

Request for Proposals
Eastern Washington State Historical Society/
Northwest Museum of Arts & Culture
Collection Management/Museum Automation Software
August 2008

OBJECTIVE

The Eastern Washington State Historical Society [hereafter called "AGENCY" or "EWSHS"] seeks to replace its collection management system with a modern intuitive tool that:

1. Indexes and illustrates (i.e. associates images) museum, archival, library, and digital media collections,
2. Provides for standard museum, archival, and library management routines including automated update features,
3. Interfaces with standard office and web applications and languages with ability to import and export information including associated images to varied applications and,
4. Offers options for Web-searchable collection catalog access.

This Request for Proposals (RFP) solicits proposals from firms that sell and maintain collection management systems designed for cultural heritage use. The successful firm will prove that its product, services, and business plan best fit the AGENCY's collection management, collection access business plan, and budgetary needs. Firms are asked to provide information concerning business plan, ownership, solvency, years of operation, list of other clients to serve as reference, and information about future projects and programs.

MINIMUM QUALIFICATIONS

The Consultant must be licensed to do business in the State of Washington. The Consultant must have two or more years of experience in providing integrated automation systems for museums.

PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about October 1, 2008 and to end on June 30, 2009. Amendments extending the period of performance, if any, shall be at the sole discretion of the AGENCY. The AGENCY will re-negotiate contract extensions and system upgrades based on the biennial budget period of Washington State. The next biennium begins July 1, 2009.

ADA

The AGENCY complies with the Americans with Disabilities Act (ADA). Consultants may contact the RFP Coordinator to receive this Request for Proposals in Braille or on tape.

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A: BACKGROUND

A.1 Organization

The Eastern Washington State Historical Society (EWSHS) was founded in 1916 and chartered in 1918 by the Washington State legislature. It is a non-profit 501(c)(3) membership organization and a trustee agency for the State of Washington. It employs 32 full and part-time employees and 200 volunteers. The Society's mission is to actively engage all people in the appreciation of arts and culture through collections stewardship, exhibits and programs that educate and entertain.

A.2 Facility

At present, the EWSHS consists of two facilities on one campus in a mixed residential historic neighborhood – Spokane's historic Browne's Addition. The Museum facility consists of a building constructed in 1959, expanded in 1983, and remodeled between 1999 and 2001 during which time the facility was annexed to new underground exhibit galleries that link to a four story education and public event center. The original building houses the collection storage and the reading room of the Joel E. Ferris Library and Archives. The reading room serves as the physical portal to all museum collections. The original museum building, the Amasa B. Campbell House built in 1898 sits adjacent to the modern buildings on campus. Meticulously restored, it is one of the premier historic house museums in the nation and boasts award-winning interpretative programming.

A.3 Collection Overview

Four collections comprise the permanent collection: regional history, special collections, visual art, and American Indian cultural materials. They share structural and content attributes. Each collection contains single source collector's collections, multiple source genre collections, unique objects, and unique collections. Each collection contains objects and materials that bridge collections.

The **Regional History Collection** is the largest collection held by the Northwest Museum of Arts & Culture. It encompasses the 1898 Campbell House, a nationally recognized historic house and site as well as regional natural history specimens and human-made objects originating primarily from the European, North American, and Asian continents. Most objects were made or used in the Inland Northwest between roughly 1860 and 1950 and represent non-Indian Americans in the Inland northwest. Inclusive dates: ca. 1693 - 1980s. Number of objects: 22,500 (+/-500)

The **Special Collections**, referred to as the Joel E. Ferris Research Library and Archives, includes a variety of primary and secondary materials: photographs, negatives, manuscripts, ephemera, architectural drawings, reel-to-reel film, oral histories, maps, books, and periodicals. These materials reflect the broad collecting categories of the museum. The strongest collections are related to regional history and American Indian culture.

Inclusive Dates: 1850-2000. Number of Objects: 4,200 linear feet, approximately 1,000,000 objects.

The **Visual Art Collection** includes works of art originating from Europe, North America, Asia and the Inland Northwest. The European, North American, and Asian art holdings suggest the tastes of Euro-American collectors and decorators during the first half of the 20th century more than they constitute a comprehensive survey of art history. Four hundred artworks spanning the late 19th century, all of the 20th century, and the beginning of the 21st century represent artwork made in the Northwest. Historic views of an evolving landscape, WPA era artwork (especially that associated with the Spokane Art Center), and modern and contemporary art represent regional art and somewhat mirror regional

and national art movements. The modern and contemporary works present a highly varied representation of the quality and focus of leading artists and art movements in the Inland and Pacific Northwest.

Inclusive dates: 16th century to 2005. Number of objects: 2,000 (+/-100)

The **American Indian Collections** broadly represent North American Indian cultures including samples from Alaska and Hawaii. This MAC collection is especially known for its world-class Plateau collection augmented by one of largest and finest collections of early-contact photographs of Plateau people. The Plateau cultural material collection boasts a strong representative cross-section: flat-twined and cylinder-twined bags unique to the Plateau; men's, women's, and children's clothing; beaded clothing, personal accessories, and horse regalia; food gathering, processing, storage tools and equipment; horse gear; canoes, and lithic material. The 2006-2007 inventory of the large lithic collection suggests that it may become a prominent feature of this Plateau collection for the presence of quality Columbia River material. The MAC also owns objects that represent Mesoamerican cultures including ancient and historic Mexico and pre-Columbian South America; these require evaluation.

Inclusive dates: 10th century - 1998. Number of Objects: 12,000 (+/- 2,000) Note these additional estimates: 4,000 lithic objects, 5,000 Pre-Columbian pottery items, 10,000 trade beads.

A.4 Audience

Museum target audiences emphasize the citizens of Washington State, especially school children and their families, teachers, and life-long learners. The EWSHS receives approximately 50,000 visitors to its galleries annually and serves another 30,000 – 50,000 people each year through varied onsite and off-site programming. The website receives 190,000 visitors each year. Currently, a small fraction of the museum's collection – 100 artworks – are available on the museum's website. This exhibit and a small inventory of podcasts generate a large share of our website traffic. 33 manuscript finding aids are currently available online through the Northwest Digital Archives. 1,000 Plateau Indian photographs are available online through the University of Washington libraries. Software that can facilitate introducing more of the museum's holdings (such as the 5,000 more American Indian photographs and 3,000 American Indian cultural objects now digitized) to an online audience will increase the museum's regional audience, expand our audience beyond Washington's borders, and provide a much broader benefit to the public at large.

A.5 Collection Database Status

The MAC runs Argus Open-end Edition 3a_17 PB9. The database contains 4,662 accession records, 45,834 item-level records (15,000 special collections, primarily photographs, 14,089 constituent records (people and institutions associated with collections as donors, artists, vendors, conservators, staff, etc.), 45,103 lexicon terms, and 14,206 records with associated images – each record has three versions of the image file attached to it. There are also donation, purchase, loan and other museum management records contained in the database.

We recently implemented new cataloguing standards that focus the museum catalog and also align it more closely with library finding aids in order to exploit the interrelated nature of the collections. Approximately 3% of the museum collection records have been remodeled to meet these new standards. 1% of collection-level and 1% of item-level records are entered for Special Collections.

B: SCOPE

B.1 Purpose: Solicit Proposals

This Request for Proposal (RFP) by the Eastern Washington State Historical Society is meant to solicit proposals from computer software systems vendors for the evaluation and purchase of software designed to manage information related to museum (natural and human-made artifacts) and special collections (manuscripts, photographs, books, and serials) and digital collections (derivative and born-digital objects) to replace the ARGUS collection management system now in use by the Agency.

B.2 Obtain Information

Through this RFP and related activities, the Eastern Washington State Historical Society will obtain information about the cost of the purchase and implementation of a complete and comprehensive collection management system. This system must be capable of maintaining a growing collection of artifacts, archives, born-digital objects, and digital assets, as well as the conversion of existing data from the Argus database system and varied databases now housed in word and excel-based formats.

B.3 Aspects of a Successful Proposal

A successful RFP may also allow for creative solutions and alternative suggestions addressing the needs of EWSHS within the limitations of time, priorities, and financial and human resources. For example, proposals that encompass *collection data management* and *digital asset management* [DAMS] into one tool will be most attractive to our organization. We will not, in any foreseeable timeframe, have budgetary resources to purchase and hire personnel to manage a separate DAMS. Additionally, systems that require rudimentary administrative skills and knowledge will be more attractive than systems that require high-level technical administration. Systems that require few, or no non-standard, third party software purchases are also attractive. Each proposed solution should be thoroughly itemized by description and cost.

C: GENERAL SPECIFICATIONS AND REQUIREMENTS

C.1 SYSTEM DESIGN

The system must:

1. Run on a standard server platform that will integrate into the existing EWSHS network.
2. Be SQL, or SQL compatible.
3. Have a secure web interface.
4. Have a web interface that can operate on a vendor-hosted site. (The MAC does not currently host its own website.)
5. Allow for secure log-in of multiple user types.
6. Be designed with backup and recovery modules or be compatible with standard commercial solutions.
7. Have customized screens and redirects that are available in the event of error system down time.
8. Not require a dedicated database administrator/programmer.

C.2 FUNCTIONS

The software must:

1. Import and export using basic tools (Microsoft Excel, Word, or other)
2. Return XML and accept http requests
3. Have the ability to export to varied formats including HTML, XML, and MARC
4. Have the ability to associate and display digital images and media with records but not re-number associated files (Example: Point to external files.)
5. Be able to scale digital images for web access
6. Have the ability to manage digital objects as collection objects (i.e. Function as a digital asset management system)
7. Have the ability to associate digital objects including varied digital media with collection records and collections. (i.e. Recorded oral history audio associated with artist, jpg, tiff, pdf, multimedia)
8. Have the ability to link to external resources or embed URL addresses in data.
9. Have the ability to create distinct collections and an interface that allows searching and managing objects in all collections
10. Allow for customization of fields and field names
11. Allow importation of, or come with, standard museum cataloging lexicons
 - o Hierarchical structure compatible with Encoded Archival Description; ability to import and export in EAD format.
 - o Ability to import and export MARC records (vendors should stipulate whether a full or partial field set is supported)
 - o Supports national (Chenhall, AAT, ULAN, LCSH, LOC) and local thesauri (manuscript index terms; photograph index terms; American Indian terms)
12. Have ability to generate reports that are easily exported and able to email or use in another program

13. Include end-user print options that can include digital images

C.3 COLLECTION MANAGEMENT

C.3.1 Collection-level Records, Acquisition/Accession and Source Information

- a. Accommodate varied accession and activity types (i.e. donation; transfer; purchase; incoming loan; outgoing loan; exhibit; found in collections; staff/curator acquisitions.)
- b. Record basic information, including: accession number; type/method of acquisition; department of entry; date received; date of acquisition; brief free text description of acquisition.
- c. Record basic information, including: object number; object name; acquisition source; acquisition date; department; collection type; physical description; publication dates/dates of manufacture; publisher; author; subject information; content information; appraisal information; free text field for general remarks; and other fields as needed.
- d. Include information for acquisition source, including name, address, telephone number, fax number, email address; object name; subject field; credit information; purchase information (purchase order number); field for possible restrictions, access and other remarks.
- e. Generate numeric number for accessions, in/outgoing loans, exhibit numbers.
- f. Provide links between function (activity), object, lexicon, and source screens.
- g. Ability to search through all fields and provide links to other screens, including acquisition, lexicon, party/source, and related objects.

C.3.2 Object-level Records, Object Entry and Cataloging

- a. Unique number entry for each object.
- b. Customization of data entry screens for departments and associated collections.
- c. Controlled-vocabulary fields and free-text fields.
- d. Links between object record, lexicon, source screen, and accession record.
- e. Reference to ownership of object and provide field to document ownership history.
- f. Management of information regarding relationships between parts of objects, sets of objects, and/or other objects, and artifacts (i.e. multi-part objects, photographs that include artifacts in them), as well as relationships between objects and collections. System should be able to establish a true data relationship between objects and sets of objects, not just a 'see also' note in a text field.
- g. Management of documentation of research, reference to archival materials, and media.
- h. Ability to record information source (i.e. staff authority name, date, "as of" dates)
- i. Publication and bibliography information: authors/editors; publishers; publication name; publication place; text reference name/title; publication medium; publication date; pages range; illustrations reference; previous citations of object.
- j. Searchability across all fields
- k. Multiple inscriptions and/or titles associated with one object. Titles include descriptive titles, official titles; portfolio or series or edition titles; translated titles.

C.3.3 Inventory control/location and movement control

- a. Record information regarding: area of location, including room, unit, and shelf number, box number; date of location; type of location (i.e., exhibit, temporary, permanent location, not found); staff involved.
- b. Record prior locations, including date, type of location, staff involved, free text field for notes.

C.3.4 Controlled hierarchical and fully integrated lexicon

- a. An integrated and multi-layered lexicon with linking access between activities, source, object records.
- b. Flexible to allow revision and additions to nomenclature.
- c. Capable of using multiple thesauri, including Chenhall's nomenclature, ATT, LCSH, etc.
- d. Changes to the lexicon automatically update terms in records. For example, a proper noun is found to be misspelled, the change is made to the lexicon, and the records in which the misspelling occur are updated by the system either automatically or by a human authorized initiated batch command.

C.3.5 Artist/Maker/Manufacturer and Provenance Information

- a. Link maker, manufacturer, and ownership and/or collector source names between all screens.
- b. Allow for inclusion of names of artist, culture group, company, place of manufacture, owner, and collector names.
- c. Allow for inclusion of biographical information for any of the above, including but not limited to: birth/death dates; existence dates; work locations; occupation; free text field for general remarks; name and date of information recorded; reference information re. the above.
- d. A linked field that allows for free text that describes an object's provenance.

C.3.6 Source Information

- a. Be able to track source information including donor, vendor, owner, lender, borrower information. To include name, addresses, telephone numbers, fax numbers, email addresses, notes/remarks information and searchability across all fields for such information.

C.3.7 Condition Information and Reporting

- a. Allow for documentation of the condition history of individual objects, including baseline condition report, and subsequent reporting. Information options must include name of person entering data, date, free text area in condition reporting and notes, physical description and condition scale -i.e., excellent, very good, good, fair, poor- preferably programmable options from a dropdown menu.
- b. Allow for condition reporting for incoming/outgoing artifacts.

C.3.8 Conservation Management

- a. Ability to record/calculate light exposure and other environmental conditions.

C.3.9 Object Measurements

- a. Ability to add object-type specific measurement terms in control fields. (I.e. measurement terms for paintings are different from those for clothing.)
- b. Ability to add types of measurements in control fields.
- c. Ability to record parts or sets of measurements.
- d. Ability to record in English and Metric. Preferably, the software will automatically convert an English or Metric measurement into the opposing measurement.

C.3.10 Rights and Reproductions

- a. Document and manage information about reproduction of objects, including preparation of images and models.
- b. Document and manage information about photographic reproductions of objects and archival materials, including exhibit images.
- c. Track and record ownership/copyright issues for objects, reproductions, archival materials used in publications, exhibits, and/or reproduction activities.
- d. Assign numbering system to reproductions of archival items and artifacts and subsequent retrieval of information.
- e. Track requests for photographic images: status of request, production/receipt/completion dates; costs involved; quantity of images available for one object.
- f. Track information about copyright, copyright status, publication restrictions, credit lines.
- g. Maintain information about reproduction, including but not limited to: photographer; maker; date of manufacture; medium; format of image; location of image.
- h. Include and track publication information regarding a specific object or archival image.

C.3.11 Appraisal/Valuation Insurance Information Management

- a. Be able to record documentation of value of objects in permanent collections and values of objects in temporary custody, including loans and exhibits.
- b. Be able to record documentation of value of collections in permanent collections and in temporary custody.
- c. Be able to include valuation, entry date and entry person; additional notes area.
- d. Be able to run reports calculating values of groups of objects such as objects on exhibit, objects in storage and by storage location, objects loaned out, objects loaned in, total value of objects on-site combining owned and loaned collections.

C.3.12 Exhibition Management and Planning

- a. Ability to track crates, mounts, and other exhibit related materials.
- b. Record information for an exhibit: Curator name(s); designer name(s); exhibition subject/theme; exhibition purpose; exhibition restrictions; record and generate exhibit lists of objects to be used; maintain lists of lenders, borrowers, potential lenders, or

potential borrowers; acquire and store exhibition narrative and exhibition graphic and other media files associated with exhibit.

- c. Ability to record object information for an exhibit, including: object name; dimensions; mounting information; conservation needs/orders; object description; crating/framing information; lighting restrictions; photography restrictions; handling and storage information; staff involved with object at all levels; dates of completion of actions.
- d. Record, maintain and display exhibit history and information about events in the museum including environmental levels. For example, accept light exposure calculations for an exhibit and associate this exposure to individual object records to generate a cumulative record of light exposure. Another example, accept environmental readings from a separate database such as excel for the duration of an exhibit or other event.
- e. Allow association of object with multiple collections, exhibits and association of collections to exhibits. Ability to create, view, edit and delete parts or all exhibit information. Ability to generate and maintain label information, including multiple versions of labels.

C.3.13 Shipping Information

The system must:

- a. Document transportation of objects, including shipping arrangements, pick up and delivery dates, special restrictions and requirements, specific people and areas of responsibility.

C.3.14 Incoming/Outgoing Loan Information Management

- a. Manage and document object borrowing for temporary exhibits: Create unique loan numbers for objects, create loan numbers for object groups from individual sources, and create unique exhibit numbers to cover all loans for a specific exhibit.
- b. Manage outgoing loans to other institutions for a specific exhibit and/or period of time: Create unique loan numbers for loans and record loan details including shipping, insurance, appraisals, valuations, packing, locations.
- c. Be able to generate crate labels and lists and other information related to shipping and handling.
- d. Be able to generate customizable outgoing loan agreements.
- e. Be able to place loan records in a separate directory from permanent collection records or otherwise separate these records from general queries against the database of permanent collections.

C.3.15 Culturally Sensitive Materials and Items relating to the Native American Graves and Protection Repatriation Act (NAGPRA):

- a. Maintain records on human remains; human remains incorporated into cultural or funerary objects; sacred and ceremonial objects; objects of cultural patrimony.
- b. Maintain records regarding status of objects, i.e. pending repatriation, return of objects, potential for repatriation.
- c. Ability to associate images and restrict access to images of sensitive objects.
- d. Track requests for information made by tribe and any subsequent contact, correspondence, and/or action;
- e. Track names of tribes, including contacts, addresses, telephone numbers, etc.;

- f. Track any specific guidelines regarding storage, pest management restrictions, handling restrictions, photography restrictions.
- g. Ability to restrict records after repatriation.
- h. Be able to place records of restricted or repatriated collections and objects in a separate directory or otherwise separate these records from general queries against the database of accessioned collections.
- i. Ability to prepare inventory lists of all objects by tribe or category.

C.3.16 De-accession and Disposal Information Management

- a. Document reason(s) for de-accession (ie. stolen/lost; destroyed; repatriated; damaged beyond repair; beyond scope; collection refinement; exchanged; research; accessioned in error)
- b. Record de-accessions as groups or objects or single objects. (activity level associated with object level.)
- c. Record and generate reports for de-accession authorization process from curatorial recommendation to Board of Trustees approval.
- d. Keep an audit trail of de-accessioned and/or disposed objects that describes the disposition method or methods for objects in a de-accession group and/or single objects following their de-accession including the tracking of transfer, sale, exchange or destruction of objects.
- e. Record financial information about disposition, including: auction house/recipient/acceptor names disposition dollar amount; destination of funds; sale code/lot number assigned by recipient or auction house; date of sale. (Preference for ability to import information about sale values from external database to avoid double keying information.)
- f. If exchanged, record what object was exchanged in return for what item.
- g. Be able to place records of de-accessioned collections and objects in a separate directory or otherwise separate these records from general queries against the database of accessioned collections.

C.3.17 Packing/Storage Management for Crates, Storage

C.3.18 Object Security / Collections Risk Management

- a. Record information relating to storage of culturally sensitive and/or hazardous materials.
- b. Record information relating to real or potential threats to collections. To include information about preventive measures taken for collections; disaster planning and implementation; pest control information; storage requirements.

C.3.19 Data Security

- a. Maintain, edit, establish security controls in program at different levels of usage. Particular attention to be given to items of cultural sensitivity, loans, appraisals, conditions, locations, numbers and other fields that may be of concern.
- b. Access controls
- c. Include built-in data-encryption mechanism
- d. Auditing logs (what action or change has been performed, when and by whom.)

C.3.20 Patron/Researcher/User/Borrower records

C.3.21 Circulation

- a. Ability to “circulate” items to individual entities (staff use of library resources) and to corporate entities (exhibition loans)

C.4 ADDITIONAL OFFERINGS

Please note any additional modules offered and provide detailed explanation of capabilities.

D. VENDOR SUPPORT

D.1. Data Conversion

Vendor will:

- D.1.1** Demonstrate experience successfully migrating data from ARGUS with low percentage of lost data.
- D.1.2** Develop a project plan including timetable for data conversion, training of personnel, and resources needed for conversion that includes:
 - a. all information needed for data conversion, interfacing, and formatting existing system data into the new system.
 - b. a migration plan for porting and normalizing current Argus system data into the new automation system.
- D.1.3** Convert and load the EWSHS database into the new database including successfully converting and loading references/links to images and other files into the new database.

D.2. Vendor Support

D.2.1 Documentation, Training, Support, Responsibilities

- a. Vendor will provide a written hard-copy and electronic copy of documentation of the system, including user procedures and instructions, system administration procedures and instructions, data base administrator procedures and instructions, system information, standards information, and other procedures regarding development, customization, linking and web procedures
- b. Vendor will provide training for users, and systems/database administrators. User training will cover all information in the operation of the database program necessary needed to perform their activities. Systems/database training will provide information and hands-on experience to cover all information in the operation of the database program necessary to perform those activities and maintain optimal performance and maintenance of the database and its applications.
- c. Vendor will provide system support through telephone, internet, or email. Vendor shall acknowledge request within two business hours and respond to request for assistance within four business hours.

E: VENDOR INFORMATION

- E.1** Vendor will describe the primary database management system used by the Vendor.
- E.2** Vendor will provide information for obtaining ultimate performance capabilities of the program (i.e., SQL, Oracle, etc.)
- E.3** Vendor will provide information concerning its ownership, solvency, years of operation, list of other clients to serve as reference, and information about future projects and programs.

F: PRICING REQUIREMENTS

- F.1** Provide complete itemized and increment pricing on any and all systems recommended.

Include any and all, State, non-profit, educational, or other discounts which may be available for this potential transaction.

- F.2** Delineate all itemized and increment costs which may be incurred for the following:

- a. installation
- b. data conversion of existing database
- c. software maintenance
- d. software licensing, including each add-on module offered
- e. yearly maintenance fees – explanation of and cost of maintenance, including information about increments in user licenses
- f. any upgrade costs
- g. hardware maintenance
- h. media/documentation
- i. training, including itemized on-site or off-site training, travel and/or lodging expenses
- j. additional costs not noted above

G: PROPOSAL SUBMISSION

G.1 Deadline for proposal submission:

September 30, 2008

G.2 Please submit proposals to:

Erin Kincaid-McIntosh
Collections Data Registrar
Eastern Washington State Historical Society/Northwest Museum of Arts and Culture
2316 W. First Avenue
Spokane, Washington 99201-5906

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