



Council on Library and  
Information Resources

**Recordings at Risk  
Recipient Informational Webinar  
November 6, 2019**

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Hello and welcome to the Recordings at Risk Recipient Informational Webinar.

We'll start with introducing the staff on the call today:

My name is Kristen Blair, Program at CLIR and I'll be moderating this webinar today. I'm joined by our geographically distributed grants team members. I'll ask them to introduce themselves now, telling you what they do and where they are today. [Introductions: Joy, Becca, and Sharon]

We'd like to begin by congratulating you all once again on being selected as a grant recipient for the Recordings at Risk program! We have an varied and remarkable collection of projects represented here, and we're very happy to be working with all of you.

Our Team thought that it would be helpful to touch base as you begin your projects to clarify some of your responsibilities as grantees and to discuss how to handle certain situations that may arise in the future. We'll begin this presentation by

covering aspects of the Reporting Requirements, then we'll move on to information regarding Grant Modifications, the Exit Interview, and some additional notes on helping us promote your projects.

Some logistics on using the Zoom platform today. If you haven't already, you can hover your mouse at the bottom of the screen to find the buttons that open the chat and Q&A boxes. Feel free to add any comments in the chat box at any time, changing the setting to "Everyone" if you'd like your message to be seen by the entire group. We'll be taking questions in the Q&A box which allows participants to up-vote a question if several people have the same one. We'll answer questions submitted through the Q&A box at the end of the webinar. We'll also be recording this session so that you can revisit it in the future or share it with colleagues.

I'll now turn the floor over to **Joy**, who will be starting the presentation...




is an independent, nonprofit organization that forges strategies to enhance research, teaching, and learning environments in collaboration with libraries, cultural institutions, and communities of higher learning.

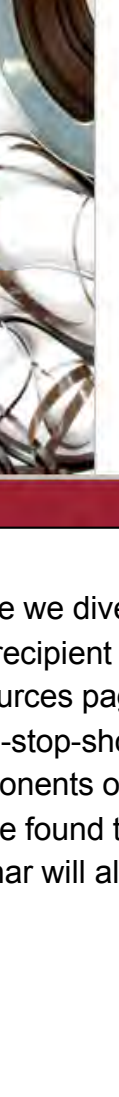


We always like to start by reminding everyone of CLIR's mission: The Council on Library and Information Resources (or "CLIR") is an independent, nonprofit organization that forges strategies to enhance research, teaching, and learning environments in collaboration with libraries, cultural institutions, and communities of higher learning.

Recordings at Risk is just one of many programs administered by CLIR and is generously supported by The Andrew W. Mellon Foundation. We have continued support for this program through the spring of 2021, so be sure to tell your friends and colleagues. We just opened cycle 7's call for proposals, and our next deadline for submissions is January 31, 2020.



# Recipient Resources



<https://www.clir.org/recordings-at-risk/recipient-resources/>

Webpage includes:

- RaR reporting form and collaborative Google Docs template
- Links to recipient webinars
- The information covered in this presentation on CLIR grant administration

Before we dive into our presentation, I wanted to point you towards the Recordings at Risk recipient resources webpage. In much the same way as the Applicant Resources page helped guide your proposal writing, the Recipient Resources page is a one-stop-shop for grant recipients, with information on the administrative components of holding a CLIR grant. Most of the information we'll be covering today can be found there if you ever need a refresher on our policies. The recording of this webinar will also be posted on this page.



# Reporting Requirements

We'll begin by going over CLIR's reporting requirements for grantees. Since most of you are just starting your projects or may not have yet begun, it may seem odd to start with reporting. But seeing what will be required at the end may help you decide how to document progress and keep metrics which may, hopefully, make the reporting easier when your projects are complete.



## Grant Term and Report Deadline

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- **Grant Term**: Activities for all projects must begin no earlier than **October 1, 2019** and must be completed no later than **September 30, 2020**.
- **Final Report**: Report form with financial assessment due within **30-90 days** of project completion, no later than **December 31, 2020**.

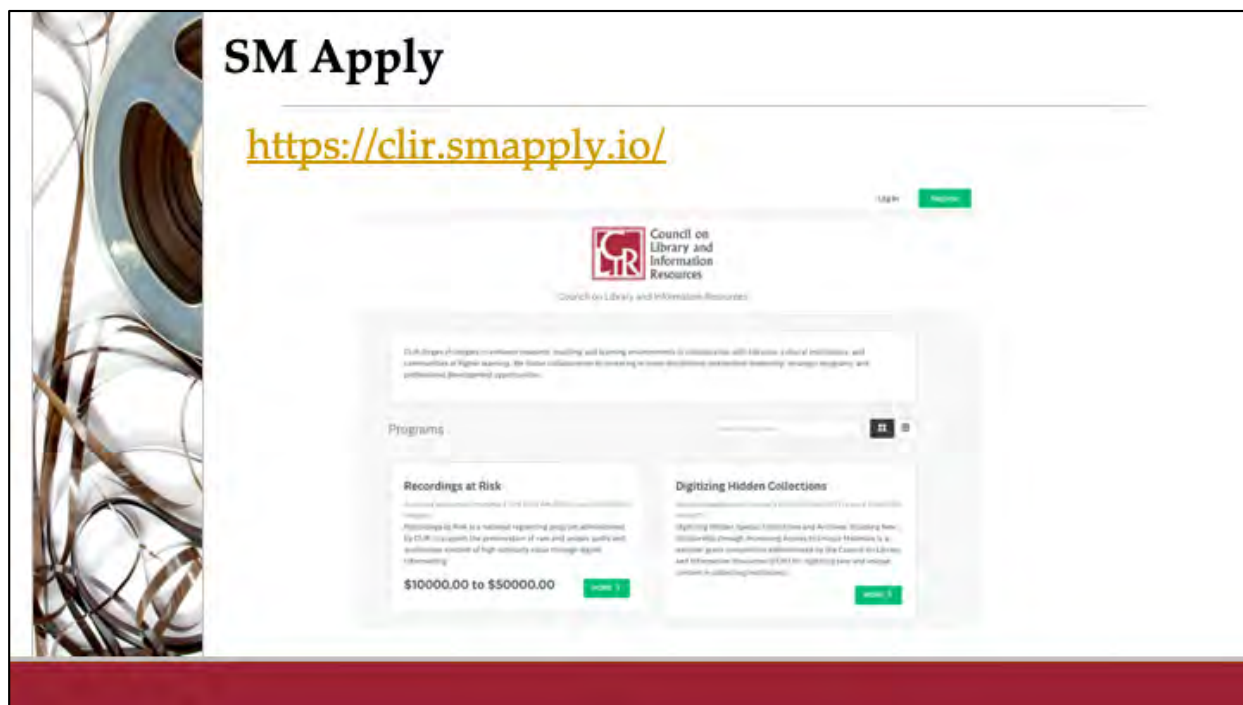
You were all awarded grants this fall in the sixth Recordings at Risk competition. For that reason, you will hear us refer to you as a group as our “Cycle 6 recipients.” To keep things easy for everyone, we start by setting everyone on the same year-long project timeline with the same deadlines, regardless of the project length you originally proposed. We have found that this is easiest for everyone.

As you may recall, for this program you could propose a project term that would last between 3 and 12 months. So all of your projects have been designed to be completed rapidly. However, for the purposes of setting reporting deadlines, our program will assume you had proposed a 12-month project beginning on **October 1, 2019**.

**Activities for all Cycle 6 projects must be completed no later than September 30, 2020.** This includes all approved project activities including digitization, metadata creation, and providing whatever access you’re providing. Grant funds may only be expended during this 12-month period. To change this timeline, you’ll need to get approval from us, which we will cover shortly.

With very few exceptions, there is only one report required for this program. Your final report form and financial assessment are due within 30-90 days of project completion. So this would mean that the latest possible reporting deadline would be **December 31, 2020**.

You may find that your project ends earlier than September 30, 2020, or that you're ready to submit your report earlier than December 31, 2020. You are always welcome to submit your final report early. If that is the case, you'll need to contact the CLIR Grants Team at [recordingsatrisk@clir.org](mailto:recordingsatrisk@clir.org) so we can start the reporting process.



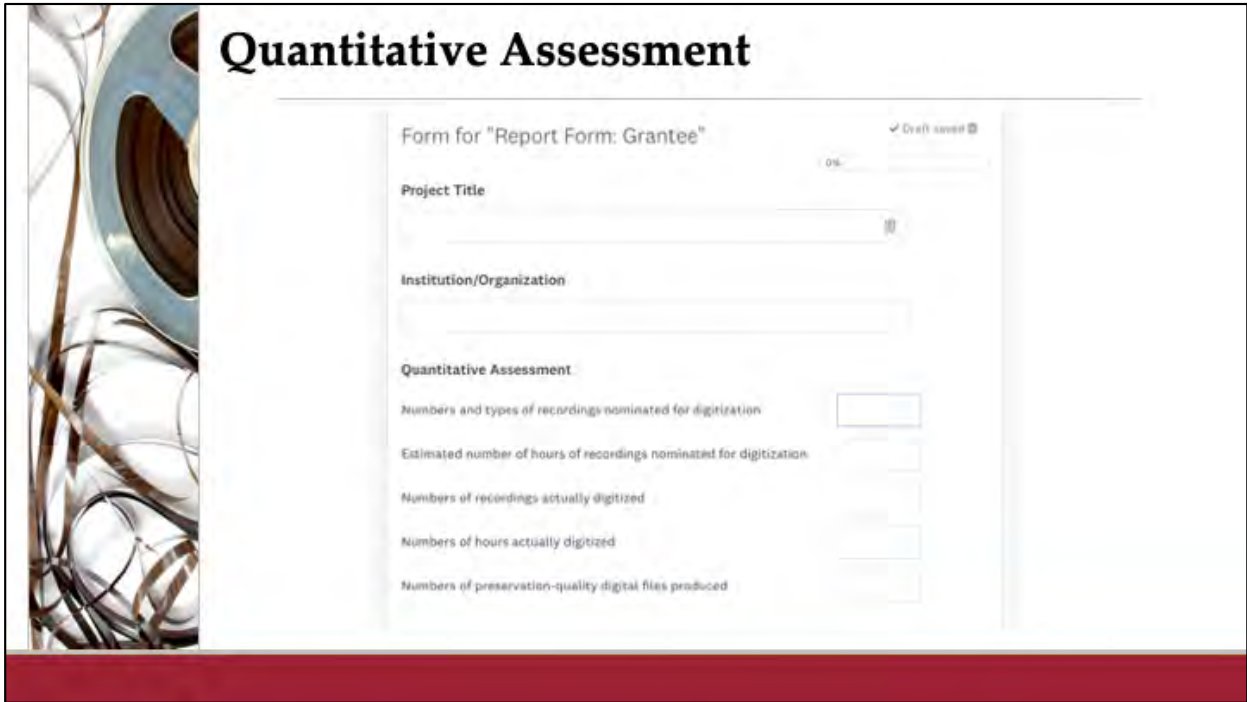
Grant reports are submitted through the same portal you used to submit your application, called SM Apply. You can also find a link to this on the Recipient Resources page on the Recordings At Risk website. All communication and reminders for reporting will be sent to the primary principal investigator (or PI), but there's no limit to the number of other project staff that can be kept in the loop. If there are any others involved in project work who need such notifications, you will need to send to our program email address the names and contact information for those people. Please share this information as soon as possible so we can keep our records up to date.

If you can, you should login to SM Apply **using the same email address and password you used to create your application**. If you use these same credentials, you should automatically see the reporting form for your project when you log in. If you forget these credentials or lose access to them for any reason (for example, if the person who created your application leaves your organization), you will need to contact us through the program email ([recordingsatrisk@clir.org](mailto:recordingsatrisk@clir.org)) so that we can link your report to the correct credentials.




An additional way to future-proof your team's access to the report is to log in using the application credentials, hit "start" to pretend like you're starting your report, then add other team members' email addresses as "collaborators" on your report. Collaborators will then receive an automatic invitation to verify their email addresses and create their own passwords to access the system. Once they do this, they will also be able to log in to view the report and enter data. One of the system's safety measures insures that only the primary principal investigator is able submit a report, so if one of the collaborators eventually needs to submit, that person will still need to contact us to make sure this can happen.

We're now going to take you on a tour of the reporting form itself.



The first section of the report is the quantitative assessment. Here you'll be entering information related to the numbers and types of recordings nominated for digitization, the number of archival master files produced, and variances between the estimated and actual digitization numbers. To complete this part, it will be helpful to have access to your original proposal for your project. Taking the time now to put a copy of your proposal in a place where all team members can access it is a good idea. You can download a copy of your proposal by logging in to the system using the same credentials you used to create your application. If you don't know where to find a copy of your proposal, you can also email us to ask for one.



## Internal Developments (cont.)

Project developments


**Internal**

- digitization metrics
- new workflows, standards, protocols, or procedures for digitization and/or description
- new tools or systems
- new financial donation or additional grant awarded to support the nominated collection
- new collection donation
- new grant application(s)

The next reporting section includes space to document project developments, both internal and public. Internal developments may include things like:

- digitization metrics such as tracking time data for steps in the project workflow (preparing materials for shipping to the vendor, metadata creation, ingest, etc.),
- the implementation of new workflows, standards, protocols, and/or procedures for digitization and description,
- the implementation of new tools or systems,
- and new donations and/or grant applications

CLIR pulls together data about the impact of its program for its own annual reporting to The Andrew W. Mellon Foundation, so providing as many details as you can about the ways that this opportunity affected your organization, collections, staff, and ways of working will be very helpful to us. Taking notes somewhere about the impact of this grant will help you easily complete this section.



## Public Developments

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### Project developments


**Public**

- new blog, social media account, or website/webpage
- new research guide or teaching guide
- new online/physical exhibition
- new materials or assignment for a course at a school, college, or university
- new publication
- presentation at a professional or academic conference

We also want to hear about Public developments, such as:

- The creation of new blogs, social media accounts, websites or even content created for existing ones;
- Research guides, online or physical exhibitions, or news articles;
- The incorporation of digitized materials into curricula at any educational level,
- Or publications or presentations about the project or arising from research using the digitized materials.

Again, keeping a file with copies of these kinds of documentation will make the reporting process easy for you. You will also have a chance to append copies of these documents to your report, demonstrating the varied and creative ways you will use your project to educate and serve others.




**New internal developments that have resulted from project work.**

*Check all that apply to your project.*

- digitization metrics (e.g. tracking time data for steps in the project workflow)
- implemented new workflows, standards, protocols, or procedures for digitization or description  
(specify)
- implemented new tools or systems (specify)
- new financial donation or additional grant awarded to support the nominated collection
- new collection donation
- new grant application(s)
- other (mention below, then address in subsequent sections)

Here's a quick glimpse of what these "impact" questions look like on the reporting form. The report form includes simple checkboxes to document activity which you'll then have the opportunity to explain further in the narrative portion of your report. Here is the checklist for internal impacts...



**New public outcomes arising from project work**

Check all that apply to your project.

- creation of new blog, social media account, or website/webpage
- new content for existing blog or social media account
- new research guide or teaching guide
- new online exhibition
- new public program or physical exhibition
- new materials or assignment for a course at a school, college, or university
- new publication arising from research using the project collection(s) (such as a book or book chapter, peer-reviewed journal article, magazine essay)
- presentation at a professional or academic conference
- news article about the project for an outlet based at home institution
- news article about the project for an external outlet
- other (mention below, then address in subsequent sections)

And here is the checklist for public outcomes. Because Recordings at Risk is designed to support smaller-scale efforts focused on preservation reformatting of audio and audiovisual materials over short periods of time, CLIR does **not** expect that all of these things will happen in the course of your work. Most recipients just check two or three boxes here, and some don't check any--that is ok. Just check any boxes that do apply to you, so we will know to look for them in your narrative and to account for them in our own summary reporting to the Mellon Foundation.




Next, we ask grant recipients to share with us where users can go to find information about the digital copies of the recordings reformatted through your project. Some of you will be providing public access to both the digital files and the associated metadata created through your project, and some may only be providing public access to the metadata.

This is a good place to remind everyone that creating and providing access to metadata for the digital copies of the recordings created through your project is a requirement of the program, unless a specific exception was made in your proposal for cultural reasons. CLIR expects that you will create and publish online at least some basic metadata for the digital copies of the recordings, so people can learn about what you have. At the end of your project, you may still have work to do to add richer descriptions, subject headings, or even transcriptions or captions, but we do expect that some basic records about what you've done be posted somewhere online.

You'll have the option to include up to 10 URLs in the report section. We encourage

you to provide a few high-level links to the collections rather than many lower level links. These links allow us to verify that you have made metadata accessible, at the least, and well as verify that those of you who can make the digital surrogates of recordings available for streaming online have done so. Again, we understand that for some of you, legal and ethical issues will make it impossible to provide full access to copies of your recordings; if this is the case, you just need to provide one or more links to where your metadata is at the end of your project. You can also provide more information about future locations for your metadata and files in the narrative sections of your report.





## Contact Information

**Contact name, title, and institution**  
Provide the name, title, and institution of the person CLIR should contact with questions regarding this report.

First Name

Last Name

Title

Institution

**Contact e-mail address**  
Provide the e-mail address for the person CLIR should contact with any questions regarding this report. This person will also receive a copy of this report, including all files uploaded, following submission.

**Project P.I.(s)**  
Enter the name(s) and title(s) of the project's current Principal Investigator (PI) or Investigators. If an original PI has left the project during this reporting period and a replacement PI has been approved by CLIR, reference this approval in the Project Narrative.

**Service Provider**

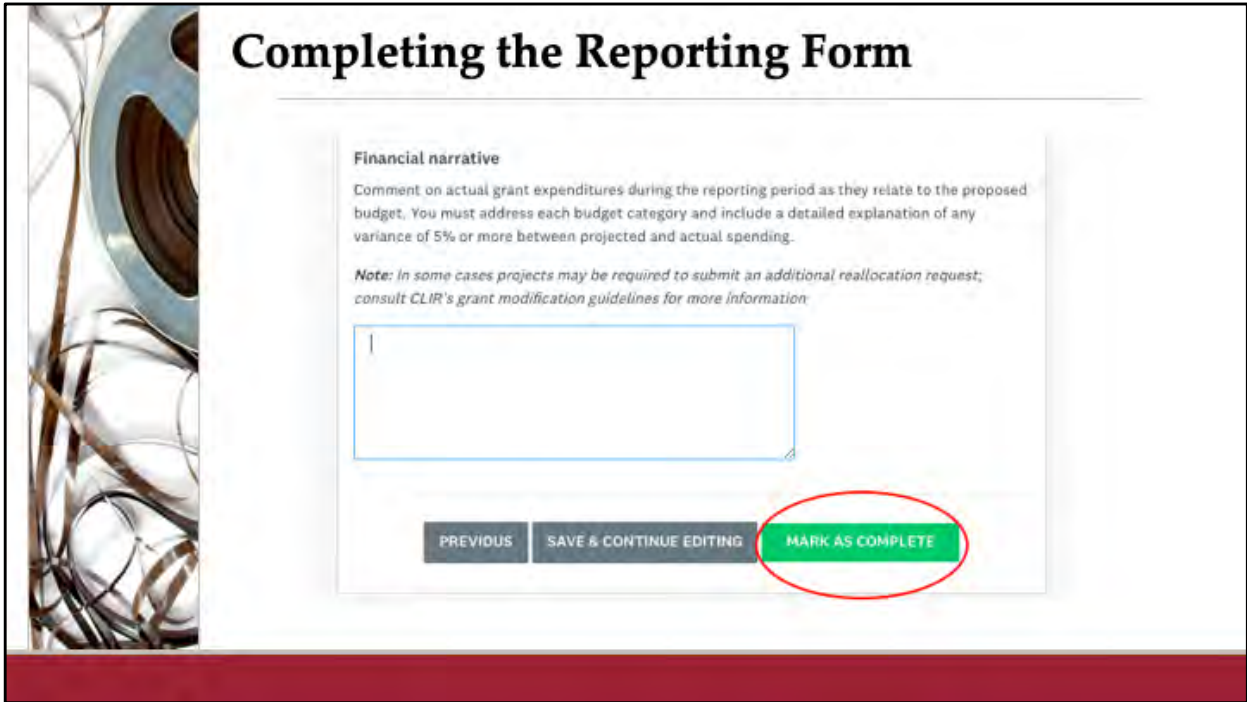
Name

Contact Name

Email address

Telephone number

You'll then provide the contact information for the project's PIs, service provider, and the person who should be contacted if questions emerge about the report.



## Completing the Reporting Form

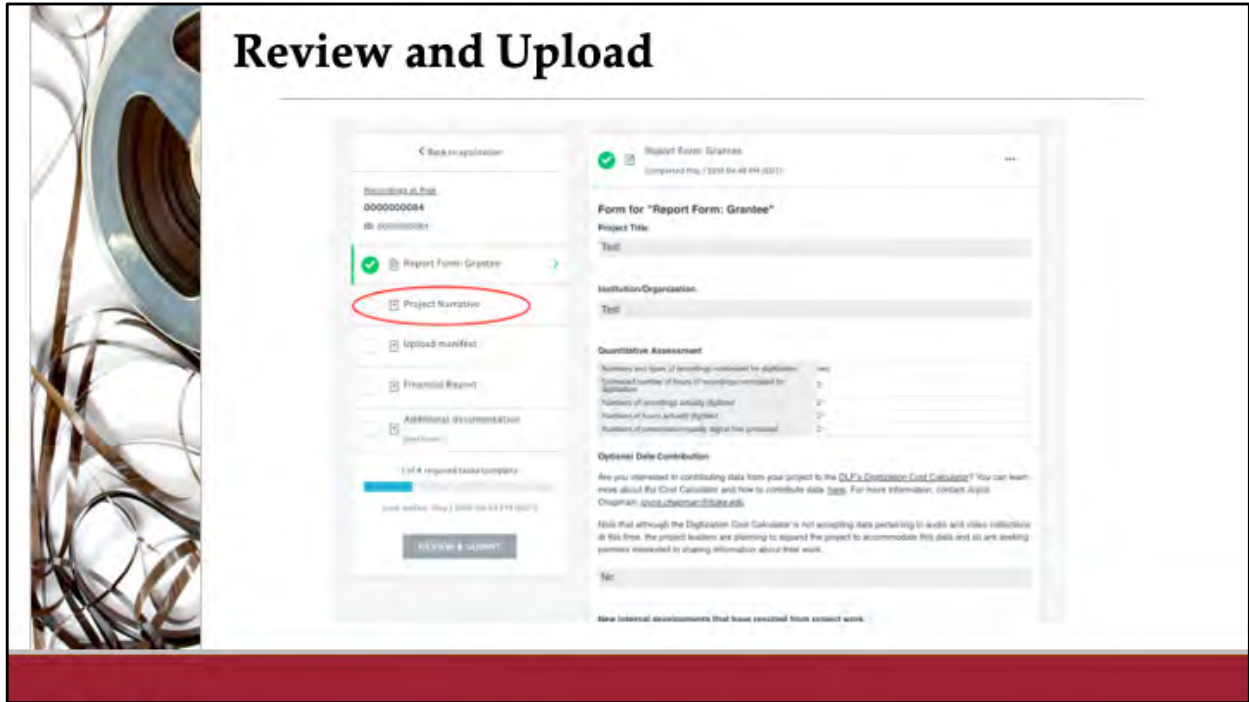
**Financial narrative**

Comment on actual grant expenditures during the reporting period as they relate to the proposed budget. You must address each budget category and include a detailed explanation of any variance of 5% or more between projected and actual spending.

*Note: In some cases projects may be required to submit an additional reallocation request; consult CLIR's grant modification guidelines for more information.*

[PREVIOUS](#) [SAVE & CONTINUE EDITING](#) [MARK AS COMPLETE](#)

Next, you'll add your financial narrative and either save this section of the form or mark it as complete. The financial narrative should address each line in your project budget.



Marking the report as complete will take you to the review page, where you can doublecheck the information you entered, and see the additional steps you need to take.

There are a few documents to upload before you'll be ready to submit your report. If you look to the left side of the screen, you can see buttons that will prompt you to upload the remaining components of the report, which we'll go over now one by one.



## Project Narrative

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- Summary of project and purpose of grant
- Progress toward expected outcomes
- Surprises, setbacks, challenges
- Significant accomplishments, lessons learned
- Future plans

*No more than 6 pages.*

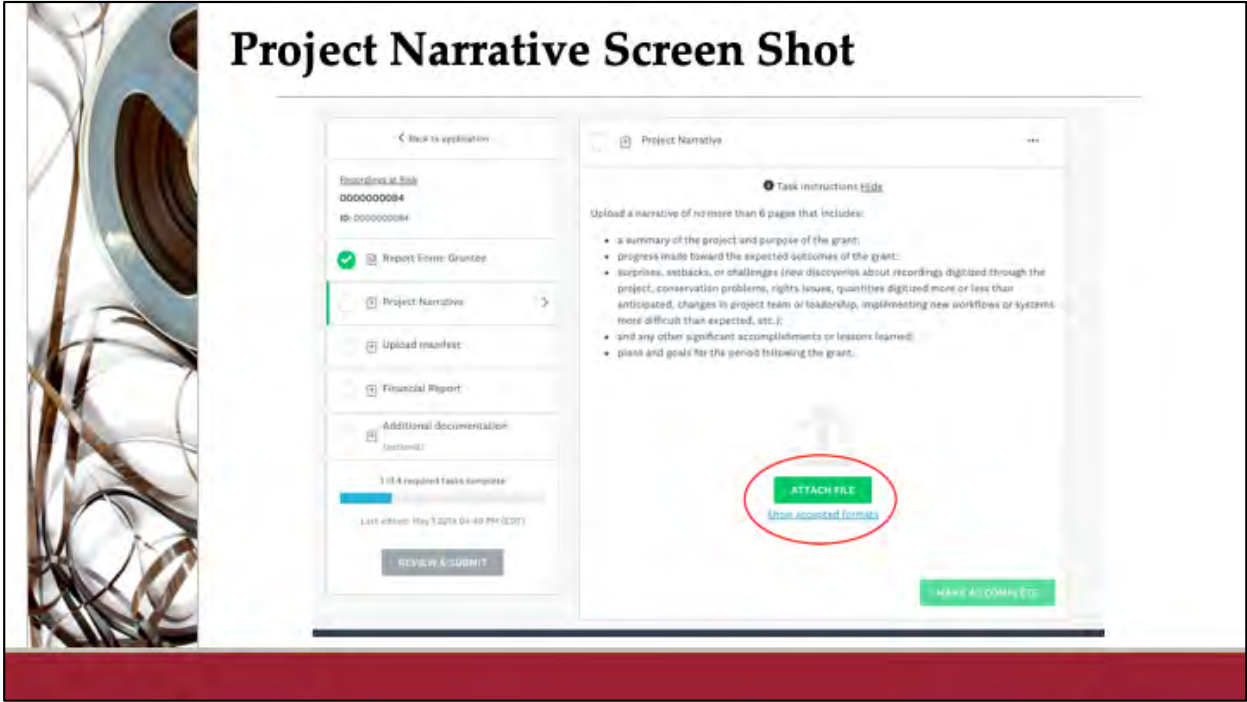
The first, and perhaps most important part of your report is the Project Narrative. This will be an uploaded document of no more than **6 pages** which will contain the types of information listed here:

- A summary of the project and purpose of your grant
- Your progress toward expected outcomes where you can explain the numbers, including any variances in your quantitative section
- Any surprises, setbacks, and challenges that you faced
- Significant accomplishments and lessons learned
- And finally, your future plans

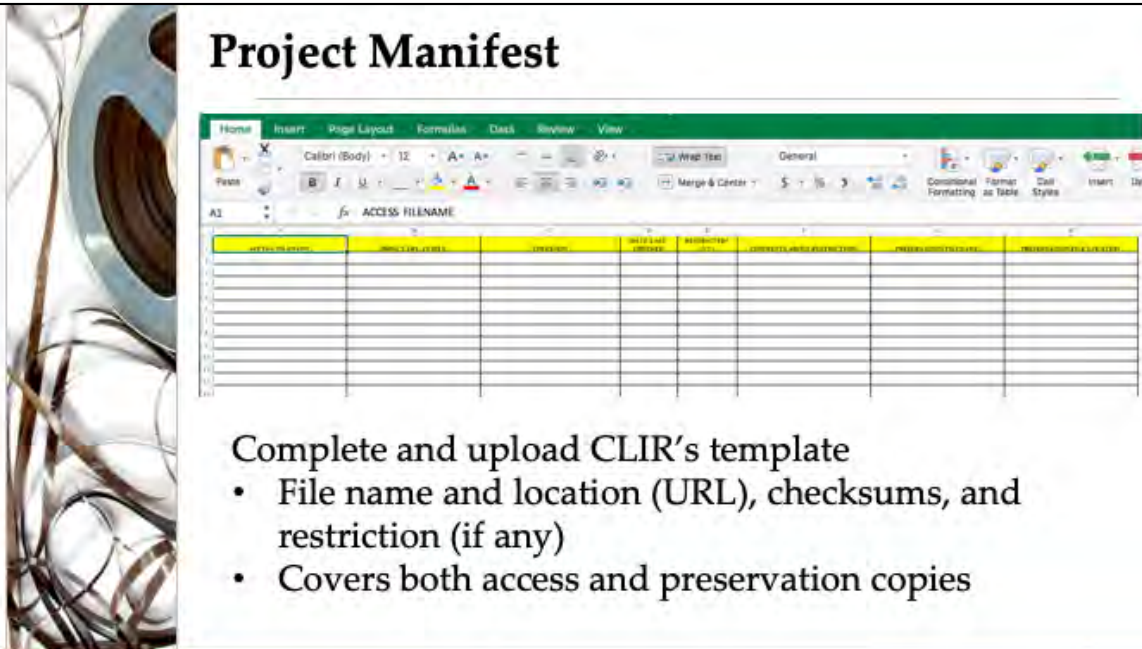
Ultimately, this is information that will help us create resources that can be of use to other institutions wanting to initiate their own a/v digitization projects. We'll also share the lessons learned from grantees with our funder, The Andrew W. Mellon Foundation, which receives a copy of every report.

If you take the time to compile notes somewhere about these topics during the course of your project and save those notes in the same place you keep your copy of the

original proposal, you will thank yourself when the final report deadline approaches.



Here's a screenshot of what you'll see when you're asked to upload the form, which you'll notice includes directions about all the topics your narrative report should cover.



## Project Manifest

Complete and upload CLIR's template

- File name and location (URL), checksums, and restriction (if any)
- Covers both access and preservation copies

You'll also be asked to upload a project manifest, a spreadsheet which includes the names and locations of the digital files (normally, the access copies), as well as notations about any checksums and restrictions. We're requiring this because we are developing a tool--a kind of web crawler--that will allow us to conduct periodic checks that the online files created through CLIR's digitization regranting programs are, in fact, online.

Note that CLIR's template for this has multiple tabs, including one with instructions, so be sure to read through all of them.

Taking a look at this template now, and building in time to create this document into your workflow, will help you save time later. Normally, your digitization vendor will return a spreadsheet to you that will be very similar to what you need to submit here, and you should be able to adapt the vendor's spreadsheet for this template. If you work out your file naming conventions at the start and insure your vendor names your files exactly according to your needs, most of your work for this requirement will be done. If you leave it until the end, it might take some scrambling to pull it together, so

we do strongly recommend coming up with a strategy for compiling this data during the course of project work.

Of all of the pieces of the final report, this document is what allows us to verify that you have created all the deliverables agreed upon when you received funding. If, in the midst of your project, issues arise that will affect your ability to reach the goals included in your application, reach out to the CLIR grants team so we can help you decide the best course of action. We will go over how to do that shortly, but first, let's finish the report form...





## Financial Assessment

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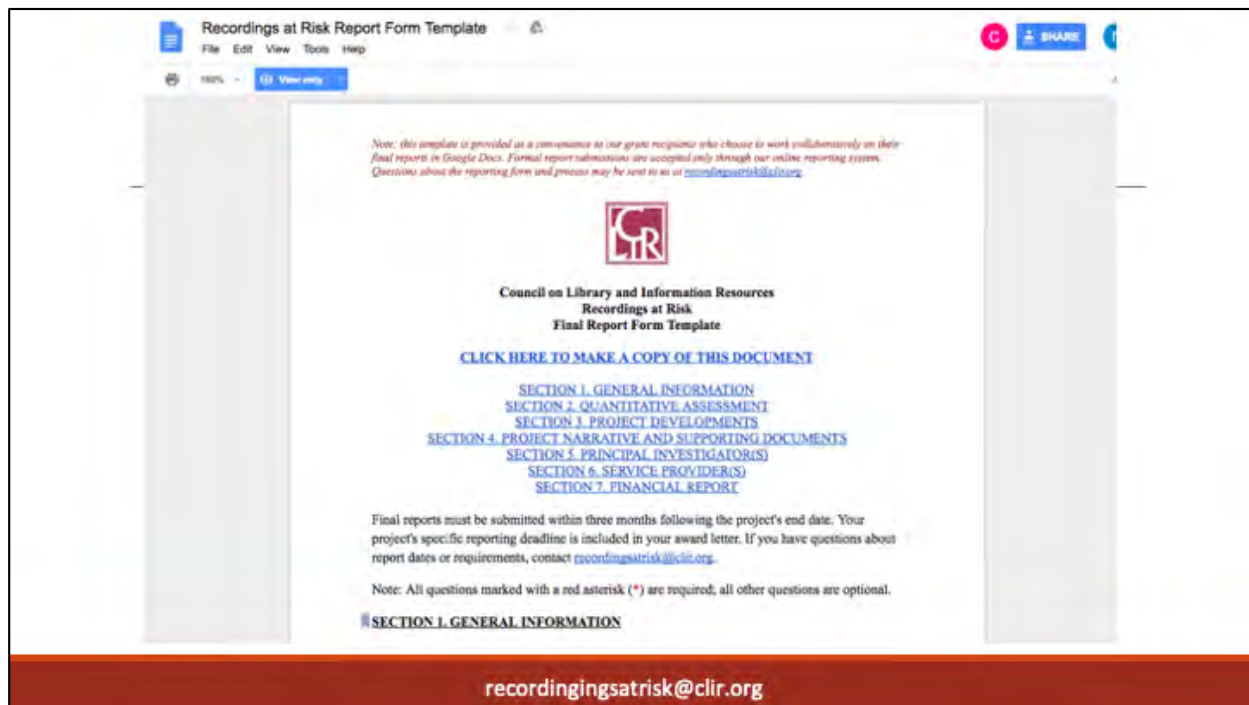
- **Narrative Report:** explanation of actual grant expenditures vs. proposed.
  - Addresses each budget category
  - includes detailed explanation of variances of 5% or more
- **Financial Report:** Budget submitted with proposal, updated to reflect actual expenditures

The final part of the Reporting Requirements that I want to touch on is the Financial Assessment, which comes in two parts.

The first is the Financial Narrative, which we glimpsed at earlier on the main report form. In the Financial Narrative, you can comment on actual grant expenditures during the reporting period as they relate to your proposed budget. Every budget category should be addressed here and, if there are any variances of 5% or more between projected and actual spending, make sure to include a detailed explanation here.

The second part is the Financial Report, which is an upload using the same budget and financial report template that you submitted with your proposal. The only difference is that you have both the Budgeted and Actual fields of the template filled in for the final report. This is another good reason to make sure you have a copy of your entire proposal saved somewhere where all your team members can access it--you'll prepare the financial report beginning with the same file you submitted with your proposal.





We noted earlier that SM Apply allows you to add other email addresses for collaborators who will contribute to your report as you develop it in the system. We do recognize, however, that sometimes it isn't realistic to expect all members of the team to figure out how to log in and use the system. For that reason, we've also created a Google Doc template that your team can use to prepare your draft report. The document includes the full information requested in the report, covering both the questions on the reporting form and the documents that will be added as uploads. You may remember using a similar document to prepare your proposal. It's the same principle here: just make your own personal copy of the document and save it somewhere your team members can find, then when your team is happy with your report, copy and paste from the document into SM Apply to submit your report.

Because the reporting form was intended to group questions thematically, and because SM Apply is built in a way that requires uploads to be added at the very end, the order of questions on the Google Doc template is somewhat different than the order of questions in SM Apply; however, the content of the questions should be identical.

You can access the Google Doc template using the link on our Recordings at Risk Recipients Resources page. To make a personal copy of the template that you can edit, click on the text that says “click here to make a copy of this document. This copy can then be shared with anyone who will be collaborating on the draft proposal. Once you have finished drafting your proposal, you must copy your report responses into SM Apply to submit your final report.



# Grant Modifications

**Joy:** And now I'll pass things over to Becca.

**Becca**

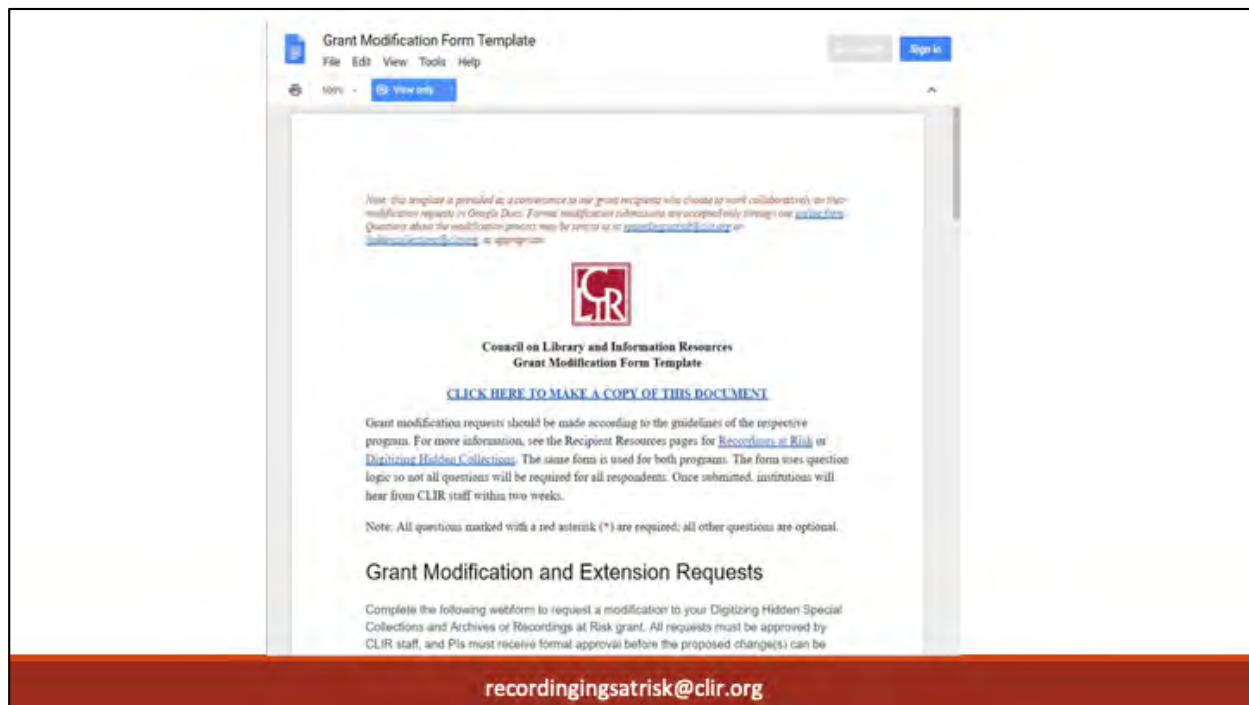
Now that we've made it through the reporting form, we need to address how you can make changes to your plans if unforeseen delays, problems, or staffing changes happen during the course of your work.

Over the course of many grant projects, we've seen that the need often arises to request a modification. Due to the unpredictability of audio and audiovisual digitization initiatives, such requests are extremely common for this program, and you should not hesitate to ask us for what you need to do to successfully complete your project. CLIR has an online modification request form through which recipients can notify us of any modification requests such as No-Cost Extensions, P.I. changes, and Reallocation Requests. The form was designed to streamline the process and reduce the amount of time spent making and approving these requests.



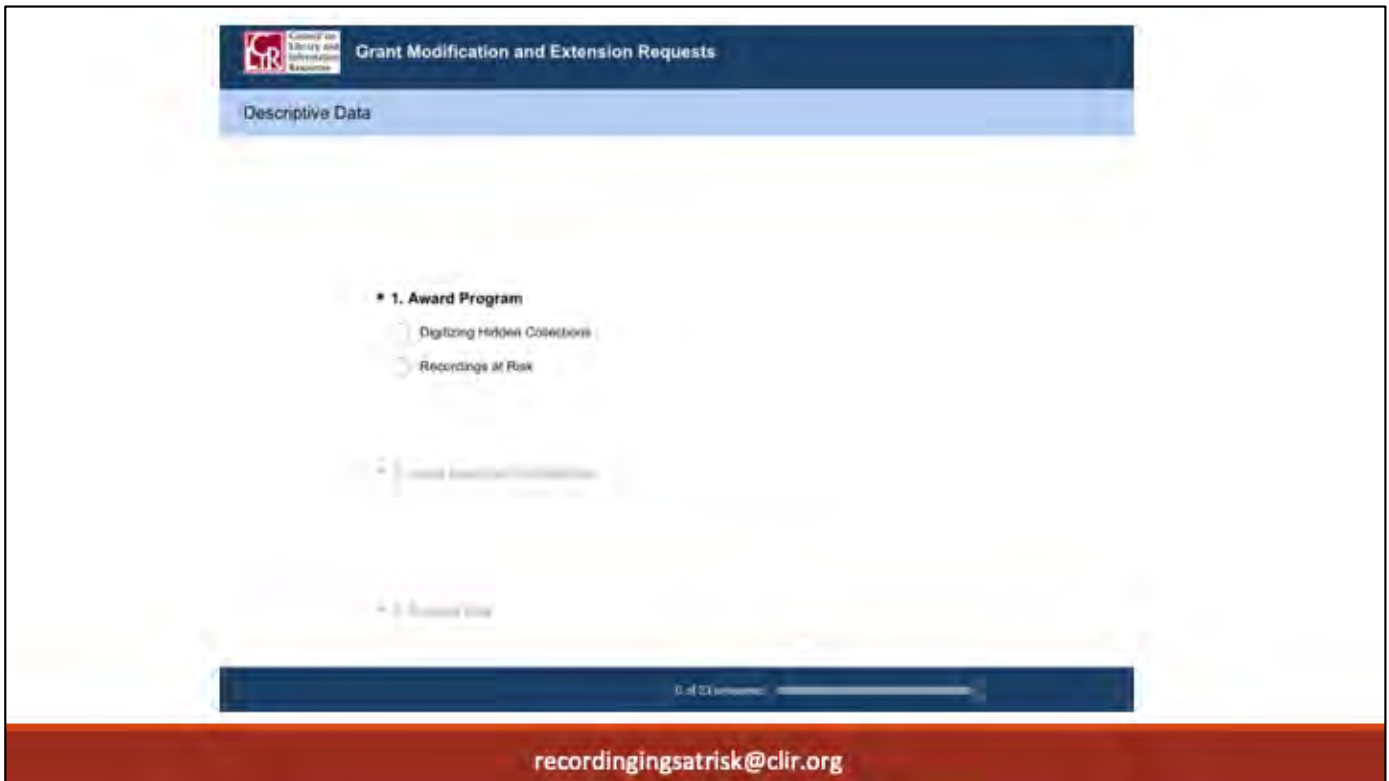
Access to the Grant Modification and Extension Request form is available through a link at the top of the Recipient Resources web page. The same form is used across CLIR's grant programs and is designed to allow for the request of multiple types of modification requests. The form includes sections on descriptive information, questions about extension requests, other modification requests, and a space to provide a brief explanation and justification of the modification.

In order for you to prepare the necessary information for the modification request, we also provide a Grant Modification Form Template, linked to on this slide and also available on the Recipient Resources page.



This shows the GoogleDoc template for the modification request form. The online form does involve some question logic, so you may not be required to answer all of the questions on the template depending on how you answer others.

A link is provided at the top of the document that allows you to create a copy of the template for collaborative working. All modification requests should be submitted through the online form, so you will need to copy and paste your prepared responses into that space.



Here's a glimpse of what the online Grant Modification and Extension Request form looks like.

In many cases, completing the form will be all you need to do to get approval for a modification. However, under certain circumstances, additional documentation may be required in order to move forward with the request.

Multiple types of modification requests can be submitted at the same time using the same form. For example, if you need to request a no-cost extension as well as a reallocation of funds, the form will accommodate both requests. Once the form has been submitted and received, you should hear from CLIR staff within two weeks.

The guidelines for modification requests vary slightly between CLIR's different grant programs, so be sure to check the Recipient Resources pages for the most up to date information. If you have any questions about the process, CLIR staff is always available via email through our program email address: [recordingsatrisk@clir.org](mailto:recordingsatrisk@clir.org).

Now for some additional information about the types of modification requests.



## No-cost extensions

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- If project work will continue beyond **September 30, 2020**, you will need an extension
- No more than one extension per project
- Request an extension between 4-6 weeks prior to project end date (mid to late September, 2020)
- The default length of an extension for this program is 6 months
- Request using CLIR's grant modification form



No-Cost Extensions are allowed in the case of unforeseen delays such as hiring or vendor processing delays. These are very common, but it is important to understand that **you can only receive one extension per project**. It may be useful to set a calendar reminder now to help you remember to evaluate whether or not you'll need to request an extension as your project end date approaches.

For those who may be new to grants, a project end date is not the same as the reporting deadline. The project end date is the date by which all project work should be complete. It's important that extension requests are submitted about 4-6 weeks prior to the project's end date, which for everyone again is **September 30, 2020**. Even if you have spent all the grant funds, you **will** need an extension if you require additional time to complete your proposed project deliverables, including making the metadata for your project available online. If all project deliverables are not complete by the end date, you will need an extension.

## Changes to Principal Investigators

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- Notify CLIR of changes to PIs through the Grant Modification Form, as soon as possible.
- In addition to the form, be prepared to supply the following via email:
  - A letter on institutional letterhead from the head of the institution or department noting the change and the date the change will become effective;
  - A C.V. for the new PI



If you need to switch principal investigators (PIs), please let us know as soon as possible by completing the Grant Modification Form. All of CLIR's grant management tasks require current contact details for every grant's principal investigators, so it is important we know when a principal investigator departs your organization and their responsibilities are transferred to someone else.

In order to complete the change of PI, you will also be required to supply via email a letter from the head of the institution or department on institutional letterhead . The letter should include the name, title, and contact information of the new PI as well as the date the change will become effective. A CV for the new PI will also be required for our files.

## Budget Reallocation Requests

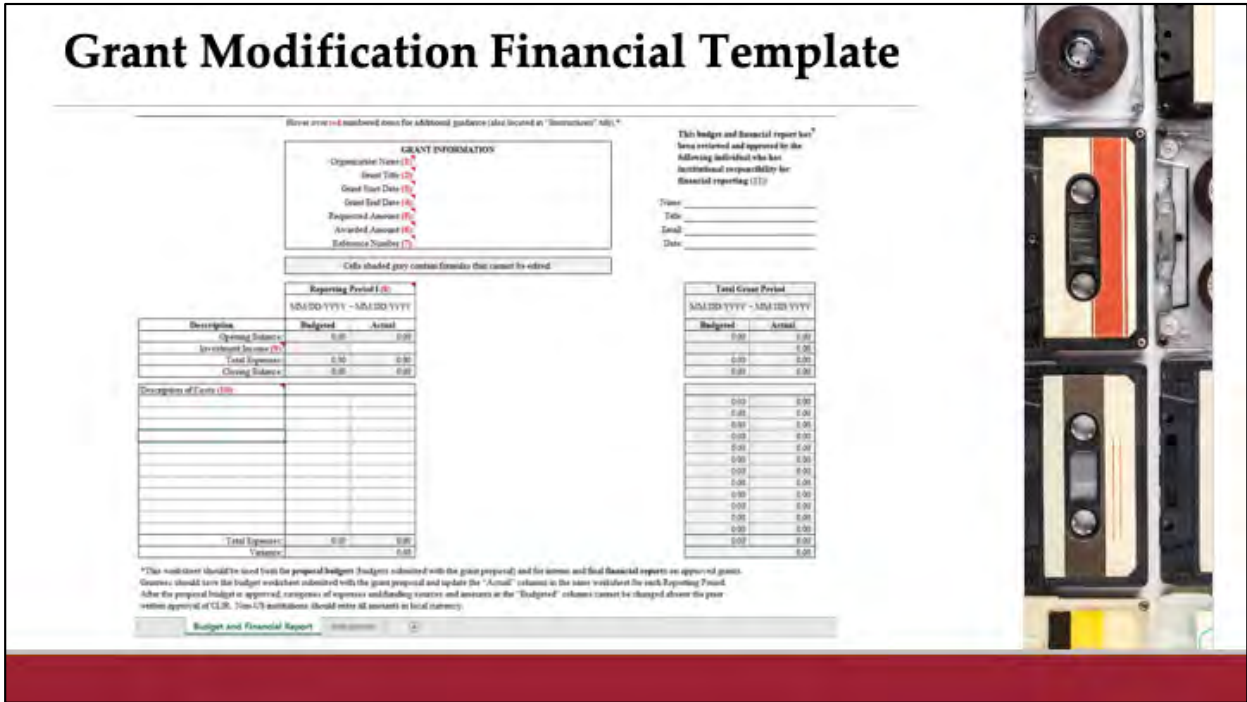
- Request budget reallocations through grant modification form **prior to making any new, unbudgeted expenditures**
- Activities covered by reallocated funds should be aligned with the goals and scope of the original proposal and be within program guidelines
- Prior approval is not necessary for reallocations amounting to less than 5% of the total project budget
- Occasionally, additional documentation will be required before the request can be approved



On occasion, grantees find it necessary to spend grant funds in a manner other than originally proposed in their application—for example, vendor services may cost more or less than originally budgeted. Reallocations of grant funds are allowable, but these changes must be approved by CLIR staff **prior to the reallocated funds being spent**. In cases where a budget surplus remains after the original deliverables have been met, you will have the option of either returning the surplus funds to CLIR or submitting a budget reallocation request that proposes how the remaining funds will be spent. Any proposed use of reallocated funds should be aligned with the original goals and scope of the project and within the current guidelines for allowable and disallowed costs for the Recordings at Risk program.

The first step for a reallocation request is completing the Grant Modification Form, where you can explain the rationale for the reallocation and how it is consistent with the original proposal. CLIR staff encourages spending surplus funds on additional digitization of material or increased spending for another previously approved line item in the project budget, rather than adding new line items. If a mutually satisfactory reallocation solution cannot be found, remaining funds must be returned to CLIR.

Note that small reallocations, amounting to less than 5% of the total project budget and within the program guidelines do not require a formal reallocation request, but we do ask that you explain these variances in your final report. If questions arise about whether or not you need official approval of a reallocation request, we are always available through email.



In some rare instances, such as when a reallocation request involves a new budget line item, our team will require the completion of an updated budget document. This is the same budget template you used to complete your application. CLIR staff can provide a copy to you if needed.

This new budget will replace the one submitted with your application. Some information will remain the same, such as your project start date and award amount. You will need to update any lines where you are proposing a change in amount and add any additional lines, as needed, if you are proposing a new spending category.

In some cases, reallocations may happen within the already approved line items. When that is the case, we likely will not require the submission of a new budget. An explanation of the changes submitted through the grant modification form and your final report will suffice.

When filling it out, be sure to include the name and title of the person filling out the form. Institutional shared costs should not be included on the budget form, which is

also true when you are completing the financial report.

## Exit Interviews for Cycle 6

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Dates not set just yet

- Likely beginning of 2021



How has the program shaped your overall strategy for a/v collections?

How have the digitized materials been used?

Within a few months following the submission of your final reports, CLIR staff will be contacting you to arrange an exit interview. These 30-45 minute conversations with our recipients help CLIR to assess the program's impact as well as to document how newly digitized collections are being accessed and used. This is important data for us to collect for our own reporting to The Andrew W. Mellon Foundation, so we hope you will be able to make yourselves available to conduct an interview with a CLIR staff member sometime toward the spring of 2021.

We will want to give a bit of time for things to develop after the project is over. This way we can discuss how the program has shaped your overall institutional strategy for preservation reformatting of audiovisual collections. We are particularly interested in hearing about how the digitized materials have been used, how you are keeping usage metrics, and what lessons you have learned.

The first interviews we've done have been very rich conversations, and our team has been learning a lot through them. Here are some points stressed by past recipients that may be useful to you as you get started:

- (1) **Metadata creation for audiovisual materials takes a lot longer than originally anticipated for most recipients.** For this reason, past recipients advise that new recipients consider how they can lay the groundwork for creating project metadata while waiting for materials to be returned from the vendor. Taking digital photographs of the containers for your recordings may help expedite metadata creation while the vendor has them, so consider whether it might be possible to do that.
- (2) Get your whole project team together as early as possible to make sure everyone understands individual roles and responsibilities, even if their contributions will only be made late in the project timeline. That way each team member can make room on their schedules to do what they need to do in a timely and efficient manner. It is particularly important for people responsible for ingesting digital files into storage systems or creating metadata for those files to understand what will be expected of them, and for them to remain aware of any changes to the project timeline. Don't forget it is okay to request a grant modification if it turns out that the one-year grant term is insufficient for creating metadata and making it available online.
- (3) If the recordings to be digitized for your project are part of a larger collection, set aside some additional "backup" items from that collection to send to your vendor as well, just in case the digitization work costs less than originally estimated or other unforeseen circumstances. If you get lucky and have extra funds left over, you can then submit a grant modification request to CLIR seeking permission to authorize the vendor to digitize the backup items as part of the project.
- (4) Keeping notes and documentation for your project in one common place for easy reference will make final reporting easier. Determining how you're going to gather the information needed for the Project Manifest now, in particular, will save you valuable time.



## Promoting Recordings at Risk Projects



Share news and exciting developments with program staff

Tag us on Twitter [@CLIRRaR](https://twitter.com/CLIRRaR)

If discussing CLIR in press releases, please let us review before publishing:

<https://www.clir.org/fellowships/acknowledgment-guidelines>

RAR Funded Projects:

<https://www.clir.org/recordings-at-risk/funded-projects/>

We love to show off the excellent work of our grantees. If there are exciting developments you would like shared with a wider audience, don't hesitate to let us know. One of the easiest way for us to share your news and accomplishments is to tag us on Twitter [@CLIRRAR](https://twitter.com/CLIRRAR) so that we can retweet you.

If you happen to be describing the Recordings at Risk program in any formal press releases, please let us review the materials ahead of time. We request this because it's very easy to unintentionally say something about CLIR or about program that could confuse potential applicants. Approval for your press release should take no more than a day or two at the most.

On that note, this link on the slide will take you to some Acknowledgement Guidelines created by our Director of Communications. These provide assistance for a variety of situations such as news releases, social media posts, press events, and so on.

We also want to make sure we're representing you correctly. Your projects are now up on the funded projects page of our website. Please read how your project is

describe there and let us know if you'd like us to adjust any of the information included. The text we use came directly from your proposals.



Council on Library and  
Information Resources

**Recordings at Risk  
Recipient Informational Webinar  
November 6, 2019**

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Thank you all for attending this presentation. We know we've covered a lot of information here and we'll be sure to post a recording of this webinar, as well as the slides, transcript, and Q&A, on our Recipient Resources page, alongside many of the other documents we discussed. If you ever have any questions, you can always reach the CLIR Grants Team at our program email address: [recordingsatrisk@clir.org](mailto:recordingsatrisk@clir.org)

We'll now shift to answering any questions you've submitted during our presentation. You can add additional questions as we go using the Q&A box at the bottom of your screen.

Wrap-up reminders:

- email us to let us know if additional members of your team should be getting info from us
- extensions and modifications are common!
- your team is here to support you. get in touch at any time.

## Recordings at Risk Cycle 6 Recipient Webinar Q&A

### **Are there recommended sites for the publishing of metadata?**

We do not have any recommended sites, but you should be sure to follow the plans that were submitted in your proposal which should have included how you would make your metadata available to the public. The solution can be as simple as posting your metadata as an Excel or .csv file on GitHub, or linked to a collection record. It's good to give people who might want to re-use it as many ways as possible to discover it, download it, and create new resources from it.

### **Did you say that we needed to acknowledge CLIR in the metadata and the finding aids describing the recordings?**

We don't require an acknowledgement, but we do appreciate when one is included. This makes it easier for us to verify that the appropriate descriptive outputs have been created, so makes assessment of your grant a lot easier on our end and saves us a good deal of time. Plus, you may be helping others learn about our organization and programs. You can find some suggested language on the [Acknowledgement Guidelines page](#).

### **So is it common to include an acknowledgement in a finding aid scope note or something like that?**

For those who create finding aids, most do include an acknowledgement in the scope note or another field to show CLIR as the funder. Including the names of the people who contributed to your project is also a great thing to do in finding aids or other collection records.

### **Follow up to the previous question. What if our library changes platforms? Do we need to notify CLIR, if for example, we said we would use Islandora but now have CONTENTdm?**

Not necessarily. You can cover it in your final report. Sometimes it will require a no-cost extension because you are dealing with the delays. Unless it will affect your timeline you will not need to let us know in advance. If you change platforms after your grant is complete and all the URLs to your collection deliverables change, we would appreciate your letting us know, since when we check that your project outcomes are still available, we won't know where you put them.

### **When you say you can have up to 10 URLs in the Accessing the Digitized Collection page of report, what would be an example of a URL besides the main location of your project spreadsheet with the metadata?**

Some projects have proposed a plan that would place metadata in multiple locations so if they are using an aggregator, such as the Digital Public Library of America (DPLA) or InternetArchive, multiple URLs may need to be submitted. If the metadata will live in two different places or if you are creating a project web page in addition to what you are creating you may include that.

**For tracking time and effort of grant activities for staff involved with the process but not funded by RaR should we track hours, salary, percentage of benefits, etc.? Essentially, document how much time and money we spend in kind?**

We do not have a requirement that you do that, however if you listed cost share you may want to report on whether or not the cost share match was made. We are most interested in seeing how the awarded funds were spent, but cost share that you listed can be shared in the financial narrative. Cost shares should not be included in the on the Financial Budget and Report form (the uploaded spreadsheet).