INSTITUTE *of*
Museum_{and}**Library**
SERVICES

Museums for America Grants

Sample Application MA-245762-OMS-20
Project Category: Collections Stewardship and Public Access

Rock and Roll Hall of Fame and Museum Inc.

Amount awarded by IMLS: $150,000
Amount of cost share: $228,531

The project description can be viewed in the IMLS Awarded Grants Search:
https://www.imls.gov/grants/awarded/ma-245762-oms-20

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

Please note that the instructions for preparing applications for the FY2021 Museums for America grant program differ from those that guided the preparation of FY2020 applications. Be sure to use the instructions in the Notice of Funding Opportunity for the grant program and project category to which you are applying.

Opening the Rock Hall's Vaults to the World

Project Justification

The Rock & Roll Hall of Fame (Rock Hall) requests funding from the Institute of Museum and Library Services, Collections Stewardship and Public Access category, to assist in furthering the administration, development and implementation of a single, combined Library, Archives and Museum (LAM) collections management system, Axiell Collections, as part of a new technology stack with cloud storage, machine learning and artificial intelligence, a digital asset management system and online public discovery interface. The project is ideally suited to the goals of the Museums for America program and the activities of the Collections Stewardship and Public Access category, specifically as they apply to building workforce capacity and increasing public access, care and management of collections, cataloging, enhancing collections management systems, and digitization. This large-scale project, an outgrowth of the Rock Hall's 2014 strategic plan with a goal to "cultivate a culture that inspires innovation, takes risks and leverages technology," radically alters the potential impact of the institution and its subject matter, opening the Rock Hall's storage vaults to the entire world. Three objectives of this goal include using technology to broaden the Rock Hall's reach, increasing internal efficiencies, and embracing transformational change—all of which are encompassed in the work associated with this IMLS proposal.

Since March 2017, the Rock Hall has been migrating the metadata from three distinct LAM collections management systems (CMS)[1] into Axiell Collections, in order to provide for more effective access to collections data and more efficient workflows for the creation and maintenance of that data. As Axiell Collections is currently set to launch in January 2020, the Rock Hall needs to be able to quickly and nimbly respond to technical issues as they arise, make additional customizations to the system as identified through staff use, manage required data cleanup, and develop additional modules in the system for exhibitions, locations management, and conservation. The system also needs to be integrated with our new digital asset management system, Tedial's Evolution and a new online public discovery interface to replace http://catalog.rockhall.com, Axiell's Arena. Through the single CMS and its integration with a new technology stack, Rock Hall audiences will greatly benefit from more comprehensive documentation of the evolution of rock and roll and its vast and varied intersections with American history through the accessibility of images and metadata describing and linking the Rock Hall's archival, artifact and library collections together for the first time.

In fact, the most frequently received feedback from users of and visitors to the Library & Archives and Museum has been the lack of online accessibility to digital assets and item-level metadata, as well as access to artifacts beyond exhibition. Among Rock Hall staff, feedback has been primarily related to the inability to identify collections materials relevant to their needs on their own. Within the Collections and Curatorial Affairs Division itself, which consists of the LAM staff charged with collections care, description and access, the biggest hurdles have been the inability to share collections metadata and workflows due to incompatible collections management systems. A larger problem across the LAM professions is few existing standards,

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[1] The Library has been using Sierra, and the Archives, Archivists' Toolkit, for the past nine years. The Museum has been using The Museum System (TMS) for the past 15 years. None of these systems, based on the requirements of the institution, contained the functionality to adequately provide collections management for the other, and in certain cases had become insufficient for their original purpose due to constraints of implementation, flexibility and software obsolescence. A number of products were demonstrated and tested for potential use as a single CMS, not only in 2016-2017 but prior even to the selection of Sierra and Archivists' Toolkit at the outset of the creation of the Library & Archives program in 2009.

guidelines, or best practices that dictate how these different departments within a single institution can effectively and efficiently interoperate and how the associated collections metadata then created should be handled. This sort of departmental and metadata integration was a hot topic in the 2000s to the early 2010s, specifically among large institutions with the funding to support such initiatives (i.e., the Smithsonian and Getty), but lack of affordable and scalable modeling seems to have halted many of these discussions, while more recent interest seems to be focused on integrating new forms of technology, such as machine learning and artificial intelligence, into preexisting systems. The upcoming third edition of the Society of American Archivists' (SAA) publication *Museum Archives* briefly touches on LAM and records integration in its chapter on acquisitions, but even that is primarily indebted to the experiential knowledge of the chapter coauthors rather than research that could be identified in the professional literature.[2]

As possible, however, standards and best practices within the individual fields of libraries, archives and museums have been combined or a specific set chosen specifically for this project, particularly in regards to name authority and subject headings (e.g., Library of Congress, Art and Architecture Thesaurus) and descriptive metadata standards for physical collections and digital media (e.g., *Describing Archives: A Content Standard* (DACS)*, MARC, VRA Core, IPTC, PBCore), but all have been treated with the flexibility necessary for local needs and interoperability. For instance, local headings have been created where required in order to assist in collections assessment and defining collections development needs, as well as to maintain an institutional base of knowledge and language as it applies to rock and roll music.[3] Another example is in the acceptance that, while the Archives does not have the luxury to perform item-level description, it can use item-level descriptions created by Museum staff in order to highlight items within archival collections; and that, while these descriptions tend not to follow DACS guidelines, it has been determined that it is preferred to have some information rather than none at all at this level of description in order to fulfill an essential user need.

This proposed project responds to these external and institutional needs; building Rock Hall staff capacity through the creation of a Technical Services Archivist position[4] and further developing best practices for the administration, development, integration and maintenance of Rock Hall workflows and new technology systems for collections preservation, description and access. The project will result in public access to the Rock Hall's born-digital and digitized Archives assets within the context of the institution's finding aids, alongside images and metadata for artifacts in the Museum's permanent collection and the Library. Additionally, the project will facilitate institutional use of collections by providing staff with universal access to digital collections and metadata, for rights management, use in social media, marketing and development campaigns, education programs, and exhibitions. It also provides our visitor engagement staff with the opportunity to further develop their encyclopedic knowledge of our collections, whether items happen to be on physical display in the Museum or not. Additionally, the project opens up the Rock Hall to future possibilities for online exhibit curation, the creation of a linked dataset for Inductees, and the maintenance of 3D scans and printing for custom artifact mounts and artifact reproductions that could allow the blind to engage with our collections in a whole new way.

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[2] The upcoming SAA publication, includes the tentatively titled chapter, "Acquisition and Stewardship of Special Collections," which was coauthored by Brad Bauer, Librarian of Archives and Special Collections, New York University Abu Dhabi, and the Rock Hall's Director of Archives Jennie Thomas.

[3] For instance, where standards fail, such as with the absence of a Library of Congress subject heading for music of the 1960s British Invasion.

[4] See Supportingdoc1.pdf for a job description.

Project Work Plan

The specific activities of the project, including evaluation, and their sequence are as listed below.[5] Please note, as the Axiell Collections portion of this project must begin with the system launch in January 2020, some of the project activities listed are a continuation of work that begins with the January go-live date. In order to move new systems, workflows and integrations from the piloting stage to scaling and mainstreaming more quickly and effectively, more personnel resources will be applied to year one of this project than the following two.[6] Other portions of the project, including preservation digitization and assessment, are already mainstreamed into Archives processes and procedures. The project manager, the Director of Archives, will be using agile project management practices in order to keep the longer timelines and ongoing work of the various tasks moving forward. Work will be divided into weekly, monthly, quarterly, and annual buckets so that staff workloads can flex, allowing the project team to continue to hit goals while individually successfully reaching personal and departmental goals unrelated to this project, including assignments that may not currently be on the radar. Beyond currently unknown assignments, other potential risks to the project include initiatives that arise through the new Rock Hall strategic plan to come in 2020, and dependencies within the digitization tasks of the project and on the Evolution customization and implementation timelines.[7] Agile and flexible management of the project and built-in slack time should mitigate risks to the work plan, but constant monitoring of the buckets of work should identify any issues as the project progresses. The scope and diversity of staff involved in the project—from information science to technology to cultural heritage professionals— and the breadth of their knowledge and professional networks should also help in determining solutions if complications arise, regardless of which aspect of the project is affected.[8] A few details regarding the initial research into the interoperability of archives and museum data and workflows that have gone into this project will be available in the aforementioned forthcoming third edition of the SAA publication *Museum Archives*. Beyond this and internally sharing the results of our project with the related project teams for Evolution and Arena, the project manager is interested in exploring whether the SAA Museum Archives Section might be interested in the project results, or if a regional or local conference, like the Midwest Archives Conference, Ohio Museum Association, or Society of Ohio Archivists, might be interested in a presentation of the results. Depending on whether the outcomes are scalable and potentially applicable to other institutions, it would also be of interest to collaborate on an article with the main project staff members on the project and its results.

September 1, 2020 – December 22, 2020 (continuation from January 21, 2020)
- The Axiell Collections Team, with support from other Curatorial Division[9] staff members, physically barcodes approximately 6,000 Locations and Containers, and updates Axiell Collections records in order to properly implement Axiell Collections Locations Management functionality.

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[5] See Scheduleofcompletion.pdf for a Gantt chart of these activities, within the context of the larger-scale project to customize and implement Evolution and Arena concurrently with Axiell Collections. Note that certain Axiell Collections activities within this timeline are dependent upon work associated with Evolution implementation, such as piloting how best to link Axiell Collections records with digital assets in Evolution.

[6] See ProjectStaff.pdf, Resumes.pdf, Supportingdoc2.pdf, and Budgetjustifiication.pdf for additional information related to resource allocation for the project. Please note that Supportingdoc2.pdf is a RACI (Responsibility-Accountability-Consulted-Informed) matrix that breaks down individual staff functions for all aspects of the project.

[7] See Scheduleofcompletion.pdf for dependencies.

[8] See Supportingdoc2.pdf for information regarding diversity of project staff.

[9] The Collections and Curatorial Affairs Division includes the VP of Collections & Curatorial Affairs; the Library & Archives Department with the Senior Director of Library & Archives, Director of Archives, Librarian, Archivist & Assistant Curator, Audiovisual Archivist, Image Archivist, Technical Services Archivist, Project Archivist, Archives Assistant, Library Assistant; the Collections Department with the Director of Collections Management, Registrar, Collections & Traveling Exhibits Manager, Collections Assistant; the Curatorial

September 1, 2020 – March 30, 2021 (continuation from January 13, 2020)

- The Axiell Collections Team[10] cleans up approximately 50,000 name authority and subject headings in Axiell Collections from migrating the three separate library, archives and museum data sets into one CMS.

September 1, 2020 – January 29, 2021 (continuation from May 1, 2020)

- The Archives Team[11] links 17,048 museum item-level records to Archives Catalog records in Axiell Collections in order to provide item-level access within archival finding aids.

September 2020 (continuation from July 13, 2020)

- Digital Archives Team, with assistance from the DAMS Team, pilots linking backlog digital files in Evolution to Axiell Collections, and editing/creating required metadata, to determine workflows and timeline.

October 1, 2020 – December 22, 2020

- Director of Archives transfers administration of Axiell Collections to the Technical Services Archivist.

October 1, 2020 – August 30, 2023

- The Archives Team begins workflows to complete the processing of all incoming archival collections by the end of the following quarter.

October 5, 2020 – unknown

- The Digital Archives Team[12], with assistance from the DAMS Team, links approximately 700,000 backlog digital files from Evolution to Axiell Collections Archives Catalog records.

October 5, 2020 – September 29, 2023

- The Archives Team processes incoming archival collections, approximately 50 collections, or 120 linear feet, per year; each before the end of the following quarter.

January 2021

- The Technical Services Archivist compiles information and statistics on budget, use, data entry, cleanup and linking from Axiell Collections and Evolution for a status report to IMLS.

January 2021, April 2021, July 2021, October 2021

- The Director of Archives evaluates whether quarterly archives processing goals have been met.

April 5, 2021 – July 30, 2021

- The Axiell Collections Team implements the Exhibitions and Conservation modules in Axiell Collections.

April 5, 2021 – May 2021

- The Image Archivist purchases high speed document feeder scanner and necessary accessories, and the Digital Archives Team scans Curatorial donor, lender, source files.

May 3, 2021 – August 31, 2021

- Members of the Library & Archives and Collections Departments link digital donor, lender, source files to their associated Acquisitions records in Axiell Collections.

July 2021

- The Digital Archives Team scans the Collections Department's historic card catalog file.

July 2021 – August 2021

Affairs Department with the Curator & Director of Curatorial Affairs, Curator, Curatorial Coordinator; as well as the Exhibitions Department, which will be tangential to this project. Available interns, volunteers, and graduate assistants are included in the Curatorial Division as well.

[10] The Axiell Collections Team includes the Director of Archives (project manager), Registrar, Librarian and Technical Services Archivist as responsible parties, while the Senior Director of Digital Systems and Strategic Technology acts as a project sponsor.

[11] The Archives Team includes the Director of Archives, Technical Services Archivist, Archivist & Assistant Curator, Image Archivist, Audiovisual Archivist, Archives Assistant, and available interns, volunteers, and graduate assistants.

[12] The Digital Archives Team includes the Image Archivist, Audiovisual Archivist, and Technical Services Archivist, with assistance from other Archives Team members as required.

- The Digital Archives Team, with assistance from the Collections Department, links the digital card catalog files to Axiell Collections Object records.

July 2021, January 2022, July 2022, January 2023, July 2023, December 2023

- The Technical Services Archivist compiles information and statistics on budget, use, data entry, cleanup and linking from Axiell Collections and Evolution for a status report to IMLS and to determine any necessary adjustments to Axiell Collections workflows.

January 2022, April 2022, July 2022, October 2022, January 2023, April 2023, July 2023, October 2023

- The Director of Archives evaluates whether quarterly archives processing goals have been met.

Project Results

The intended results of the project include, first and foremost, an online public access portal to digital content and associated metadata from across the permanent collections of the Rock & Roll Hall of Fame. This access will empower our users, whether Rock Hall staff or the public, to define and research, share and explore their own rock and roll stories as they relate to the Rock Hall's collections, their experiences, and our collective history. Unfacilitated Library & Archives access to digital content has been nonexistent to users before this project, and access to collections metadata has been spread across two separate CMS and two separate online catalogs. The fact that this project enables the Rock Hall to provide digital asset and metadata access across the entirety of its permanent collections—library, archives and museum—through a single interface is game-changing for the institution and its users. Additionally, replacing and expanding the aging Library & Archives technology stack[13] will result in the Rock Hall more successfully managing its digital preservation efforts with more flexible, extensible storage and compatible systems. Other results include:

- Defined processes and procedures for integrated Rock Hall LAM Departments and Axiell Collections, Evolution, and Arena systems workflows.
- Museum-created item-level descriptions of archival materials linked within the hierarchy of Archival finding aid records.
- Axiell Collections Exhibitions and Conservation modules implemented to provide the Curatorial Division with a means to track exhibit text, label content, conservation treatments, and to perform condition reporting from anywhere; means previously unavailable to Collections staff.
- Accurate name authority and thesaurus metadata in Axiell Collections, with defined procedures for creating and identifying new headings and for auditing new data.
- Locations management functionality, including tracking location histories and shelf-reading activities and temporary and future movement planning, is enabled in Axiell Collections.
- Some percentage[14] of the backlog of digital assets in the Evolution DAM linked to associated Axiell Collections records for display within the context of archival finding aids
- Clearly defined rights management for digital assets.

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[13] The current Library & Archives technology stack includes an inoperable LTO-5 tape library, Sierra, Archivists' Toolkit, WorldCat Discovery for catalog access to library materials, an opensource Hydra instance that serves as a digital asset manager for video, and an opensource Blacklight instance that provides online public access to archival finding aids. There is currently no staff to support or further develop the opensource software applications in use at the Library & Archives.

[14] Currently the workflows, complexity, and timeline for this process are unknown. The DAMS Team, which includes the Senior Director of Media & Strategic Technology, Director of Archives, a DAMS consultant from Chromata Solutions, and a project team from the vendor, Tedial Media IT, is working on a means by which to automate some of this work, but even in cases where the automation may work, manual editing of the associated metadata for backlog digital assets is highly likely. Going forward, the automation will provide a simple means by which digital assets and associated metadata can be linked from Evolution to Axiell Collections.

Tangible products to come out of the project include procedure manuals for LAM use of Axiell Collections and Axiell Collections use within the context of Evolution and Arena; a system administration manual for Axiell Collections; approximately 150 finding aids for incoming archival collections (360 linear feet); 35 years of donor, lender, and source documentation digitized for preservation and access, linked to associated Axiell Collections Acquisition records; a high speed document feeder scanner with PDF and OCR capabilities purchased for use in the digitization of other Rock Hall Records projects; and a plan for any future development of Axiell Collections as use of the system is biannually assessed. Few barriers can be seen to others who may wish to learn from and/or adapt the Rock Hall's results or products in their own projects. Potential barriers could occur due to the unique nature of the Rock Hall as a Hall of Fame, Museum and Library & Archives and the needs of its audiences. The relative infancy of popular music as a field of scholarly research has also driven some of the institution's descriptive practices, which may seem unusual in the context of generally accepted archival theory.[15]

To evaluate and measure the success of the project, the Rock Hall will collect data on the number of onsite research visits to the Library & Archives and collections use through virtual requests. The Rock Hall will also look for changes in the number and type of reference and reproduction requests received, to see whether more people can find what they need for themselves, and whether that reduces the number of simple requests but increases more advanced and complex requests for information that is not as easily discoverable. Additionally, engagement activity through the online discovery interface will be tracked to determine how users are searching for and interacting with our assets through favoriting and commenting on objects and collections and sharing digital content. Feedback from LAM staff on the ease of integrated workflows will also be gathered to help craft future development of Axiell Collections and to serve as a model for other institutions with similar departmental structures and collections needs. Finally, it is the hope of the Axiell Collections Team to see processing speeds increase through more efficient workflows and metadata interoperability.

The tangible products and results of this project, coupled with a well-trained staff and a robust and continuous assessment program for our systems, will leave us in a great position to maintain the many benefits of our project. Obtaining the funding for the Technical Services Archivist position beyond the grant project period will be fundamental to the continued success of the project. The Technical Services Archivist is essential to maintaining and continuing to develop the CMS with a single, experienced administrator who is familiar with all aspects of the software, its intricacies and use across departments. The Technical Services Archivist also continues the Archives' ability to maintain a processing program at the same rate as new collections are incoming, while sustaining the detailed level of description that is required by our users. Going forward, the Library & Archives will take a more aggressive approach to requesting funding in the annual budget for the position and/or working with the Rock Hall's Development Division to secure the financial means to permanently fund it beyond September 2023.

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[15] When the Archives first began in 2010, the priority was to have as many collections processed as quickly as possible, using best practices as defined through Meissner and Greene's More Product, Less Process. In 2013, the Archives changed to more detailed processing due to anecdotal evidence from the reading room and reference interviews, researcher evaluations, and feedback from Museum staff. Detailed processing makes the materials more accessible by empowering researchers to find what they need on their own, and consequently means less work for staff members providing reference assistance. As the archives reference staff is also the processing staff, a decision had to be made as to where staff time was best spent. As the Rock Hall Library is a brand new repository in a new scholarly field with many novice users, the greatest concern was that potential users—expecting Google-type search results—were going to the online catalog and, being unable to find exactly what they needed in a high-level finding aid, were then abandoning their search. For a new archives in a museum, where users are already expecting item-level access, with collections focused in a research field still in its relative infancy, it is necessary that we provide as detailed descriptive information for our users as possible.

Task	Activity	2020 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Year 1 Sep	Oct	Nov	Dec	2021 Jan	Feb
Evolution (Digital Asset Management)	Complete Phase 2 of Evolution implementation	O													
	Train System Administrators		O												
	Complete Phase 3 of Evolution implementation			O	O	O	O								
Axiell Collections (Collections Management)	Pilot linking backlog digital files in Evolution to Axiell Collections records to determine workflow and timeline							O	O	B					
	Link backlog digital files in Evolution to Axiell Collections records										B	B	B	B	B
	Go-Live with Axiell Collections across the Curatorial Division	O													
	Train Curatorial Division staff in Axiell Collections	O	O												
	Train Axiell Collections Team in adapl programming language	O	O	O											
	Complete Axiell Collections customizations for the linking and movement of data between tables; setup up automated forms, reports and alerts	O	O	O	O	O									
	Create non-Curatorial access to Axiell Collections				O	O	O	O							
	Pilot name authority and subject heading cleanup in Axiell Collections	O													
	Cleanup name authority and subject headings in Axiell Collections		O	O	O	O	O	O	O	B	B	B	B	B	B
	Physically barcode all Locations and Containers, and update Axiell Collections records to enable Locations Management functionality		O	O	O	O	O	O	O	B	B	B	B		
	Pilot linking Museum item-level descriptions to Archives finding aid descriptions in Axiell Collections to verify workflow and timeline	O	O	O											
	Link museum item-level descriptions to Archives finding aid descriptions in Axiell Collections				O	O	O	O	O	B	B	B	B	B	
	Transfer administration of Axiell Collections from the Director of Archives to the Technical Services Archivist											B	B		
	Implement Axiell Collections Exhibitions and Conservation modules														

Task	Activity	2020 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Year 1 Sep	Oct	Nov	Dec	2021 Jan	Feb
	Complete NHPRC grant to process archival backlog and develop workflows for processing using Axiell Collections	██	██	██	██	██	██	██	██	██					
	Process incoming archival collections by the end of the following quarter									↓	██	██	██	██	██
	Purchase and setup high speed document feeder scanner with PDF and OCR capabilities														
	Digitize donor and lender files														
	Link born-digital and digitized donor and lender files to records in Axiell Collections														
	Digitize Museum artifact location cards														
	Link digitized Museum artifact location card files to records in Axiell Collections														
Arena (Discovery)	Customize and implement Arena											██	██	██	██
	Go-Live with Arena at 2021 Inductions														
Assessment	Compile statistics on data entry, cleanup, linking, and use from Axiell Collections, Evolution, and Arena						██							██	██
	Complete and submit IMLS interim and/or performance reports													██	██

* **Blue** indicates activities related to the new Rock Hall technology stack that are a part of the grant project and occur within the proposed IMLS grant project time period. **Yellow** indicates activities related to the new Rock Hall technology stack that are not a part of the grant project, or that occur outside the proposed IMLS grant project time period. The **red lines** define the proposed IMLS grant project time period, while the **red arrows** indicate dependencies.

Task	Activity	Mar	Apr	May	Jun	Jul	Aug	Year 2 Sep	Oct	Nov	Dec	2022 Jan	Feb	Mar	Apr	May
Evolution (Digital Asset Management)	Complete Phase 2 of Evolution implementation															
	Train System Administrators															
	Complete Phase 3 of Evolution implementation															
Axiell Collections (Collections Management)	Pilot linking backlog digital files in Evolution to Axiell Collections records to determine workflow and timeline															
	Link backlog digital files in Evolution to Axiell Collections records	█	█	█	█	█	█	█	█	█	█		█	█	█	█
	Go-Live with Axiell Collections across the Curatorial Division															
	Train Curatorial Division staff in Axiell Collections															
	Train Axiell Collections Team in adapl programming language															
	Complete Axiell Collections customizations for the linking and movement of data between tables; setup up automated forms, reports and alerts															
	Create non-Curatorial access to Axiell Collections															
	Pilot name authority and subject heading cleanup in Axiell Collections															
	Cleanup name authority and subject headings in Axiell Collections	█														
	Physically barcode all Locations and Containers, and update Axiell Collections records to enable Locations Management functionality															
	Pilot linking Museum item-level descriptions to Archives finding aid descriptions in Axiell Collections to verify workflow and timeline															
	Link museum item-level descriptions to Archives finding aid descriptions in Axiell Collections															
	Transfer administration of Axiell Collections from the Director of Archives to the Technical Services Archivist															
	Implement Axiell Collections Exhibitions and Conservation modules		█	█	█											

Task	Activity	Mar	Apr	May	Jun	Jul	Aug	Year 2 Sep	Oct	Nov	Dec	2022 Jan	Feb	Mar	Apr	May
	Complete NHPRC grant to process archival backlog and develop workflows for processing using Axiell Collections															
	Process incoming archival collections by the end of the following quarter	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
	Purchase and setup high speed document feeder scanner with PDF and OCR capabilities		■													
	Digitize donor and lender files		■	■												
	Link born-digital and digitized donor and lender files to records in Axiell Collections			■	■	■										
	Digitize Museum artifact location cards				■	■										
	Link digitized Museum artifact location card files to records in Axiell Collections					■	■									
Arena (Discovery)	Customize and implement Arena	▨														
	Go-Live with Arena at 2021 Inductions															
Assessment	Compile statistics on data entry, cleanup, linking, and use from Axiell Collections, Evolution, and Arena					■						■				
	Complete and submit IMLS interim and/or performance reports					■						■				
Blue indicates activities related to the new Rock Hall technology stack that are a part of the grant project and occur within the proposed IMLS grant project time period. *Yellow* indicates activities related to the new Rock Hall technology stack that are not a part of the grant project, or that occur outside the proposed IMLS grant project time period. The *red lines* define the proposed IMLS grant project time period, while the *red arrows* indicate dependencies.																

Task	Activity	Jun	Jul	Aug	Year 3 Sep	Oct	Nov	Dec	2023 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Evolution (Digital Asset Management)	Complete Phase 2 of Evolution implementation															
	Train System Administrators															
	Complete Phase 3 of Evolution implementation															
Axiell Collections (Collections Management)	Pilot linking backlog digital files in Evolution to Axiell Collections records to determine workflow and timeline															
	Link backlog digital files in Evolution to Axiell Collections records	███	███	███	███	███	███		███	███	███	███	███	███	███	███
	Go-Live with Axiell Collections across the Curatorial Division															
	Train Curatorial Division staff in Axiell Collections															
	Train Axiell Collections Team in adapl programming language															
	Complete Axiell Collections customizations for the linking and movement of data between tables; setup up automated forms, reports and alerts															
	Create non-Curatorial access to Axiell Collections															
	Pilot name authority and subject heading cleanup in Axiell Collections															
	Cleanup name authority and subject headings in Axiell Collections															
	Physically barcode all Locations and Containers, and update Axiell Collections records to enable Locations Management functionality															
	Pilot linking Museum item-level descriptions to Archives finding aid descriptions in Axiell Collections to verify workflow and timeline															
	Link museum item-level descriptions to Archives finding aid descriptions in Axiell Collections															
	Transfer administration of Axiell Collections from the Director of Archives to the Technical Services Archivist															
	Implement Axiell Collections Exhibitions and Conservation modules															

Task	Activity	Jun	Jul	Aug	Year 3 Sep	Oct	Nov	Dec	2023 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
	Complete NHPRC grant to process archival backlog and develop workflows for processing using Axiell Collections															
	Process incoming archival collections by the end of the following quarter	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
	Purchase and setup high speed document feeder scanner with PDF and OCR capabilities															
	Digitize donor and lender files															
	Link born-digital and digitized donor and lender files to records in Axiell Collections															
	Digitize Museum artifact location cards															
	Link digitized Museum artifact location card files to records in Axiell Collections															
Arena (Discovery)	Customize and implement Arena															
	Go-Live with Arena at 2021 Inductions															
Assessment	Compile statistics on data entry, cleanup, linking, and use from Axiell Collections, Evolution, and Arena		■						■					■		
	Complete and submit IMLS interim and/or performance reports		■						■					■		

*_**Blue**_ indicates activities related to the new Rock Hall technology stack that are a part of the grant project and occur within the proposed IMLS grant project time period. **Yellow** indicates activities related to the new Rock Hall technology stack that are not a part of the grant project, or that occur outside the proposed IMLS grant project time period. The **red lines** define the proposed IMLS grant project time period, while the **red arrows** indicate dependencies._

Task	Activity	Sep	Oct	Nov	Dec
Evolution (Digital Asset Management)	Complete Phase 2 of Evolution implementation				
	Train System Administrators				
	Complete Phase 3 of Evolution implementation				
Axiell Collections (Collections Management)	Pilot linking backlog digital files in Evolution to Axiell Collections records to determine workflow and timeline				
	Link backlog digital files in Evolution to Axiell Collections records	▓	▓	▓	▓
	Go-Live with Axiell Collections across the Curatorial Division				
	Train Curatorial Division staff in Axiell Collections				
	Train Axiell Collections Team in adapl programming language				
	Complete Axiell Collections customizations for the linking and movement of data between tables; setup up automated forms, reports and alerts				
	Create non-Curatorial access to Axiell Collections				
	Pilot name authority and subject heading cleanup in Axiell Collections				
	Cleanup name authority and subject headings in Axiell Collections				
	Physically barcode all Locations and Containers, and update Axiell Collections records to enable Locations Management functionality				
	Pilot linking Museum item-level descriptions to Archives finding aid descriptions in Axiell Collections to verify workflow and timeline				
	Link museum item-level descriptions to Archives finding aid descriptions in Axiell Collections				
	Transfer administration of Axiell Collections from the Director of Archives to the Technical Services Archivist				
	Implement Axiell Collections Exhibitions and Conservation modules				

Task	Activity	Sep	Oct	Nov	Dec
	Complete NHPRC grant to process archival backlog and develop workflows for processing using Axiell Collections				
	Process incoming archival collections by the end of the following quarter	🟧	🟧	🟧	🟧
	Purchase and setup high speed document feeder scanner with PDF and OCR capabilities				
	Digitize donor and lender files				
	Link born-digital and digitized donor and lender files to records in Axiell Collections				
	Digitize Museum artifact location cards				
	Link digitized Museum artifact location card files to records in Axiell Collections				
Arena (Discovery)	Customize and implement Arena				
	Go-Live with Arena at 2021 Inductions				
Assessment	Compile statistics on data entry, cleanup, linking, and use from Axiell Collections, Evolution, and Arena				
	Complete and submit IMLS interim and/or performance reports				🟦

* **Blue** indicates activities related to the new Rock Hall technology stack that are a part of the grant project and occur within the proposed IMLS grant project time period. **Yellow** indicates activities related to the new Rock Hall technology stack that are not a part of the grant project, or that occur outside the proposed IMLS grant project time period. The **red lines** define the proposed IMLS grant project time period, while the **red arrows** indicate dependencies.