



# Parks, Recreation and Historic Preservation

## Request for Proposals C003421 Collections Management System May 26, 2020

### Attachment 2 – Proposal Response Form

Proposers **MUST** utilize this form as part of their Technical Proposal submission. Bidders **must** select only one checkbox within the Affirmation Statement column for **each** requirement. Responses which exist outside of this form, except for those where expressly permitted, may not be evaluated. Requirements labeled **M** are mandatory and must be completed. Requirement labeled **D** are desirable.

Bidders **MUST NOT** include any Financial Proposal information; the existence of Financial Proposal information within this document or any Technical Proposal document may result in the Bidder's proposal being found non-responsive and such Proposal may be rejected.

#### Bidder Information

<b>Firm Name</b>	
<b>Firm Address</b>	
<b>Parent Company</b>	
<b>Affiliates</b>	

#### Bidder Primary Contact

<b>Name, Title</b>	
<b>Address</b>	
<b>Email Address</b>	
<b>Telephone Number</b>	

#### Affirmation of Proposal

By signature below and submission of this Proposal, Bidder affirms that it has read the RFP in its entirety and understands and agrees to abide by the requirements, terms, and conditions contained within the RFP, if awarded a Contract. Further, Bidder affirms that it has reviewed its Proposal for completeness and accuracy, that all requirements which are mandatory have been appropriately addressed, and that the signatory below is authorized to commit the Bidder to an engagement if so awarded.

\_\_\_\_\_

Name

\_\_\_\_\_

Signature

\_\_\_\_\_

Title

\_\_\_\_\_

Date

2.1 Core Requirements			Meets	Does Not Meet
2.1.1 Collections Management Software	M	<ul style="list-style-type: none"> <li>Must be a web-based, vendor-hosted commercially available collections management software that has a proven history (minimum of five (5) years) of successful performance. System is capable of:               <ul style="list-style-type: none"> <li>being available via Internet browsers to include Internet Explorer, Google Chrome, Safari, and Firefox;</li> <li>supporting open Web Application Program Interface (Web API) to allow flexibility and ease of integration to other OPRHP systems;</li> <li>creating records for each object in the Agency's collection;</li> <li>tracking the location, use, conservation treatment and condition of objects;</li> <li>easily searching through records based on user-defined search criteria, and both export or print out query results;</li> <li>importing files and associate these with one or more objects in the collection; and</li> <li>possess a public-facing component that provides web access to selected data fields and files.</li> </ul> </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.1.2 Collections Management Categories	M	<ul style="list-style-type: none"> <li>Must accommodate the unique data requirements of a museum collection that is comprised of the following broad categories:               <ul style="list-style-type: none"> <li>archives (books, manuscripts, documents, film, etc.);</li> <li>historic objects;</li> <li>works of art;</li> <li>archaeological artifacts; and</li> <li>natural history specimens.</li> </ul> </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.1.3 Data Storage & Expansion	M	<ul style="list-style-type: none"> <li>Must accommodate an increase in the number of object records and/or database file size of approximately 15 percent (15%) per year over the contract term including any contract renewals.</li> <li>Must be able to accommodate an expected minimum of three (3) million object records having an expected total database file size of three and one-half (3.5) TB without loss of functionality or performance over the contract term and including any contract renewals.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.1.3 Agency Licenses	M	<ul style="list-style-type: none"> <li>Must accommodate a minimum of sixty (60) total agency users with fifty percent (50%) of these being concurrent users.</li> <li>Must accommodate an increase in the minimum number of total and concurrent agency users.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

2.2 Collections Management Process			Meets	Does Not Meet
2.2.1 Acquisition & Accessioning	M	<ul style="list-style-type: none"> <li>• Must accept an accession numbering format that is based on Agency-defined criteria described in <i>Exhibit B Accession Numbering and Location Format</i>.</li> <li>• Must prevent assigning duplicate accession numbers to an object record.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	D	• Can record that an accession number has been physically applied to an object.	<input type="checkbox"/>	<input type="checkbox"/>
		• Can record the date that an accession number was applied to an object.	<input type="checkbox"/>	<input type="checkbox"/>
		• Can record the name of the person who performed the task.	<input type="checkbox"/>	<input type="checkbox"/>
2.2.2 Cataloging	M	<ul style="list-style-type: none"> <li>• Must support the creation and maintenance of individual object records that capture at minimum the following types of information:                             <ul style="list-style-type: none"> <li>○ Type of object (classification);</li> <li>○ Name/title of the object;</li> <li>○ Name of the manufacturer/maker;</li> <li>○ Date manufactured/created;</li> <li>○ Materials/composition;</li> <li>○ Dimensions;</li> <li>○ Location;</li> <li>○ History of ownership (provenance) or provenience;</li> <li>○ Citations of bibliographic references;</li> <li>○ Exhibition history;</li> <li>○ Conservation treatment history; and</li> <li>○ Appraisal history</li> </ul> </li> <li>• Must support the use of the standardized object classification system: Nomenclature for Museum Cataloging (Nomenclature 4.0). See <a href="https://nomenclature.info/index.app">https://nomenclature.info/index.app</a></li> <li>• Must capture at least three (3) prior accession or registration numbers for an object.</li> <li>• Must accommodate citations of bibliographic references from a wide range of source material, including books, journals (including e-journals), newspapers and websites.</li> <li>• Must capture information relating to at least two (2) separate appraisals, including the appraised value, date of the appraisal and name of the appraiser.</li> <li>• Must capture, as a text field, up to three (3) object labels or captions and associate them with related object record or image file.</li> <li>• Must accommodate up to five (5) different photographic images per object record, including but not limited to the following attributes:                             <ul style="list-style-type: none"> <li>○ The name of the photographer;</li> <li>○ Type of medium;</li> </ul> </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

2.2 Collections Management Process			Meets	Does Not Meet
		<ul style="list-style-type: none"> <li>○ Resolution and/or size of image;</li> <li>○ Date taken; and</li> <li>○ Copyright ownership or status.</li> </ul>		
	D	<ul style="list-style-type: none"> <li>● Can prompt usage of classification-specific fields to capture information unique to an object, such as materials and dimensions.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.2.3 Inventory Control	M	<ul style="list-style-type: none"> <li>● Must record the physical location of an object, or object lot, using Agency-defined criteria included in <i>Exhibit B Accession Numbering and Location Format</i>.</li> <li>● Must accommodate at least four (4) separate location fields (or field sets) as follows:                             <ul style="list-style-type: none"> <li>○ Permanently assigned location;</li> <li>○ Current location; and</li> <li>○ Minimum of two (2) prior location(s).</li> </ul> </li> <li>● Must require an entry in the location data field (or field set); a null value is not permitted.</li> <li>● Must record the reason for the relocation of an object from among a list of at least five (5) OPRHP defined options.</li> <li>● Must record the current status of an object based on Administration user-defined options, including but not limited to:                             <ul style="list-style-type: none"> <li>○ On display;</li> <li>○ On loan;</li> <li>○ In storage;</li> <li>○ Undergoing treatment; or</li> <li>○ Preparing for exhibition.</li> </ul> </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	D	<ul style="list-style-type: none"> <li>● Can <b>both</b> 1) provide a shortcut that enables an Agency user to reset the “current location” field to the data provided in the “permanently assigned location” field, <b>AND</b> 2) capture the data from the “current location” into the most recent “prior location” field.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> <li>● Can provide a shortcut that enables an Agency user to change or update the current location of a group of objects.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> <li>● Can display a floor plan from a searchable list of OPRHP floor plans.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.2.4 Deaccessioning	M	<ul style="list-style-type: none"> <li>● Must preserve, without loss of data, the entire catalog record of an object that has been deaccessioned.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

2.2 Collections Management Process		Meets	Does Not Meet
	<ul style="list-style-type: none"> <li>• Must allow deaccessioning of part of an object, a portion of an object lot or assembled collection without affecting the other parts.</li> <li>• Must allow the ability to tag an object as selected for deaccessioning.</li> <li>• Must capture detailed information regarding each step in the process of deaccessioning an object or group of objects (refer to <i>Exhibit C Deaccessioning</i> for a description of deaccessioning process). This information includes the notification and response of up to five (5) state agencies.</li> </ul>		
2.2.5 Exhibition Management	<p style="text-align: center;"><b>M</b></p> <ul style="list-style-type: none"> <li>• Must capture, at minimum, the following types of information related to an individual exhibition:                             <ul style="list-style-type: none"> <li>○ Title of the Exhibition;</li> <li>○ Name and Address off the Sponsoring Organization;</li> <li>○ Exhibition Venues (Minimum of Four (4) Venues Per Exhibition);</li> <li>○ Exhibition Start and End Dates;</li> <li>○ Status of the Loan and Exhibition Agreement(s);</li> <li>○ Packing and Transportation Arrangements;</li> <li>○ Object Condition Reports;</li> <li>○ Insurance Requirements and Status;</li> <li>○ Courier Requirements;</li> <li>○ Storage and Display Requirements;</li> <li>○ Exhibition Photography Requirements; and</li> <li>○ Exhibition limitations on an object basis, including but not limited to, reduced number of venues or exhibition period.</li> </ul> </li> <li>• Must be able to tag an object record as reserved for a future exhibition(s)</li> <li>• Must be able to support the creation and maintenance of individual object records for items that are received on loan, and identify them separately from the agency’s permanent collection capturing, at a minimum, the following types of information related to such an object(s)                             <ul style="list-style-type: none"> <li>○ Registration or identification number;</li> <li>○ Type (classification);</li> <li>○ Name/Title;</li> <li>○ Manufacturer/Maker;</li> <li>○ Date of creation;</li> <li>○ Material(s);</li> <li>○ Dimensions;</li> <li>○ Location;</li> <li>○ Insurance value; and</li> <li>○ Owner information.</li> </ul> </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

2.2 Collections Management Process		Meets	Does Not Meet
	<ul style="list-style-type: none"> <li>• Must be able to identify an object as subject to loan renewal <b>AND</b> capture the renewal date.</li> <li>• Must be able to identify an object on loan as subject to a pending bequest.</li> <li>• Must capture an itemized accounting of, at a minimum, each of the following types (or categories) of expenses associated with an exhibit:                             <ul style="list-style-type: none"> <li>○ Appraisal Fees;</li> <li>○ Photography Expenses;</li> <li>○ Object Preparation and Packing;</li> <li>○ Transportation Expenses;</li> <li>○ Courier Expenses; and</li> <li>○ Insurance Expenses.</li> </ul> </li> <li>• The information captured for each expense must include, at a minimum, the amount (in U.S. dollars), vendor data, date of invoice, and date payment was received.</li> </ul>		
2.2.6 Object Conservation	<p style="text-align: center;"><b>M</b></p> <ul style="list-style-type: none"> <li>• Must capture and preserve the following information relating to Condition Assessments for each object as part of an associated data set displayed hierarchically by date of analysis:                             <ul style="list-style-type: none"> <li>○ Date of examination;</li> <li>○ Name (and title) of examiner;</li> <li>○ Overall object condition assessment or rating, such as excellent, good, fair, and poor; and</li> <li>○ Summary list of remedial work required.</li> </ul> </li> <li>• Must capture and preserve the following information relating to Materials Analyses as part of an associated data set displayed hierarchically by date of analysis:                             <ul style="list-style-type: none"> <li>○ Type of analysis (FTIR, SEM, X-ray, etc.);</li> <li>○ Purpose of the analysis;</li> <li>○ Name and date of the analyst; and</li> <li>○ Brief (narrative) summary of the findings.</li> </ul> </li> <li>• Must capture and preserve the following information relating to Treatment Reports as part of an associated data set displayed hierarchically by date of treatment:                             <ul style="list-style-type: none"> <li>○ Date that treatment was completed;</li> <li>○ Name (and title) of conservator or technician;</li> <li>○ Purpose of the conservation treatment; and</li> <li>○ Brief (narrative) summary of the work completed.</li> </ul> </li> <li>• Must capture information pertaining to the handling, storage, and display requirements for each object in the Agency's permanent collection:</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

2.2 Collections Management Process			Meets	Does Not Meet
		<ul style="list-style-type: none"> <li>○ Temperature requirements (expressed as a range in degrees Fahrenheit);</li> <li>○ Humidity requirements (expressed as a range in percent relative humidity);</li> <li>○ Light exposure (expressed as a maximum limit of illuminance in lux); and</li> <li>○ UV exposure (expressed as a maximum limit of microwatts per lumen).</li> </ul>		
	D	<ul style="list-style-type: none"> <li>● Can capture the duration of a required rest period (expressed in months) for an individual object or group of objects in the Agency’s permanent collection.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> <li>● Can express the required rest period as a fixed end date based on the duration and start date (using a calendar picker or other tool).</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.2.7 Online Catalog	M	<ul style="list-style-type: none"> <li>● Must be a public-facing web-supported interface that enables public users to view, browse, and search the Agency’s permanent collections database.</li> <li>● Public must be able to access the online catalog from the Agency’s website.</li> <li>● Welcome screen must be customizable.</li> <li>● Public must be able to view, browse, or search permanent agency objects by, at a minimum, facility, object type, name of maker or manufacturer and date of manufacture or creation.</li> <li>● Must allow an administrative user to select which data fields are accessible for viewing by the public.</li> <li>● Must be able to apply a watermark to images published to the online platform.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
		D	<ul style="list-style-type: none"> <li>● Can capture the following types of non-personally identifiable data associated with public use of the online catalog:                             <ul style="list-style-type: none"> <li>○ Number of discrete logins (initial sessions beginning with the welcome screen);</li> <li>○ Length of online session (including minimum, maximum and average viewing times); and</li> <li>○ Number of hits (views) received by each object catalog record in the database.</li> </ul> </li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>● Captured data can be preserved for up to one (1) calendar year and available for export.</li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>
			<ul style="list-style-type: none"> <li>● Can enable automatic translation programs to convert text data into other languages.</li> </ul>	<input type="checkbox"/>

2.3 Data Management		Meets	Does Not Meet	
2.3.1 Multi-Media Files	M	<ul style="list-style-type: none"> <li>• Must accept uploading media and document files directly to the database.</li> <li>• Must accept, at a minimum, the following media file types: tiff, jpeg, dng, mov, wmv, wav, mp3 and mp4.</li> <li>• Must accept, at a minimum, the following document file types: pdf, doc/docx and xls/xsls.</li> <li>• Must capture and preserve the metadata of uploaded files.</li> <li>• Must associate (or index) uploaded image(s) and document file(s) with an individual object record.</li> <li>• Must capture and maintain the original order of individually uploaded graphic/image files.</li> <li>• Must associate and display captions along with their respective image file.</li> <li>• Must associate and display transcriptions along with their respective audio and video files.</li> <li>• Must display text and associated images on the same page.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	D	<ul style="list-style-type: none"> <li>• Can display multiple images in a variety of configurations (for example, singly or tiled format).</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.3.2 Data Validation Tools	M	<ul style="list-style-type: none"> <li>• Must support the designation of specified date formats for selected user defined date fields. Date formats include fixed dates, flexible dates (e.g. "circa") and date ranges (e.g. 18th century or 1930-1950).</li> <li>• Must support an Administration-level user to designate selected fields as requiring a value.</li> <li>• The system must prescribe or restrict the type or format of data that the system will accept for certain fields.</li> <li>• Must be able to perform spelling checks for text fields using standard English language dictionaries.</li> <li>• Must set the default format of monetary values to U.S dollars and display to the hundredth of a dollar.</li> <li>• Must be capable of setting the default format for dimensional values to display in US imperial units.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.3.3 Vocabulary Control	M	<ul style="list-style-type: none"> <li>• Must support the creation of customized (administrative user defined) authority lists for use during data entry and query/search functions.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.3.4 Data Field Structure	M	<ul style="list-style-type: none"> <li>• Must allow for the ability to create sub-fields (or subsets) within a data field to capture a series of related entries individually and separately.</li> <li>• Must allow for the ability to set or expand the length of text fields or areas, up to 1000 characters, providing the ability to display text on multiple lines.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

2.3 Data Management			Meets	Does Not Meet
		<ul style="list-style-type: none"><li>• Must allow for administrative users to change the name (label) of a data field.</li><li>• Must allow for administrative users to select individual fields as “hidden” from view by other agency users and/or public users.</li></ul>		

*Remainder of Page Intentionally Left Blank*

2.4 User Interface			Meets	Does Not Meet
2.4.1 Data Entry Tools	M	<ul style="list-style-type: none"> <li>Must have the ability to automatically save any new additions or edits entered into or made to the database.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	D	<ul style="list-style-type: none"> <li>Supports the creation and use of dialog boxes to guide data entry.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> <li>Supports automatic data entry when used in conjunction with authority lists or dialog boxes.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> <li>Supports the use of copy/paste and cut/paste functions both within and between object catalog records.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> <li>Supports the use of default values for selected fields, such as the current date for a "date completed" field. Default values can be over-ridden.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> <li>Includes an "undo/reset" button to clear (delete) a previous entry in a field or to reset a form prior to saving.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.4.2 Data Updates	M	<ul style="list-style-type: none"> <li>Must automatically update the database to capture any changes (additions, edits or deletions) in real time.</li> <li>Must automatically create a record of any changes (additions, edits or deletions) made to an object catalog record AND capture the username and date.</li> <li>Must automatically create an archive (backup) copy of the database at least once every 24 hours.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.4.3 Help Features	M	<ul style="list-style-type: none"> <li>Must provide a searchable list of help topics that explain data entry conventions.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	D	<ul style="list-style-type: none"> <li>Includes the use of dialog boxes that explain the purpose or requirements for a specific field.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

2.5 Queries and Reports			Meets	Does Not Meet
2.5.1 Search/Browse	M	<ul style="list-style-type: none"> <li>• Must provide search type options including, at a minimum, es Boolean, range and wildcard searches and the use of search operators.</li> <li>• Allows a user to view/browse an entire object record based on the results of a query search.</li> <li>• Query/search results can be displayed on screen, printed, or be exported as: csv, or xlsx/xls files.</li> <li>• Can identify the total number of records (hits) that meet the query criteria and provide the option to proceed with displaying the results (i.e. each record).</li> <li>• Allows a query to be saved for future use (saving the query form, not the results).</li> <li>• Allows a query, once it has been executed, to be modified and re-executed.</li> <li>• When the information in an object record cannot be displayed on one screen, the system automatically includes (carries forward) key data that identifies the object (e.g.: title/description of the object and accession number).</li> <li>• Retrieves and display the records of associated objects (i.e.: whole/part relationships) that meet query criteria.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	D	<ul style="list-style-type: none"> <li>• When the information in an object record cannot be displayed on one screen, the system can automatically display the relative position of the current screen (or page) number within the set (e.g., displaying screen X of N).</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

2.6 System Administration			Meets	Does Not Meet
2.6.1 Credentialing	M	<ul style="list-style-type: none"> <li>Requires entering a unique username and password to access the system as an Agency user.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.6.2 Authority / User Levels	M	<ul style="list-style-type: none"> <li>Must allow at least four (4) different role-based User Levels as outlined below. OPRHP reserves the right to modify specific permissions within each User Level.                             <ul style="list-style-type: none"> <li><u>Level 1 Administrative User</u> <ul style="list-style-type: none"> <li>Ability to add/remove Agency users (or change their authority level)</li> <li>Ability to designate individual data fields as hidden</li> <li>Full access to all user functions and features</li> <li>Full authority to access, create, edit and delete data in the database</li> </ul> </li> <li><u>Level 2 Facility User</u> <ul style="list-style-type: none"> <li>Ability to enter and edit data using pre-existing forms/fields</li> <li>Ability to import image and document files</li> <li>Ability to create and print reports using pre-existing templates</li> <li>No access to any data field designated as hidden</li> </ul> </li> <li><u>Level 3 Researcher</u> <ul style="list-style-type: none"> <li>Full search/query capabilities (without export)</li> <li>No access to any data field designated as hidden</li> </ul> </li> <li><u>Level 4 Guest (Public)</u> <ul style="list-style-type: none"> <li>Read-only access for OPRHP defined fields, records.</li> </ul> </li> </ul> </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	D	<ul style="list-style-type: none"> <li>The ability to apply additional granular permissions (e.g., the ability to allow a specific Level 3 Researcher to import image and document files, but none of the other Level 2 abilities).</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	D	<ul style="list-style-type: none"> <li>The capability to require Agency users to change their password at a specified interval, such as every 60 days.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2.6.3 Editing Controls	M	<ul style="list-style-type: none"> <li>Must indicate that a record is locked when a user is editing or importing data <b>AND</b> display the name of the Agency user.</li> <li>Locked records must remain available to view as read-only.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>