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00:00:16.100 --> 00:00:26.850

CLIR Webinars/Louisa Kwasigroch: Hello, and welcome to the fifth webinar for those who've been invited to submit final applications to CLIR's *Digitizing Hidden Collections: Amplifying Unheard Voices* program this year.

2

00:00:27.040 --> 00:00:33.509

CLIR Webinars/Louisa Kwasigroch: I'm Louisa Kwasigroch, Managing Director at CLIR and today's session will focus on staffing and budget.

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00:00:38.080 --> 00:00:49.730

Sharon Burney: Before we get started with introductions to the platform and our presenters for today's webinar, we wanna launch a quick poll to gauge how you're feeling about today's topics.

4

00:00:56.260 --> 00:00:57.760

Sharon Burney: Here we go.

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00:01:15.410 --> 00:01:18.829

Sharon Burney: People are still filling it out.

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00:01:23.270 --> 00:01:26.829

Sharon Burney: A couple more seconds for those just coming.

7

00:01:31.920 --> 00:01:34.430

Sharon Burney: Alright. We'll end the poll here.

8

00:01:41.190 --> 00:01:45.190

Sharon Burney: Now, here's some notes about using Zoom. During this session

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00:01:45.280 --> 00:01:54.840

Sharon Burney: A live transcript is being generated. If you'd like to utilize it, to turn on this feature, click the "CC Live Transcript" button at the bottom of your Zoom window.

10

00:01:55.170 --> 00:02:02.940

Sharon Burney: Attendees will be muted throughout the presentation. However, you're welcome to use chat for general introductions and conversation.

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00:02:03.040 --> 00:02:18.490

Sharon Burney: If a chat box isn't already displaying on your Zoom screen, you can hover your mouse toward the bottom of the screen and open it manually. In order to send a message to everyone, remember to change the default from "All panelists and hosts" to "Everyone."

12

00:02:18.620 --> 00:02:36.730

Sharon Burney: We ask that you use the separate Q&A box to ask questions. This can be opened the same way as the chat box. Because we have limited time together, please feel free to follow along with questions as they come in and upvote them to let us know that it would be helpful to you to have them answered live.

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00:02:36.770 --> 00:02:44.459

Sharon Burney: We will do our best to answer all of the questions live, but we will also share responses to all questions alongside the recording.

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00:02:44.620 --> 00:02:55.130

Sharon Burney: This session is being recorded. The slides, Q&A, recording, and transcript will be made available on the [Apply for an Award](#) page of our website in the next two weeks.

15

00:03:01.880 --> 00:03:13.239

Jane Larson (she/her): Before we move into our program content, we'd like to center today's conversation by acknowledging that, as residents of the US, we are speaking to you from unseeded land of many indigenous peoples

16

00:03:13.370 --> 00:03:22.469

Jane Larson (she/her): we recognize a longstanding history that has brought us to reside on this land, and we seek to have greater understanding of our place within that colonial history.

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00:03:22.790 --> 00:03:29.079

Jane Larson (she/her): We denounce any acts of terrorism, colonialism, and environmental disregard, both past and present.

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00:03:29.410 --> 00:03:36.800

Jane Larson (she/her): In particular, we would like to respectfully acknowledge and recognize the original and current caretakers of the land, water, and air where we live,

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00:03:36.850 --> 00:03:40.819

Jane Larson (she/her): All indigenous peoples and all their ancestors and descendants.

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00:03:41.080 --> 00:03:52.290

Jane Larson (she/her): I'm grateful to have the opportunity to live and work on their homelands and ask you to join me in acknowledging all indigenous communities, their elders, both past and present as well as future generations.

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00:03:52.460 --> 00:04:01.380

Jane Larson (she/her): May this acknowledgement in our ongoing work demonstrate CLIR's commitment to beginning the process of working to dismantle the ongoing legacies of settler colonialism.

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00:04:01.580 --> 00:04:08.559

Jane Larson (she/her): If you haven't done so already, we'd love for you to introduce yourself in the chat and share a land acknowledgement for the area where you live, if you'd like.

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00:04:11.590 --> 00:04:22.689

Jane Larson (she/her): During today's session, our co-host will dig into staffing and budget. We've allotted 90 min total for today, and we'll pause around 2:35 pm ET for a quick break during their content.

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00:04:22.800 --> 00:04:35.669

Jane Larson (she/her): We're hoping for an engaging time of conversation around staffing considerations and training needs, offering a compelling case for need in a budget narrative, and using a budget narrative to build and justify budget detail.

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00:04:36.020 --> 00:04:45.939

Jane Larson (she/her): The plan is to reserve about 25 min for Q&A near the end of this session. Both the session co-hosts and CLIR staff will be available to answer questions at that time.

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00:04:45.950 --> 00:04:58.380

Jane Larson (she/her): So while you may pose questions throughout using the Q&A box, keep in mind that we might not get to every question as it is asked. Staff will be keeping track, and we'll circle back to any unanswered questions during the dedicated Q&A.

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00:05:01.770 --> 00:05:22.790

Alyson Pope: In today's session, you'll learn more about the skills and strategies you need to complete the following application tasks: the project details- capacity task, which includes the resumes and/or job descriptions, uploads, and the project details- need for support task, which includes the subcontracts, budget detail and budget narrative uploads.

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00:05:25.850 --> 00:05:29.330

Alyson Pope: Now, we're glad to turn things over to our co-hosts.

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00:05:29.560 --> 00:05:48.580

Alyson Pope: Dr. M. Stephanie Chancy and Tania Rios Marrero from the Digital Library of the Caribbean, where Stephanie is the Director of Operations, and Tania is the Project Coordinator for the Digital Library of the Caribbean. We'll take just a moment to let Stephanie and Tania share their slides and get oriented.

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00:06:09.140 --> 00:06:11.510

Tania Ríos Marrero: Okay. Good afternoon.

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00:06:12.590 --> 00:06:15.259

Tania Ríos Marrero: First, I just wanna say

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00:06:15.270 --> 00:06:18.230

Tania Ríos Marrero: thanks to all of you for being here and

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00:06:18.310 --> 00:06:21.710

Tania Ríos Marrero: congratulations for your work on these grant applications.

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00:06:22.528 --> 00:06:28.499

Tania Ríos Marrero: I'm sure it's not easy, and that it takes much patience and determination. So congratulations

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00:06:28.540 --> 00:06:30.160

Tania Ríos Marrero: for getting this far

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00:06:30.180 --> 00:06:37.150

Tania Ríos Marrero: in the process. That alone speaks volumes to your commitment to the important work of digitizing

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00:06:38.220 --> 00:06:43.280

Tania Ríos Marrero: hidden collections. So thank you, and thanks so much to the folks at CLIR

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00:06:44.041 --> 00:06:46.350

Tania Ríos Marrero: for inviting Stephanie and I.

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00:06:46.945 --> 00:07:00.820

Tania Ríos Marrero: I hope that the ideas and thoughts I have to share in this first portion of the application of the, sorry, of the presentation will be useful to you as you think about and refine your applications,

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00:07:01.139 --> 00:07:07.289

Tania Ríos Marrero: I want to start by sharing a little bit of background on me so you know where I'm coming from, and have

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00:07:07.340 --> 00:07:10.759

Tania Ríos Marrero: a sense for the experiences that I'm pulling from.

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00:07:11.365 --> 00:07:13.380

Tania Ríos Marrero: So again, my name is Tania.

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00:07:13.440 --> 00:07:19.799

Tania Ríos Marrero: I am a librarian and an archivist, living and working in San Juan, Puerto Rico.

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00:07:20.219 --> 00:07:25.499

Tania Ríos Marrero: I work as Project Coordinator for the Digital Library of the Caribbean or DLOC for short.

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00:07:25.989 --> 00:07:51.819

Tania Ríos Marrero: Quick intro to DLOC. DLOC is a cooperative digital library that preserves and provides open access to resources about, and from the Caribbean. DLOC uses a post custodial approach to archives, and consists of over 90 partners that share materials from their collections, and that share governance over the organization.

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00:07:52.554 --> 00:08:00.005

Tania Ríos Marrero: We're currently in the middle of a grant funded project ourselves. It's called the Revitalizing DLOC Initiative.

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00:08:00.800 --> 00:08:11.100

Tania Ríos Marrero: There are several programmatic areas to our project, and one of these is supporting the ethical reuse of DLOC collections in teaching and research.

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00:08:11.190 --> 00:08:24.769

Tania Ríos Marrero: So in my role, I manage a program that supports open educational resource development for Caribbean studies. So from that grant, we've developed an OER program that is now in its second year

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00:08:25.260 --> 00:08:27.780

Tania Ríos Marrero: and prior to my role in DLOC.

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00:08:28.153 --> 00:08:49.180

Tania Ríos Marrero: I've worked as a digital archivist for cultural heritage materials here in Puerto Rico and on a range of digital collections and digital humanities projects over the last several years. I've also worked in other grant funded initiatives, and in the not so distant past, I worked as a community organizer at the Free Library of Philadelphia and that role

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00:08:49.694 --> 00:08:56.639

Tania Ríos Marrero: involved building community engagement frameworks for a big grant project called the Twenty-first Century Library Initiative.

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00:08:57.330 --> 00:09:03.169

Tania Ríos Marrero: So I'm passionate about community centered work in and through libraries.

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00:09:04.080 --> 00:09:07.265

Tania Ríos Marrero: and I speak with you all today,

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00:09:08.440 --> 00:09:38.109

Tania Ríos Marrero: and not from the perspective of a reviewer or admin, but as a worker, in grant funded projects. And with my organizing background, I've always been interested in thinking about what groups need to work effectively together towards shared goals. And I think that's relevant to the capacity staffing and capacity component of your applications, which is the section I'll be thinking and talking about with you today.

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00:09:45.170 --> 00:09:46.280

Tania Ríos Marrero: So

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00:09:47.320 --> 00:09:49.007

Tania Ríos Marrero: the capacity component.

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00:09:49.910 --> 00:09:59.539

Tania Ríos Marrero: So my feeling is that this part is as much about thinking through and articulating the strengths of your team and organizations

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00:09:59.580 --> 00:10:03.030

Tania Ríos Marrero: as it is also about identifying opportunities

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00:10:03.040 --> 00:10:09.685

Tania Ríos Marrero: to build new and even better ways of working together and working with collections.

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00:10:10.250 --> 00:10:28.450

Tania Ríos Marrero: It's super positive to use these types of strength based approaches to project planning. Starting from that place of positive recognition. Naming our collective points of pride and identity creates a strong foundation from which to build.

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00:10:29.771 --> 00:10:42.499

Tania Ríos Marrero: There's also an exciting opportunity here to think carefully with your team about potential gaps in capacity. Thinking through critically and creatively about areas for growth

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00:10:43.085 --> 00:10:48.980

Tania Ríos Marrero: and using the grant application to dream with your team members.

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00:10:49.577 --> 00:10:51.310

Tania Ríos Marrero: To ask yourselves -

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00:10:51.590 --> 00:10:56.659

Tania Ríos Marrero: What are we currently doing really well? What do we need support with?

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00:10:57.312 --> 00:11:01.050

Tania Ríos Marrero: What are our ideal working conditions?

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00:11:01.490 --> 00:11:12.289

Tania Ríos Marrero: What resources do we need to not only meet the material deliverables of the project, but to thrive as people doing this work?

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00:11:12.922 --> 00:11:29.799

Tania Ríos Marrero: There's opportunity in these projects to create new and better conditions for meaningful work to occur. Work that creates new collections as well as new relationships, connections, and communities.

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00:11:32.670 --> 00:11:39.539

Tania Ríos Marrero: So to explore this part of the application a bit further, I want to talk about the

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00:11:39.970 --> 00:11:48.999

Tania Ríos Marrero: power and potential of community asset mapping. Asset mapping is a collaborative often facilitated

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00:11:49.530 --> 00:11:55.260

Tania Ríos Marrero: process by which a group can identify and discover their strengths.

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00:11:55.280 --> 00:12:23.049

Tania Ríos Marrero: And at the same time share stories and connect with each other. Maybe you've heard this term before. Maybe not. It's typically known as an approach to community development. But asset-based approaches are transferable to project planning of all sorts. I won't go too deep in the weeds of how to go about asset mapping but know that there are a large range of exercises you could try out with your team.

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00:12:23.640 --> 00:12:27.860

Tania Ríos Marrero: I do want to touch on the larger concepts, because I think

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00:12:27.930 --> 00:12:35.629

Tania Ríos Marrero: that this is a useful model to reference for this part of your application.

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00:12:35.690 --> 00:12:47.490

Tania Ríos Marrero: Primarily, because one outcome of asset mapping exercises is documentation, right? So documentation of a community or an organization's existing resources and strengths.

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00:12:47.530 --> 00:12:52.349

Tania Ríos Marrero: And that would be useful, right? But even more significant

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00:12:52.640 --> 00:13:22.289

Tania Ríos Marrero: then the resulting documentation, I would argue, is the process behind creating this documentation. The process of groups collaboratively and collectively identifying and in many cases discovering their strengths. I really like to advocate for the use of thoughtfully facilitated group asset mapping sessions as part of project planning of any sort. And and there's lots of

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00:13:22.900 --> 00:13:28.180

Tania Ríos Marrero: wonderful free resources and facilitation guides for this type of activity online.

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00:13:29.791 --> 00:13:44.888

Tania Ríos Marrero: But again, main concepts. So what are assets? Assets really boil down to those aspects of people and organizations that are valuable. Things that bring value to a project.

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00:13:45.690 --> 00:14:15.015

Tania Ríos Marrero: And assets shouldn't be viewed in a strictly formal sense. Right? Assets can be wide ranging and more qualitative than quantitative. So here on this slide, I share just a few sample asset types. There are personal assets. So this might include an individual's subject matter, knowledge, or technical expertise, as well as personal background and lived experience.

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00:14:15.920 --> 00:14:37.870

Tania Ríos Marrero: for example, maybe you or a person on your team brings a type of local or place based knowledge to a digital collections project. Maybe that knowledge informs a multilingual metadata aspect to your project. Maybe it informs a reparative description aspect to your project.

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00:14:39.427 --> 00:14:46.330

Tania Ríos Marrero: Passions, dreams, and aspirations of individuals are also valuable and noteworthy.

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00:14:46.881 --> 00:15:11.800

Tania Ríos Marrero: Whether or not you very extensively document these in your grant applications, I think that these are things to learn and know about your project team. These are the things that catalyze and drive teams forward. Right? They are the things that keep projects together when organizations inevitably undergo change. In community organizing, we talk about self interest.

83

00:15:12.376 --> 00:15:26.029

Tania Ríos Marrero: A lot. We talk about the importance of learning what compels individuals to engage and stay engaged. And this totally applies here. Right? We should learn what compels people

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00:15:27.240 --> 00:15:33.129

Tania Ríos Marrero: to engage in the work of building digital collections and note that.

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00:15:34.861 --> 00:15:46.250

Tania Ríos Marrero: Having folks talk about their passions and dreams and learning about the passions and dreams of each other through a group asset mapping exercise

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00:15:46.280 --> 00:15:53.440

Tania Ríos Marrero: can be a really powerful way to bring a team together around shared values.

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00:15:53.947 --> 00:16:09.502

Tania Ríos Marrero: And then, once you know also about the passions and aspirations of individuals on your team, then you can really implement mentorship and systems for personal and professional development into your project.

88

00:16:10.520 --> 00:16:27.689

Tania Ríos Marrero: Making plans to leverage the project as a space for capacity building of individuals. All super important. I'll talk a little bit more about mentorship and capacity building in a moment. But I just really wanted to call out and highlight this point that

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00:16:28.135 --> 00:16:35.539

Tania Ríos Marrero: the aspirations of individuals are important aspects of your projects, and, I think, worthy of identification

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00:16:35.900 --> 00:16:37.829

Tania Ríos Marrero: in project planning.

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00:16:39.700 --> 00:16:50.530

Tania Ríos Marrero: So, aside from those personal assets, there are social and organizational assets. So thinking through relationships, networks, connections

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00:16:50.530 --> 00:17:09.980

Tania Ríos Marrero: both between individuals and groups, and both formal and informal, I think are valuable, and you'd be surprised how many relationships that you, perhaps, as the person preparing the grant application, may not be fully aware of without an asset mapping exercise that involves your whole team.

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00:17:10.730 --> 00:17:13.050

Tania Ríos Marrero: In any case, getting a full

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00:17:13.270 --> 00:17:42.699

Tania Ríos Marrero: picture of your relationships at the stage is super important. And I love that CLIR places such large emphasis on this, on the relationships. I love that the relationships are

held in such high esteem because it's really from and through relationships that this work happens at all. This work of storytelling, of documentation, of preservation. And not just any stories, right? Stories that have

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00:17:42.900 --> 00:18:06.829

Tania Ríos Marrero: historically and persistently and systematically been marginalized or censored, or subject to erasure. The work of recovery and care and stewardship of those stories, that's all deeply relational work. Just innately. So relationships are how we do this work. And they're also why we do this work.

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00:18:10.679 --> 00:18:19.899

Tania Ríos Marrero: So quick visualization here that just simply shows that we are ecosystemic. I didn't make this chart. I pulled it from

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00:18:19.940 --> 00:18:21.620

Tania Ríos Marrero: an institute.

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00:18:22.168 --> 00:18:27.151

Tania Ríos Marrero: that does lots of asset mapping and organizational development consulting.

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00:18:27.840 --> 00:18:34.649

Tania Ríos Marrero: But I like this visualization because it situates us, individuals, in relationship to other entities.

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00:18:35.074 --> 00:18:46.999

Tania Ríos Marrero: And again thinking through making use of asset mapping as a model, as a framework for documenting strengths. We could take time to map strengths in all of these

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00:18:47.150 --> 00:18:49.850

Tania Ríos Marrero: micro and macro realms.

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00:18:50.742 --> 00:18:56.409

Tania Ríos Marrero: And it may sound simple enough, but working through a collaborative

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00:18:56.480 --> 00:19:16.930

Tania Ríos Marrero: and participatory process to do this with your team at this early stage can be revelatory and potentially transformative for all involved. I have facilitated asset mapping sessions with groups of all sizes and at all stages of a given project, and I have been so inspired

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00:19:16.930 --> 00:19:42.729

Tania Ríos Marrero: to witness the ways that people frequently undermine their own skills and strengths or else not fully recognize them. And it's through intentional group work that we uncover and value those strengths both in ourselves and in our group mates. In these types of exercises, people are constantly learning new things about their group mates things they didn't know previously. Things they never thought to ask.

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00:19:43.179 --> 00:19:48.429

Tania Ríos Marrero: It's truly a method for deep listening and learning about ourselves and each other.

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00:19:49.223 --> 00:20:08.699

Tania Ríos Marrero: And and learning also, not only about existing resources within our projects, but also potential resources. Circling back to this question of how are we using the grant opportunity to grow and create new and better conditions for our work?

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00:20:12.390 --> 00:20:16.080

Tania Ríos Marrero: And on that note, I'm going to

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00:20:16.290 --> 00:20:18.370

Tania Ríos Marrero: pivot now to

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00:20:19.023 --> 00:20:28.966

Tania Ríos Marrero: sharing some resources that I think are helpful and also vital to thinking through staffing and by extension, working conditions.

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00:20:29.550 --> 00:20:36.860

Tania Ríos Marrero: So the CLIR application asks you to upload CVs for the PIs or key project staff

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00:20:37.414 --> 00:20:52.805

Tania Ríos Marrero: or job descriptions of if the positions will be filled at a later date. And in the bulleted instructions in this section, CLIR says that job descriptions should be equitable and acknowledge the precarity of contingent labor.

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00:20:53.510 --> 00:20:56.960

Tania Ríos Marrero: There are really good resources on this topic.

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00:20:58.450 --> 00:20:59.490

Tania Ríos Marrero: For example,

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00:20:59.680 --> 00:21:10.270

Tania Ríos Marrero: the [Collective Responsibility Labor Advocacy Toolkit](#), a super important suite of resources. I'm not sure if everybody is aware

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00:21:11.070 --> 00:21:15.316

Tania Ríos Marrero: here on this call is aware of these tools. Maybe it's been mentioned before.

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00:21:16.130 --> 00:21:17.680

Tania Ríos Marrero: but they are,

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00:21:17.980 --> 00:21:30.160

Tania Ríos Marrero: these are a must read. The toolkit consists of a [white paper](#) that addresses in detail the specific problems of precarity that grant funded

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00:21:30.230 --> 00:21:33.329

Tania Ríos Marrero: positions can create and reproduce.

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00:21:34.970 --> 00:21:52.989

Tania Ríos Marrero: It discusses the problems and consequences of term positions that are part-time, under classified, or without benefits. And how these positions can negatively impact the lives and careers of workers, particularly workers from minoritized communities.

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00:21:54.780 --> 00:21:58.470

Tania Ríos Marrero: And it talks about how these working conditions

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00:21:59.510 --> 00:22:15.097

Tania Ríos Marrero: can be not only harmful to workers, in some cases, but also detrimental to the projects as well. Poor working conditions can lead to retention issues. Staff can turn over quickly if projects are

122

00:22:15.990 --> 00:22:19.556

Tania Ríos Marrero: inappropriately scoped, or if positions

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00:22:21.145 --> 00:22:32.500

Tania Ríos Marrero: are poorly designed or not well supported. So this paper develops a framework for [actionable guidelines on improved grant labor practices](#). It's a really wonderful resource.

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00:22:38.480 --> 00:22:42.010

Tania Ríos Marrero: And I think it is worthwhile

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00:22:43.110 --> 00:22:44.180

Tania Ríos Marrero: to

126

00:22:46.200 --> 00:22:48.029

Tania Ríos Marrero: spend some time

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00:22:49.072 --> 00:22:53.097

Tania Ríos Marrero: during this session, looking carefully at some of the guidelines

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00:22:54.320 --> 00:23:07.780

Tania Ríos Marrero: created by the Digital Library Federation Labor Working group as well as the project criteria available in the [Collective Equity Handbook](#). Both of these are resources inside of the larger toolkit.

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00:23:08.237 --> 00:23:09.279

Tania Ríos Marrero: And they're both

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00:23:09.540 --> 00:23:20.720

Tania Ríos Marrero: truly awesome resources. And what they're doing is essentially breaking down the building blocks and essential elements of equitable grant funded positions.

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00:23:21.440 --> 00:23:22.530

Tania Ríos Marrero: For instance,

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00:23:22.630 --> 00:23:24.150

Tania Ríos Marrero: they talk about

133

00:23:24.590 --> 00:23:33.670

Tania Ríos Marrero: the importance of prioritizing full time positions with benefits over the creation of multiple part-time positions.

134

00:23:35.055 --> 00:23:36.680

Tania Ríos Marrero: They prompt us to ask,

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00:23:37.090 --> 00:23:40.589

Tania Ríos Marrero: are the positions, benefits, and classification

136

00:23:41.050 --> 00:23:44.770

Tania Ríos Marrero: equitable within the institution and sector?

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00:23:45.560 --> 00:23:47.889

Tania Ríos Marrero: Benefits, as we know, could include

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00:23:49.115 --> 00:24:00.445

Tania Ríos Marrero: you know, healthcare, sick leave and vacation time, retirement, but also workload distribution that accommodates contribution to research and service.

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00:24:01.760 --> 00:24:13.727

Tania Ríos Marrero: Relocation expenses, if you're asking folks to relocate for the project. Also, remote work is a potential benefit. This one remote work is a big one.

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00:24:15.340 --> 00:24:19.037

Tania Ríos Marrero: Consider whether or not you actually need

141

00:24:20.063 --> 00:24:36.476

Tania Ríos Marrero: everyone on the team to physically re relocate to the place where your institution is located if you are hiring for the project. You know, not everyone can afford to relocate even with some relocation benefits, especially for term positions.

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00:24:37.920 --> 00:24:44.573

Tania Ríos Marrero: Yeah, I would just kind of like to uplift that a lot of digital collections work, not all, certainly not all,

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00:24:46.704 --> 00:24:56.015

Tania Ríos Marrero: but a lot can be done successfully, remotely. For example, I am working right now for DLOC 100% remotely from Puerto Rico.

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00:24:57.110 --> 00:24:59.218

Tania Ríos Marrero: And I don't think that

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00:24:59.660 --> 00:25:06.089

Tania Ríos Marrero: remote work is a super common benefit for a lot of grant funded library workers in general yet.

146

00:25:08.010 --> 00:25:09.003

Tania Ríos Marrero: But the

147

00:25:10.000 --> 00:25:26.927

Tania Ríos Marrero: the PIs who created my position description designed this benefit into the project that I'm currently working in. They pushed for this benefit. And it's allowed for me to sustain my family and community in Puerto Rico, instead of having to relocate

148

00:25:27.750 --> 00:25:32.426

Tania Ríos Marrero: to Gainesville, the University of Florida for the short period of the grant term.

149

00:25:32.870 --> 00:25:33.869

Tania Ríos Marrero: And so

150

00:25:34.190 --> 00:25:42.340

Tania Ríos Marrero: yeah, I think that there's a lot to be said for remote work and digital libraries and digital collections work in general. Again, of course, that's

151

00:25:42.530 --> 00:25:47.899

Tania Ríos Marrero: doesn't apply to all the work that needs to be done for digital collections development. But some of it.

152

00:25:48.030 --> 00:25:50.059

Tania Ríos Marrero: And it's worth considering,

153

00:25:53.840 --> 00:25:58.640

Tania Ríos Marrero: the other toolkit resources also prompt us to ask

154

00:25:59.620 --> 00:26:03.220

Tania Ríos Marrero: about equitable salaries. It asks us, and you know,

155

00:26:03.890 --> 00:26:14.067

Tania Ríos Marrero: are the proposed salaries equitable with the cost of living for the geographic region, the work being done and the credentials required.

156

00:26:15.120 --> 00:26:23.997

Tania Ríos Marrero: They provide some tools that can help with assessing this, including the [MIT Living Wage Calculator](#) and [United for ALICE](#).

157

00:26:27.380 --> 00:26:28.539

Tania Ríos Marrero: I think,

158

00:26:29.060 --> 00:26:30.040

Tania Ríos Marrero: you know,

159

00:26:33.290 --> 00:26:34.710

Tania Ríos Marrero: providing folks

160

00:26:34.900 --> 00:26:47.246

Tania Ríos Marrero: with a living wage to do this work. I'm really thinking critically about wages and how we're paying and supporting the labor that goes behind this work because it is really important.

161

00:26:47.920 --> 00:26:49.620

Tania Ríos Marrero: Keeping in mind, too,

162

00:26:49.840 --> 00:26:57.770

Tania Ríos Marrero: how labor is currently divided in your institution. I pretty recently, I once learned of a difficult, contentious case of

163

00:26:58.190 --> 00:27:15.992

Tania Ríos Marrero: grant funded workers doing a special digitization and digital collections, a project in a state archive with much higher pay than the State archives workers. And that created a difficult dynamic in the institution. So that's something to keep in mind, too.

164

00:27:16.670 --> 00:27:21.220

Tania Ríos Marrero: But in general, you know, using the grant application to

165

00:27:22.127 --> 00:27:26.350

Tania Ríos Marrero: advocate for livable wages. We really need

166

00:27:26.370 --> 00:27:36.650

Tania Ríos Marrero: baseline livable wages in this profession. And we should be raising and informing new standards around livable wages at every turn using every opportunity we can.

167

00:27:41.630 --> 00:27:45.199

Tania Ríos Marrero: The toolkit resources also prompt us to ask

168

00:27:45.670 --> 00:27:46.590

Tania Ríos Marrero: if

169

00:27:46.940 --> 00:27:52.670

Tania Ríos Marrero: the salary, if salaries are appropriate for the proposed scope of work.

170

00:27:53.927 --> 00:27:57.269

Tania Ríos Marrero: I think, just in general ensuring that

171

00:27:57.990 --> 00:28:05.904

Tania Ríos Marrero: propose, that the proposed scope of work is actually feasible for a temporary grant funded position.

172

00:28:07.330 --> 00:28:09.739

Tania Ríos Marrero: I was part of a project once that

173

00:28:09.890 --> 00:28:13.661

Tania Ríos Marrero: really struggled to scope realistic project goals

174

00:28:15.460 --> 00:28:19.720

Tania Ríos Marrero: and so upheld unreasonable expectations over the workers.

175

00:28:20.554 --> 00:28:28.185

Tania Ríos Marrero: The scope of work they had also didn't estimate or allow for personal time or sick time.

176

00:28:30.000 --> 00:28:51.816

Tania Ríos Marrero: It's like they kind of overlooked that part. So it's like when a project staffer inevitably got sick, then suddenly there was this feeling like we were all behind on grant deliverables, and there was always this sense of urgency and anxiety in the project, and that was due to poor project planning and position design, too.

177

00:28:52.740 --> 00:29:03.979

Tania Ríos Marrero: So scope of work should allow for the necessary and expected slowdowns and changes that will happen to people and to organizations and

178

00:29:04.020 --> 00:29:05.210

Tania Ríos Marrero: and groups.

179

00:29:06.400 --> 00:29:10.378

Tania Ríos Marrero: Another thing, another influencing factor into, you know, scope of work.

180

00:29:11.380 --> 00:29:22.485

Tania Ríos Marrero: our digitization goals, right? Like making sure that scope of work upholds realistic digitization goals that account for people's needs.

181

00:29:23.740 --> 00:29:34.020

Tania Ríos Marrero: Digital Library Federation and CLIR together have a really good scoping tool for this thing exactly. It's called the [Digitization Cost Calculator](#).

182

00:29:34.429 --> 00:29:39.739

Tania Ríos Marrero: And it makes cost and time estimates and that might be useful

183

00:29:39.830 --> 00:29:44.720

Tania Ríos Marrero: to you as well as you think about scope of work and position, descriptions.

184

00:29:49.080 --> 00:30:00.814

Tania Ríos Marrero: And the last thing I want to briefly note, and we could talk about any number of these elements at length and again, the resources are so extensive and detailed and good,

185

00:30:01.260 --> 00:30:04.160

Tania Ríos Marrero: but the toolkit resources really emphasize

186

00:30:04.980 --> 00:30:11.850

Tania Ríos Marrero: the importance, the indispensable importance of providing institutional support for worker growth.

187

00:30:12.396 --> 00:30:20.880

Tania Ríos Marrero: So this looks like professional development funding through training and travel support and in the personnel budgeting.

188

00:30:22.267 --> 00:30:24.599

Tania Ríos Marrero: Supporting the workers

189

00:30:24.610 --> 00:30:35.476

Tania Ríos Marrero: participation in professional activities like research service, publication and presentations at conferences and so forth.

190

00:30:36.480 --> 00:30:39.645

Tania Ríos Marrero: Providing structured mentorship.

191

00:30:40.840 --> 00:30:45.069

Tania Ríos Marrero: Acknowledging the workers ability and agency to steer

192

00:30:45.330 --> 00:30:46.896

Tania Ríos Marrero: project goals.

193

00:30:50.130 --> 00:30:58.920

Tania Ríos Marrero: Grant workers should have opportunities to develop new skills, build their capacity, develop their professional portfolios,

194

00:31:00.260 --> 00:31:02.189

Tania Ríos Marrero: and not so they perform

195

00:31:02.700 --> 00:31:04.519

Tania Ríos Marrero: tasks as

196

00:31:04.780 --> 00:31:06.610

Tania Ríos Marrero: as the toolkit

197

00:31:06.810 --> 00:31:17.878

Tania Ríos Marrero: describes. So these resources provide way more detail and a long list of ways to provide this type of infrastructural support to workers.

198

00:31:19.140 --> 00:31:21.550

Tania Ríos Marrero: Just to provide another personal example.

199

00:31:21.990 --> 00:31:23.660

Tania Ríos Marrero: When I first started with

200

00:31:23.810 --> 00:31:35.139

Tania Ríos Marrero: with DLOC, I had experience with project management and digital scholarship, but I did not have experience with open educational resources and library publishing, and that was a big part of my new role.

201

00:31:36.390 --> 00:31:39.779

Tania Ríos Marrero: And so I was encouraged and financially supported

202

00:31:39.840 --> 00:31:42.180

Tania Ríos Marrero: to enroll in a certificate program.

203

00:31:42.662 --> 00:31:47.010

Tania Ríos Marrero: It was a 10 week certificate program through the open education network

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00:31:47.453 --> 00:31:55.120

Tania Ríos Marrero: that would prepare me for managing an OER program and so through that I gained access to learning modules

205

00:31:55.140 --> 00:31:58.400

Tania Ríos Marrero: and instructors and a community of peers

206

00:31:58.420 --> 00:32:16.820

Tania Ríos Marrero: to discuss my work with and that was hugely beneficial to me. To both me professionally, it builds my portfolio and my CV, and my experience, and helps me perform my role, and it also benefits the deliverables and outcomes of the grant project.

207

00:32:17.160 --> 00:32:31.780

Tania Ríos Marrero: Right? And that's the thing. Ultimately, this person centered approach to project design, that the collective equity and DLF working group authors advocate for. This approach benefits

208

00:32:31.790 --> 00:32:41.464

Tania Ríos Marrero: the workers and the deliverables and outcomes of projects everybody and everything benefits.

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00:32:42.450 --> 00:32:44.160

Tania Ríos Marrero: And at the same time,

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00:32:44.480 --> 00:32:49.070

Tania Ríos Marrero: when we implement and put these values into practice,

211

00:32:49.790 --> 00:33:02.769

Tania Ríos Marrero: we shift culture in the profession. And frankly, radical culture shifts within LIS are super important and necessary, and we think.

212

00:33:03.334 --> 00:33:24.090

Tania Ríos Marrero: When we think critically and creatively about our staffing models. When we pair that with participatory strength based approaches to project planning. We create space and possibility. For meaningful work with special collections to happen into the future.

213

00:33:29.390 --> 00:33:37.969

Tania Ríos Marrero: So thanks. We're going to take a break, a 5 min break. I'll hand it over to CLIR staff, and then we're going to. And Stephanie is going to talk about budgets right after that.

214

00:33:44.920 --> 00:33:47.860

Alyson Pope: Hi all! We will see you back at 2:38. Thank you.

215

00:33:48.430 --> 00:33:52.066

M. Stephanie Chancy: Been 4 years people, and I left myself muted.

216

00:33:52.760 --> 00:34:03.830

M. Stephanie Chancy: Good afternoon. My name is Stephanie Chancy, and as a very quick reminder, I am the Caribbean partnerships, librarian and Director of DLOC operations

217

00:34:03.980 --> 00:34:07.230

M. Stephanie Chancy: here at the University of Florida.

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00:34:07.784 --> 00:34:26.339

M. Stephanie Chancy: My role today is to talk to you about budgets and your grant application. I do think it's a little bit funny that I'm talking to you about the numbers, since I always say that God or the Higher Power knew what they were doing when they made me a historian and not an accountant.

219

00:34:27.909 --> 00:34:36.140

M. Stephanie Chancy: I do want to echo Tania, and say congratulations. You've made it to this full application round.

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00:34:36.670 --> 00:34:38.600

M. Stephanie Chancy: You have your narrative

221

00:34:38.620 --> 00:34:40.479

M. Stephanie Chancy: and if you're anything like me,

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00:34:40.679 --> 00:34:47.369

M. Stephanie Chancy: you've put off what you consider the quote unquote, hard part until last - the budget.

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00:34:47.880 --> 00:35:00.010

M. Stephanie Chancy: Now you may see this as procrastination, but more accurately, it is productive procrastination, since you are probably doing other necessary things for your final application.

224

00:35:00.390 --> 00:35:02.140

M. Stephanie Chancy: Let me give you a little boost.

225

00:35:02.640 --> 00:35:14.869

M. Stephanie Chancy: Waiting until you are almost done with all the other sections of your application before you dig into the budget is actually a wise course of action.

226

00:35:15.360 --> 00:35:21.590

M. Stephanie Chancy: Today, I'd like to share some tips to help you as you work on your budget.

227

00:35:22.420 --> 00:35:23.969

M. Stephanie Chancy: Full disclosure.

228

00:35:24.130 --> 00:35:28.590

M. Stephanie Chancy: You're also probably gonna get some stories along with those suggestions.

229

00:35:30.190 --> 00:35:42.910

M. Stephanie Chancy: Now, one of the things that I tend to do when I'm undertaking something that's not fully in my comfort zone is I like to go back to basics to make sure that I understand what is being asked of me.

230

00:35:43.170 --> 00:35:47.649

M. Stephanie Chancy: And when I say basics, I really mean basic.

231

00:35:48.120 --> 00:35:52.460

M. Stephanie Chancy: So our very first basic is to define

232

00:35:54.420 --> 00:35:55.370

M. Stephanie Chancy: budget.

233

00:35:55.880 --> 00:35:57.370

M. Stephanie Chancy: What is a budget?

234

00:35:58.070 --> 00:36:05.210

M. Stephanie Chancy: It is an approximation of expenses that will be incurred during a set period.

235

00:36:05.410 --> 00:36:09.009

M. Stephanie Chancy: As in this case, for a specific project.

236

00:36:09.660 --> 00:36:11.180

M. Stephanie Chancy: When applicable,

237

00:36:11.330 --> 00:36:16.170

M. Stephanie Chancy: the budget also includes expected revenue or income.

238

00:36:17.541 --> 00:36:20.190

M. Stephanie Chancy: To put it even more simply,

239

00:36:20.440 --> 00:36:25.979

M. Stephanie Chancy: your budget is a written plan of how you will spend your money.

240

00:36:26.610 --> 00:36:30.299

M. Stephanie Chancy: Now we all have budgets for our households

241

00:36:30.320 --> 00:36:35.699

M. Stephanie Chancy: for vacations that we're planning for major purchases that we need to undertake.

242

00:36:36.160 --> 00:36:41.550

M. Stephanie Chancy: A grant budget is not that much different than our personal budgets.

243

00:36:41.740 --> 00:36:46.510

M. Stephanie Chancy: Well, it's different in one big way. It probably has a few extra zeros.

244

00:36:48.210 --> 00:36:52.529

M. Stephanie Chancy: So when should you start thinking about your project budget.

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00:36:54.300 --> 00:37:00.790

M. Stephanie Chancy: Cost considerations should be part of your grant application process from the beginning.

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00:37:01.260 --> 00:37:04.769

M. Stephanie Chancy: You may not get to the concrete figures

247

00:37:04.780 --> 00:37:08.270

M. Stephanie Chancy: until you are some ways along in the process,

248

00:37:08.590 --> 00:37:11.900

M. Stephanie Chancy: but thinking about what things cost,

249

00:37:12.180 --> 00:37:26.519

M. Stephanie Chancy: how much staffing you need and what that will cost, and any equipment you might need to buy should be in your mind as you lay out your objectives, goals, and outcomes.

250

00:37:28.050 --> 00:37:33.500

M. Stephanie Chancy: After all, your budget is your grant narrative in numbers.

251

00:37:33.990 --> 00:37:36.399

M. Stephanie Chancy: Basically, what the budget does

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00:37:36.470 --> 00:37:43.939

M. Stephanie Chancy: is it outlines the money that you are going to need to carry out your proposed project.

253

00:37:44.720 --> 00:37:48.879

M. Stephanie Chancy: Thus, you need to have a firm grasp

254

00:37:48.930 --> 00:37:56.800

M. Stephanie Chancy: and understanding of your project narrative, your project goals, your objectives and your outcomes.

255

00:37:57.490 --> 00:38:05.450

M. Stephanie Chancy: Now, you know it's an official presentation by me, Michelangelo Buonarroti has managed to make it in.

256

00:38:07.360 --> 00:38:10.319

M. Stephanie Chancy: You need to also be well versed

257

00:38:10.420 --> 00:38:12.600

M. Stephanie Chancy: in the necessary steps

258

00:38:12.680 --> 00:38:17.800

M. Stephanie Chancy: that you need to take to achieve your goals and your objectives.

259

00:38:18.070 --> 00:38:22.939

M. Stephanie Chancy: That's why it's a good idea to tackle your budget last.

260

00:38:24.320 --> 00:38:25.700

M. Stephanie Chancy: Your budget

261

00:38:25.940 --> 00:38:31.140

M. Stephanie Chancy: lays out what each step of your proposal will cost.

262

00:38:31.360 --> 00:38:34.339

M. Stephanie Chancy: And this is in terms of staff salaries.

263

00:38:34.550 --> 00:38:36.370

M. Stephanie Chancy: Fringe benefits.

264

00:38:37.070 --> 00:38:38.530

M. Stephanie Chancy: Equipment.

265

00:38:39.030 --> 00:38:42.739

M. Stephanie Chancy: Possible external consultants and contractors.

266

00:38:43.220 --> 00:38:45.270

M. Stephanie Chancy: Travel and training.

267

00:38:46.060 --> 00:38:48.610

M. Stephanie Chancy: Your goal with the budget

268

00:38:48.920 --> 00:38:51.059

M. Stephanie Chancy: is to convey,

269

00:38:51.240 --> 00:39:03.960

M. Stephanie Chancy: and this is true with other sections of your application as well. You are trying to convey that you have a realistic understanding of how much it is going to cost

270

00:39:03.990 --> 00:39:09.089

M. Stephanie Chancy: to see your project successfully through to completion.

271

00:39:10.360 --> 00:39:12.799

M. Stephanie Chancy: Okay, so where do you get these numbers?

272

00:39:14.690 --> 00:39:16.240

M. Stephanie Chancy: Your budget

273

00:39:16.840 --> 00:39:22.530

M. Stephanie Chancy: comes from the activities that you're proposing to carry out for your project.

274

00:39:22.860 --> 00:39:33.409

M. Stephanie Chancy: These numbers need to be realistic estimates that reflect what you will actually require to implement and carry out the project.

275

00:39:34.040 --> 00:39:38.009

M. Stephanie Chancy: It needs to be comprehensive and detailed.

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00:39:38.680 --> 00:39:51.159

M. Stephanie Chancy: This is how you show the funder and the panel of reviewers that you understand and can justify why you are asking for a certain amount of money.

277

00:39:52.800 --> 00:39:56.320

M. Stephanie Chancy: It's important that your numbers

278

00:39:56.370 --> 00:40:02.889

M. Stephanie Chancy: be specific and reflect real costs per item or per hour.

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00:40:03.630 --> 00:40:11.869

M. Stephanie Chancy: It may make your budget look really nice, and even if you round everything up by a hundred dollars or a thousand dollars.

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00:40:12.320 --> 00:40:28.130

M. Stephanie Chancy: But the reviewers who are looking at your application, they are people just like you. They are working on programs and projects just like yours. So what's gonna happen? They're gonna see these inflated numbers. And they're gonna go. Hmm!

281

00:40:28.230 --> 00:40:30.220

M. Stephanie Chancy: They're gonna start questioning them.

282

00:40:31.120 --> 00:40:35.360

M. Stephanie Chancy: Giving the precise and accurate numbers

283

00:40:35.480 --> 00:40:46.860

M. Stephanie Chancy: shows reviewers and funders that you've done your research, and that you've thought deeply and realistically about the project for which you are seeking funding.

284

00:40:49.080 --> 00:40:56.819

M. Stephanie Chancy: Now I did prepare for this session, and in my preparation I looked at 2 books

285

00:40:57.180 --> 00:40:59.659

M. Stephanie Chancy: on writing grant proposals.

286

00:41:00.121 --> 00:41:04.760

M. Stephanie Chancy: And there are a million of those types of books out there.

287

00:41:04.990 --> 00:41:06.899

M. Stephanie Chancy: The first was Deborah

288

00:41:08.270 --> 00:41:18.489

M. Stephanie Chancy: Deborah Ward's *Writing Grant Proposals that Win* and Ellen Karsh and Arlen Sue Fox is *The Only Grant Writing Book You'll Ever Need*.

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00:41:18.790 --> 00:41:25.960

M. Stephanie Chancy: Karsh and Fox indicate that as you work on your budget, you need to ask yourself 2 key questions.

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00:41:26.580 --> 00:41:33.179

M. Stephanie Chancy: Is the amount of money that I'm asking for sufficient to achieve the goals and objectives that I've set out.

291

00:41:34.190 --> 00:41:41.399

M. Stephanie Chancy: To determine this, go back to why am I doing this? Go back to your objectives.

292

00:41:41.540 --> 00:41:49.700

M. Stephanie Chancy: You also need to ask yourself, is the amount reasonable? Is it outlandish? Or is it in between?

293

00:41:49.750 --> 00:41:51.790

M. Stephanie Chancy: Are you asking for too much

294

00:41:51.840 --> 00:41:53.209

M. Stephanie Chancy: or not enough?

295

00:41:55.660 --> 00:42:00.460

M. Stephanie Chancy: What you are aiming for, what I'll call the Goldilocks of asks.

296

00:42:00.520 --> 00:42:06.310

M. Stephanie Chancy: You don't want it to be too high. You don't want it to be too low. You want it to be just right.

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00:42:06.840 --> 00:42:15.359

M. Stephanie Chancy: To get those accurate numbers, you need to go back and forth with your narrative, your goals, and your objectives.

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00:42:15.960 --> 00:42:21.670

M. Stephanie Chancy: Every line item in your budget needs to be reflected in the proposal narrative.

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00:42:21.750 --> 00:42:28.719

M. Stephanie Chancy: So it might help if you put the narrative page numbers that correspond with the budget line items.

300

00:42:29.250 --> 00:42:34.789

M. Stephanie Chancy: Make sure the budget line items and their matching objectives make sense.

301

00:42:36.950 --> 00:42:41.550

M. Stephanie Chancy: I know what you're thinking, that's all well and good to say that. But how do I do that?

302

00:42:41.560 --> 00:42:44.179

M. Stephanie Chancy: Base yourself on your experience.

303

00:42:44.600 --> 00:42:53.060

M. Stephanie Chancy: Your experience in your profession, in your community, and in your or your what you do.

304

00:42:54.040 --> 00:42:57.950

M. Stephanie Chancy: If you have something in your budget that you're not familiar with,

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00:42:58.030 --> 00:42:59.760

M. Stephanie Chancy: talk with colleagues.

306

00:43:00.150 --> 00:43:01.460

M. Stephanie Chancy: Ask people.

307

00:43:02.440 --> 00:43:19.309

M. Stephanie Chancy: Now, my colleague Tania did talk about staffing, and this likely is going to be the most expensive item in your budget. And as we prepared for this presentation, I remembered something that happened when I was working at the Digital Library of the Caribbean as a graduate student.

308

00:43:19.490 --> 00:43:24.479

M. Stephanie Chancy: One of our affiliates, was invited to apply for funds for a digital project in Haiti.

309

00:43:24.520 --> 00:43:27.930

M. Stephanie Chancy: She came to us for advice on purchasing equipment.

310

00:43:28.170 --> 00:43:34.639

M. Stephanie Chancy: But as we were talking to her, the then executive director looked at her budget, and he says, wait a minute.

311

00:43:34.670 --> 00:43:42.199

M. Stephanie Chancy: You are way underestimating how much time it's going to take to do this digitization project.

312

00:43:42.470 --> 00:43:47.410

M. Stephanie Chancy: Based on his experience when calculating a workday in Haiti,

313

00:43:47.420 --> 00:43:59.169

M. Stephanie Chancy: you needed to account for the minimum. 1 h coffee snack break in the morning, an extended lunch, and typically that the workday ends at 4, not 5.

314

00:43:59.510 --> 00:44:03.910

M. Stephanie Chancy: Getting that insight from someone who had worked in Haiti

315

00:44:04.000 --> 00:44:09.320

M. Stephanie Chancy: impacted the way the budget was written, and how the timeline was estimated.

316

00:44:09.690 --> 00:44:14.359

M. Stephanie Chancy: Similarly, if you are hiring consultants or contractors,

317

00:44:14.620 --> 00:44:15.760

M. Stephanie Chancy: talk to them.

318

00:44:15.840 --> 00:44:20.290

M. Stephanie Chancy: Get their rate per hour, get their rate per day or per job.

319

00:44:20.340 --> 00:44:25.469

M. Stephanie Chancy: You'll also want to get prices for equipment from a reputable vendor.

320

00:44:25.660 --> 00:44:26.960

M. Stephanie Chancy: Ask people.

321

00:44:26.990 --> 00:44:36.820

M. Stephanie Chancy: They're usually pretty happy to give you the name of a favorite vendor so that they can get the business, and that's also a way to find out who you should stay away from.

322

00:44:37.480 --> 00:44:45.180

M. Stephanie Chancy: You don't want to over budget expenses, but you also don't want to put yourself in a bind by under budgeting.

323

00:44:45.210 --> 00:44:50.879

M. Stephanie Chancy: And I think that this is probably the most important piece of advice that I'll share with you today.

324

00:44:50.950 --> 00:44:55.790

M. Stephanie Chancy: Be informed about the real costs of things.

325

00:44:56.120 --> 00:45:00.830

M. Stephanie Chancy: Whatever you do, don't guess, and don't rely on memory.

326

00:45:04.000 --> 00:45:12.339

M. Stephanie Chancy: Now, I'm supposed to talk to you about the budget narrative, but we can't really discuss that unless we talk about the line item budget first.

327

00:45:12.590 --> 00:45:14.550

M. Stephanie Chancy: Most funders,

328

00:45:15.040 --> 00:45:24.550

M. Stephanie Chancy: CLIR included, give you detailed instructions about each section of their application, and they have a whole section on the budget.

329

00:45:24.580 --> 00:45:26.670

M. Stephanie Chancy: Read that very carefully.

330

00:45:26.720 --> 00:45:43.760

M. Stephanie Chancy: Now I know we are in the digital age, and we're all trying to divest ourselves of paper. But I suggest strongly that you print out the application instructions, set some time aside, read those instructions and highlight what the funder is asking for.

331

00:45:43.960 --> 00:45:54.159

M. Stephanie Chancy: Budget guidelines for CLIR, Hidden Special Collections state the following: the award can only be between 50,000 \$300,000.

332

00:45:54.490 --> 00:45:57.370

M. Stephanie Chancy: They'll tell you what cost they allow.

333

00:45:57.490 --> 00:46:05.310

M. Stephanie Chancy: What you can use their money for. Those are your line item budgets, and these include staff salaries,

334

00:46:05.550 --> 00:46:13.930

M. Stephanie Chancy: as Tania indicated, budget for and pay a living, equitable wage wage for your area and industry.

335

00:46:14.270 --> 00:46:16.850

M. Stephanie Chancy: Fringe or fringe benefits.

336

00:46:16.970 --> 00:46:21.029

M. Stephanie Chancy: Though related to salaries, it's typically a separate line item.

337

00:46:21.490 --> 00:46:30.650

M. Stephanie Chancy: In the US that might include health insurance retirement benefits, medicare social security, unemployment, insurance.

338

00:46:30.850 --> 00:46:45.700

M. Stephanie Chancy: All of these constitute a percentage of the annual salary. Now, some institutions like the University of Florida, where Tania and I are, they have a set formula for fringe that is automatically calculated.

339

00:46:46.700 --> 00:46:51.520

M. Stephanie Chancy: Other allowable cost include staff training and consultant fees.

340

00:46:51.850 --> 00:46:55.640

M. Stephanie Chancy: There are some allowable costs that have restrictions.

341

00:46:56.190 --> 00:47:00.149

M. Stephanie Chancy: CLIR allows that you can have administrative support

342

00:47:00.260 --> 00:47:04.029

M. Stephanie Chancy: and they also allow you to purchase equipment and supplies,

343

00:47:04.120 --> 00:47:08.900

M. Stephanie Chancy: but for both of those the maximum allocation is \$10,000.

344

00:47:08.980 --> 00:47:15.660

M. Stephanie Chancy: So you can certainly enter an amount less than \$10,000, but you can't go over that amount in your budget.

345

00:47:16.090 --> 00:47:38.129

M. Stephanie Chancy: Travel and conference fees are also allowable, but the travel needs to be necessary to execute the project. The person has to be directly involved in the project, and if they're going to a conference they have to present about the project and not just attend. You need to be aware of these as you do your line item budget.

346

00:47:38.680 --> 00:47:39.440

M. Stephanie Chancy: That

347

00:47:39.730 --> 00:47:45.849

M. Stephanie Chancy: needs to be detailed and specific, and this will help you create the budget narrative.

348

00:47:46.380 --> 00:47:47.769

M. Stephanie Chancy: The narrative

349

00:47:47.970 --> 00:47:50.850

M. Stephanie Chancy: explains each item.

350

00:47:51.120 --> 00:47:55.230

M. Stephanie Chancy: It explains how you arrived at the cost

351

00:47:55.270 --> 00:48:11.309

M. Stephanie Chancy: and how that cost relates to or helps you attain your stated goals. It's a supplement to the project narrative, and it gives you an opportunity to explain all your costs in detail. At the end of the day,

352

00:48:11.380 --> 00:48:15.519

M. Stephanie Chancy: it's the story of your project in numbers.

353

00:48:16.870 --> 00:48:21.620

M. Stephanie Chancy: Explain how each expense connects to an objective.

354

00:48:23.050 --> 00:48:29.899

M. Stephanie Chancy: How will this money help you complete the activities and meet the objectives and reach the outcomes.

355

00:48:30.710 --> 00:48:35.420

M. Stephanie Chancy: How and why did you come up with the numbers for each line item?

356

00:48:36.860 --> 00:48:39.050

M. Stephanie Chancy: So in your budget narrative

357

00:48:39.090 --> 00:48:42.980

M. Stephanie Chancy: you need to indicate- what are you paying for?

358

00:48:43.560 --> 00:48:45.839

M. Stephanie Chancy: How much are you paying per item?

359

00:48:46.170 --> 00:48:49.350

M. Stephanie Chancy: How much are you paying each person per day?

360

00:48:49.600 --> 00:48:56.120

M. Stephanie Chancy: Who are you paying now? You don't need to give people's names, but you definitely need to give position titles.

361

00:48:56.840 --> 00:49:05.869

M. Stephanie Chancy: How many hours per week is each person expected to devote to the grant? How many days or hours will a consultant be needed?

362

00:49:06.080 --> 00:49:09.170

M. Stephanie Chancy: How did you arrive at these dollar amounts?

363

00:49:09.410 --> 00:49:14.640

M. Stephanie Chancy: And if you are getting in-kind donations, include those.

364

00:49:14.800 --> 00:49:38.420

M. Stephanie Chancy: In your line item budget, as well as in your budget narrative. So if a hotel is giving you room nights for guest speakers, include that in the budget and give it a value. That will explain to the reviewer why you are asking, for example, for \$60,000 instead of the \$100,000 that may be required to successfully complete your project.

365

00:49:38.990 --> 00:49:51.489

M. Stephanie Chancy: The budget narrative is helpful as you make sure that all aspects, tasks, activities, and other necessities of your proposed project are covered.

366

00:49:52.080 --> 00:49:54.760

M. Stephanie Chancy: As Karsh and Fox say,

367

00:49:55.060 --> 00:50:02.120

M. Stephanie Chancy: your budget is showing that you can meet program needs in terms of staffing and other cost.

368

00:50:02.410 --> 00:50:14.070

M. Stephanie Chancy: And you're showing that each of the activities that you say you're going to carry out can be done properly with the amount of money that you're asking for in your budget.

369

00:50:14.940 --> 00:50:20.100

M. Stephanie Chancy: Now I will admit that, like Patrick Star, I cannot math.

370

00:50:20.320 --> 00:50:24.030

M. Stephanie Chancy: Maybe you are like me, and you cannot math either.

371

00:50:24.370 --> 00:50:28.440

M. Stephanie Chancy: Your budget is not really about math.

372

00:50:28.630 --> 00:50:36.849

M. Stephanie Chancy: It's about determining the right amount of money that you need to successfully see your project through to fruition.

373

00:50:37.410 --> 00:50:41.160

M. Stephanie Chancy: As to the math involved, that's why we have excel.

374

00:50:41.830 --> 00:50:44.780

M. Stephanie Chancy: It does the long additions for us.

375

00:50:45.460 --> 00:50:54.749

M. Stephanie Chancy: And I think I just at time thank you very much for your time and your attention, and I look forward to getting your questions.

376

00:51:20.810 --> 00:51:26.329

Sharon Burney: Okay, I think we're gonna start with the question and answer period now. And

377

00:51:26.430 --> 00:51:30.940

Sharon Burney: we may have some already submitted. Let me get to the document.

378

00:51:31.140 --> 00:51:31.850

Sharon Burney: Okay.

379

00:51:39.630 --> 00:51:40.770

Sharon Burney: Here it goes.

380

00:51:41.380 --> 00:51:43.659

M. Stephanie Chancy: I see Annet

381

00:51:45.400 --> 00:52:11.999

M. Stephanie Chancy: Holierhoek. Did I? I'm sorry if I've mispronounced that. She asked, if we are contributing in-kind staffing, we include this in the budget, but enter \$ 0.00 in the budget and explain in the budget narrative what the true value is? Actually, you need, probably, if you're having in-kind donations, what I have seen done in the past is there is a column for in-kind.

382

00:52:12.140 --> 00:52:16.140

M. Stephanie Chancy: And you put, you have, you give it a value.

383

00:52:16.290 --> 00:52:25.220

M. Stephanie Chancy: And then you can explain further in the budget narrative. Now, CLIR, y'all may do it differently. So please

384

00:52:25.440 --> 00:52:30.030

M. Stephanie Chancy: interject if I am giving incorrect information.

385

00:52:32.000 --> 00:52:45.770

Sharon Burney: Yeah, you can. You can address in-kind donation, in-kind budget lines in both the narrative and the budget detail, if you'd like. But the budget details not necessarily required.

386

00:52:48.660 --> 00:52:52.890

Alyson Pope: And it should be, if it is in your budget detail, it's not a part of your

387

00:52:52.920 --> 00:52:55.569

Alyson Pope: award total, and it needs to be a separate line.

388

00:53:03.368 --> 00:53:15.490

Alyson Pope: I will pitch this next one, when adding time for research/professional development/service, what is an acceptable amount of time? Could it be 10 hours per week? More/less?

389

00:53:22.530 --> 00:53:25.139

Alyson Pope: I think that's maybe a Tania question.

390

00:53:25.140 --> 00:53:25.995

Tania Ríos Marrero: Yeah, I mean.

391

00:53:26.700 --> 00:53:37.410

Tania Ríos Marrero: I took a look at my own position description to see what it said about that. It said 5% of my total duties are dedicated toward

392

00:53:40.100 --> 00:53:41.630

Tania Ríos Marrero: professional development

393

00:53:42.266 --> 00:53:43.319

Tania Ríos Marrero: as needed.

394

00:53:43.920 --> 00:53:45.360

Tania Ríos Marrero: I hope that's helpful.

395

00:53:46.030 --> 00:53:50.770

M. Stephanie Chancy: So somebody was just asking me, How do you figure out

396

00:53:50.820 --> 00:54:00.449

M. Stephanie Chancy: if you have somebody who's dividing their time, and they're supposed to give you 40% here and 60% here. How do you figure that out?

397

00:54:00.580 --> 00:54:03.490

M. Stephanie Chancy: And again, we're gonna have to math.

398

00:54:04.984 --> 00:54:14.650

M. Stephanie Chancy: And I think that, I think what the way you would have to do that is, figure out if you work 40 hours a week, what is 5% of 40 hours.

399

00:54:14.650 --> 00:54:15.240

Tania Ríos Marrero: Yeah.

400

00:54:15.530 --> 00:54:23.740

M. Stephanie Chancy: And you know that's the amount of time that you allocate to research, professional development, and service.

401

00:54:30.170 --> 00:54:51.210

Sharon Burney: And the next question we have, Thanks for this! I have more of a CLIR-team question re: allowable costs in regard to sharing the results of the project. In addition to other

sharing platforms, we will want to update our public-facing database. Is the purchase of new software (that integrates with our CRM database) allowed?

402

00:54:52.455 --> 00:55:02.034

Sharon Burney: You can always, one: email us directly to explain the exact software that you're going to use. But we do allow

403

00:55:04.156 --> 00:55:19.096

Sharon Burney: supplies and materials and dedicated software and hardware for the digitization and production of the metadata. There is a maximum. This will be under equipment supplies and materials, so it would be \$10,000.

404

00:55:20.061 --> 00:55:31.570

Sharon Burney: What you will want to reflect in your budget narrative possibly, is that you'll be able to afford the continuation of this software after the grant period.

405

00:55:31.650 --> 00:55:48.369

Sharon Burney: So make sure that you explain that clearly. And those are the things that we're looking for. Are you utilizing this software just for this particular project, but that you can keep the materials front facing for the public afterwards, and sustain it over time.

406

00:55:49.740 --> 00:55:53.269

Alyson Pope: And it is limited that it must be a one time cost.

407

00:55:54.420 --> 00:55:55.080

Alyson Pope: Yes.

408

00:55:56.284 --> 00:56:10.439

M. Stephanie Chancy: Annet has a question. She is located in Canada, and health insurance, etc. is included in gross salary. Oh, it just moved. Do we still need to separately explain this under fringe expenses?

409

00:56:10.760 --> 00:56:15.839

M. Stephanie Chancy: I believe so, if it's coming out of grant dollars.

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00:56:16.776 --> 00:56:19.199

M. Stephanie Chancy: Because for us,

411

00:56:19.430 --> 00:56:28.540

M. Stephanie Chancy: we are fortunate here at the University of Florida that health insurance expenses is included as part of our benefits package

412

00:56:28.640 --> 00:56:32.839

M. Stephanie Chancy: and that is figured into the fringe.

413

00:56:33.885 --> 00:56:34.730

M. Stephanie Chancy: So

414

00:56:34.960 --> 00:56:48.500

M. Stephanie Chancy: it may be called something different in Canada, but I believe if it's coming from grant dollars, if you're going to be paying that out of grant dollars, it needs to be included on the budget.

415

00:56:49.730 --> 00:56:50.580

Sharon Burney: That's correct.

416

00:56:54.730 --> 00:57:07.360

Alyson Pope: Yeah, and I would say, if it's a component of the salary, that is acceptable, but that could be explained in the narrative. If you need to show why you don't have that line in your detail.

417

00:57:08.450 --> 00:57:21.589

Sharon Burney: Yeah, it's separate from the fringe just once again, justifying and making it as clear to reviewers as possible in your narrative. The less questions they have, the better for your application.

418

00:57:29.900 --> 00:57:38.629

M. Stephanie Chancy: The compensation from the co-PIs, the 2 co-PIs they're trying to compensate the work they will be doing as project managers

419

00:57:38.660 --> 00:57:53.220

M. Stephanie Chancy: and contributing to digitization labor. However, when they are budgeting for that, it appears that their own compensation takes a huge chunk of the budget before any needed staff/student hires.

420

00:57:53.290 --> 00:57:56.359

M. Stephanie Chancy: Any advice for how to approach this issue?

421

00:57:58.800 --> 00:58:01.380

Alyson Pope: Stephanie, do you have any advice for that?

422

00:58:03.873 --> 00:58:06.836

M. Stephanie Chancy: I tell you, I just

423

00:58:07.660 --> 00:58:10.880

M. Stephanie Chancy: I came on board last year

424

00:58:10.900 --> 00:58:19.719

M. Stephanie Chancy: and this year we had another departure. So that's another thing that you need to plan for is staff changes.

425

00:58:19.900 --> 00:58:29.580

M. Stephanie Chancy: And all of a sudden, I found myself responsible for the budget, and one of the things that I noticed is the biggest part of the budget is staff expenses.

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00:58:29.810 --> 00:58:38.389

M. Stephanie Chancy: If there's any way, maybe this is one of the areas where, if your institution is amenable,

427

00:58:38.480 --> 00:58:44.190

M. Stephanie Chancy: you do part of your salary as an in-kind donation.

428

00:58:46.130 --> 00:58:49.860

M. Stephanie Chancy: So you're not taking grant dollars,

429

00:58:50.110 --> 00:58:58.219

M. Stephanie Chancy: so you do, but you're explaining why you're not asking for as much in staff salaries

430

00:58:58.560 --> 00:59:14.049

M. Stephanie Chancy: since you and your co-PI are giving your time as an in-kind. Your institution is giving your time as an in-kind donation. That is the one way that I'm thinking that you might be able to address this.

431

00:59:16.410 --> 00:59:22.129

Sharon Burney: Yeah, and unlike our *Recordings at Risk* that requires outsourcing the digitization

432

00:59:22.240 --> 00:59:33.740

Sharon Burney: of the materials, this one can be done in-house. So there is an expectancy that the salary costs may be a little higher than what we would normally see.

433

00:59:34.257 --> 00:59:38.079

Sharon Burney: I think that's great advice from Stephanie, and

434

00:59:38.330 --> 01:00:01.249

Sharon Burney: making sure that also, when you justify your salaries on there, that the work that you're doing is as it just appears for this particular project, and not necessarily the work you normally do in your job role at your organization. So making that distinction in your budget narrative is important, also.

435

01:00:02.080 --> 01:00:04.050

Alyson Pope: Yeah, and really explaining

436

01:00:04.180 --> 01:00:09.110

Alyson Pope: Sorry, really explaining what the work being done

437

01:00:09.936 --> 01:00:25.359

Alyson Pope: by the PIs is because if it is digitization, I mean, that is the core of the grant and the grants goals. If that is done via vendor or via in-house, it can look really different on that budget detail.

438

01:00:27.410 --> 01:00:33.640

M. Stephanie Chancy: And the other thing that I would advise, since the digitization is being done in-house.

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01:00:34.410 --> 01:00:42.899

M. Stephanie Chancy: That if you've when I first started to digitize. It always takes longer than you think it's going to take.

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01:00:43.000 --> 01:00:46.390

M. Stephanie Chancy: So do keep that in mind.

441

01:00:46.410 --> 01:00:58.709

M. Stephanie Chancy: And it's not because your work day is truncated. It just, especially since you're digitizing for preservation, it takes a lot, I mean, I was scanning for Stephanie for years.

442

01:00:58.840 --> 01:01:21.029

M. Stephanie Chancy: And when I started working for DLOC, apparently, Stephanie standards are not the same as the preservation standards. It does take a lot longer than you anticipate. So this is one where I would suggest that maybe if you've not done something like that before, reach out to somebody who's done a project similar.

443

01:01:21.110 --> 01:01:27.199

M. Stephanie Chancy: Usually people are pretty amenable and open to talking to you and giving you advice.

444

01:01:28.880 --> 01:01:42.240

Sharon Burney: Here's a follow up on the asset mapping. One I think we might have missed. Is this a process that you recommend including in the project activities, and or, should this be done ahead of the grant proposal?

445

01:01:45.165 --> 01:01:46.500

Tania Ríos Marrero: I think

446

01:01:46.650 --> 01:01:52.304

Tania Ríos Marrero: either/or, you know. You know one helpful

447

01:01:53.425 --> 01:02:00.549

Tania Ríos Marrero: aspect of asset mapping is that it produces documentation, I mean, like an asset mapping exercise will produce

448

01:02:00.580 --> 01:02:03.660

Tania Ríos Marrero: documentation of existing strengths

449

01:02:04.039 --> 01:02:09.280

Tania Ríos Marrero: in the organization, and that's part of the capacity component of the application. But,

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01:02:10.220 --> 01:02:29.120

Tania Ríos Marrero: so there could be some preliminary asset mapping that happens as part of the application. You know. It's optional. I think it would be helpful to the application process. But it's also something that can happen after, and it could happen over the course over

451

01:02:29.120 --> 01:02:58.659

Tania Ríos Marrero: several weeks. It can happen in multiple sessions. It can, it can build. Sessions can build off one another. That can really kind of be used as a way to bring everyone on the team into alignment with why they're there, and what binds them to the project, and how the project is strong. Right? So yeah, asset mapping can happen before, during, after. It can happen like mid

452

01:02:58.840 --> 01:03:04.950

Tania Ríos Marrero: mid project, too. If you know there's like a need for for group

453

01:03:04.960 --> 01:03:06.020

Tania Ríos Marrero: work,

454

01:03:07.710 --> 01:03:11.060

Tania Ríos Marrero: then, you know it has like an interesting

455

01:03:11.890 --> 01:03:20.119

Tania Ríos Marrero: way of kind of gelling folks together. So I think that it's useful on different parts of a project.

456

01:03:23.943 --> 01:03:37.079

Alyson Pope: We also have. What if our organization's salaries currently do not match those identified in the living wage calculator? Also, our organization does not provide benefits. Will this count against us?

457

01:03:42.060 --> 01:03:42.760

M. Stephanie Chancy: That's

458

01:03:43.660 --> 01:03:48.722

M. Stephanie Chancy: What do you all say, CLIR, on that one? That one's that one's you.

459

01:03:49.430 --> 01:03:52.319

Alyson Pope: It in terms of

460

01:03:55.956 --> 01:04:03.630

Alyson Pope: salaries that don't match the living wage calculator, I will say, if you have salaries in the detail

461

01:04:03.770 --> 01:04:07.860

Alyson Pope: that the panel considers to be

462

01:04:08.381 --> 01:04:11.820

Alyson Pope: not a living wage or not equitable,

463

01:04:12.420 --> 01:04:15.180

Alyson Pope: they

464

01:04:15.896 --> 01:04:21.309

Alyson Pope: at times that makes it non competitive, and at times they come back, and they ask

465

01:04:22.240 --> 01:04:26.781

Alyson Pope: for the grantees to increase the ask.

466

01:04:28.330 --> 01:04:29.910

Alyson Pope: How that works

467

01:04:30.160 --> 01:04:49.030

Alyson Pope: within your organization, which has, like obviously longer term salaries beyond just the year or 2 that you would be handling a grant, is really something to be negotiated internally. I would say. We have seen

468

01:04:49.612 --> 01:05:01.227

Alyson Pope: with some organizations, they kind of package it as a bonus. So it's not a permanent pay raise, but it's a raise for the duration of the grant that

469

01:05:01.610 --> 01:05:07.480

Alyson Pope: takes you to a livable wage in the detail. Sharon, do you have any thoughts?

470

01:05:07.480 --> 01:05:24.359

Sharon Burney: Yeah, we've seen this point of contention in the past. Rarely. My recommendation would be to explain that we understand that these salaries in your grant narrative may be

471

01:05:24.821 --> 01:05:44.647

Sharon Burney: lower than what is livable. It's equitable based on your organization. Or you could challenge your organization somewhat to say, Hey, this is a temporary position, we're bringing them in, we know, to have a competitive application, they're looking for living wages.

472

01:05:45.710 --> 01:06:08.370

Sharon Burney: We've also seen people say, we'll add a signing bonus or whatever. Sometimes people have to relocate for the job. Maybe you could move that into the moving expenses that they may need to move there and add that adjustment right there for that. And it's also a great way to start conversations with your organizations about

473

01:06:08.500 --> 01:06:29.909

Sharon Burney: living wages for everybody that's working at the organization. So explaining it in a budget narrative is, as honestly and openly as possible, because the reviewers will catch it, and the reviews may say they have an understanding of what's going on here. And even though we don't necessarily agree, they have clarified that to us.

474

01:06:31.260 --> 01:06:38.750

M. Stephanie Chancy: One of the other things, too. I didn't have a chance to look at the calculator that Tania shared with you.

475

01:06:40.410 --> 01:06:41.410

M. Stephanie Chancy: Is.

476

01:06:42.790 --> 01:06:45.809

M. Stephanie Chancy: Are the wages that you're paying,

477

01:06:46.260 --> 01:06:50.429

M. Stephanie Chancy: what is the standard in your locality?

478

01:06:50.470 --> 01:06:52.600

M. Stephanie Chancy: Because that's also

479

01:06:52.750 --> 01:06:58.350

M. Stephanie Chancy: you know it. It's not. It's like medicine. It's not one size fits all.

480

01:06:58.530 --> 01:07:17.409

M. Stephanie Chancy: So depending, and if it's these are the wages for your locality, those are the wages for. Because in the example that I gave about calculating the staff time in Haiti, one of the things that they had done is they had way over, estimated they were paying US rates

481

01:07:18.095 --> 01:07:35.660

M. Stephanie Chancy: and you don't want to do that because that causes problems for the people who are not getting that wage. And also, you know? So it could cause all sorts of problems. So if it's, these are the wages for our locality. This is the, these are,

482

01:07:35.900 --> 01:07:37.140
M. Stephanie Chancy: say that.

483
01:07:37.520 --> 01:07:47.889
Sharon Burney: Yeah, they look at, the reviewers will look at based on your location, regardless. And also maybe the title

484
01:07:47.900 --> 01:08:02.969
Sharon Burney: of that position should equate the experience. So you might not, you might want to say, Well, what does an archivist get paid in this area? You might wanna lift the title to subset that

485
01:08:03.570 --> 01:08:06.439
Sharon Burney: pay wage discrepancy.

486
01:08:07.290 --> 01:08:07.990
Sharon Burney: But

487
01:08:08.190 --> 01:08:26.809
Sharon Burney: great ideas here left and right. This might be a CLIR question. We strive to hire people full time, whenever possible, for one another, positions that would work directly on our proposed CLIR project. That position can only be full time with the grant funds, otherwise we could only employ them half time.

488
01:08:26.810 --> 01:08:46.939
Sharon Burney: Thus, we are planning to have them devote 50% of their time to this grant project. Do we only include 50% of their salary plus percentage for fringe in the grant budget? Or do we include the other half of their salary funds not funded by CLIR as it in-kind, even though that part of their time will need to be devoted to maintaining other work.

489
01:08:46.939 --> 01:09:12.779
Sharon Burney: You only need to put the 50% of, you need to reflect the work that they'll be doing with grant funds towards that grant. So if they're only doing 50% of that salary, 50% of their work on a CLIR grant. Then that's what you reflect in the budget. You don't have to put that in for in-kind. We're only concerned with the money that's being spent for the actual grant.

490

01:09:16.175 --> 01:09:24.459

M. Stephanie Chancy: Somebody asked if we could suggest a resource to look for equipment to digitize. I'm looking for hours.

491

01:09:24.620 --> 01:09:30.460

M. Stephanie Chancy: Our technical director does have. It may be a little out of date.

492

01:09:30.944 --> 01:09:37.429

M. Stephanie Chancy: But I'm looking for ours so that I can share it in the chat with you all.

493

01:09:40.240 --> 01:09:52.520

Alyson Pope: We should also, if you look into our application guidelines, we have some links to some technical guidance guidelines and to a DLF,

494

01:09:53.010 --> 01:09:55.059

Alyson Pope: there's a DLF wiki

495

01:09:55.330 --> 01:09:56.830

Alyson Pope: that

496

01:09:56.920 --> 01:10:04.499

Alyson Pope: has a lot of this information, too, that we have linked in there. I believe it's called the [DLF Special Formats Wiki](#).

497

01:10:04.720 --> 01:10:07.180

Sharon Burney: And it's on our [Apply for an Award](#) page.

498

01:10:07.180 --> 01:10:10.060

Alyson Pope: There we go. Yay. Good job, us.

499

01:10:13.672 --> 01:10:27.169

Alyson Pope: I'm also going to take this. Our university has a research department that coordinates our grant applications, contracts, invoicing, etc. They always request a standard percentage contribution

500

01:10:27.960 --> 01:10:40.119

Alyson Pope: of the total project cost as compensation for administrative work. Is that allowed? No, [CLIR's indirect cost policy](#) is that they are disallowed. We do not

501

01:10:40.240 --> 01:10:43.710

Alyson Pope: pay indirect administrative costs on our grants.

502

01:10:46.420 --> 01:10:55.030

Sharon Burney: There's an indirect cost policy on our page that we can drop in the link to in the chat, too, that you can refer back to that.

503

01:10:55.030 --> 01:10:55.880

Alyson Pope: I'll get that real quick

504

01:11:02.960 --> 01:11:03.730

Alyson Pope: now.

505

01:11:05.060 --> 01:11:29.359

Sharon Burney: And that this might be also connected, this next question, to what you just answered, Alyson. What type of institutional administrative costs are allowable? For example, if there's a coordinator at our institution who will be contributing to the administrative and financial management part of the project, can we indicate the percentage of their work hours on a monthly basis in the budget?

506

01:11:34.220 --> 01:11:41.400

Sharon Burney: Grant personnel cannot be included on the, on salaries and wages.

507

01:11:41.922 --> 01:11:51.180

Sharon Burney: Most of the salaries and ranges can be reflective of people who are actually doing the work on the project itself.

508

01:11:52.464 --> 01:11:57.109

Sharon Burney: But personnel who are not directly affiliated with the project,

509

01:11:57.410 --> 01:12:13.030

Sharon Burney: but contribute to its overall coordination or implementation, which includes accountants, administrative staff, who schedule project meetings, or process invoices. Now that you can do, but not actual grant

510

01:12:13.820 --> 01:12:15.130

Sharon Burney: personnel.

511

01:12:15.340 --> 01:12:26.570

Sharon Burney: That would be work that they would already be doing on behalf of the university, and they're not directly connected or hired for this particular project. If you, if that makes sense.

512

01:12:26.860 --> 01:12:32.489

Alyson Pope: There is an exception. For administrative support on collaborative projects.

513

01:12:33.315 --> 01:12:45.949

Alyson Pope: So for collabs, you may have somebody coordinating the various institutions administratively. They do have an allowance for administrative support up to \$10,000.

514

01:12:46.680 --> 01:12:49.299

Sharon Burney: And they should be named collaborative

515

01:12:50.550 --> 01:12:53.370

Sharon Burney: organizations that qualify on your grant.

516

01:12:53.600 --> 01:12:54.250

Alyson Pope: Yeah.

517

01:12:57.810 --> 01:12:59.580

Alyson Pope: Is that all of them Sharon?

518

01:13:01.910 --> 01:13:03.070

M. Stephanie Chancy: Yeah.

519

01:13:05.080 --> 01:13:09.110

Sharon Burney: Hold on. Let me see if there's a new question. No, we answered them all?

520

01:13:09.770 --> 01:13:11.240

Sharon Burney: Unbelievable.

521

01:13:12.220 --> 01:13:13.250

Sharon Burney: Okay.

522

01:13:13.800 --> 01:13:22.770

M. Stephanie Chancy: Oh, we have one more. Look! The and Annet is in Canada, and would they apply at the exchange rate at time of submission?

523

01:13:22.770 --> 01:13:25.350

Alyson Pope: Apply in US dollars.

524

01:13:25.910 --> 01:13:33.389

Alyson Pope: The grant will be dispersed according to the exchange rate on the day that the money is transferred.

525

01:13:35.240 --> 01:13:37.790

Alyson Pope: I know that's tricky, because

526

01:13:38.420 --> 01:13:42.779

Alyson Pope: it means there'll be a couple of months till you know exactly how much money you'll have. But

527

01:13:42.960 --> 01:13:44.259

Alyson Pope: that's what we do.

528

01:13:50.380 --> 01:13:51.450

Alyson Pope: Okay.

529

01:13:52.110 --> 01:13:52.780

Sharon Burney: Okay.

530

01:13:52.780 --> 01:14:08.440

Alyson Pope: Oh, we have. We got a new one. We have a collaborative project partner who has calculated a cost per item, whereas we calculate our costs by staff hours and other line items. Would we need to break down the cost per item? Should we treat them like a contractor?

531

01:14:11.010 --> 01:14:16.659

M. Stephanie Chancy: Are you applying with them as a co- applicant, or are you the applicant?

532

01:14:18.470 --> 01:14:21.501

Sharon Burney: They look like they're the organization.

533

01:14:21.880 --> 01:14:23.710

Alyson Pope: I'm guessing they're the lead.

534

01:14:23.710 --> 01:14:24.560

M. Stephanie Chancy: Okay.

535

01:14:30.700 --> 01:14:32.470

Alyson Pope: Truly,

536

01:14:32.910 --> 01:14:41.759

Alyson Pope: the lead organizations receive all the funds. And they are responsible for the management and the

537

01:14:41.960 --> 01:14:50.430

Alyson Pope: disbursement of those funds. So the key is that the budget detail makes sense

538

01:14:50.480 --> 01:14:56.685

Alyson Pope: to you as the lead org. So whatever apples to apples

539

01:14:57.370 --> 01:15:01.900

Alyson Pope: way is easiest for you all to,

540

01:15:02.480 --> 01:15:04.180

Alyson Pope:

541

01:15:04.380 --> 01:15:07.299

Alyson Pope: kind of reconcile that to get to

542

01:15:07.320 --> 01:15:31.069

Alyson Pope: like one number for both. But if they're a collaborator you wouldn't treat them like a contractor. You could pay them a flat budget line fee for services, similar to how you would a contractor, but we don't necessarily stipulate how you figure out

543

01:15:31.855 --> 01:15:34.380

Alyson Pope: how to make those terms

544

01:15:34.928 --> 01:15:39.410

Alyson Pope: similar enough to come to one full award amount request.

545

01:15:41.320 --> 01:15:51.020

Sharon Burney: Estimate as appropriate as possible. Is the Grant money disbursed upfront, or on a reimbursement basis over the course of the grant? You will get,

546

01:15:51.070 --> 01:16:02.460

Sharon Burney: if awarded funding, you will receive a check one time at the beginning of your grant and it's up to you to disperse them as necessary, the funds as necessary.

547

01:16:04.260 --> 01:16:14.897

Alyson Pope: Yes, we did get a follow up there. They are the lead. It's a 50% split of labor. There's no requirement are on our end that you represent that the same way

548

01:16:15.410 --> 01:16:28.676

Alyson Pope: ss long as the detail is clear, we can understand where the money is going, and you as the lead organization responsible for dispersing the funds through to the collaborators understand where the money is going. You have a line that's

549

01:16:29.180 --> 01:16:35.730

Alyson Pope: salary for them. You have a lump sum line for them. We don't really dictate how you represent that.

550

01:16:36.080 --> 01:16:44.975

M. Stephanie Chancy: If I might suggest to all of the applicants, and it's not necessarily for your application, but for your sanity.

551

01:16:47.666 --> 01:16:57.969

M. Stephanie Chancy: I would create what I'm calling a working budget. That's where you have all, that's what I did, I have all of my line items

552

01:16:57.990 --> 01:17:07.190

M. Stephanie Chancy: and under my line items, I have what I've paid out of that line item. So I'm essentially treating my budget like a checkbook.

553

01:17:07.440 --> 01:17:16.850

M. Stephanie Chancy: So if it comes in, it's a plus. If it goes out, it's a minus, and then you know where you're at in terms of the funds that you've expended

554

01:17:17.539 --> 01:17:28.099

M. Stephanie Chancy: and where that money has gone. So that's just, you know, for in the background, just for you to keep track

555

01:17:28.230 --> 01:17:31.219

M. Stephanie Chancy: once you, you get your grant funding.

556

01:17:31.602 --> 01:17:36.120

M. Stephanie Chancy: I just found out that to to be much easier for me

557

01:17:36.210 --> 01:17:42.820

M. Stephanie Chancy: to keep my head straight and to know. Okay, this is where I can spend money. This is where I have to pull back a little.

558

01:17:43.430 --> 01:17:55.750

Alyson Pope: Also probably make your financial reporting easier, which you'll have to do yearly. So doing it on an ongoing basis, is probably easier than trying to do it all at once, for your report.

559

01:17:56.300 --> 01:17:57.710

M. Stephanie Chancy: Oh, and include dates.

560

01:17:58.090 --> 01:18:00.210

M. Stephanie Chancy: Treat it just like a checkbook.

561

01:18:01.290 --> 01:18:17.369

Alyson Pope: So we got a couple more. We jinxed ourselves. Can we include rental space for sorting and digitizing the collection by a professional archive contractor before it is rehoused at our organization?

562

01:18:23.200 --> 01:18:24.400

Alyson Pope: I don't.

563

01:18:25.570 --> 01:18:27.700

Sharon Burney: Yeah, that's tricky.

564

01:18:29.590 --> 01:18:38.600

Sharon Burney: Rental space. Where do you defining as rental space? Is it at your organization? Is it a location that's already at your

565

01:18:39.020 --> 01:18:41.580

Sharon Burney: institution or organization?

566

01:18:42.180 --> 01:18:50.849

Sharon Burney: Is this something that the contractor is doing in their space, and they want to charge for the storage of the materials there?

567

01:18:51.300 --> 01:18:53.330

Sharon Burney: We would probably need a little more

568

01:18:53.620 --> 01:18:55.180

Sharon Burney: context on that.

569

01:18:55.180 --> 01:18:59.439

Alyson Pope: Yeah, if you could email us that hiddecollections@clir.org with more details.

570

01:19:00.730 --> 01:19:25.169

Sharon Burney: So we can give a more comprehensive answer for that. Thank you. What kind of community engagement and outreach activities are allowed in the budget? And is there a threshold that we should be mindful of? Okay, the guidelines are, are your friend. [Appendix A](#) in the budget would tell you all of the allowable costs and disallow costs, and they give a great explanation of those.

571

01:19:25.690 --> 01:19:37.569

Sharon Burney: It depends on your actual project, right? What your outreach looks like. For some people, some of the outreach looks like community conversations programs to

572

01:19:38.360 --> 01:19:51.744

Sharon Burney: to engage the materials that you're nominating experts in the field. Sometimes their programs and symposiums. Sometimes they do a film festival. It would. It would all be contingent upon your specific

573

01:19:52.681 --> 01:20:02.788

Sharon Burney: program. As long as you're hitting the [core values of our of the Hidden Collections AUV](#) program and make sure that they're backed up by that.

574

01:20:03.210 --> 01:20:16.500

Sharon Burney: So they look like honorarium. Sometimes they may be travel costs for your guest speakers. Sometimes it looks like, and I'm just thinking off the top of my head of what I've seen in the past,

575

01:20:17.220 --> 01:20:18.613

Sharon Burney: sometimes it's

576

01:20:19.630 --> 01:20:26.574

Sharon Burney: whatever it takes for you to put on this programming, right? That you're doing for outreach.

577

01:20:27.080 --> 01:20:30.959

Sharon Burney: If if you have a specific cost that you're unsure about,

578

01:20:31.020 --> 01:20:36.529

Sharon Burney: once again, email us tell us what that cost looks like, and we'll tell you if it's disallowed.

579

01:20:37.448 --> 01:20:39.441

Sharon Burney: But I would view the

580

01:20:41.750 --> 01:20:45.660

Sharon Burney: the [Appendix A](#) of our guidelines.

581

01:20:46.630 --> 01:21:07.099

Alyson Pope: And we have another question. Do you allow marketing and communications related costs of the project in the budget? I feel like that's a really similar question, just different words. So if you think of marketing and communication as a form of outreach related to the project. Yes, we do. And all of what Sharon just said would apply to that as well.

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01:21:09.350 --> 01:21:11.360

Alyson Pope: And we have a last one.

583

01:21:11.904 --> 01:21:31.730

Alyson Pope: We'll get through this one, and then we will pop our last poll. If our employer has offered to disperse payments, do the HR side of things for staff hired, we list the service as an in-kind donation? No, that's more of what we were talking about from the indirect costs. So that's something that we just kind of expect.

584

01:21:31.730 --> 01:21:51.000

Alyson Pope: If we are able to use a scanner already at an institution., do we list this as an in-kind donation? You don't have to list that as an in-kind donation because you're not it's not.

You're not spending funds, but you can certainly mention in your project plan that you already have this equipment in place, so that you can use it in-house.

585

01:21:51.910 --> 01:21:57.719

Sharon Burney: Yeah, but you could, like whoever's scanning it, you could add their salaries for the work that they're doing.

586

01:21:58.010 --> 01:21:58.830

Alyson Pope: Just not that.

587

01:21:59.255 --> 01:22:10.320

Sharon Burney: It's like our panelists say. There's a lot more scanning than they thought. So okay, we're gonna do a second poll while we get ready. Hold on.

588

01:22:10.560 --> 01:22:12.199

Sharon Burney: Let me get to my

589

01:22:12.660 --> 01:22:14.370

Sharon Burney: slide.

590

01:22:14.620 --> 01:22:15.850

Sharon Burney: Sorry.

591

01:22:17.470 --> 01:22:19.320

Sharon Burney: Okay.

592

01:22:21.150 --> 01:22:31.409

Sharon Burney: Okay, so we have a few reminders before we break. And so let's check in and see how you're feeling about the polls. Where did my polls go? Hold on.

593

01:22:32.700 --> 01:22:33.710

Sharon Burney: Here we go.

594

01:22:35.030 --> 01:22:35.930

Sharon Burney: So maybe

595

01:22:41.990 --> 01:22:44.470

Sharon Burney: my polls aren't coming up.

596

01:22:45.640 --> 01:22:47.170

Sharon Burney: Okay.

597

01:22:51.580 --> 01:22:55.510

Sharon Burney: Can somebody else launch the poll? My poll is not coming up.

598

01:22:56.260 --> 01:23:00.440

Sharon Burney: It's not letting me. For some reason, it keeps giving me the other one.

599

01:23:01.370 --> 01:23:03.520

Sharon Burney: Louisa, can you launch the poll

600

01:23:03.690 --> 01:23:04.600

Sharon Burney: for us?

601

01:23:05.140 --> 01:23:06.800

Sharon Burney: Poll 5B.

602

01:23:07.190 --> 01:23:08.190

Sharon Burney: Thank you.

603

01:23:09.910 --> 01:23:13.529

Sharon Burney: As we see how you guys are feeling now.

604

01:23:27.230 --> 01:23:28.210

Sharon Burney: Okay.

605

01:23:29.110 --> 01:23:30.730

Sharon Burney: Alright, looks good.

606

01:23:30.790 --> 01:23:32.400

Sharon Burney: Thank you, Louisa.

607

01:23:32.660 --> 01:23:52.380

Sharon Burney: It looks like the polls are complete. Thank you for your participation and feedback, and as you work on your final application, remember, there'll be one more final session which will be a Q&A Session, where you just bring all your questions, and that's on April 17th, and you can sign up for that on our [Apply for an Award](#) page.

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01:24:02.000 --> 01:24:23.138

Jane Larson (she/her): And we're so glad that you were able to join us today, and we extend a huge thanks to Stephanie and Tania for leading. As we continue the assessment of our program, we appreciate your continued feedback, and we've shared the [survey link for today's webinar](#), and we look forward to hearing how things went, what you might like to see in future sessions, and how we might improve.

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01:24:23.450 --> 01:24:30.879

Jane Larson (she/her): Again, please don't hesitate to send questions to the CLIR Grants team as they come up between now and the final submission deadline of May 8th.

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01:24:30.900 --> 01:24:41.459

Jane Larson (she/her): And as needed, our team will also be able to consult Stephanie and Tania on specific questions related to today's topic. Thank you so much, and we hope to see you next week at our last session!