



REQUEST FOR PROPOSALS

Leveraging Our Archives:

*Development and Implementation of
a Digital Asset Management Solution*

February 2, 2015

DEADLINE FOR RESPONSES:
March 9, 5:00 PM EST

CONTACT:

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Background

Project Overview

The Trustees of Reservations (The Trustees) has received a generous grant that will allow us to leverage our Archives & Research Center (ARC) over the next two years. Through this technology partnership, we will develop a digital platform to improve the ARC's accessibility and impact with The Trustees' community of 150 staff, 44,000 member households, and current and future visitors. To accomplish this, the ARC wishes to implement a digital asset management system (DAM) that will enhance access to our museum collections catalog and non-collections archival material, as well as ensure the security of our digital items.

The Trustees of Reservations

Founded in 1891 by Boston landscape architect Charles Eliot, The Trustees of Reservations is the nation's oldest land conservation organization. The Trustees have worked for more than 120 years to conserve the natural, cultural, and historic character that makes Massachusetts' landscapes and communities unique. The organization's mission is to preserve, for public use and enjoyment, properties of exceptional scenic, historic, and ecological value in Massachusetts and The Trustees now care for 112 iconic reservations in 75 communities across the state, including five National Historic Landmarks, one Natural National Landmark, twelve formal gardens, and 95 cultural landscapes. We are the largest private owner of farms and coastline in Massachusetts. Through these special places, The Trustees welcome more than a million visitors each year and serve 100,000 members. Our early beginnings combined preservation with conservation, providing inspiration for the British National Trust and other acclaimed historic preservation and conservation organizations. We are Massachusetts' only organization that carries this dual mandate.

Our founder's simple but bold idea of connecting people to place, through conservation and preservation for public enjoyment, has a new urgency in today's world. We, and our conservation peers, face significant challenges to our ability to build a future constituency, now that our world depends and leverages technology in all aspects of daily life. Over its 123 year history, The Trustees have been a conservation and preservation innovator. Thus, we must embrace and harness digital opportunities so that as our conservation ambassadors begin to age, we remain relevant to the next generation that will steward and protect these special places. Our landscapes and their histories are powerful legacies in the communities where they are located. We seek to activate them using technology respectfully, while creating a more interactive and relevant story to a younger, broader audience.

The Archives & Research Center

In addition to our reservations, The Trustees operates an Archives and Research Center, a highly respected archives facility that serves as the hub of our curatorial stewardship and shelter for 123 years of records. The ARC, established in 2008, cares for a rich collection of historical items, including objects, books, manuscripts, and other archival materials. Subjects represented in the collections encompass American farming, social history, women's history, and military history, as well as American art, architecture, and landscape architecture, among many others. The ARC also contains collections that

document the lives of American families from the 17th to the 21st century.

In its short time of existence, the ARC has become a valuable resource to The Trustees' staff and researchers from around the United States. We have seen incredible growth in our use and holdings. Our research requests have more than tripled since 2012, and we are making fast progress on cataloging our holdings of more than 20,000 objects, 40 manuscript collections, 5,000 books, and 16,000 images. Our goal is to continue this expansion and bring more of the ARC's resources to an even wider audience than we currently reach. By creating online access to our museum collections catalog, we aim to better serve the scholars, genealogists, teachers, writers, and the general public that currently enjoy our properties and resources. By offering enhanced internal access to our institutional records, we hope to aid staff in their roles as stewards in a long line of caretakers and to contribute to future restoration efforts. By implementing a digital asset management system, we intend to preserve the records that document an incredible past so that they can inform and inspire far into the future.

Statement of Needs

The digital asset management solution will help preserve the digital work done at The Trustees, permit faster access to collection images through our online museum catalog, and enable the ARC to fulfill its role as the digital caretakers for our historical and stewardship material, as well as any born-digital items.

The project outlined by the technology partnership has several connected components that are centered on the DAM. The Trustees recognizes that one consultant may not be able to fully provide all the elements described below and that additional partners may be needed for certain line items. In the submitted response, please describe a strategy that takes the full project into consideration and addresses how each item will be approached if not handled by the responding firm.

Item 1: Protecting and sharing our digital assets internally

The DAM solution will help preserve the digital work done at The Trustees and enable the ARC to fulfill its role as the digital caretakers for our historical and stewardship material, as well as any born-digital items. As part of this role, the ARC will use the DAM as a means for searching and sharing digital materials across the organization.

Some of the features that must be addressed are:

- Be compliant with common standards such as the OAIS reference model and HTML5, among others;
- Ability to customize user categories/profiles with viewing and editing permissions;
- Secure support for standard file formats (e.g. Microsoft Office objects, JPG, TIFF, PDF, etc.);
 - Strategy for non-standard or additional file formats, such as GIS database output or obsolete formats ;
- Service and support (SaS) agreement, training documentation, and/or other strategy for maintenance and troubleshooting;

- Interoperability with PastPerfect, or a compatibility plan;
- Clear hosting solution;
- Flexible storage infrastructure with a minimum of 3-5 TB of storage;
- Basic keyword search functions;
- Advanced search capabilities using common metadata fields;
- Appealing and intuitive user experience.

Item 2: Online Collections Catalog

The ARC seeks to make our museum collections management system (CMS) available to web visitors through The Trustees’ website. We have approximately 15,000 records to date in PastPerfect and expect to double that number by the launch of our online catalog, with the anticipation that we will continue to grow our digital records after the launch. We wish to house the image files for the online catalog in the DAM, so at a minimum the system must be compatible with our current CMS, PastPerfect, as well as our web technology. The ARC is looking for a solution that can offer a web-based, public-facing search interface with a clear, sophisticated user experience.

Some of the features that must be addressed include:

- Basic keyword search functions;
- Advanced search capabilities using common metadata fields;
- Faceted browsing by select PastPerfect metadata fields (e.g. date range, object type, etc.);
- Ability for the ARC staff to act as administrators and select which PastPerfect records and fields within these records will be available through a web search;
- Visual search screen for searching by object type/catalog type (e.g. furniture, photographs, manuscripts, etc.);
- Access to the museum collections catalog from the ARC landing page;
- Ability to maintain a live site while performing catalog and collection updates;
- Cross-browser and multi-browser compatibilities;
- Ability to link images from digital asset management system;
 - Ability to match images linked from DAMS with corresponding metadata from PastPerfect in a seamless display;
- Service and support (SaS) agreement, training documentation, and/or other strategy for maintenance and troubleshooting;
- Ability to flexibly incorporate The Trustees’ branding;
- Visually appealing results display – beyond what is available in the PastPerfect-Online module.

We are also looking for creative additions and enhancements to these requirements. These could include:

- “Zoom” or other viewing options on images;
- Faceted browsing on applied themes (beyond current PastPerfect metadata fields);
- GPS and mapping features;

- Responsive design;
- An exhibition module to showcase collection highlights.

Technical Requirements

All responses must take into account The Trustees' technical infrastructure and limitations as described below.

Any custom coding must be thoroughly documented and written project documentations must be submitted at the close of the project.

Current Systems & Support

The ARC uses PastPerfect for its museum collection management system. While we recognize that this is not an ideal solution, we are unable to migrate to a new system at this time. Still, any web catalog and DAMS options that we adopt must consider that we hope to migrate away from PastPerfect in 2-3 years.

The day to day work of IT support at The Trustees is outsourced to SourceOne IT. All updates – from system-wide upgrades to workstation changes – must go through SourceOne IT.

The Trustees operates a Wide Area Network (WAN) that connects 6 campuses across the state. The WAN connects to the SSAE 16 type ii certified data center operated by Xand in Marlboro, MA. SourceOne leases data center space from Xand, which provides access to physical and virtual servers. The server farm is comprised of at least 26 virtual servers in a Microsoft RDP environment, on which most of the organization's applications – including PastPerfect – run. The Microsoft RDP powers individual users across the WAN as well as more than 20 remote sites.

The majority of workstations at The Trustees are Dell PCs that run Windows 7. There are approximately 10 Apple desktop stations and uncounted mobile devices that run Windows through the virtual machine interface of the WAN.

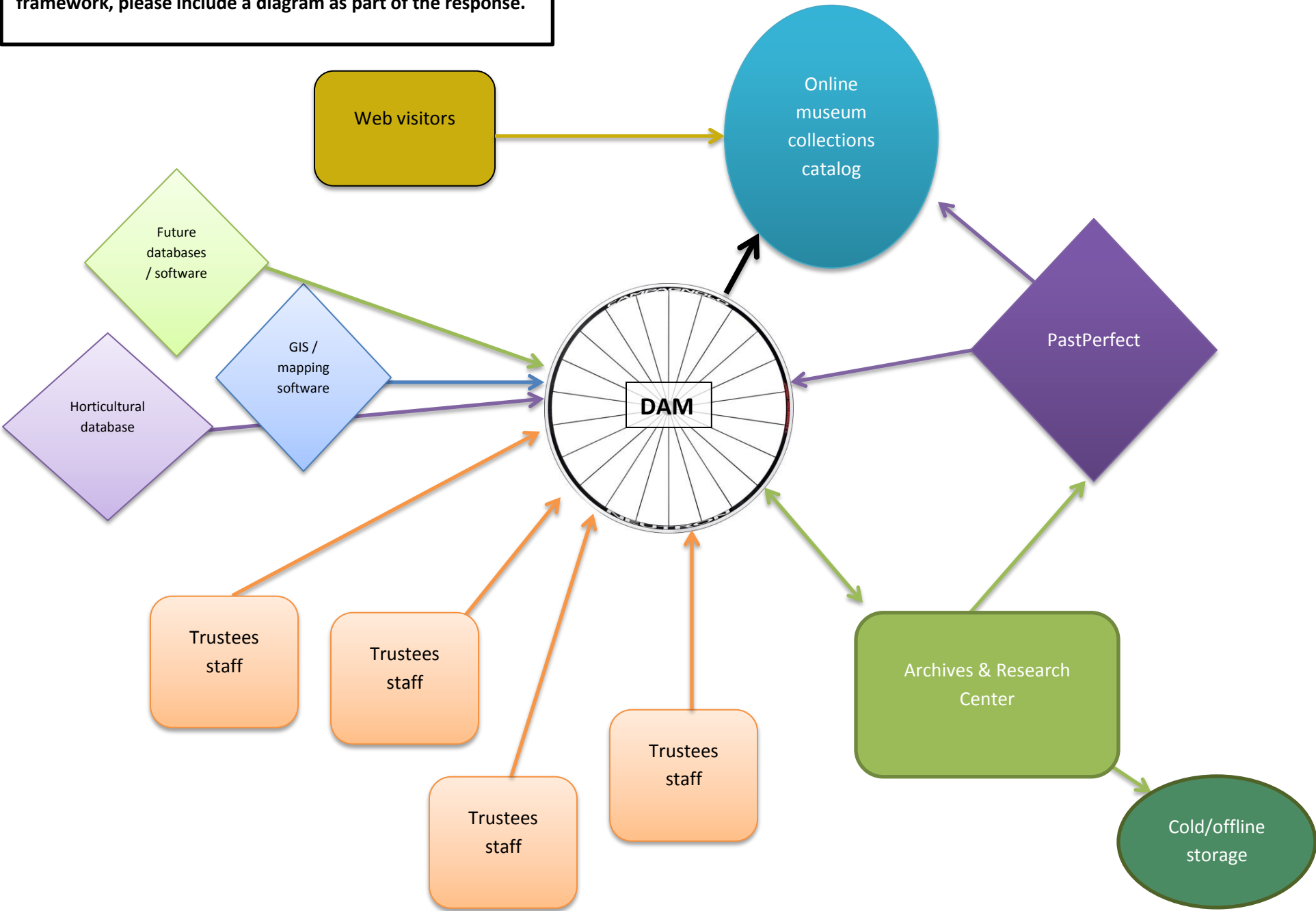
All web hosting is done with Convio.

The Trustees has one staff member that handles our website design and maintenance. This individual will help answer questions about the parameters and branding of the online museum collections catalog, but will not be expected to provide IT support after the catalog's interface has been developed.

Workflow

(See following page)

Sample template for digital workflow. If proposing a different framework, please include a diagram as part of the response.



Budget

The technology partnership is one section of a 1.6 million dollar grant. The Trustees will entertain all proposals and encourage creative, professional discourse on the best process for attaining our goals.

All budgets submitted must be itemized, with each line indicating whether it is a one time cost or, if not, the frequency of recurrence. Please include the annual cost for maintenance as a recurring item.

If responding to some but not all items in the full project, the submitted budgets must take into account the costs necessary to complete the other components.

Milestones

The following schedule reflects that the work must be completed in an expeditious manner with a hard deadline for project completion. However, the ARC will work with the successful bidder to develop more specific milestones and workflow that best fits the proposed solution.

Milestone	Deadline
Digital workflow and systems integration strategy finalized	May 2015
Any third party consultants vetted and hired	June 2015
Web: Online collection interface finalized and approved	August 2015
DAM: 50% of target materials ingested and tested	November 2015
DAM: Internal launch for testing	December 2015
Web: Online collection launched internally for testing	January 2016
DAM: Feedback incorporated and troubleshooting complete	March 2016
Web: feedback incorporated and troubleshooting complete	April 2016
DAM: 100% of target materials ingested and tested	May 2016
All components go live	June 1, 2016

Deliverables & Qualifications

Deliverables

It is expected that responses to this RFP will include:

- **Organizational Overview**
 - A summary of the firm's background and competencies;
 - Names of all proposed project staff with summaries of their experience;
 - If the consultant anticipates needing to hire an outside contractor, include the information of the outside parties;
 - Description of firm's work process and approach to projects of this nature.
- **Project Scope and Budget**
 - Proposed project plan with milestones and timeline;
 - Itemized budget and fee schedule, including explanation of fee structure and dependencies.
- **Portfolio**
 - Examples of similar project work with live links;
 - A minimum of 3 client references, where at least one of the references is within a similar budget to the proposed project.

Additional Qualifications

The consultant(s) selected must have experience with cultural heritage organizations, such as museums, archives, or historical societies. Experience with PastPerfect preferred. Successful proposals will demonstrate an understanding of current best practices in the cultural heritage community. All responses must speak to scalability.

Because of the technical infrastructure at The Trustees, the consultant(s) selected must be open to collaboration with our current and future partners.

Schedule

- February 2, 2015: RFP posted
- March 2, 2015: Last day for questions
- March 9, 2015: Deadline for submissions
- April 3, 2015: Vendor(s) selected
- April 27, 2015: Start of project
- June 30, 2016: Project completed

Contact

Please address questions or concerns related to this proposal (preferably by email) to:

Alison Bassett, Archives & Research Center Manager

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781-784-8200

Sarah Hayes, Digital Archivist

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All questions will be answered promptly and questions and answers will be circulated to all potential bidders via email throughout the proposal process.