

# **Appendix A: Collections management system questionnaire for heritage institutions**

**Provide a brief description of the heritage institution:**

## **Description of institution's needs**

Do you require the vendor to provide installation only or installation and migration?

What kind of training do you need?

Which collections management system (CMS) capabilities are of importance to your institution?

What vendor hosting and support services do you need?

Describe your institution's technical environment.

## **Rationale**

Why is your institution moving to a new CMS?

What do you not like about your current CMS?

## **Collection size**

What is the size of your collection?

How many records do you have?

How many do you expect to have?

What types of objects are catalogued?

## **Standards**

What are the metadata standards your institution uses and plans to use in the future?

## **Importing and exporting data**

Will you be importing existing data?

If so, are you able to export data from your current CMS?

## **Online availability**

Is your collection available online?

Will you need your CMS to interact with your website?

If not, do you plan to make your collection available online?

## **Budget**

What is your budget and the project's timeline from contract to implementation?

Is this project funded by a grant?

## **Workflow**

How does your institution's collections department operate?

What is your typical workflow?

## **Documentation**

How has your organization been documenting its collection?

Are there any documentation standards, controlled vocabularies and data standards that you are following?

If so, what are they?

Will you need to customize?

## **Storage**

Where is all of your collections data located (in the cloud, on your institution's server, on another vendor's server)?

## **Cleanup**

Does your organization's data require significant cleanup?

How many records would you estimate require cleanup?

## **Staff**

How many staff members will be using the system?

Do you have IT staff tasked with the administration of your CMS?

Do you have dedicated staff for this project?

If so, will they be part of the selection process?

Will they be part of the implementation?

Will they be part of the training process?

## **Open access**

Does your institution have a plan for open access with rights fields, application protocol interface (API) connections and integration with digital asset management systems and cloud media asset hosting with your CMS?

## **Indigenous knowledge**

Does your institution plan to integrate Indigenous or traditional knowledge into your CMS?

## **Accessibility**

Does your institution have a plan to support accessibility with verbal description, alternative text tags and transcripts for objects in your collections?

Have you considered other accessibility requirements?

## **Data sharing**

Is your institution ready to share or already sharing data and media assets with aggregators like Artefacts Canada, the Creative Commons Search, Wikidata, Digital Public Library of America or Europeana?