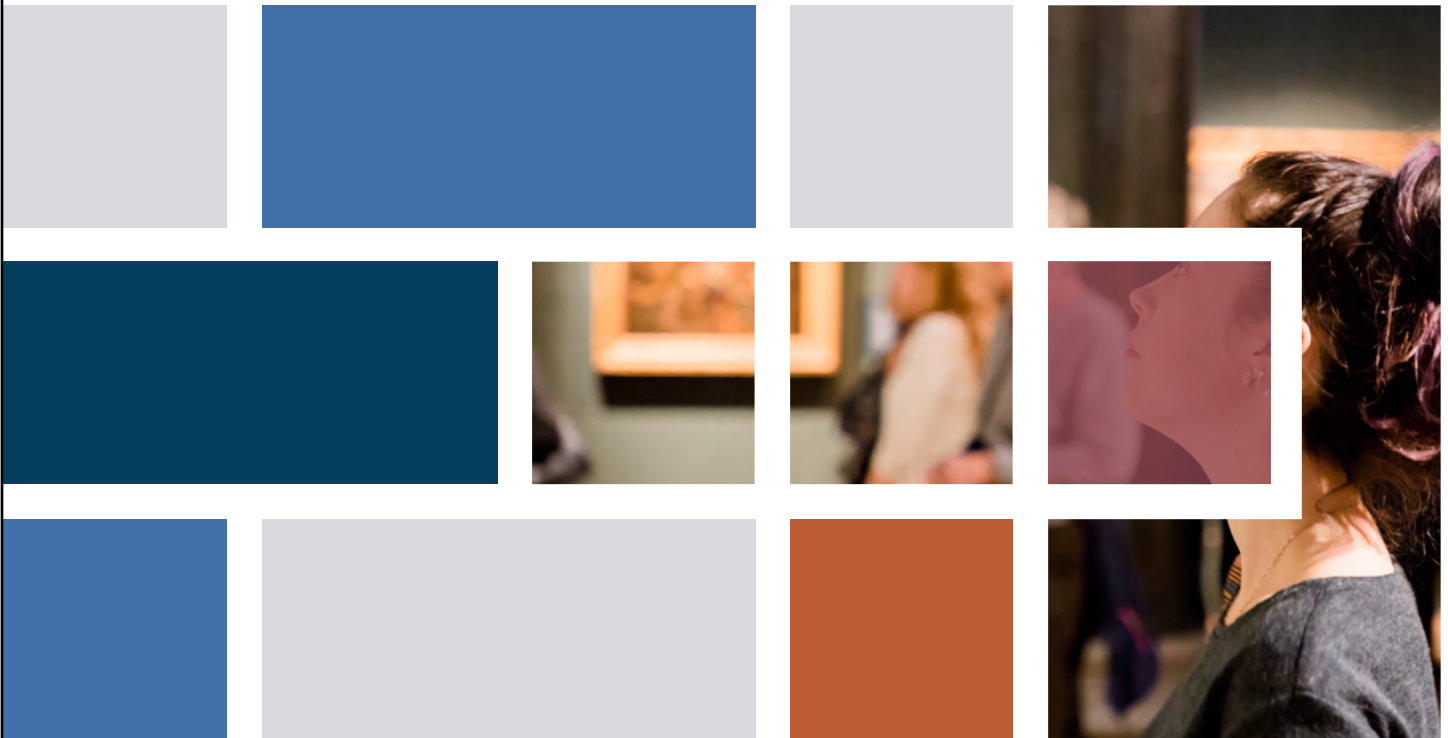


How to Write an RFP for a New Collections Management System

An Educational Guide by Gallery Systems



Why a CMS RFP Matters

As your institution grows, so do your collection management needs. Ensuring that your museum's Collections Management System (CMS) supports accurate, comprehensive, and accessible data is essential to the long-term success of your operations. Over time, legacy systems may no longer align with evolving institutional workflows, interoperability requirements, or stakeholder expectations.

Whether you're transitioning from a previous CMS or selecting one for the first time, initiating a formal Request for Proposals (RFP) process ensures you gather structured, targeted responses that align with your collection's unique requirements. This guide offers expert advice on building an effective and insightful RFP to ensure you select the best CMS for your institution.

Understanding the Types of Procurement Requests

Before you begin drafting your RFP, it is helpful to distinguish between common procurement documents:

- **RFI (Request for Information):** A preliminary step to learn more about the CMS landscape. Ideal when you're exploring options and need vendor input before committing to a formal process.
- **RFQ (Request for Quote):** Focuses on pricing. Suitable when you already know your exact technical requirements.
- **RFP (Request for Proposals):** Solicits comprehensive proposals including functionality, pricing, implementation timelines, support offerings, and strategic alignment.

The RFP process is best suited for institutions seeking a tailored solution and a long-term partnership, particularly for complex collections management needs.

When to Begin the RFP Process

If your institution is experiencing any of the following, it may be time to consider a new CMS:

- Incompatibility with other museum systems
- Increasing complexity in data management
- Workflow bottlenecks or excessive manual processes
- Difficulty producing necessary reports for stakeholders
- Low staff adoption due to usability issues
- Challenges with managing digital assets or loans
- Reliance on outdated technology without reliable support

Institutions using legacy in-house solutions or open-source applications often face these challenges. Such systems can be difficult to maintain and typically require hiring external developers for updates or new features, resulting in increased costs, slower response times, and reduced efficiency.

Start by identifying the specific challenges and goals of your team. The more precisely you can articulate these within the RFP, the better equipped vendors will be to respond with relevant solutions.

Step-by-Step Guide to Creating Your CMS RFP

1. Assemble Your Internal RFP Team

Identify a project lead and core stakeholders, including representatives from:



Collections Management



Registration



Curatorial



Conservation



**IT and Database
Administration**



**Executive
Leadership**



**Power
Users**

Engage these stakeholders early to define functional needs, gain buy-in, and ensure broad alignment.

In addition to forming the RFP committee, consider the broader user base for each system under review. For example, legacy server-based solutions may have supported only a few workstations, but modern, browser-based platforms often expand access across departments. If your institution is exploring multiple systems, such as a CMS, DAMS, or online publishing tool, assess how many staff members will use each one and allocate resources accordingly. Understanding usage patterns can help shape your team, requirements, and your evaluation process.



2. Define Your Requirements

Your RFP should include both **functional** and **non-functional** requirements:

Functional Requirements

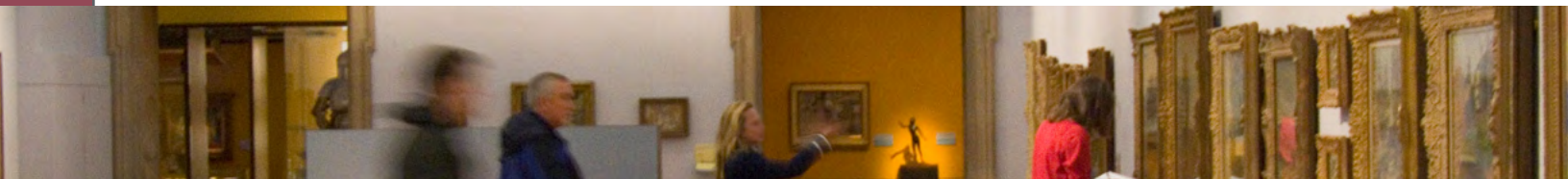
Describe the system's capabilities in plain language:

- "The system should support multilingual records."
- "The CMS should allow for digital asset linking and rights management."

Non-Functional Requirements

Include performance, usability, and compliance expectations:

- "The system should be accessible via a modern web browser."
- "The vendor should provide annual support and training resources."
- "The vendor should have the option to provide customized services, such as recreating all the in-house reports that the museum is currently using, including putting the museum logo on each report header."



Data Requirements

- Types of collection items and associated attributes to manage (e.g., fine art, archival materials, historical artifacts, natural history specimens, and more)
- Data standards to be supported (e.g., Spectrum, GDPR compliance, ISAD(G), DACS, etc.)
- Scalability considerations for anticipated increases in collection volume and for evolving institutional needs over the next decade, including support for DAMS, online publishing, conservation modules, and other future integrations.
- Sample data schema or data dictionary (if available)



Include 5–10 key reports or exports your team depends on (e.g., loan agreements with images, exhibition object lists).

How to Write an RFP for a New Collections Management System

When evaluating potential CMS solutions, it’s essential to understand the capabilities that define a modern, future-ready platform. Today’s museums require systems that go beyond basic object cataloguing, encompassing robust workflow automation, digital asset management, web publishing, and cross-departmental collaboration. Below is a checklist of key requirements that reflect current industry standards and best practices. These features not only support efficient day-to-day operations but also ensure long-term scalability and alignment with your institution’s mission. Solutions like **TMS Collections** are designed to meet these evolving demands, providing museums with the tools they need to manage, preserve, and share their collections effectively.

CATEGORY	REQUIREMENT
Core Collections Management	Hierarchical object classification and parent-child record structures
	Comprehensive cataloging fields including provenance, credit line, and creator details
	Multilingual data entry and thesaurus support
Workflow and Task Management	Customizable workflows for loans, exhibitions, conservation, and more
	Task tracking and calendaring tools
	User-defined status fields for process tracking
Location and Movement Tracking	Nested location tracking (e.g., room > cabinet > shelf)
	Batch location update functionality
	Barcode support for inventory and tracking
Reporting and Data Exports	Customizable reports and outputs (labels, forms, checklists)
	User-friendly report builder
	Exports in PDF, Excel, and XML formats

CATEGORY	REQUIREMENT
Web Access and Online Publishing	Integration with public-facing collections websites
	Direct publishing from CMS to online galleries
	Media streaming support (e.g., video, audio)
Digital Asset Management (DAM)	Support for a wide range of media formats (TIFF, PDF, MP3, etc.)
	Multiple media records linked to single object entries
	Versioning and rights management for media
Exhibition and Loan Management	Exhibition checklist and history management
	Condition reports and conservation scheduling
	Loan agreements, shipping, insurance, and contact management
Data Integration and Extensibility	APIs for integration with third-party systems
	Custom fields and forms
	Bulk import/export tools
User Access, Security, and Permissions	Role-based access controls
	Audit logs for user activity
	Compliance with data security standards

CATEGORY	REQUIREMENT
Scalability and Hosting Options	Scalable architecture for large record volumes
	Flexible hosting: Managed hosting, on-premise, or hybrid
	Secure browser-based access
User Support and Community	Multi-channel support: phone, email, and portal
	Training resources, user guides, and webinars
	Active user community and regular user conferences

Hosting Options: Choosing What’s Right for Your Institution

When drafting your RFP requirements, be sure to include your institution’s hosting preferences. Whether you plan to manage infrastructure in-house or prefer a vendor-managed solution, your choice of hosting strategy will influence long-term performance, support needs, and IT resource allocation. For example:

Managed Hosting by Gallery Systems provides a secure, dedicated cloud environment tailored to your institution’s needs. It minimizes technical overhead by offering built-in upgrades, enterprise-grade security, and responsive support. This option is ideal for organizations seeking a low-maintenance, high-stability solution.

Self-Hosting, on the other hand, grants full control over your IT environment. It’s best suited for institutions with established infrastructure and in-house technical staff capable of managing servers, backups, and security protocols.

Including specific hosting expectations in your RFP can help vendors propose solutions aligned with your technical capacity, security requirements, and institutional priorities.

3. Structure the RFP Document

A clear structure improves vendor response quality and review efficiency.

RFP documents usually include:

Project Overview

- Background of your institution
- Overview of your collection (size, types of objects, media formats)
- Vision for the future of your CMS
- Note any planned data migration and include a representative sample export, if available

Submission Instructions

- List of required documents and deliverables
- Proposal submission deadline
- Timeline for vendor questions and demonstrations
- Contact information for the project manager

CMS Goals

- Specific outcomes your institution hopes to achieve
- Operational improvements, digital access objectives, reporting needs, etc.

Assessment Criteria

- Define how proposals will be evaluated (e.g., 40% functionality, 30% cost, 30% vendor experience)



Other institutions may be willing to share their past RFP documents. Don't hesitate to leverage your professional network; reviewing existing RFPs can provide valuable insights, help identify any overlooked requirements, and inspire new ideas tailored to your collection. Comparing approaches across similar institutions is an excellent way to strengthen your own proposal and align with sector best practices.

4. Prepare Your Requirements Grid

A matrix format can clarify your expectations and streamline the vendor evaluation process. This structured approach is particularly helpful when comparing how solutions align with your institution's priorities. For each requirement, include:

Requirement	Priority (1–5)	Fulfillment	Comments	Alternate Solution
Manage outgoing loans and shipments	5	Fully	TMS Collections includes integrated loan and shipment tracking, with customizable loan forms and reports.	Request demonstration of loan lifecycle workflow.
Support multilingual terminology	4	Fully	Supports multilingual thesauri and alternate language data fields.	Include demo of bilingual catalog entry.
Link digital media to conservation records	5	Fully	Easily attach and annotate images, link condition reports to object records.	Provide example of annotated media.
Publish records to a public website	3	Fully	Seamless integration with eMuseum for online access.	Explore custom publishing options if needed.
Batch update locations using barcodes	4	Fully	TMS Collections supports batch processing and barcode workflows.	Include in inventory demo scenario.

This format supports side-by-side vendor comparison and helps identify additional development, configuration, or training that may be required. It also allows institutions to understand where a system like **TMS Collections** meets or exceeds expectations, ensuring transparency and informed decision-making.

Sample Questions to Include in Your RFP

Once you've outlined your institutional priorities in a requirements grid, consider adding specific questions to your RFP that prompt vendors to explain how their solution addresses your highest-priority needs. This ensures responses are actionable and directly tied to your expectations.

Here are example questions to include:

How does your system manage outgoing loans and shipments, including documentation and tracking?

Please describe how loan workflows are handled across their full lifecycle, including integration with reporting tools.

What multilingual support is available, particularly for terminology management and data entry fields?

Include details on how alternate languages are stored, displayed, and maintained.

How does your platform support linking high-resolution digital media to conservation records or object entries?

Include is annotations or metadata can be applied directly to media assets.

What tools are available to publish records online, and how customizable is the public-facing display?

Include whether web publishing is built-in or requires a third-party integration.

How are batch location updates and barcode workflows managed in your system?

Please describe any tools or interfaces available for streamlining inventory management.

How does your system handle hierarchical relationships between objects, such as sets, components, or archival groupings?

Describe how records are linked and whether actions can be performed at both parent and child levels.

What tools support the management and documentation of conservation treatments and ongoing care?

Describe how treatment histories are linked to objects and how workflows are supported.

How does your system support controlled vocabularies and authority files?

Can vocabularies be customized or integrated with external standards (e.g., Getty AAT, ULAN)?

Can the system accommodate multiple departments or user groups with different workflows and permissions?

Please outline how access controls and user interfaces can be tailored.

What are your system's capabilities for audit tracking and change history?

State if administrators can view what changes were made, when, and by whom.

Including focused, capability-aligned questions will help you evaluate how well each solution supports your real-world workflows and institutional priorities, while also surfacing any limitations or opportunities for customization.





5. Define Your Project Scope and Timeline

Clearly defining the scope and timeline of your CMS project is essential to setting vendor expectations and ensuring the process remains on track. By outlining both the technical and operational boundaries of your project, you give vendors the context they need to deliver accurate, tailored proposals. Transparency at this stage fosters more meaningful responses and prevents costly misunderstandings later.

Be explicit about the following key factors:

- **Data migration needs** and available export formats (e.g., CSV, XML, SQL)
- **User access** requirements, including the number of concurrent users and departmental involvement
- **Hosting preferences**, such as cloud-based, or on-premise
- **Training and change management** expectations, including ongoing support post-implementation

Also, provide a clear timeline for both the RFP process and the broader implementation project. For example:

- RFP release date: August 1
- Vendor Q&A period: August 1–15
- Proposal deadline: September 1
- Product demonstrations: Mid-September
- Final selection and notification: October

Establishing a defined scope and realistic schedule sets the tone for a structured and efficient selection process. It also demonstrates to vendors that your institution is organized and prepared, qualities that encourage high-quality proposals and better collaboration from the outset.



Be sure to allow ample time for vendors to craft thoughtful, comprehensive responses; a well-paced timeline ultimately benefits both your institution and prospective partners.

6. Budget and Pricing Expectations

If possible, share a target budget and ask for full cost breakdowns:

- Licensing and implementation
- Hosting and support
- Annual upgrades
- Training
- Customizations

Ask vendors to project 5-year total cost of ownership and distinguish between one-time and recurring expenses.



Gallery Systems' TMS Suite is supported with in-depth onboarding, training, and client services, providing lasting value for your investment.

Evaluating and Comparing Vendor Responses

After receiving submissions, use a multi-step process to assess the best-fit solutions for your institution:

1. Initial Screening

Eliminate any proposals that do not meet your core functional or technical requirements. This helps focus your time and resources on the most viable options.

2. Scoring Guide

Apply a consistent scoring rubric based on your requirements grid. Evaluate each response according to how well it fulfills priority needs, how clearly it communicates solutions, and the level of institutional fit.

3. Follow-Up Process

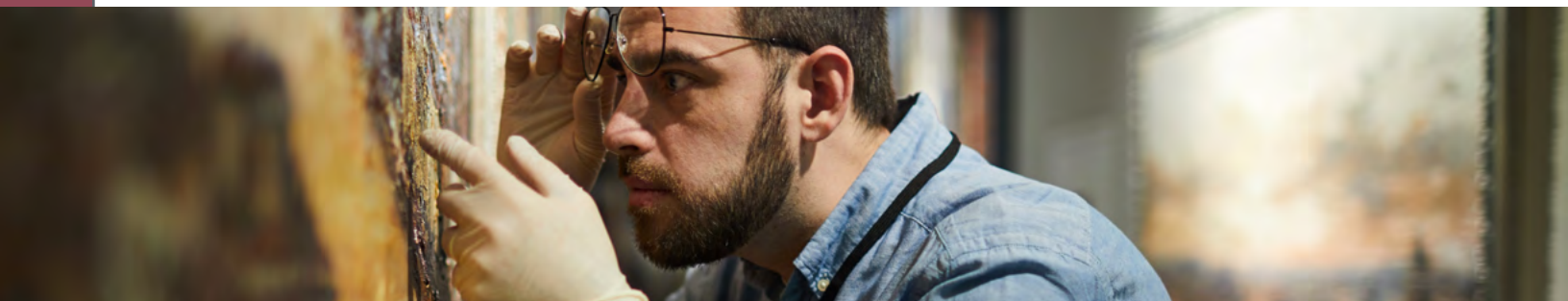
For shortlisted vendors, expect a two-stage engagement:

- **Discovery Call:** This first conversation allows the vendor to understand your institution's goals, workflows, and system priorities.
- **Custom Demo:** A second, more in-depth demonstration will then be scheduled and tailored to your needs, focusing on the specific functionality most relevant to your institution.

Share your completed requirements grid or a summary of your priorities in advance to ensure a productive and relevant demo experience.

4. Reference Checks

Request client referrals or case studies, ideally from institutions of similar size, collection scope, or governance structure. Ask references about long-term support, upgrade experiences, and adaptability of the system to evolving needs.



Key Vendor Evaluation Questions

Consider asking:

- How long have you worked in the cultural heritage sector?
- How have you supported museums of our size and collection type?
- Can you share real-world use cases or demos tailored to our workflows?
- What support services do you offer after implementation?

With over 40 years of experience, Gallery Systems has helped leading museums, like MoMA, the Smithsonian Institution, and the Royal Ontario Museum, implement advanced CMS solutions tailored to their needs.

Expectations for Long-Term Partnership

Selecting a new Collections Management System is not just a software decision, it's the beginning of a strategic relationship that will influence your museum's operations for years to come. The right CMS vendor should be more than a provider; they should serve as a committed partner who understands the nuances of your collection, aligns with your institutional goals, and evolves alongside your needs.

A successful implementation is only the first milestone. Your institution will benefit most from a CMS partner that delivers consistent product innovation, offers responsive and knowledgeable support, and fosters a collaborative user community. These elements are critical to sustaining long-term value, minimizing risk, and empowering your team with the tools and training required to keep pace with industry standards.

Gallery Systems is proud to offer enduring partnerships through our client-centric support model, continuous software enhancements, and strong professional community. From onboarding and training to annual upgrades and user forums, we are dedicated to helping your institution get the most out of your CMS.

Closing Your RFP

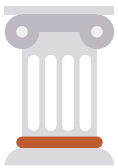
The closing of your RFP is your final opportunity to leave a strong, professional impression and reinforce the importance of your institution's project. A well-crafted closing helps set the tone for vendor responses and encourages thoughtful, personalized proposals.

What to Include in Your RFP Closing



A Brief Recap of Your Goals

Summarize your institution's core objectives and the overarching vision for implementing a new CMS. Reinforce how this project supports your mission, enhances stewardship, and empowers collaboration across departments. This reaffirms the purpose of the RFP and guides vendors to tailor their responses accordingly.



Institutional Background and Context

Include a brief reminder of your museum's size, collection focus, and any unique aspects of your operations or workflows that should be top of mind when vendors prepare their proposals. This may also be a place to highlight any non-negotiable institutional requirements, such as compliance needs or preferred hosting arrangements.



Project Manager or Main Contact Details

Clearly name the primary contact for the RFP process, including their role, email address, and phone number. Indicate whether this contact should field vendor questions during the submission period and clarify if there are any restrictions on communication (e.g., only written questions, questions accepted until a certain date).



Submission Instructions and Deadlines

Reiterate the proposal due date and preferred submission method (e.g., email, procurement portal, printed copies). If there are additional documents that need to accompany the proposal (e.g., signed forms, technical specs, or pricing breakdowns), summarize those again to avoid confusion.

Best Practices for Finalizing Your RFP

To ensure a smooth and effective close to your RFP process, consider the following best practices:



Build in Extra Review Time

Allow adequate time between the submission deadline and vendor selection to thoroughly evaluate proposals. If needed, communicate your timeline clearly to manage expectations.



Encourage Clear and Comprehensive Responses

Remind vendors to respond to each requirement as thoroughly and transparently as possible, and to provide supporting documentation or examples wherever applicable.



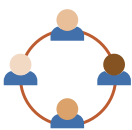
Remain Flexible, but Firm

While your RFP should define your needs, be open to alternative solutions that may be more efficient or innovative than originally envisioned. However, maintain clarity on your must-have features and timelines.



Document Communication

Keep a record of all vendor communications during the RFP period for future reference, especially in the event of clarifications, updates, or changes to the process.



Establish Internal Evaluation Criteria Early

Before receiving proposals, align your team on how responses will be scored or prioritized. Consider creating a standardized rubric to ensure fair and objective assessments.

By closing your RFP with clarity and professionalism, you'll signal that your institution is both organized and collaborative, qualities that often lead to more engaged and tailored responses from vendors. A thoughtfully closed RFP also lays the foundation for a productive working relationship with your selected CMS partner.

Cost vs. Value in CMS Selection

Choosing a CMS based solely on the lowest price can lead to hidden costs and limited functionality. While a lower upfront cost may seem appealing, it often excludes critical features like training, data migration, or support, resulting in higher long-term expenses. Instead, focus on overall value: a solution that aligns with your workflows, offers reliable support, and evolves with your institution.

With an integrated product suite like Gallery Systems' TMS Suite, you can add new features and modules as your needs change without costly data migrations or managing multiple vendors. This ensures your investment continues to deliver value as your institution grows.

Key considerations when evaluating value over cost:



Scalability: Choose a system that supports your current needs and can expand with your institution over the next decade.



Integration: Enterprise platforms that combine CMS, DAMS, and online publishing streamline workflows, reduce administrative overhead, and minimize IT strain. Studies show that nearly 40% of IT budgets go toward software and integration costs alone.



Sustainability: Maintaining several disconnected systems complicates long-term support and increases reliance on IT resources.



Cost of ownership: A full-featured CMS implementation typically ranges from \$7,500 to \$50,000+ upfront, with ongoing licensing and support fees. Adding separate DAMS or publishing tools can significantly increase total costs—making integrated solutions the more cost-effective choice over time.

Investing in a comprehensive, future-ready system can reduce long-term expenses, simplify operations, and better support institutional growth.

Take the First Step Toward a Better CMS

Launching an RFP for your next CMS is a significant strategic step. By crafting a clear, detailed, and thoughtful proposal, your institution can ensure it finds the best partner for managing your collection.

Let Gallery Systems help guide you through the process and beyond. Contact us at www.gallerysystems.com to discuss how we can support your vision.

CONTACT US