CMS software in use begins to fail. As the voice of the Minnesota local history community, MAHLM will be the coordinating organization for the pilot program. The eventual goal is that, upon the successful completion of the pilot program, the software will be made available state-wide with MAHLM providing a centralized home for the community and managing hosting services for the software; managing and maintaining

community resources such as working groups, and a mailing list; coordinating bug tracking and feature requests from members; and allowing members to leverage shared economies to protect each organization's investment in the software. A strong member base ensures the software developed today continues to evolve into the future.

Five pilot sites, along with other interested organizations will work with the chosen vendor to develop the software template and configure the reports, forms, search and browse interfaces. Museum currently faces several challenges in dealing with digital workflow: limited technology, limited human/staff resources, and a decentralized system that leads to duplication of work and effort. Digital images currently reside in various locations, compromising the images' integrity, consistency and accessibility.

B. Processes and Assumptions
1. Application will be open source
2. The CMS will be browser-based.
3. Creation of centralized setup through possible multi-tenancy.
4. Allow for future expansion and data sharing capabilities.
5. Design and production of public collections web sites for pilot members.
6. The vendor will work with MALHM to import data from a variety of partner legacy systems. These include: 3 PastPerfect databases; 1 FileMakerPro database; 1 Excel database.
7. Pre-configured with several museum and archive standards including Dublin Core, and Nomenclature 4.0
8. In an effort to plan for future consortium integration, including a federated repository site where partner holdings are aggregated, the MALHM installation profile will be consistent for all participating partners.
9. Multi-level access/security for general users and content administrators.
10. Accommodate low-resolution images of collection items.
11. The CMS should support a Graphic Conversion Engine.
12. The CMS supports the generation of a range of custom reports and forms, as well as customized search and browse tools, export formats and controlled vocabularies.
13. The vendor will work with MALHM to specify server requirements, acquire necessary infrastructure and install all required supporting software. MALHM is prepared to purchase any necessary hardware and software as required by the system selected, including a server, and other hardware and software.
14. The vendor will provide consulting and support to MALHM administrators as the project is developed.

C. CMS Features
Organizationally, the CMS will be a primary tool for physical and digital asset management. It should have standard collections management functions, as well as the ability to create customizable fields and to integrate with the web platform and other technology systems.

1. Standard Functions
   MALHM requires a CMS that can perform standard collections management functions, including (but not limited to) the following:
   a) Object-specific activities for data entry
   b) Cataloguing
   c) Data queries
   d) Accessioning
   e) Location recording
   f) Inventory
   g) Loans
   h) Handling
   i) Provenance
   j) Conservation condition reports
   k) Treatment records
   l) Maintenance records
   m) Authority controls
   n) Nomenclature

    o) Insurance
    p) Deaccession/disposal
    q) Rights management

  2. Customizable Fields
   MALHM wants the ability to create custom fields, as determined by the CMS advisory group.

  3. Data Storage
   The current data storage requirements are minimal, however, as the collection grows, the growth will be significant. At this point, total data storage needs are an estimate but could grow by 1 to 2 terabytes per year in its first few years. It is important that the CMS have the capacity for growth.

D. Statistics
  1. Physical Asset Records
   a) It is estimated there are approximately 100,000 records in total from the five participating organizations ready to be integrated into a new CMS.
   b) Annual growth rate anticipated being approximately 500-1,000 entries per year.
   c) Average size for data on each existing legacy CMS application is approximately 2-6 GB.
  2. Users
   a) Five consecutive users for the one-year pilot.
    (1) Pope County Historical Society
    (2) Minnesota Indian Affairs Council
    (3) Stevens County Historical Society
    (4) Renville County Historical Society
    (5) Isanti County Historical Society

E. After the one-year pilot, if deemed successful, the project will open up to Minnesota's other 500+ history organizations.

II. **Proposal Content -** Interested proponents must provide a proposal that comprises the following information:
 A. **Company Synopsis** - Provide a company synopsis, which includes the following:
  1. Legal corporate/business name, and description of the type of ownership
  2. Business address, including location, phone/fax, and website
  3. Contact information for your representative with respect to this submission (name, title, phone and email)
  4. An overview and history of your business

 B. **Product Information** - Provide the following product information:
  1. Description of the Collections Management System, including hosting and deployment options.
  2. Description of data asset management capabilities.
  3. Description of web publishing capabilities.
  4. Description of product support and training.
  5. Schedule of costs for different system implementations, including any on-going support and/or licensing fees, and any fees for migrating from other systems.
  6. The vendor should indicate how upgrades (major and minor), patches and bug fixes are handled and whether they are covered by a service agreement.
  7. A list of clients with systems of similar scope and size as that proposed to MALHM.
   a) The clients selected should appropriately showcase the vendor's capabilities as they relate to this proposal and should demonstrate the vendor's capability in working in a similar environment. The list should include the name and telephone number of an appropriate contact person and the version of software used by the client.

C. **MALHM Questions** - Please respond to the following questions in your submission:
   1. What is your licensing model?
   2. What is the process for migrating current datasets to your system? What is MALHM's scope of responsibility in this process?
   3. Are there add-on modules that can be purchased later?
   4. How flexible is your system in terms of adding new features?
   5. What is your general approach for software integration and communication with other systems?
   6. How frequently is your software updated?
   7. What was the date of your last major upgrade?

D. **Sample Contract**
   1. Vendors will provide a skeleton or sample contract that includes all standard (including negotiable) clauses. The sample contract should include the vendor's customary wording and/or clauses relating to the following topics.
   2. Any guarantees or warranties relating to any aspects of system performance.
   3. The definition of vendor nonperformance.
   4. Any remedies available to MALHM for vendor nonperformance.
   5. MALHM's rights in the event of vendor termination (i.e. bankruptcy, acquisition, merger etc.).
   6. The time period of the contract.
   7. Vendor billing and collection policies.
   8. MALHM obligations
   9. Vendor Obligations

E. **Evaluation Criteria**

   1. Certain key criteria will be used in evaluating the vendor's proposal. The following is a list of some, but not necessarily all, of the criteria to be considered. No single item will be a determining factor. The criteria are not listed in any particular order.
      a) An understanding of MALHM's needs and the corresponding vendor recommendations.
      b) Proper solution to the RFP requirements. Additional ideas may be added as long as the RFP requirements are met.
      c) Total cost of the project.
      d) The vendor's track record and past job performance.
      e) Availability and quality of personnel both for installation and post installation support.
      f) Demonstrated superior support of hardware and software.
      g) Ability to customize software to suit MALHM.

F. **Professional Resumes**
   1. Professional resumes or job descriptions of the project manager and other key individuals involved in the implementation must be provided to MALHM.

G. **A complete copy of the proposal should be submitted via email to** marci@minnesotahistorymuseums.org.

   Questions and clarifications should be directed to:
   Marci Matson
   The Minnesota Alliance of Local History Museums
   612-500-7460
   marci@minnesotahistorymuseums.org

H. **Proposal Conditions**

   1. MALHM accepts no obligation for the direct or indirect costs incurred by successful or unsuccessful bidders in the preparation of proposals in response to this RFP.
   2. This RFP may be modified or withdrawn by the MALHM at any time as determined necessary by the MALHM.
   3. MALHM reserves the right to reject any and all proposals resulting from this RFP.

4. The proposal received from the successful bidder will become part of the agreement between the MALHM and the vendor.
5. Payment Terms - Progress payments will be made upon completion of each section in a pre-agreed schedule.
6. Project Timeline
    a) RFP published: **March 8**, 2017
    b) Proposals due: **April 14**, 2017
    c) Contract Signed: **June 1**, 2017 (contingent on receiving MHCHG funds)
    d) Project Completed by: Completion of pilot project study slated for **June 1**, 2018.