Request for Proposal

Museums’ Collections Database Gap Analysis

Summary

Five Colleges, Inc. (FCI) seeks a research partner as it engages in a gap analysis of the consortium’s museum collection management system (CMS), MimsyXG. The gap analysis is one portion of an Andrew W. Mellon Foundation grant to plan for the future of joint management of the database that contains information describing art and cultural heritage collections held by six repositories in the Connecticut River Valley area of Massachusetts, and to prepare for a linked data environment across all five parent college libraries, archives, special collections, and museums. The gap analysis, in concert with other concurrent and parallel projects, will help determine the requirements for a new CMS.

Context

Overall Project

The Museum Collections Management Commons (MCMC) project is a two-year planning grant funded by The Andrew W. Mellon Foundation and administered by Five Colleges, Inc (FCI) and an interdisciplinary, intercampus steering committee. The overall project has several goals. The first is to assess the current status of the museums’ consortial collection management platform and its ability to meet the collection management needs of member museums. The second is to evaluate the quality and consistency of the metadata contained in the current CMS and the governance systems that oversee it, so as to plan for a linked data environment with related campus library and archives resources. Third, the MCMC project is undertaking a significant study of users of the public portal to further understand their needs and expectations as related to discovery of museum resources on the web. Goals two and three are intended to enable student and faculty discovery of interconnected regional cultural assets. All components of this project are currently underway.

The consortial database (MimsyXG) has been in use since 1996 and is shared by UMass Amherst’s University Museum of Contemporary Art, Amherst College’s Mead Art Museum, Smith College Museum of Art, Mount Holyoke College Art Museum, Hampshire College’s Gallery, and Historic Deerfield. The database is administered and stewarded by FCI and collections are published to the web via a public portal. Although the six museums have shared a system for several decades, the many-museums-one-CMS model remains pioneering in the museum field.

For more than 50 years, FCI’s work has included the continual development of an integrated library system, providing unified access to the rich physical and electronic resources distributed across five campuses. Beginning in the 1990s, this commitment was complemented by a parallel project to open up discovery of and access to the museum collections held within the member campuses by creating a consortial database with a public-facing portal. Additionally, FCI coordinates Museums10, a dynamic collaborative of 10 museums in the immediate region that inspire, engage and enrich their communities through shared experiences of art, literature, history, and the natural world. Not only have these initiatives been of wide benefit to academic and broader communities, they have established a strong foundation of collaborative practice encompassing governance structures, funding models, shared
systems, and coordinated operations. This culture of cooperation positions FCI to advance to an even more collaborative and innovative endeavor: to optimize effective cross-collection discovery to unlock the extraordinary cultural heritage and scholarly resources held within the consortium.

As a critical step on this journey, FCI is preparing to upgrade the consortial museum database to a next-generation solution. At its core this project will identify a strategy that will maintain (and improve) the integrity of collection metadata and collection management processes. More broadly, the project will define the requirements for a solution that will allow for the integration of museum data with other collection data that will ultimately provide richer context and more efficient discovery experience for public users; that could be extended to incorporate additional managed collections of artifacts; and that is undergirded by a sustainable vision for coordinated oversight, staffing, and support.

The overall project is conceived as having two primary, parallel trajectories. The first is a research process to assess current needs and context to develop a set of functional requirements for a future system and to identify the steps necessary for implementation. The second will focus on organizational development, mapping new cross-collection systems of governance, planning and communication to facilitate increased coordination across museums, libraries and archives. This second phase seeks to break down silos that impede collaboration and to diagnose the imbalanced distribution of expertise and capacity across the colleges and their special collections to build and sustain a more robust cross-collection network of knowledge and discovery.

The proposed project aims to address significant challenges posed by the shared database model, including: 1) adopting controlled vocabularies and best practices for metadata creation and management, 2) instituting a formal governance system, 3) developing specifications for a new collection management system that incorporates linked data across many managed collections at the five campuses and broader Museums10 group, and 4) providing for the possibility of federated discovery of museum, library, and special collections resources across the campuses and museums for external and internal stakeholders.

**Purpose of Gap Analysis**

The Gap Analysis seeks to answer the following questions:

1. In what ways do the processes and workflows used by each of the six museums to manage their collection converge or diverge from each other?
2. Does the custom instance of the current CMS, MimsyXG, adequately support these processes and workflows?
3. What external systems (outside of MimsyXG) are in use by the museums that also help to manage workflows and processes?
4. What features or requirements do the museums feel are needed in a CMS to support their work?
5. What are the specifications of an ideal CMS(s) for the consortial members? What is the ideal operating environment in terms of human support for the ideal solution? What must Five Colleges supply? What must each museum supply? What must the CMS provider supply?
About Five Colleges, Incorporated

Composed of Amherst, Hampshire, Mount Holyoke and Smith Colleges and the University of Massachusetts Amherst, the Five College Consortium in the Connecticut River Valley of western Massachusetts is one of the oldest and most extensive higher education consortia in the United States. Its four original campuses began collaborating in the early 20th century, decades before incorporating as a formal consortium and midwifing the creation of Hampshire College in the late 1960s.

Over their 100-plus years of collaboration and 50-plus years as a consortium, the shared spirit of collaboration, community service, and intellectual excellence of the Five College campuses has engendered an organization serving five campuses with 30,000 students, 2,200 faculty members, 7,000 courses, and a combined library collection of some 10 million volumes. In addition to administering a wide array of academic and administrative programs that benefit faculty, students, and staff at member institutions, Five Colleges creates a dynamic intellectual and cultural environment for local communities.

Scope of Work and Deliverables

The selected firm will partner and work closely with the MCMC project team and IT staff at FCI, the museums’ staff, campus and museum IT staff, and others, to undertake the Gap Analysis. The deliverables below have been identified as essential to planning for the future of a consortial CMS, and are intended to draw on, support, and complement other deliverables as part of the MCMC process. In their proposals, firms may suggest and advocate for additional deliverables.

1. Business process models for each of the six (6) consortial members, for each of these eighteen (18) core collection management activities and processes as identified by this modified version of the Spectrum Standard framework for museum collection management:
   a. Temporary custody/Pre-entry
   b. Acquisition and Accessioning
   c. Location and movement control and object entry/exit
   d. Inventory/Collection assessment/Collection Audits
   e. Cataloging
   f. Deaccession and disposal
   g. Incoming Loans
   h. Outgoing Loans
   i. Condition checking and technical assessment
   j. Collections care and conservation
   k. Valuation
   l. Insurance and indemnity
   m. Damage and Loss
   n. Rights and Reproduction request management
   o. Use of collections by external public researchers
   p. Use of collections by faculty and staff for teaching and learning
   q. Exhibition development and execution, and history
   r. Digital surrogate and born-digital object management
   s. Internal research processes and reports
2. Technical and functional specifications, lay descriptions, and visual models of the existing instance of MimsyXG. Data related to current and past IT support of the consortial database and where that support is seated (with the database supplier, at FCI, at consortial member locations). Relevant information from each member organizations’ strategic plan as they relate to and impact support of museum-specific IT needs.

3. An inventory of the technical and functional specifications for all current software or analog systems that support the business process models defined in Deliverable 1, how they are used, and how they are supported (or not) by IT or other staff, and how the integrate with existing systems, or might integrate with potential future systems.

4. A report summarizing the findings of Deliverables 1, 2 and 3, especially highlighting similarities and differences among the six organizations. Prepared data used to generate th report’s findings should also be supplied with this deliverable.

5. Engage the museums’ staff and related IT professionals in visioning about an ideal CMS solution with particular attention to improved ways of working together across museums and campus functional areas including academic programs, libraries, advancement, and communications. Summarize the findings of this work in a report.

6. Recommend an ideal operating environment including:
   a. Technical and functional specifications for an ideal CMS (including supporting systems as necessary) with close attention to security and WCAG compliance.
   b. List of system integrations and protocols available to other systems.
   c. Specifications related to IT support and training (immediate and ongoing) in terms of staff skills, number of hours, and support levels. Note where the support is currently, where future support should be seated, and what type(s) is(are) needed.
   d. Recommendations specific to Digital Asset Management that considers existing procedures, software, and resources in use either at museums or elsewhere on their parent campuses.

7. With MCMC project staff and FCI IT staff, write an RFI for a new provider.

**Budget**

The budget for this project is $60,000- $100,000
2021 RFP Review Timeline

- Release of RFP: September 17, 2021
- Question Period: September 17 - October 3, 11:59pm EST
- Question responses released: by October 6, 11:59 pm EST
- Submission deadline: October 15, 11:59pm EST
- Proposal Review: October 18 - October 29
- Interviews with top firms: November 1 - 5
- Firm selection: by November 12

2021-2022 Project Timeline

- Project begins: December 2021
- Project ends: by June 30, 2022

Proposals should include:

Proposer qualifications and identification of team members
Include a firm profile and qualifications and experience of each team member anticipated to work on the project.

Methodological approach
Explain in detail how you will approach each deliverable of this gap analysis. Be specific about methodologies and the format of required deliverables, particularly Deliverable 5. Will you incorporate a method for accounting for learnings from changes in resources, processes, and workflow that have been the result of the ongoing pandemic? If so, how? Will you propose any additional deliverables? If yes, justify the inclusion of those additions. Specify which work will occur in person, virtually, or if some work is preferred to be in person, with a virtual option if public health or other situations dictate.

Proposed project schedule
Given the academic calendar, the current Covid-19 environment, and the time your team requires to gather information, the methods you will use for that, and how you will prepare the deliverables, please lay out a clear and detailed proposed project schedule. It is generally understood that December 2021 will be needed to work with the MCMC team to prepare a detailed project plan, taking any externalities that have arisen between proposal submission and project start date. Most of the museums’ staffs are engaged in end of the semester activities in December and the last week of the month should be considered unavailable.

Previous related work undertaken by the proposer
Include brief descriptions and/or links to publications referencing similar projects.
References

References should include email and phone contact information for at least three (3) references. These references will preferably be clients involved in the completion of the work described in the above section.

Price

Provide a total price for the project with a breakdown of the cost for each required deliverable and any additional deliverables proposed. Specify if travel to accomplish work on-site is included, listed separately as option, or otherwise accounted for in the price proposal.

Instructions for submission

All proposal components should be submitted as one PDF document emailed to bCUSIN@FIVECOLLEGES.EDU with the subject line “Gap Analysis RFP submission [submitter name]” by October 15; proposals received after October 15, 11:59pm EST will not be considered.

Questions about the proposal can be emailed to bCUSIN@FIVECOLLEGES.EDU before October 3, 11:59 pm EST with the subject line “Gap Analysis RFP questions”. Receipt of questions will be acknowledged when received, but all submitted questions will be answered in one response document emailed to all individuals and firms who communicated with us about the RFP on October 6, 2021.

Proposal evaluation criteria

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<tr>
<th>Qualifications of proposer</th>
<th>40%</th>
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<tr>
<td>Methodology and work plan</td>
<td>45%</td>
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<td>Cost</td>
<td>15%</td>
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