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00:00:06.570 --> 00:00:22.139

Sharon Burney: Welcome everyone to the *Digitizing Hidden Collections: Amplifying Unheard Voices* recipient webinar. We're going to begin today with a short presentation. Then, following the presentation, we'll be back on live to answer some questions and have some conversations.

2

00:00:22.280 --> 00:00:23.239

Sharon Burney: Thank you.

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00:00:29.690 --> 00:00:37.710

Louisa Kwasigroch: Hello, and welcome to the Recipient Informational Webinar for the *Digitizing Hidden Special Collections: Amplifying Unheard Voices* program.

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00:00:38.090 --> 00:00:44.050

Louisa Kwasigroch: We want to begin by congratulating you all again on being selected as grant recipients for this program.

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00:00:44.440 --> 00:00:47.860

Louisa Kwasigroch: Yours is a varied and remarkable collection of projects.

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00:00:48.140 --> 00:00:50.889

Louisa Kwasigroch: We know how much work has gone into them already.

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00:00:51.130 --> 00:00:55.870

Louisa Kwasigroch: We are so excited to see these projects progress over the coming months and years

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00:00:58.430 --> 00:01:06.510

Louisa Kwasigroch: During today's session, we'll briefly explain what you may need to know as your grant project begins. We'll be covering the following topics:

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00:01:06.920 --> 00:01:16.099

Louisa Kwasigroch: In Part one, we'll talk about CLIR, our team, and you the 2024 recipients of *Digitizing Hidden Collections: Amplifying Unheard Voices* grant.

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00:01:16.530 --> 00:01:23.280

Louisa Kwasigroch: In Part 2, we'll transition to grant management and discuss grant modifications and reporting requirements.

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00:01:23.540 --> 00:01:28.629

Louisa Kwasigroch: We'll cover how to make changes to your project and how and when to report on activities.

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00:01:29.320 --> 00:01:35.799

Louisa Kwasigroch: In Part 3, we'll discuss ways to stay in touch throughout your project and answer any questions you may have.

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00:01:36.150 --> 00:01:45.240

Louisa Kwasigroch: Feel free to type your questions into the question and answer box or Q&A box at any point, and we'll address them during the third portion of this session.

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00:01:45.720 --> 00:01:51.190

Louisa Kwasigroch: We especially want to welcome staff, who may not oversee these projects, but will work on them daily.

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00:01:51.580 --> 00:02:02.469

Louisa Kwasigroch: It's really important to us that you hear about all of these details, too, so that you understand how your work fits into your organization's grant and the larger cultural heritage preservation efforts at CLIR.

16

00:02:02.810 --> 00:02:05.380

Louisa Kwasigroch: So with that, let's get started.

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00:02:08.289 --> 00:02:15.109

Louisa Kwasigroch: We'll start our time together with some introductions first to this platform and then to CLIR, and everyone here.

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00:02:18.490 --> 00:02:23.549

Lizzi Albert: To start off, we want to share some notes about how you can use Zoom during this session.

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00:02:23.800 --> 00:02:33.189

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

20

00:02:33.670 --> 00:02:54.530

Lizzi Albert: Attendees will be muted throughout the presentation. However, you're welcome to use chat for general introductions and conversation. If a chat box isn't already displaying on your Zoom screen, you can hover your mouse towards the bottom of the screen and open it manually. In order to send a message to everyone, remember to change the default from "Host and Panelists" to "Everyone."

21

00:02:55.130 --> 00:03:17.089

Lizzi Albert: Because of how busy chat can get, we ask that you use the separate Q&A box to ask questions today, which can be opened the same way as the chat box. You can submit questions at any point during the webinar, and we'll get to them at the end of the webinar. If you're following along with questions as they come in, you can "upvote" them if they're similar to your own, to let us know that it would be helpful to you to have them answered live.

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00:03:18.150 --> 00:03:24.549

Lizzi Albert: The session recording and transcript will be made available on the [Manage an Award](#) page of our website within a week.

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00:03:28.710 --> 00:03:50.520

Lizzi Albert: CLIR's work is accomplished by a relatively small staff of about 20 geographically distributed individuals. Today's webinar is led by the Grants Team, which administers CLIR's active regranting programs, offering support for the entire grant cycle, from application to final report. Some or all of you may already know us from applicant webinars or from email exchanges, but we'll do some quick introductions.

24

00:03:50.950 --> 00:03:58.330

Lizzi Albert: Sharon Burney, program officer, Midlothian, Virginia, is contributing to the presentation and Q&A.

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00:03:58.920 --> 00:04:05.979

Lizzi Albert: Allison Pope, program officer, Pittsburgh, Pennsylvania, is contributing to the presentation, and Q&A.

26

00:04:06.310 --> 00:04:13.349

Lizzi Albert: Jane Larson, program associate, Pittsburgh PA, is contributing to the presentation and Q&A support.

27

00:04:13.760 --> 00:04:18.449

Lizzi Albert: Louisa Kwasigroch, Managing Director, Chicago, Illinois,

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00:04:18.680 --> 00:04:29.540

Lizzi Albert: is contributing to Zoom logistics and Q&A. Support. Lizzi Albert, Deputy Operations Officer, Washington, DC, is contributing to Zoom logistics and Q&A support.

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00:04:31.910 --> 00:04:41.629

Lizzi Albert: Our team would like to center today's conversation by acknowledging that as residents of the United States, we are speaking to you from unceded land of many Indigenous peoples.

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00:04:41.770 --> 00:05:04.690

Lizzi Albert: I'd like to respectfully acknowledge and recognize the original and current caretakers of the land, water, and air where I live, the Piscataway and Anacostan peoples and all of their ancestors and descendants. I am 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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00:05:04.790 --> 00:05:12.739

Lizzi Albert: May this acknowledgment remind us of our shared commitment to beginning the process of working to dismantle the ongoing legacies of settler colonialism.

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00:05:16.060 --> 00:05:42.509

Lizzi Albert: On this slide we've listed all the organizations participating in awarded grants this cycle. You are a broadly experienced and talented group, and we know that there are many others who are helping you as partners and collaborators, too. You will often hear us refer to you as the program's 2024 grant recipients of Amplifying Unheard Voices (AUV) Cohort 2. Please feel free to introduce yourself and your role and your favorite TV show at the moment in the chat.

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00:05:42.740 --> 00:05:47.280

Lizzi Albert: Land acknowledgements for the area where you live or work are also most welcome.

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00:05:51.490 --> 00:06:11.470

Jane Larson: For those new to CLIR, we like to begin with a reminder of our mission: The Council on Library and Information Resources (or “CLIR”) is an independent, nonprofit organization that forges strategies to enhance research, teaching, and learning environments in collaboration with libraries, cultural institutions, and communities of higher learning.

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00:06:12.120 --> 00:06:19.739

Jane Larson: So what does that all mean? CLIR takes on a number of roles, including publishing research, convening meetings, and running programs.

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00:06:20.060 --> 00:06:37.739

Jane Larson: As an independent nonprofit, we are not part of the federal government. We are also not a private foundation. Our activities are not funded by an endowment, but rather by a combination of grants and sponsorships which give us the flexibility to operate our programs a bit differently than government funders or private foundations.

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00:06:38.140 --> 00:06:47.750

Jane Larson: The *Digitizing Hidden Collections* program is a regranting program, which means the funds for your projects were awarded as part of a grant to CLIR from the Andrew W. Mellon Foundation.

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00:06:47.890 --> 00:06:53.940

Jane Larson: CLIR reapplies periodically to Mellon for funds to operate the Hidden Collections program and award new grants,

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00:06:54.090 --> 00:06:58.529

Jane Larson: so we can completely empathize with all the work that you put in to get here.

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00:07:02.470 --> 00:07:18.929

Jane Larson: *Digitizing Hidden Collections* is just one of many programs administered by CLIR, and it is generously supported by the Andrew W. Mellon Foundation. In 2021, with the foundation's support, the program transitioned to a new thematic focus, *Amplifying Unheard Voices*.

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00:07:19.060 --> 00:07:30.249

Jane Larson: There are many metrics by which the program measures its progress; including, but absolutely not limited to the number of funded projects, awarded funds, and digitization outputs.

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00:07:30.370 --> 00:07:44.570

Jane Larson: As a historical overview, since the program began in 2015, CLIR has awarded \$32.9 million dollars to fund 133 projects and generate more than 10.2 million master digital files.

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00:07:44.840 --> 00:07:52.089

Jane Larson: 33 of those projects were funded through *Amplifying Unheard Voices*, and the program is currently in its third award cycle.

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00:07:55.690 --> 00:08:09.719

Jane Larson: We also want to shout out a community facilitated by another CLIR program, the Digital Library Federation. There are more than 10 amazing working groups coordinated by DLF, where practitioners meet regularly on a variety of digital library topics.

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00:08:09.880 --> 00:08:11.500

Jane Larson: A couple I want to point out

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00:08:11.830 --> 00:08:26.810

Jane Larson: in particular are the Metadata Support Group, which runs a Slack space for folks dealing with metadata and the Digital Accessibility Working Group, who are currently offering accessibility audits of websites and systems, which you can contribute to or take advantage of.

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00:08:27.130 --> 00:08:30.850

Jane Larson: DLF's working groups are open to everyone and meet regularly.

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00:08:32.980 --> 00:08:59.250

Alyson Pope: Finally, one last resource we would like to share is the [Digitizing Special Formats Wiki](#). This is a project of DLF, and contains a growing collection of resources about planning and executing digitization projects. If there are additional resources you think would be helpful to include on the guide, it's an ever-evolving document open for contributions. Just email us at hiddencollections@clir.org and we'll pass along your suggestions.

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00:09:01.550 --> 00:09:26.439

Alyson Pope: Now that you know who we are and the range of things we do as an organization, we will move into a discussion about some key administrative information for you as the latest recipients of *Digitizing Hidden Special Collections: Amplifying Unheard Voices* grants. We realize that this webinar will contain a lot of information that may not seem relevant now, but we'll be sharing the recording and transcript online so that you can reference it later or share it with others.

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00:09:26.440 --> 00:09:32.940

Alyson Pope: In this next section, we'll describe processes for grant modifications and reporting requirements.

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00:09:35.390 --> 00:10:00.979

Alyson Pope: Although we hope and expect that project activities listed in your approved proposals will be executed as described, we understand that unanticipated issues can arise. These may require that you deviate from the original plans you submitted. We realize that many of you will face operational hurdles that may cause delays. We hope you understand that our job is to support your teams as you encounter the unexpected during your project timelines.

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00:10:01.350 --> 00:10:19.209

Alyson Pope: Some project changes won't require pre-approval from CLIR, such as a change in project staff other than the principal investigators (PI) or small shifts in budget expenditures. Generally, such small changes can be addressed in a project's interim narrative and financial reports.

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00:10:19.290 --> 00:10:37.510

Alyson Pope: However, changes that affect the underlying terms of the grant must receive prior approval by CLIR. Examples include extensions of the project end date, changes to PIs, any changes to the collections being digitized through the project, and significant budget reallocations.

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00:10:37.780 --> 00:10:46.830

Alyson Pope: Modification requests are common for this program, and you should not hesitate to ask us for what you need to do to successfully complete your project.

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00:10:47.100 --> 00:10:59.140

Alyson Pope: Program staff can always be reached by email at hidencollections@clir.org. To move forward with a modification CLIR has an online form through which recipients can initiate modification requests.

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00:11:02.870 --> 00:11:11.329

Sharon Burney: Access to the [Grant Modification and Extension Request Form](#) is available through a link at the top of the [Manage an Award](#) page.

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00:11:11.450 --> 00:11:34.430

Sharon Burney: The form will always be available on this page and is designed to allow for the submission of multiple types of modification requests. The form includes sections on descriptive information, questions about extension requests, other types of modification requests, and a space to provide a brief explanation and justification of the modification.

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00:11:34.620 --> 00:11:50.100

Sharon Burney: Once the form has been submitted and received, you should hear from CLIR staff within two weeks. For that reason, if you find you need a modification, it is important to request at least 1-3 months before the final end date for your grant.

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00:11:50.540 --> 00:12:09.880

Sharon Burney: Some modifications, such as changes in Principal Investigators, should be requested immediately rather than waiting until the end of your project. Project end dates were included in the grant agreement. If you ever need a reminder of your project end date or award number, just ask program staff.

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00:12:10.050 --> 00:12:25.669

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

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00:12:25.770 --> 00:12:47.470

Sharon Burney: The guidelines for the modification request vary slightly between CLIR's different grant programs, so be sure to check the [Manage an Award](#) page for the most up-to-date information. If you have any questions about the process, CLIR staff is always available via email through our program email address, hidencollections@clir.org.

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00:12:48.760 --> 00:13:01.989

Sharon Burney: In order for you to prepare the necessary information for the modification request, we also provide a [Grant Modification Form Template](#), also available on the [Manage an Award](#) page and displayed on this slide.

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00:13:02.220 --> 00:13:21.829

Sharon Burney: The online form does involve some question logic, so you may not be required to answer all of the questions on the template, depending on how you answer others. A link is provided at the top of the document that allows you to create a personal copy of the template that you can share with anyone you're collaborating with.

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00:13:21.950 --> 00:13:31.540

Sharon Burney: All modification requests should be submitted through the online form, so you will need to copy and paste your prepared responses into that space.

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00:13:32.860 --> 00:13:56.220

Sharon Burney: No cost extension requests are exactly what they sound like: a request to push back the project end date and final report, without requesting additional funding. These may be requested in the case of unforeseen project delays which may include prolonged personnel searches, staff turnover, delays when working with a vendor partner,

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00:13:56.320 --> 00:14:24.049

Sharon Burney: Illnesses, or delays caused by institutional infrastructure issues. No cost extensions should be requested between 1-3 months prior to a project's end date. The reason we ask you to wait until these final months is that only one no cost extension can be granted per project, and we have found that requests made closer to the end date provide more accurate estimates of the amount of extra time that's actually needed.

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00:14:24.330 --> 00:14:37.959

Sharon Burney: We encourage you to take time now to set a calendar reminder for your team for your end date, and for 3 months before the end of your project, so you'll know when it's time to request an extension if you need one.

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00:14:38.070 --> 00:14:44.229

Sharon Burney: You may also want to set similar reminders for your annual interim and final reporting deadlines.

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00:14:44.390 --> 00:14:57.399

Sharon Burney: Keep in mind that your end date and your final reporting deadlines are 2 different dates. The end date is the point at which all your work on your project must be completed and all grant funds expended.

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00:14:57.550 --> 00:15:03.890

Sharon Burney: You cannot spend grant funds after your end date without first being granted an extension.

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00:15:04.040 --> 00:15:12.539

Sharon Burney: Your final reporting deadline is set later so that you have time to reflect upon your work and complete final accounting for your grant.

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00:15:12.740 --> 00:15:24.759

Sharon Burney: It's important to note that extensions cannot be granted for projects whose end dates have already passed. We really cannot emphasize enough the importance of paying attention to your end date

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00:15:24.880 --> 00:15:30.290

Sharon Burney: The project end date typically comes 3 months before your final report deadline.

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00:15:30.450 --> 00:15:33.589

Sharon Burney: Some people have been confused about this in the past.

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00:15:33.650 --> 00:16:03.089

Sharon Burney: We recommend standard project extension lengths of 12 months. On the request form, you are also able to enter a custom date, but we may choose to make an alternative recommendation. In most cases the modification form is often sufficient for staff to evaluate extension requests, but we may follow up to ask for additional information or documentation, such as a revised project plan, collections list, or project budget.

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00:16:06.510 --> 00:16:16.730

Jane Larson: If one of the Principal Investigators, also known as PIs, changes during the grant. The grantee must inform CLIR immediately by completing the [Grant Modification Form](#).

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00:16:16.880 --> 00:16:28.100

Jane Larson: All of CLIR's Grant management tasks, including setting up your grant management system to accept your reports, require current contact details for all principal investigators,

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00:16:28.260 --> 00:16:35.760

Jane Larson: so it's important we know when a principal investigator departs your organization, and that the responsibilities have been transferred to someone else.

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00:16:36.220 --> 00:16:57.550

Jane Larson: In order to complete a change of PI, you will also be required to supply via email a letter on institutional letterhead from the head of your organization or department. The letter doesn't need to be long, but should include the name and title of the new PI, as well as the date the change will become effective. A CV for the new PI will also be required for our files.

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00:17:00.990 --> 00:17:07.890

Jane Larson: On occasion, grantees find it necessary to spend grant funds in a manner other than originally proposed in their application.

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00:17:08.130 --> 00:17:16.770

Jane Larson: Reallocations of Grant funds are allowable, but these changes must be carefully reviewed and approved by CLIR staff prior to the reallocated funds being spent.

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00:17:17.010 --> 00:17:20.829

Jane Larson: To initiate this process, complete the [Grant Modification Form](#).

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00:17:21.119 --> 00:17:32.420

Jane Larson: Any proposed use of reallocated funds should be aligned with the original goals and scope of the project, and within the current guidelines and limits for allowable and disallowed costs for the Hidden Collections program.

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00:17:32.680 --> 00:17:45.779

Jane Larson: As a rule of thumb, for smaller Hidden Collections projects, defined as under \$200,000, CLIR generally doesn't require notification for reallocations that amount to less than 5% of a project's total budget.

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00:17:46.020 --> 00:17:55.089

Jane Larson: Larger projects, those over \$200,000, and all projects really should contact CLIR about any reallocations that are over \$10,000.

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00:17:55.350 --> 00:18:02.120

Jane Larson: When in doubt, just ask us or go ahead and complete the [Grant Modification Form](#).

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00:18:02.570 --> 00:18:07.999

Jane Larson: When completing the [Grant Modification Form](#), you'll be asked to provide the amount of funds remaining in the grant,

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00:18:08.250 --> 00:18:15.329

Jane Larson: how much of any of the original funds will remain at the close of the project, and a brief description of how the funds will be spent.

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00:18:15.720 --> 00:18:23.150

Jane Larson: CLIR program staff may request additional information, such as a revised project budget, to complete review of the request.

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00:18:27.720 --> 00:18:37.309

Jane Larson: All of this information can be found on the [Manage an Award](#) page. Should we update any of our grant modification procedures, we'll post the most up-to-date information there for your reference.

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00:18:37.480 --> 00:18:43.119

Jane Larson: Do be sure to share this webpage with all staff who may be involved in the management of your project.

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00:18:43.650 --> 00:18:57.770

Jane Larson: CLIR program staff are available to answer any of your questions related to modifications, so don't hesitate to reach out via our program email account. As we mentioned, modifications are not uncommon with this program, and we always seek to find ways to make your project successful.

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00:18:57.910 --> 00:19:05.700

Jane Larson: For more complicated grant modification requests, you may find it helpful to set up a conversation with a program officer prior to submitting your request.

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00:19:05.860 --> 00:19:08.690

Jane Larson: We'll be happy to talk through any possible changes.

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00:19:10.640 --> 00:19:14.779

Alyson Pope: At this point we'll shift into a discussion of reporting requirements.

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00:19:14.920 --> 00:19:35.490

Alyson Pope: Recipients of the Hidden Collections grant are required to submit reports, both narrative and financial, through our online system on or before the dates outlined in each of your grant agreements. If you don't have access to a copy of your letter, and need to know your designated report dates, or any other information related to your report, do let us know.

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00:19:35.490 --> 00:19:50.570

Alyson Pope: Your first report is due a year and 2 months after the start date of your project, and then each interim report after that is due exactly one year after the previous one. Your final report is then due 3 months after your project end date.

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00:19:50.570 --> 00:20:13.969

Alyson Pope: This means we should be receiving one report from you each year. If your project is only 12 months you will submit your final report 3 months after the end date of your project. An email reminder from CLIR will be sent to the PIs and additional contacts that we have on file around a month prior to the due date for each of your annual interim reports, and around 3 months prior to your project's end date.

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00:20:14.360 --> 00:20:38.109

Alyson Pope: Your annual reports to CLIR are a deeply important part of the agreement between our grantees, CLIR, and our own funder, the Mellon Foundation. Our team compiles its own reports on the Hidden Collections program each year, which we submit to Mellon. This report also includes all of the reports we received from our recipients in the previous 12 months, and communicates to Mellon the importance of the work that all of you are doing.

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00:20:38.850 --> 00:20:41.070

Alyson Pope: Just a few more words in reporting.

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00:20:41.370 --> 00:20:56.719

Alyson Pope: Reports are not only a way to help us keep up with your progress, but also a means for us to provide the best support to you as your project evolves. For instance, we may be able to connect you with others in the Hidden Collections community who have faced similar challenges as the ones you report facing.

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00:20:56.960 --> 00:21:20.219

Alyson Pope: Your reports can also help us to help you identify and mitigate potential issues in advance. For example, we may notice from your reports that you may need a no-cost extension and can remind you of that process. However, if an issue is time sensitive, or if you have a specific question, we encourage you to reach out about it directly to program staff rather than waiting until your next report.

103

00:21:20.920 --> 00:21:35.410

Alyson Pope: If you find that your report is likely to be late, due to circumstances beyond your control, which we know can happen, let us know as soon as possible. We are glad to work with our grantees in these situations, but it's important that we hear about them before your report is overdue.

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00:21:37.670 --> 00:22:01.429

Alyson Pope: To submit your reports, you will use the same system- SurveyMonkey Apply or [SMAppl](#)y that your team used to apply for your grant. We've linked to that on this slide as well as on the [Manage an Award](#) page. All communication and reminders for reporting will be sent to the PIs on file, so if there are any others involved in the project work who need such notifications, you will need to send us names and contact information for those people.

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00:22:01.840 --> 00:22:07.010

Alyson Pope: Please share this additional contact information as soon as possible, so we can keep our records up to date.

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00:22:07.670 --> 00:22:36.789

Alyson Pope: It is a good idea to log into [SMAppl](#)y at your earliest convenience, using the same email address and password you used to submit your application. If you use these same credentials, you should automatically see the reporting form for your project when logged in. If you forget these credentials or lose access to them for any reason. For example, if the person who created your application leaves your organization, you will need to contact us through the program email so that we can link your report to the correct credentials.

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00:22:37.430 --> 00:22:51.389

Alyson Pope: One way to future-proof your team's access to the report would be to log in using the application credentials, hit start to pretend like you're starting your report, then add other team members' email addresses as "collaborators" on your report.

108

00:22:51.790 --> 00:22:59.660

Alyson Pope: Collaborators will then receive an automatic invitation to verify their email addresses and create their own passwords to access the system.

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00:23:00.560 --> 00:23:28.659

Alyson Pope: Once they accept the invitation and create their credentials, they will also be able to login to view the report and enter data. One of the system safety measures ensures that only the proposal owner is able to submit a report, so if one of the collaborators eventually needs to submit, that person will need to contact us to make sure this can happen. Collaborators do not have to be limited to PIs. If your financial reporting is handled by a research office or grant manager, you may want to add them as well.

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00:23:30.860 --> 00:23:44.750

Alyson Pope: Teams of collaborators working on project reports can also reference our [Collaborative Google Doc Template for Reports](#) available on the [Manage an Award](#) page. This document includes the questions you'll be expected to answer on the reporting form.

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00:23:44.750 --> 00:24:03.290

Alyson Pope: Note that there are three different templates, one for 2015 to 2017 recipients, another for 2018 to 2020 recipients, and another for *Amplifying Unheard Voices* recipients. So be sure to use the correct template. Using the template, you have the option to begin working on your draft report as early as you would like.

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00:24:03.300 --> 00:24:11.020

Alyson Pope: For now we will just briefly cover the components of the report so that you are prepared with the relevant information you need when the time comes.

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00:24:12.480 --> 00:24:24.000

Sharon Burney: The report form is organized into 4 - 5 sections: general information, narrative assessment, quantitative assessment, financial assessment,

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00:24:24.340 --> 00:24:28.080

Sharon Burney: final project assessment (final reports only).

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00:24:28.240 --> 00:24:56.689

Sharon Burney: When writing a report, the first place to start is the final proposal you submitted to CLIR during the application process. All sections of the report should demonstrate the project's consistency with these original ideas. Of course, some variations are to be expected, as the project adapts to real life scenarios and new opportunities. Small differences between the planned approach and actual project work can be explained in the narrative report.

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00:24:56.720 --> 00:25:22.609

Sharon Burney: However, as mentioned earlier, grantees will need to request grant modifications for more substantive changes, particularly those regarding the budget, timeline, or deliverables. Overall, it is important to demonstrate to CLIR, and the Mellon Foundation that the scope and goals of the project continue to reflect the proposal selected for funding by CLIR's independent review panel.

117

00:25:23.990 --> 00:25:44.119

Sharon Burney: A beginning note that while the grants team has taken steps to simplify the reporting for this incoming cohort, if you are working through the report and need to take a break, just scroll to the bottom of whichever page you are on within the report form and you'll find the option to save and continue editing.

118

00:25:45.470 --> 00:26:01.860

Sharon Burney: With that overview in mind, we're now going to do a quick walkthrough of the information you will be asked to include in your reports to CLIR. The first section of our report covers general information about the project: the grant reference number, which was provided in your Grant Agreement,

119

00:26:02.040 --> 00:26:10.710

Sharon Burney: project title, institution/organization, PIs, and contact information of person submitting the report.

120

00:26:10.900 --> 00:26:29.929

Sharon Burney: The first 3 elements (grant reference number, project title, and institution/organization) will be pre-populated from your final application, and cannot be edited. If you encounter any errors in that information, contact us at hidencollections@clir.org to have it corrected.

121

00:26:30.120 --> 00:26:37.729

Sharon Burney: There will be additional sections of the report that are pre-populated from your final application, which we'll touch on shortly.

122

00:26:37.890 --> 00:26:45.230

Sharon Burney: These sections are also indicated in the aforementioned Google Docs [reporting template](#) with a black asterisk.

123

00:26:45.660 --> 00:26:54.029

Sharon Burney: So if you're working collaboratively in that document ahead of time, please remember that these will be areas that you do not need to fill out.

124

00:26:54.230 --> 00:27:12.179

Sharon Burney: Enter names and email addresses for current project PIs. Changing PIs will require a formal grant modification submission. If you have made any modifications or personnel changes, you'll want to mention this in the progress and impact questions under the narrative assessment.

125

00:27:15.780 --> 00:27:38.409

Jane Larson: The narrative assessment provides space for the project team to: summarize your progress toward the project goals and objectives during the reporting period, emphasizing how this progress has exemplified the [core values](#) of the *Amplifying Unheard Voices* program: public knowledge, broad representation, authentic partnerships, sustainable infrastructures, and community-centered access.

126

00:27:38.520 --> 00:27:47.860

Jane Larson: You will also want to discuss any challenges or setbacks you have experienced in this reporting period, and any strategies that have proven successful in addressing them.

127

00:27:47.980 --> 00:27:53.239

Jane Larson: And finally, you want to describe your future plans for the remainder of the project.

128

00:27:55.940 --> 00:28:20.759

Jane Larson: All questions in the assessment section have space for text-based responses and are word limited. The word limit is indicated above the text box. You may find it easier to draft

your responses elsewhere, such as in the Google template and paste them here rather than drafting and adding them in the report space. The system will generate an error when you try to save and move forward if you enter more words than are allowed in the form.

129

00:28:22.680 --> 00:28:27.249

Jane Larson: The next section of the report form will ask for information about 3 things:

130

00:28:27.610 --> 00:28:35.209

Jane Larson: the quantity and types of materials you proposed to digitize compared to what has actually been digitized during the reporting period,

131

00:28:35.420 --> 00:28:47.959

Jane Larson: the preservation file formats and quantities proposed compared to what has actually been created during the reporting period, and information about the creation and accessibility of metadata records for the files you have created.

132

00:28:50.130 --> 00:28:59.690

Jane Larson: To complete this part of the report, questions referring to the original quantities proposed will be pre-populated with the information you entered in your final application.

133

00:28:59.950 --> 00:29:14.010

Jane Larson: These questions will be locked for editing and hidden from view until you choose a number of categories of source materials from the quantity drop down. The instructions will indicate to you how many categories were originally proposed, so you don't have to remember.

134

00:29:14.160 --> 00:29:20.679

Jane Larson: You'll be able to consult the figures you proposed, then share what you actually digitize during the reporting period.

135

00:29:21.490 --> 00:29:38.359

Jane Larson: Begin by selecting the number of categories of source materials you actually digitized. Up to 10 categories are allowed, but unless you've added materials to your project plan, you will probably need the same number of categories you proposed, or fewer, if you haven't started working on some types of materials.

136

00:29:38.540 --> 00:29:45.320

Jane Larson: Categories should match the order of the categories defined in your final application and those auto-generated within the report.

137

00:29:45.530 --> 00:29:51.339

Jane Larson: Once the number of categories is entered, the same number of populated category fields will appear below.

138

00:29:51.550 --> 00:30:01.839

Jane Larson: The questions regarding preservation file formats will be structured the same way with the information regarding what you originally proposed pre-populated from your final application.

139

00:30:02.080 --> 00:30:18.770

Jane Larson: Compiling these numbers will be much easier if you plan now to track them as your project proceeds, so, setting up a shared document to do that will be something you'll thank yourself for later. CLIR does have an Excel template you can use for this if you wish. It's located on the [Manage an Award](#) page.

140

00:30:20.950 --> 00:30:47.969

Alyson Pope: Next up is the financial assessment, which comes in 2 parts. The first is the financial narrative. In the narrative report, this is a place for you to comment on actual grant expenditures during the reporting period, as they relate to your proposed budget. Every budget category should be at least mentioned here, and if there are any variances of 5% or more between projected and actual spending, make sure to include a detailed explanation of the reasons for that over or under expenditure.

141

00:30:48.370 --> 00:30:53.029

Alyson Pope: You should also discuss any approved budget modifications since your last report.

142

00:30:54.050 --> 00:31:09.860

Alyson Pope: The second part is the financial report, which is an upload using the same budget detail spreadsheet that you submitted with your proposal. The only difference is that you will have both the budgeted and actual fields filled in this time for the current reporting period, instead of just the budgeted column.

143

00:31:12.040 --> 00:31:34.990

Alyson Pope: A budget template specific to your project was sent to project PIs and financial contacts via email, and will also be attached to future report reminder emails, and this is the file you should edit and submit. If you have any budget reallocations or no cost extensions approved in the course of your project, we will provide you with an updated financial report form to use that reflects the approved changes.

144

00:31:36.920 --> 00:31:46.870

Alyson Pope: This screenshot of the budget detail template is just a reminder of what this looks like. If you ever lose track of this file, email us and our team can provide you with a replacement.

145

00:31:47.270 --> 00:31:50.690

Alyson Pope: Note the field for investment income on this sheet.

146

00:31:51.080 --> 00:31:58.790

Alyson Pope: All CLIR grantees are expected to keep grant funds in a secure interest-bearing account, and to report on interest income here.

147

00:31:59.110 --> 00:32:09.379

Alyson Pope: Interest earned on grant funds may be used to support direct costs for your project, so you should be prepared to indicate how much interest has been earned each period and how that interest has been spent.

148

00:32:10.260 --> 00:32:31.409

Alyson Pope: The template is cumulative, and will be built upon over the course of the project. Grantees are expected to update this spreadsheet with the actual spending for the period in question, which may vary from the amount budgeted. Variances of more than 5% in any category must be explained in the financial narrative, and may require a modification request to be submitted.

149

00:32:33.920 --> 00:32:43.080

Alyson Pope: When it comes time to submit your final report as opposed to your interim reports, you will include a final project assessment which has 4 required components:

150

00:32:43.220 --> 00:32:50.770

Alyson Pope: The final project narrative, which will be an overall assessment of your project, including the most significant outcomes, challenges, and lessons learned.

151

00:32:51.330 --> 00:33:05.479

Alyson Pope: The final financial narrative and report, which will show all actual expenses, interest earned, and indicate and explain any remaining award funds. These will have to be returned to CLIR as directed by [CLIR's Return of Funds Policy](#).

152

00:33:05.860 --> 00:33:24.610

Alyson Pope: URLs, or other instructions to access the digitized collections and metadata in any catalogs, repositories, or services you've used, and finally, a project manifest which is a spreadsheet containing a sampling of URLs linking to actual digital files created through your project.

153

00:33:26.200 --> 00:33:41.280

Sharon Burney: The project manifest is a spreadsheet which includes the names and locations of a representative sampling of the digital files. Normally, the access copies as well as notations about any checksums and restrictions for those files.

154

00:33:41.480 --> 00:33:57.289

Sharon Burney: We're requiring this because we are using an automated tool, a kind of web crawler, that allows us to conduct periodic checks that the online files created through CLIR's digitization regranting programs remain, in fact, online.

155

00:33:57.630 --> 00:34:05.289

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

156

00:34:05.460 --> 00:34:14.109

Sharon Burney: Taking a look at this template now, and building completion of this document into your workflow will help you save time later.

157

00:34:14.230 --> 00:34:28.580

Sharon Burney: For those of you who work with vendors, often your digitization vendor will return a spreadsheet to you that will be very similar to what you need to submit here, and you should be able to adapt the vendor spreadsheet for this template.

158

00:34:28.630 --> 00:34:54.729

Sharon Burney: If you work out your file naming conventions at the start of your project, and ensure your vendor names your files exactly according to your needs, most of your work for this requirement will be done. If you leave it until the end, it might take some scrambling to pull it together, so we do strongly recommend coming up with a strategy for compiling this data during the course of the project work.

159

00:34:55.020 --> 00:35:06.690

Sharon Burney: Of all the pieces of the final report, this document is what allows us to verify that you have created all the deliverables agreed upon when you accepted the grant.

160

00:35:06.900 --> 00:35:15.939

Sharon Burney: This evidence is critical to our own reporting to the Mellon Foundation, so we really appreciate your help in making this possible for us.

161

00:35:17.140 --> 00:35:36.430

Sharon Burney: Once all tasks are completed in SMAApply for either the interim or final report, there is a final step necessary in order to submit your report to CLIR,. Click the green "submit" button once you have reviewed all answers and documents, and are ready to submit.

162

00:35:36.850 --> 00:35:44.860

Sharon Burney: Once you hit submit the first time, you will be prompted to hit submit again, or given one last chance to review.

163

00:35:45.010 --> 00:36:05.089

Sharon Burney: A quick warning: if you choose "Review" then you are presented with all of the content associated with the application: initial application, final application, and all related forms and reports. You'll need to scroll down a bit to see the newly completed task, if you'd like to review the parts of the report you've just completed.

164

00:36:05.320 --> 00:36:17.149

Sharon Burney: As we mentioned, there can be multiple collaborators within one project reporting space, however, only the application owner is given the option to submit.

165

00:36:17.330 --> 00:36:27.040

Sharon Burney: If you have completed the report, and need to submit it to CLIR, but do not see the option to submit, that indicates that you are not the application owner.

166

00:36:27.260 --> 00:36:36.449

Sharon Burney: Contact hiddeencollections@clir.org to complete submission for you in instances where the application owner is not available to do so,

167

00:36:36.760 --> 00:36:40.760

Sharon Burney: or if the project team is unsure who owns the application.

168

00:36:42.800 --> 00:36:56.200

Sharon Burney: We all know that was a lot of information, but we've now reached the final section of our presentation to share some brief information about modes of communication before we turn over to questions and discussion.

169

00:36:57.530 --> 00:37:07.949

Sharon Burney: CLIR's website contains quite a lot of information for you as you move into your grant recipient role, just as you may have used the resources of the Apply for Award page

170

00:37:08.080 --> 00:37:17.820

Sharon Burney: during the grant writing process, we have a similar page, the [Manage an Award](#) page that we've talked about quite a lot today as you work through your project.

171

00:37:17.970 --> 00:37:33.650

Sharon Burney: Here, you will find information on the grant modification and reporting process that we discussed earlier. Additionally, contact information for the CLIR's Grants Team templates and information on citing CLIR are all contained on this page.

172

00:37:33.820 --> 00:37:42.479

Sharon Burney: On the [Funded Projects](#) page, you can find descriptions of each of the projects that have been funded by the Hidden Collections program to date.

173

00:37:42.770 --> 00:37:51.570

Sharon Burney: If you have not already done so, please proofread the summary of your project that's currently posted there, and send us any proposed changes.

174

00:37:51.850 --> 00:38:10.489

Sharon Burney: On the [CLIR's Policies](#) page, you will find the [Acknowledgement Guidelines for Recipients of Grants or Fellowships](#). If discussing CLIR in press releases, you will want to review these guidelines. The best way to contact us is through the hidencollections@clir.org email inbox.

175

00:38:10.800 --> 00:38:33.160

Sharon Burney: We also love to hear about your progress. So if you're sharing updates on X or Instagram, please feel free to tag us or use #DigHC, so we can repost. If there's something you would like us to share directly with our followers, just email the team we love to be able to spread the word about the amazing work you're doing.

176

00:38:33.280 --> 00:38:43.190

Sharon Burney: We also try to share your news in [CLIR's Grants and Program Newsletter](#). So check out the website for details on how to subscribe to that, if you haven't already done so.

177

00:39:02.570 --> 00:39:09.269

Alyson Pope: Thank you all for joining us at our webinar today. We know that we've covered a lot of material.

178

00:39:09.820 --> 00:39:14.920

Alyson Pope: We'll now shift to answering any questions you've submitted during our presentation.

179

00:39:21.490 --> 00:39:26.679

Sharon Burney: It looks like the first one we have is, can you still request an extension if you have a 3 year project?

180

00:39:26.860 --> 00:39:42.709

Sharon Burney: Yes, all projects can request a no cost extension. As a reminder though, you should request a no cost extension no earlier than one to 3 months prior to your project end date, so that will vary based on the length of your projects.

181

00:39:49.587 --> 00:39:54.659

Alyson Pope: Do we need to let CLIR know if the proposed schedule for a project activity changes

182

00:39:54.850 --> 00:40:24.839

Alyson Pope: (on the work plan)? The activity will still take place, but on a shifted timeline. No, we don't need to know about things like swaps in workflow. If they're still taking place within the proposed timeline, it may be something that you want to address in an interim or final report, just to explain why, so that it can be passed along to other recipients, as perhaps things can go better in this order than that. But you don't need to alert us of those changes.

183

00:40:25.440 --> 00:40:49.249

Sharon Burney: And also to add on to that, the grant modification project process is primarily for unexpected changes in your project that are due to maybe vendor delays, changing infrastructure, and variances in reallocations that are over like 5% of the total budget.

184

00:40:49.740 --> 00:40:53.720

Sharon Burney: And speaking of budget Alyson, do you want to handle the next question?

185

00:40:55.250 --> 00:41:16.610

Alyson Pope: Could you please clarify or provide more information about interest-bearing accounts? Hidden Collections, because of the size of the awards, has a requirement that you put them into interest-bearing accounts unless you're expending them upfront to vendors in order for you to capitalize on that chunk of money.

186

00:41:16.610 --> 00:41:35.470

Alyson Pope: Interest earned can be used for any project activity. So if you find that you have an overage in a vendor for outsourced digitization, or something of the like, you can use those funds to cover. If you get to the end of a project and you have

187

00:41:35.470 --> 00:41:55.640

Alyson Pope: interest funds, and you've met all your deliverables, you may want to look at doing some more outreach activities or the like to expend those funds. They are under the umbrella of the [Return of Funds Policy](#), which requires that money over a hundred dollars left at the end of the project be returned to CLIR.

188

00:41:59.050 --> 00:42:24.310

Alyson Pope: Also quick note on budgets, very minor, but to our Canadian recipients, I realized yesterday our budget details expect you to put the dates in in the American format, and if y'all do not do that, there will be some very minor bits of the budget detail that will not work properly for you. So you may want to use the American format. Sorry about that. We can't set Excel to accept them both.

189

00:42:27.500 --> 00:42:34.809

Sharon Burney: Speaking of budgets, please use the budgets that we send you whenever you do your reports.

190

00:42:35.603 --> 00:42:39.710

Sharon Burney: If you don't, they'll go havoc, and they won't make sense.

191

00:42:43.820 --> 00:42:46.640

Alyson Pope: Sharon, do you want to take the next one? Do you want me to take that one?

192

00:42:52.970 --> 00:43:17.810

Sharon Burney: Our grant is in Canada, and we have received more funds than estimated in our budget after we exchange from US dollars to Canadian dollars. How should report the use of these funds? Will a budget reallocation request be needed? No, we understand that this happens. That's why we asked in the application process that you use US dollars to Canadian dollars,

193

00:43:17.950 --> 00:43:20.590

Sharon Burney: US Dollars in your budget.

194

00:43:21.174 --> 00:43:31.040

Sharon Burney: We understand that this is gonna happen because of the currency exchange. So always start with the amount that we awarded you in US dollars.

195

00:43:33.990 --> 00:43:56.099

Alyson Pope: Yeah, and that's something you can just address in your financial narrative and financial reporting. You would have the same [Return of Funds Policy](#) at the end, where, if you have an overage more than a hundred dollars, you would return that to CLIR, but you would be able to use some of those funds if you end up with overages in the project workflow.

196

00:43:56.960 --> 00:43:59.000

Sharon Burney: And just put that in your reporting.

197

00:44:06.000 --> 00:44:20.490

Sharon Burney: I can get this one. We have a transition for the dean of our college. The dean was for the lead organization, not a PI. Do we need to report this change and should we share the interim dean info or just the final info once a dean is selected?

198

00:44:21.208 --> 00:44:28.310

Sharon Burney: If they're not a PI on the project, I don't think we need to know. If they're the additional contact,

199

00:44:28.620 --> 00:44:44.988

Sharon Burney: then yes, you could put that information, but usually an additional contact on our applications are financial officers, connected. So no, we don't need to know about the new dean.

200

00:44:45.620 --> 00:44:47.029

Sharon Burney: If you

201

00:44:47.380 --> 00:44:56.899

Sharon Burney: have a change in PI, then that new Dean would sign the PI change form that would be required in the modification request.

202

00:45:21.970 --> 00:45:24.759

Alyson Pope: I'm gonna give a few more minutes. I think we

203

00:45:25.600 --> 00:45:28.340

Alyson Pope: have answered what we've gotten thus far.

204

00:45:38.620 --> 00:45:40.480

Sharon Burney: Yeah. No more questions?

205

00:45:44.090 --> 00:45:47.389

Lizzi Albert (she/hers): There's one question in the chat.

206

00:45:47.800 --> 00:45:53.249

Alyson Pope: Yeah, I can clarify. The interest component is a part of the [Return of Funds Policy](#).

207

00:45:53.410 --> 00:46:09.549

Alyson Pope: And if you look at the budget detail, there is a line that goes across in the top section where you would enter income interest. So you'll kind of see how it tabulates all of that on the right hand side to tell you what's left.

208

00:46:13.520 --> 00:46:16.290

Sharon Burney: Besides, okay, we have another question?

209

00:46:17.420 --> 00:46:19.200

Sharon Burney: Another couple, right?

210

00:46:19.990 --> 00:46:48.879

Sharon Burney: Okay? So let's see, next question, Our secondary PI has left the organization and will not be replaced. Is it necessary to have a second PI? (primary PI and application contact have stayed the same). No, it's not necessary to have a secondary PI. You can have up to 3 PIs, but you can have just one. However, you will need to send, put in a modification request

211

00:46:49.417 --> 00:47:05.719

Sharon Burney: that lets us know that that PI has left the organization and it would require you to send a letter on institutional letterhead that states that this person has left, and the date that they left the project.

212

00:47:07.910 --> 00:47:16.969

Sharon Burney: If you were adding a new PI, then you would also put that information in, and a resume of the new PI that would replace them.

213

00:47:20.412 --> 00:47:28.147

Alyson Pope: Can funds be invested to mature annually (and therefore there would not be quarterly earnings to be reported for the first year)? Yeah, we don't.

214

00:47:29.350 --> 00:47:40.820

Alyson Pope: It's a pass along for Mellon, the requirement that the funds are placed in interest bearing accounts. We don't really stipulate beyond that how that is achieved.

215

00:47:41.720 --> 00:47:55.390

Alyson Pope: I'll take the next one, too, just because that was an easy one. B Besides a change of PI can you please give the short list of reasons to get pre approval of modifications again? Thank you. So our main ones are no cost extensions,

216

00:47:57.843 --> 00:48:07.773

Alyson Pope: budget reallocations, and changes of PI. You, we will also sometimes

217

00:48:08.470 --> 00:48:33.830

Alyson Pope: get modifications for the collections being digitized. Like sometimes for those of you using a vendor, it may end up costing less than initially estimated, and you may want to use those remaining funds to digitize more than initially proposed. We see that occasionally, and you would have to contact us for that, and we would approve

218

00:48:34.060 --> 00:48:48.249

Alyson Pope: a new collections scope for the project. And those materials typically need to be pretty heavily correlated with what you're already digitizing. I would say, those are our main

219

00:48:49.625 --> 00:48:53.349

Alyson Pope: modifications. Am I missing anything?

220

00:48:53.640 --> 00:49:10.039

Sharon Burney: No, I don't think so. No cost extension, budget reallocations, changes to PI, and a change in deliverables is what she was just discussing, and if you sometimes what happens is people find that they have duplicates in their collections. Once they got to the vendor, or sometimes they find out that

221

00:49:10.343 --> 00:49:27.340

Sharon Burney: there was more damage, and they didn't do more extensive reformatting. These are all the different things that can happen once you start the digitization process. If you do a change in deliverable, say you add more, or you save money, and you want to add more from the collection, then we would have a few

222

00:49:27.580 --> 00:49:32.950

Sharon Burney: statements that you would have to provide after approval of the modification.

223

00:49:33.120 --> 00:49:38.529

Sharon Burney: But you must always do this before, and not after contacting us.

224

00:49:38.880 --> 00:49:45.369

Sharon Burney: If one of the PIs changed institutions, and still has a connection to the original institution,

225

00:49:45.620 --> 00:49:49.050

Sharon Burney: should a form be completed?

226

00:49:50.500 --> 00:49:57.740

Sharon Burney: No, it's the, your PI isn't changing in that instance. However, if you want to update us to a new

227

00:49:58.080 --> 00:50:26.769

Sharon Burney: email or address that we need to have on file for them, you would just send us an information, and we would update that information, or you could go. And they could? Well, this depends on if they're in SMAApply as a collaborator, but if you would just contact us with their updated information, because sometimes we do have to contact the PIs for modification requests, and we would need updated email address and physical address of the PI.

228

00:50:34.640 --> 00:50:37.559

Alyson Pope: Oh, did we say change in vendor for.

229

00:50:38.090 --> 00:50:45.000

Sharon Burney: No, we did not. If you do change the vendor, yes, you do need to send a new vendor quote

230

00:50:45.640 --> 00:50:52.509

Sharon Burney: and send in a modification request, saying that you're changing the vendor and an updated vendor quote

231

00:50:52.680 --> 00:50:55.020

Sharon Burney: for your digitization. Sorry.

232

00:50:58.520 --> 00:51:20.720

Alyson Pope: Have you considered creating a space where, for recipients to support each other, have previous cohorts done this informally? We have considered this historically throughout the program, although how we have looked at it has kind of changed post pandemic. Currently, we do not have

233

00:51:20.890 --> 00:51:33.840

Alyson Pope: a specific plan to facilitate that. What we did do in 2022,

234

00:51:33.960 --> 00:51:37.610

Alyson Pope: I believe, was hold a symposium

235

00:51:37.730 --> 00:52:04.460

Alyson Pope: connected to the DLF Forum, where we had a number of the DHC18-2020 cohort come together, and we are in discussion about tentatively doing something like that for the first couple years of AUV, but that is not a firm plan at the moment. That will be reliant on

236

00:52:04.620 --> 00:52:15.760

Alyson Pope: some funding and other issues, but we are investigating the possibility of bringing people together physically to discuss.

237

00:52:15.940 --> 00:52:18.620

Alyson Pope: their projects and processes.

238

00:52:19.380 --> 00:52:23.589

Sharon Burney: That's in the very, very early possible stages.

239

00:52:24.980 --> 00:52:53.730

Sharon Burney: The focus of the last forum was: we've digitized it - what's next? So for those collections. Thank you so much for this. You said that if we are unsure about whether a change requires advance permission that we can complete the Grant Modification form and send it with our questions so you can provide us with guidance as long as we leave enough time to do that? Yeah, you know the Grant modification, as you have heard,

240

00:52:53.860 --> 00:52:59.340

Sharon Burney: the process could include so many different types of modification requests.

241

00:52:59.570 --> 00:53:07.660

Sharon Burney: First, I would say, if you have any questions about whether you should fill out the form or not, please email us at

242

00:53:07.760 --> 00:53:09.409

Sharon Burney: hidencollections@clir.org

243

00:53:09.730 --> 00:53:15.879

Sharon Burney: and tell us what the situation is, and then we'll give you the best guidance, moving forward.

244

00:53:16.433 --> 00:53:26.060

Sharon Burney: Other than that, if you know you need a modification request, then you can fill out the form, and if it's not necessary, we'll also let you know that there, too.

245

00:53:26.570 --> 00:53:37.834

Alyson Pope: Yeah, I would say, what we get the most that's not necessary is occasionally we get reallocation requests that are either below the threshold of needing an approval or

246

00:53:38.500 --> 00:53:39.930

Alyson Pope: something of the like.

247

00:53:40.480 --> 00:54:04.709

Sharon Burney: Yeah, especially with collaborative projects. We mainly only deal with the lead organization and how you move money between collaborating organizations are up to you. We only deal with the one budget that we give you at the onset, and that's the total of all the budget that you submitted. That's

248

00:54:04.900 --> 00:54:09.489

Sharon Burney: all we are interested in, not what you do internally.

249

00:54:14.650 --> 00:54:38.759

Alyson Pope: If we're changing the proportion of materials from the collections we have already reported, for example, doing less from one collection and more from another where we need to

submit a change form? This is an instance where I would email us and give us some more details. We may need you to do a change of deliverables, but if it's a more minor adjustment, it might not be something that's necessary. We do

250

00:54:38.800 --> 00:54:52.699

Alyson Pope: know that some of these collections are not entirely processed and organized before these processes begin. So there is some flexibility that we expect in how you all handle them.

251

00:54:53.620 --> 00:55:02.489

Sharon Burney: Yeah. And primarily, if they stay within the same project, scope and deliverables, and it's a small amount, we wouldn't ask for that.

252

00:55:02.970 --> 00:55:06.739

Alyson Pope: Yeah, if you thought you had 50 VHS and 25

253

00:55:06.910 --> 00:55:15.950

Alyson Pope: tapes, and you have 30 tapes and 40 VHS, that's not something that you would need to put in a modification for.

254

00:55:24.330 --> 00:55:26.050

Sharon Burney: These are great questions.

255

00:55:36.980 --> 00:55:39.070

Sharon Burney: Any more questions?

256

00:55:45.476 --> 00:55:48.209

Sharon Burney: Will there be any more

257

00:55:48.420 --> 00:56:01.820

Sharon Burney: any future webinars for recipients? No, we typically only do one recipient webinar. We will have the notes, this question and answer document,

258

00:56:01.980 --> 00:56:14.349

Sharon Burney: the transcript, and the recording of the webinar online, and the slides. That you can download, and we usually try to get it up within a week's time of the the end of this

259

00:56:14.710 --> 00:56:20.260

Sharon Burney: webinar. And then once you have that, you should have that, and then, as always.

260

00:56:20.470 --> 00:56:24.919

Sharon Burney: We are always in the inbox. We're always here for any questions that you have.

261

00:56:25.280 --> 00:56:35.669

Sharon Burney: Please review your guideline in your handbook. That is your friend, and it has almost every question that you need to answer in it.

262

00:56:37.260 --> 00:56:42.829

Sharon Burney: We can't stress that enough, and share it with all of your Pls

263

00:56:43.090 --> 00:56:49.250

Sharon Burney: and your applicant contact if they're the person that handles the budget for you.

264

00:56:49.960 --> 00:56:52.449

Sharon Burney: You want to add anything to that, Alyson?

265

00:56:53.378 --> 00:57:00.920

Alyson Pope: No, I'll pop up our closing slide. I know we have a survey.

266

00:57:05.040 --> 00:57:20.954

Jane Larson (she/her): Yeah, before we go, I want to make note of a super short [survey](#) that I included in the chat regarding this webinar, and this is part of our program assessment, so your honest feedback on the webinar will help us in our future support efforts.

267

00:57:21.300 --> 00:57:37.729

Jane Larson (she/her): Thank you all for joining us today. We'll be posting the recording and slides soon to our [Manage an Award](#) page. And in the meantime, if you think of any additional

questions, you can always reach us at hidecollections@clir.org. We look forward to working with you, and hope you all have a great day.