00:00:04.000 --> 00:00:10.000
Louisa Kwasigroch: Thank you for joining us today.

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Louisa Kwasigroch: During this session, we'll give a brief overview of eligibility for this grant program.

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Louisa Kwasigroch: Show you how to start an application. Provide an overview of what's asked and share a few final tips.

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Louisa Kwasigroch: We'll then turn to questions. I'm Louisa Kwasigroch, Managing Director at CLIR.

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Louisa Kwasigroch: We'd like to begin with a few brief introductions to this platform,

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Louisa Kwasigroch: to CLIR as an organization, and to our team.

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Louisa Kwasigroch: First, the platform. So many of us are old pros at Zoom by now. We want to provide a few reminders.

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Louisa Kwasigroch: A live transcript is being generated if you'd like to utilize it.

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Louisa Kwasigroch: To turn on this feature, click the CC Show Captions button at the bottom of your Zoom window.

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

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Louisa Kwasigroch: If a chat box isn't already displaying on your Zoom screen,

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Louisa Kwasigroch: you can hover your mouse towards the bottom of the screen and open it manually.

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Louisa Kwasigroch: In order to send a message to everyone, remember to change the default from "Host and Panelists" to "Everyone."

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Louisa Kwasigroch: We ask that you use the separate Q&A box to ask questions.

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Louisa Kwasigroch: This can be opened the same way as the chat box, and you could submit questions at any point during the webinar.

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Louisa Kwasigroch: We'll have dedicated time to answer them at the end of the session.

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Louisa Kwasigroch: 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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Louisa Kwasigroch: And finally, the session is being recorded. The recording, slides, transcript,

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Louisa Kwasigroch: and a Q&A document will be made available on the [Apply for an Award](#) page of our website

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Louisa Kwasigroch: within two weeks of this webinar.

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Lizzi Albert: For those new to CLIR, we like to begin with a reminder of our mission.

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Lizzi Albert: The Council on Library and Information Resources, or CLIR, is an independent nonprofit organization that forges tragedies to enhance research, teaching, and learning environments in collaboration with libraries, cultural institutions,

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Lizzi Albert: and communities of higher learning. So what does that all mean?

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Lizzi Albert: CLIR takes on a number of roles, including publishing research, convening meetings, and running programs.

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Lizzi Albert: As an independent nonprofit, we are not part of the federal government, we are also not a private foundation.

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Lizzi Albert: Our activities are not funded by an endowment, but rather by a combination of grants and sponsorship, which gives us the flexibility to operate our programs a bit differently than government funders or private foundations.

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Lizzi Albert: The *Recordings at Risk* program is a re-granting 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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Lizzi Albert: CLIR reapplies periodically to Mellon for funds to operate *Recordings at Risk*,

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Lizzi Albert: and award new grants.

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Lizzi Albert: CLIR's work is accomplished by a relatively small staff of about 20 geographically distributed individuals with the greatest concentration living in the DC area.

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Lizzi Albert: Today's webinar is led by The Grants Team, which administers CLIR's active re-granting programs, offering support for the entire grant cycle from application to final report.

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Lizzi Albert: The CLIR Grants Team includes Sharon Burney, Program Officer based in Midlothian, Virginia.

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Lizzi Albert: Alyson Pope, Program Officer, based in Pittsburgh, Pennsylvania. Jane Larson, Program Associate, based in Pittsburgh, Pennsylvania.

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Lizzi Albert: Lizzi Albert, Deputy Operations Officer, based in Washington, D.C, And Louisa Kwasigroch, Managing Director, based in Chicago, Illinois.

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Lizzi Albert: Our team would like to center today's conversation by acknowledging that, as residents of the United States,

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Lizzi Albert: we are speaking to you from unceded land of many Indigenous peoples.

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Lizzi Albert: I'd like to respectfully acknowledge and recognize the original and current caretakers of the land, water, and air where I live:

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LIzzi Albert: the Piscataway and Anacostan peoples and all of their ancestors and descendants.

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LIzzi Albert:I'm grateful to have the opportunity to live and work on their homelands,

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LIzzi Albert: and ask you to join me in acknowledging all Indigenous communities, their elders both past and present,

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LIzzi Albert: as well as future generations. May this acknowledgement remind us of our shared commitment to beginning the process of working to dismantle the ongoing legacies of settler colonialism.

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LIzzi Albert: If you haven't done so already, we'd love for you to introduce yourself in the chat and share a land acknowledgement of the area where you live,

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LIzzi Albert: if you'd like.

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Jane Larson: For more than 20 years, CLIR has partnered with organizations to help raise awareness about the legal and practical threats to audio and audiovisual content.

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Jane Larson: We supported the creation of the *Library of Congress National Recording Preservation Plan* in 2012 and gained valuable experience in re-granting through our flagship *Cataloging and Digitizing Hidden Special Collections and Archives* programs.

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Jane Larson: In 2015, we collaborated on the ARSC Guide to Audio Preservation, which is a practical introduction to caring for and preserving audio collections and it is available as a free PDF download on our website.

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Jane Larson: Through our work on these projects, CLIR came to recognize that there are unique challenges facing those performing audio

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Jane Larson: and audiovisual digitization and description. The first and biggest of these is that much AV content is at high risk of being lost due to physical degradation and changing environmental conditions.

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Jane Larson: As materials disappear, cultural history does too. A second major challenge is that specialized training is often necessary to address description, storage, and maintenance needs for these materials, which staff may not possess.

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Jane Larson: Third, storage costs post-digitization can be prohibitive. Organizations may not have the existing digital infrastructure to store and maintain preservation copies, production copies, and access copies of the materials.

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Jane Larson: And a final challenge that CLIR recognized was that often tricky intellectual property situations surrounding AV content.

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Jane Larson: All the projects that have been funded through *Recordings at Risk* have had time to work through some, if not all of these challenges.

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Jane Larson: Through the program, CLIR aims to help organizations identify priorities for digital reformatting,

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Jane Larson: build relationships with partners, and raise awareness of best practices,

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Jane Larson: and develop practical strategies for addressing all of them. To date, CLIR has completed 11 award cycles for RAR, funding a total of 190 projects involving more than 168 unique institutions and awarding over $5.8 million.

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Jane Larson: In light of the many challenges unique to AV collections, the *Recordings at Risk* program was developed with four primary assessment criteria.

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Jane Larson: Impact, urgency, potential for preservation, and approach to access.

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Jane Larson: These are different from our sibling regranting program, *Digitizing Hidden Collections*,

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Jane Larson: as the emphasis for *Recordings at Risk* is grounded in the need for preservation through digitization,

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Jane Larson: and the recognition that materials will have varying levels of appropriate access given legal and ethical concerns.

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Jane Larson: *Recordings at Risk* awards are smaller with shorter timelines and have a very narrow focus on the activities directly related to digitization work.

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Jane Larson: With that, Alyson will move into the eligibility requirements for the program and the resources available to applicants.

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Alyson Pope: Thanks, Jane. We have provided all the information applicants should need on the *Recordings at Risk* program pages, in particular the [program's homepage](#) and the [Apply for an Award](#) page.

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Alyson Pope: We'll share these links throughout the presentation and also point to specific resources available.

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Alyson Pope: We'll start with eligibility. To be considered for funding, you must be a U.S. nonprofit academic, research, or cultural memory organization. The organization and its collections must also be located within the United States or a related entity, such as Puerto Rico or American Samoa.

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Alyson Pope: Government units and their agencies are eligible so long as their primary function is cultural heritage.

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Alyson Pope: And federally recognized tribal governments are also eligible. If you have any questions about whether or not your organization is eligible for a grant, you can always contact us via our program email at recordingsatriskatrisk@clir.org.

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Alyson Pope: An eligible organization can only submit one application per cycle. If an organization submits more than one proposal, CLIR will contact the responsible parties and ask them to select just one for consideration.

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Alyson Pope: A common question we receive concerns different campuses of a single academic entity. For the purpose of this program, we treat each individual campus of a university system as its own distinct institution.

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Alyson Pope: For example, UC Berkeley and UC Riverside may submit a separate application and would not be required to join forces through a single University of California application.

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Alyson Pope: However, one of these universities would not be able to submit two applications from different schools or departments within the institution, such as one from the School of Law and one from the School of Engineering,

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Alyson Pope: or one from a campus library and one from a campus museum.

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Alyson Pope: Similar distinctions apply for national libraries and archives. *Recordings at Risk* does not have an official list of allowed or disallowed formats. We welcome applications as long as the format is audio and/or visual, is time-based in nature (so no still photographs or slides), and you can find a qualified external service provider or vendor that can perform digital reformatting in an appropriate way for the format and condition of the physical materials.

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Alyson Pope: It is important to note that the program was designed with analog-to-digital reformatting projects in mind.

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Alyson Pope: While born-digital AV content is no less important and is surely at risk, it is not the focus of this particular program at this moment.

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Alyson Pope: There are, of course, a few formats that blur the lines when it comes to the analog/digital distinction, such as digital audio tape or DATs. This particular format, for instance, is eligible and certainly at-risk.

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Alyson Pope: Files on a hard drive, however, in need of digital reformatting are not eligible.

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Alyson Pope: Don't hesitate to reach out to us to double check the eligibility of a specific format.

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Sharon Burney: Let's review this brief flowchart of our most frequently asked questions to determine If your proposed project is a good fit for the *Recordings at Risk* program.

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Sharon Burney:One, is your organization a U.S. Nonprofit academic, research, or cultural heritage organization?

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Sharon Burney:Both the applicant organization and its collections must be located in the United States or an associated entity, for example, the Commonwealth of Puerto Rico or American Samoa.

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Sharon Burney: Grants may be made to government units and their agencies or instrumentalities provided that cultural heritage is the primary function of the unit and grant funds will be used for charitable purposes within the scope of the *Recordings at Risk* program.

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Sharon Burney: Indian tribes, Alaskan native villages, regional corporations, and village corporations are eligible to apply for funding.

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Sharon Burney: Generally speaking, to be eligible for this program, applicants must be recognized by the IRS as tax-exempt under one of the following:

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Sharon Burney: IRS code section 501c3. IRS Code Section 115.

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Sharon Burney: IRS Code Section 170c1. Grants may be made to government units and their agencies or instrumentalities not organized under IRS Section 501c3,

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Sharon Burney: Provided that collecting and disseminating scholarly and cultural resources are among the primary functions of the unit,

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Sharon Burney: and grant funds will be used for charitable purposes within the scope of the *Recordings at Risk* program.

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Sharon Burney: Two, is your collection located in the US or an associated entity?

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Sharon Burney: Both the applicant organization and its collections must be located in the United States or an associated entity.

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Sharon Burney: Three, is your collection owned and held by your organization. The materials nominated for digitization must be owned and held by the eligible organization and cannot come from an individual's personal collection or

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Sharon Burney: one held by a for-profit organization. Eligible format materials may include: Audio, open-reel audio tape, compact cassette, shellac/vinyl/lacquer disc,

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Sharon Burney: wax cylinder, wire recording, micro cassette, digital audio tape (DAT), compact disc, mini disc.

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Sharon Burney: Video: VHS, U-matic, 8mm, Betamax, BetaCam. Digital8, DV, miniDV. Film: 8mm, 16 mm, 35 mm, and Super 8.

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Sharon Burney: You can read our full eligibility requirements on our [Apply for an Award](#) page.

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Sharon Burney: Our timeline for Cycle 12 began on January 14, 2025 when the call for proposals opened.

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Sharon Burney: Proposals are due on April 14, 2025. Recipients will be announced in early August 2025.

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Sharon Burney: We always notify applicants individually before the public announcement is made.

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Sharon Burney: All projects must be between three and 12 months.

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Sharon Burney: For cycle 12, all project work should take place between September 1st, 2025
And August 31st, 2026.

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Sharon Burney: This is our final planned cycle of *Recordings at Risk* at this time.

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Sharon Burney: An independent team is conducting an assessment of the program and we are
actively discussing its future with the Mellon Foundation.

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Sharon Burney: However, we cannot yet confirm if or when the next funding cycle will take place
or whether the program structure will remain the same.

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Sharon Burney: We encourage you to sign up for our grants and programs newsletter for
upcoming cycle announcements.

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Sharon Burney: The Apply for an Award page has a wealth of information to assist your grant
writing process.

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Sharon Burney: Of particularly note are the template budget documents, frequently asked
questions, and a number of sample applications that may help inspire your proposal.

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Sharon Burney: We are regularly reviewing the resources we provide and often update these in
response to common questions or issues that we see.

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Sharon Burney: Perhaps, the most important resource on this page is the Application Guidelines
and Template.

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Sharon Burney: This is a single document providing step-by-step application instructions,
explanation, and space for drafting responses.

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Sharon Burney: You can access it by clicking the "View Guidelines" at the top of the page.

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Lizzi Albert: We've shared a screenshot of the first page of that document.

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Lizzi Albert: The guidelines and template can be thought of as a handbook for the application, identifying how the questions will be asked in the online application system and providing additional explanation, instructions.

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Lizzi Albert: And the underlying rationale for various components of the proposal. Some of what is covered in the guidelines will be mentioned here in the webinar and on the application form itself,

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Lizzi Albert: but always reference the guidelines for a more comprehensive explanation of the application questions and requirements.

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Lizzi Albert: This is available as a Google Doc you can copy in order to develop your proposal alongside your team.

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Lizzi Albert: You can also download the document as a Word document or PDF by selecting "File," then "Download As."

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Lizzi Albert: Be sure that you are using the most recent version of this document, which is labeled Cycle 12 and dated January 2025.

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Lizzi Albert: This version will have all the appropriate dates and instructions. Bear in mind that the Guidelines and Template Google Doc is only a working doc.

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Lizzi Albert: You will still need to copy and paste your responses into CLIR's online application system in order to submit a valid proposal.

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Lizzi Albert: There are two other resources on the Apply for an Award page that we want to highlight.

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Lizzi Albert: The first is the Digitizing Special Formats Wiki, a project co-hosted by our colleagues in the Digital Library Federation

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Lizzi Albert: (DLF) program. This resource may be of particular use to anyone new to digitization projects.

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Lizzi Albert: And includes links to planning resources, workflow documentation, and even a list of digitization service providers.

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Lizzi Albert: The second is the Technical Recommendations for CLIR's *Recording at Risk program*.

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Lizzi Albert: This is available under the *Key Guides, Policies, and References* section of our applicant resources *Document Library*.

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Lizzi Albert: Developed with the input of several of the members of our independent review panel,

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Lizzi Albert: this document communicates more specific information about reviewer expectations for various aspects of *Recording at Risk* projects.

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Lizzi Albert: This will be especially useful to those who may be new to digital reformatting, working with vendors, or thinking about digital sustainability.

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Lizzi Albert: We continue to add resources and refine this document as needed.

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Lizzi Albert: Next, we'll take a look at how to begin filling out the application, Jane?

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Jane Larson: Once you've confirmed your eligibility as well as your project's alignment to the program, you may be ready to start your application.

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Jane Larson: You'll do this through our online grant management system SurveyMonkey Apply, also known as SMApply,

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Jane Larson: which you can reach by clicking the "Apply Here" button on the [Apply for an Award](#) page.

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Jane Larson: The first step in the application process is registering for an account.

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Jane Larson: If you have applied to a previous *Recordings at Risk* cycle, beginning with the third call,

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Jane Larson: or to a *Digitizing Hidden Collections* call, or another CLIR fellowship program from 2018 forward,

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Jane Larson: you'll be able to log in with the CLIR SMApply profile you have already set up.

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Jane Larson: You can use the "Forgot your Password?" prompt if you need a reminder for that information.

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Jane Larson: All others should use the "Register Here" link at the bottom of the dialog box circled in red on your screen.

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Jane Larson: For new users, you will receive a message from the SMApply system that will verify your registration.

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Jane Larson: If you don't receive the message right away, be sure to check your spam and or junk folders.

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Jane Larson: And if you still cannot find the verification email, contact our team before attempting to register again.

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Jane Larson: Try to avoid creating a new account when you've already set one up. This helps reduce the number of duplicate accounts

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Jane Larson: in the system, which makes it easier for us to assist you.

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Jane Larson: Something to consider as you're setting up your account - the same login information you use to submit your proposal will be how you will log in and access the reporting space should your project be awarded funding.

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Jane Larson: We recommend documenting the email and password you've used to reduce any confusion in the future.

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Jane Larson: Once you've logged in or created and verified your account, you will see your application dashboard and should be able to start *Recordings at Risk* application.

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Jane Larson: Here you can jump to the different tasks of the application, view your progress, and add collaborators to help you prepare your application in the system.

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Jane Larson: There is no need to attempt completing the entire application in one sitting.

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Jane Larson: You can also complete the tasks in any order you choose.

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Jane Larson: Just be sure to save your work as you go. Most of the application content is contained in the application form task of SMApply. The remaining tasks are all for uploads.

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Jane Larson: When referencing the Guidelines and Template, you'll notice cross-referencing to actions that require an upload.

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Jane Larson: This is our attempt to help applicants understand how all the pieces of the application fit together thematically even though the online system separates uploads to be added at the end.

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Jane Larson: We've tried to make all this as clear as possible in our supporting documents.

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Jane Larson: But if you have any questions or suggestions of how we can make it even better, email us at recordingsatrisk@clir.org.

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Jane Larson: Next, we'll do an overview of the different components of the application.

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Alyson Pope: The application is composed of nine sections listed here. I'll pause for a moment to remind you that if any questions have come up or if you think of any as we dive into these sections, feel free to submit them in the Q&A box.

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Alyson Pope: And as noted, all required uploads are added at the end of the process, even though we'll be talking about them as parts of these sections.

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Alyson Pope: The first section of the application is the project summary. This is where you provide basic information about the project and your letter or letters of institutional support.

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Alyson Pope: This letter should come from a head administrator within your organization who will be responsible for making decisions about allocating resources for preserving and maintaining access to the project's deliverables over time.

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Alyson Pope: The purpose of this letter is to affirm your organization's dedication to the project and its long-term sustainability.

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Alyson Pope: At the end of Section 1 and throughout the application form task in SM Apply, you'll be given the choice to click "Save & Continue Editing,"

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Alyson Pope: which will save your work and keep you on the same page, or click "Next," which will save your work and move you to the next page. These buttons will navigate you through the entire form so you don't miss any of the nine sections.

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Alyson Pope: Section 2, description of content, is where you provide a more thorough description of the source materials to be reformatted. We are looking for information related to their provenance,

00:22:24.000 --> 00:22:41.000
Alyson Pope: arrangement, and current accessibility. The application also allows for the upload of an optional inventory. The inventory enables applicants to share with reviewers exactly which recordings will be digitized and supply additional information about the condition, length, or right status of each recording.

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Alyson Pope: We do not have specific format requirements for the inventory, so applicants have the option of providing an edited and annotated copy of pre-existing collection guides or finding aids. We just ask that your inventory make very clear which media you are proposing to digitize through the funds you're requesting in the proposal.

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Alyson Pope: Finally, this section requires you to break down the materials by quantity and type. The image at the bottom shows the initial drop-down menu that asks how many different media types are included in your project. For example, if your project would reformat 42 VHS videotapes and also four hours of wire recordings,

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Alyson Pope: you would need to choose "2" different media types.

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Sharon Burney: This slide shows the forms that are generated when two categories have been selected.

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Sharon Burney: Here you would be able to enter the quantities and types of media you propose to reformat.

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Sharon Burney: You could describe your VHS tapes under Category 1 and your wire recordings under Category 2.

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Sharon Burney: The fields under each category include material type, amount, and unit of measure. Units of measurement may be either "items" or "recorded hours."

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Sharon Burney: We ask that you list each category of materials only once. If you would like to include both the number of items and number of recorded hours here, you can select one as the official unit of measurement and include the other in the additional information box below.

00:24:07.000 --> 00:24:12.000
Sharon Burney: You can also use the additional information box to specify media brand types.

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Sharon Burney: Since some are more at risk than others and or other details that may be useful to reviewers, such as how you determine the estimated amount of materials.

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Lizzi Albert: Section 3 concerns scholarly and public impact. Along with risk of loss, scholarly and public impact are the primary criteria upon which applications to this program are assessed.

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Lizzi Albert: CLIR instructs reviewers to prioritize projects that include collections that are of high importance to a variety of disciplines and uses.

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Lizzi Albert: And we'll have a broad national and or international impact on the creation of new knowledge or experiences.

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Lizzi Albert: This is your opportunity to make a compelling case of the potential impact of your nominated materials.

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Lizzi Albert: In addition to your own statement in this section, the application also requires that you provide at least one and up to three external letters of support from experts familiar with the collection to help you make your case.

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Lizzi Albert: The letters cannot come from individuals directly connected to the project, and it is strongly recommended that you get support letters from individuals outside your home institutiom, and, when possible, outside the local region to help demonstrate wider interest.

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Lizzi Albert: That being said, if there is a local scholar who is really the best person to support your project, then it likely makes sense to ask them for a letter.

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Lizzi Albert: To help you gather the strongest letters of support, we've created CLIR's Guidelines for Authors of Letters of Support, which can be found in the document library of our Apply for an Award page. We encourage you to share this document with all of your letter writers to help guide the process and provide context for the request.

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Lizzi Albert: Section 4 concerns risk assessment. Here is where the urgency of the proposed project is explained.

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Lizzi Albert: Competitive applications will demonstrate the organization's understanding of these risks, their strategic priorities for mitigating these risks.

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Lizzi Albert: And how the proposed project advances those priorities. Note that if your materials are in good condition, you aren't necessarily going to be looked at unfavorably by reviewers.

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Lizzi Albert: Sometimes good condition is a reason why the recording should be preserved now.

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Lizzi Albert: The review panel considers many factors when evaluating risk so we encourage you to think beyond the physical condition of your materials.

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Lizzi Albert: Though things like age and evidence of decay are important, also take note of environmental factors affecting your geographic region,

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Lizzi Albert: age or health of the originator of the content, and or access to native speakers of endangered languages.

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Lizzi Albert: Rarity of the items is also considered, so if you have the only copy of something, that certainly adds to its risk of loss.

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Lizzi Albert: The rights, ethics, and re-use section helps reviewers assess an applicant's understanding of the legal and ethical issues affecting access to the nominated content,

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Lizzi Albert: and evaluate the proposed approach. We require you to dedicate all metadata to the public domain under a Creative Commons waiver and to avoid imposing additional access restrictions on the reformative recordings other than what may already be in place for the source recordings.

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Lizzi Albert: While this program does prioritize preservation over access, reviewers strongly prefer that applicants avoid creating unnecessary barriers to access since such barriers inhibit a project's impact.

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Lizzi Albert: Access restrictions are allowable when well justified due to legal and/or ethical concerns.

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Lizzi Albert: Such restrictions will not necessarily disadvantage you in the competition and may even be viewed favorably by the review panel.

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Lizzi Albert: This includes restricting access to recordings that include personally identifiable information or culturally sensitive material.

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Jane Larson: The project design section describes how the project would work in practice and consists of the components listed here.

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Jane Larson: Design a project plan with a timeline that identifies all the major activities taken during each phase of your project,

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Jane Larson: including the parties responsible in the deliverables. Develop a technical approach that provides information related to preservation reformatting specs, metadata schema, and so on.

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Jane Larson: Present a thoughtful digital digital preservation plan, which describes the process and parties responsible for preserving the files created during the project,

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Jane Larson: and how preservation activities will be managed over time. Consider the creation of multiple copies of files,

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Jane Larson: scheduled fixity checks, periodic migration of data to new storage media,

00:28:53.000 --> 00:29:03.000
Jane Larson: and any metadata creation that enables these activities. Finally, provide a list of all envisioned project deliverables and how they will be made available to users.

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Jane Larson: You'll also list conditions and terms that limit their availability. All these elements are discussed at great length in the Application Guidelines.

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Jane Larson: In this section and throughout the application, be mindful of all page limit requirements.

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Jane Larson: Documents that exceed page limits will be truncated before being passed along to reviewers.

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Jane Larson:Section 7 focuses on service provider information. Because the goal of the program is to help institutions without in-house capacity and expertise get started with preservation reformatting of their audio and audio visual collections,

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Jane Larson: All *Recordings at Risk* applicants must propose projects that name a qualified external service provider,

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Jane Larson: who will provide reformatting surfaces. In-house digitization is not allowed

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Jane Larson: and proposals to reformat recordings at your own institution will disqualify your application.

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Jane Larson: The most frequent question we receive about this is from academic institutions who would like to use on-campus digitization services that may run through a different department.

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Jane Larson: This would be considered in-house digitization. In addition to covering the basic information on your selected service provider or provider,.

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Jane Larson: you will be asked to submit a rationale for service provider selection.

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Jane Larson: Here you will demonstrate that you've chosen a service provider or providers that perform technically competent and cost-effective digitization appropriate for the specific materials you are nominating.

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Jane Larson: You may reference the service provider proposals, but make sure that you clearly explain your decision-making process.

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Jane Larson: Generally, our review panelists expect to see more than simply saying,

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Jane Larson: "We've worked with this vendor before." Our recipients also encourage all of you to look outside your usual vendors because you may find another service provider more suited to your particular project.

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Jane Larson: We technically only require one service provider proposal, but in most cases, you are strongly encouraged to seek out additional bids and conclude up to three total.

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Jane Larson: Multiple bids helps demonstrate to reviewers that you've done your research,

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Jane Larson: and that the services to be provided are right for your specific materials and your organization's needs.

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Jane Larson: Should your organization prohibit the selection of a service provider until after grant funds are awarded,

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Jane Larson: you must still make a tentative selection for this proposal in order to support figures included in your project budget.

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Jane Larson: The guidelines and template provide more detail and CLIR staff is available to answer questions at recordingsatrisk@clir.org.

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Jane Larson: While we are unable to recommend specific qualified service providers, we do have a few tips to help you in this process.

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Jane Larson: Consider reaching out to colleagues for recommendations. Check to see which service providers partnered with organizations on similar grant projects.

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Jane Larson: Explore resources provided by industry organizations like the Association of Moving Image Archivists,

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Jane Larson: or AMIA, and the Association for Recorded Sound Collections, or ARSC, that often publish lists of digitization service providers who meet their professional standards.

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Jane Larson: Also, the DLF's Digitizing Special Formats Wiki has a list of companies and organizations who have volunteered their information to the page.

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Jane Larson: You will still need to do your homework when it comes to assessing proposals from service providers.

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Jane Larson: Another resource that may be helpful to you is the "Effective Outsourcing with Audiovisual Digitization Service Providers" webinar also hosted by our colleagues at DLF and available on the wiki.

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Jane Larson: We also encourage you to consult our Guidelines for Grants Involving Consultants or Subcontractors,

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Jane Larson:for guidance on bidding, selection, and budgeting. When working with external service provider,

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Jane Larson: our technical recommendations for CLIR's *Recordings at Risk* program also includes a section on soliciting and evaluating bids.

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Jane Larson: Both documents are available on our Apply for an Award page.

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Alyson Pope: Section 8 is about funding, which relates directly to the service provider section since the primary expense for most projects will be the cost of digital reformatting. There are three budget documents that need to be uploaded.

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Alyson Pope: The first is the budget narrative, which has no page limits and serves to explain to the review panel what you are spending and why.

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Alyson Pope: The budget narrative template is available on the Apply for an Award page and you should use the application guidelines to help you build this narrative.

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Alyson Pope: You should explain all line items that appear in your budget, discuss how your organization will manage your project, and why you are seeking external funding for this project.

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Alyson Pope: The budget detail must be submitted on the budget detail form, which is a macros enabled Excel template provided by CLIR. You can hover over any red numbers on the sheet to access additional instructions as well as review the instructions tab for more detail.

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Alyson Pope: The third budget document is the service provider proposal. This is simply a PDF upload of the proposal or proposals that you have selected. Quotes from additional service providers that you did not ultimately select can be added as appendices.

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Alyson Pope: All allowable costs within the request, which includes any costs from your service provider, should be directly related to preservation reformatting of nominated materials and may include costs charged by a service provider related to stabilizing media for the purposes of preservation reformatting,

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Alyson Pope: conducting preservation reformatting, or basic metadata creation; shipping of materials to the service provider; and insurance for materials during shipping and handling by the service provider.

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Alyson Pope: In addition to the expenses directly related to the preservation through digital reformatting of at-risk materials, this program allows for some additional yet still connected activities. All such additional costs must be specifically and strongly justified throughout the proposal and especially in the budget narrative.

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Alyson Pope: We have made these adjustments in response to frequent requests to consider allowing requests for these kinds of services and materials.

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Alyson Pope: Note in particular that automated captioning, some basic transcription work, and the purchase of digital storage media or rehousing supplies are allowable.

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Alyson Pope: At the same time, it is vital to keep in mind that the purpose of the *Recordings at Risk* program is to support preservation reformatting and not enhance access. To remain competitive, applicants are advised that costs other than vendor-provided digitization services, shipping, and insurance should total no more than 50% of the total request.

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Alyson Pope: Reviewers will, at their discretion, decide which applicants might need more additional support of these kinds than others,

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Alyson Pope: due to the apparent limitations of the applicant organization's capacity to fund this work through other means.

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Alyson Pope: CLIR in its review panel expects to see fair compensation for any labor funded through this program.

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Alyson Pope: Conversely, there are a handful of disallowed costs. I'll just point out a few that are particularly relevant.

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Alyson Pope: Indirect costs are disallowed by all CLIR's grants programs as are any miscellaneous costs.

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Alyson Pope: Electronic equipment other than dedicated digital storage media. Software licenses and services are unfortunately something that we can't cover, including digital storage services.

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Alyson Pope: Extensive conservation work beyond what is required to get a solid capture of the materials is not covered.

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Alyson Pope: Extensive processing and editing of digital audio files post transfer is also disallowed.

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Alyson Pope: The most complete list of allowable and disallowed costs will be found in Appendix A of the guidelines and template document. So be sure to carefully review as you develop your proposal. You can reach out to us via email with any questions you have regarding these items.

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Alyson Pope: The applicant information section is pretty straightforward. You'll be asked to provide proof of nonprofit status and contact information of the PI and your institution's address.

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Alyson Pope: You will be given the option of submitting proof of nonprofit status one or two ways:

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Alyson Pope: By entering your IRS EIN number or by supplying your IRS determination letter or other approved document.

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Alyson Pope: Not all EINs will be recognized by the SMOPLY system. So if it does not work, just plan to upload the appropriate document. And as always, let us know if you have any questions or issues.

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Sharon Burney: The final component of the application is an optional additional information section,

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Sharon Burney: where you can upload appendices. Keep in mind that you should use this judiciously and only include additional information that clearly and directly supports your main proposal.

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Sharon Burney: Reviewers will prioritize the main application form and required components and will be unlikely to do more than skim additional documents that are especially lengthy or tangential to the proposal. It can be helpful to highlight particular points or details you want reviewers to notice rather than expect them to wade through a 100-page finding aids

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Sharon Burney: or pages of photographs of very similar looking items. You want these supporting documents to build reviewers' excitement about your project rather than to frustrate or confuse them.

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Sharon Burney: Allowable uploads are listed in the guidelines and include: Summary documentation of collection assessments.

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Sharon Burney: Accession documentation. Donor agreements: this is handy to reference when discussing rights issues.

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Sharon Burney: Photographs of the nominated materials to show their physical condition. These are especially helpful to prove the at-riskness of your items.

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Sharon Burney: Audio video samples relevant to the nominated materials. These can help make the case for scholarly impact.

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Sharon Burney: Sample metadata records or even mock-ups of how records will appear to users online.

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Sharon Burney: These can help illustrate the technical plan and how access will be provided to deliverables.

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Sharon Burney: As mentioned earlier, extra service provider proposals can be added here as well.

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Sharon Burney: We're nearing the end of our presentation, so feel free to submit questions in the Q&A box for us to address.

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Sharon Burney: We may not have time to address all questions today. So please join us again for our Q&A webinar on February 26th, which will be dedicated to answering your questions.

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Sharon Burney: The link to register can be found on our Apply for an Award page And we will send it in the chat. You are also welcome to email us at recordingsatrisk@clir.org.

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Sharon Burney: Project planning in the best of times can be challenging, so we wanted to take a moment to make a few specific notes to all of you working on applications right now.

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Sharon Burney: One of the most common reflections we hear from recipients is that additional time should be factored into project timelines.

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Sharon Burney: The program limits projects to no more than 12 months. So think what that may mean when you consider potential delays in any plans for accessibility to materials.

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Sharon Burney: Would a smaller project be more feasible? Could you achieve the same goal through a different or more flexible metadata strategy?

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Sharon Burney: Do you have plans in place if you are unable to access your collection for a period of time?

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Sharon Burney: Service providers have often been affected by the same closures and delays. So think about how that may translate to your project.

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Sharon Burney: Have you asked about any protocols that you may now have in place to facilitate remote processing?

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Sharon Burney: Considerations for shipping delays. Lessons they've learned and could pass along to you moving forward?

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Sharon Burney: We also do want to note that should your project be funded, the program does have allowances for no cost extensions

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Sharon Burney: and other modifications. Our hope for all funded projects is to see them safely and successfully to completion.

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Sharon Burney: And the grants team is here to support you every step of the way.

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Jane Larson: A few broader tips. First, ask yourself if this program is the right fit for my project.

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Jane Larson: It's worth the time spent researching to make sure you're investing time in a program whose criteria and goals align with yours.

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Jane Larson: Second, please read the instructions carefully. Third, leave yourself as much time as possible and plan everything out in advance.

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Jane Larson: Treating this like a project and meeting often to track progress will make for a smooth drafting process.

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Jane Larson: Fourth, assemble a team of people with different expertise to draft different parts of the proposal.

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Jane Larson: Also, our panelists really care that proposals ask for the amount needed to get the project done successfully.

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Jane Larson: Don't just choose the lowest cost vendor because it's the lowest cost.

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Jane Larson: Select the vendor most qualified to do the work to the standards you've established and then justify your choice. If you need to include staffing for work directly connected to the project,

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Jane Larson: explain to the reviewers why that funding is necessary and how that work is outside the normal scope of work or current institutional capacity.

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Jane Larson: Next, reach out to staff. At CLIR, we're available to answer your questions over email at any time.

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Jane Larson: Finally, propose a project that you really believe in. Your commitment to and excitement about a project definitely comes across in your application and reviewers take note.

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Sharon Burney: Okay, thank you. We're going to get into questions now. And if we run out of time to answer all your questions today,

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Sharon Burney: we will be sure to provide written answers in the Q&A doc that will be posted alongside the recording. And please note that we'll be hosting a full hour long session completely dedicated to questions and answers on February 26th.

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Sharon Burney: Give us at least a week to get up the Q&A docs for you to see.

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Sharon Burney: We try to get it sooner than that, but if not.

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Sharon Burney: And also be aware that we may, you know, we're having the questions ported over into a document for Alyson and I to review. So if we don't go in order, we're going to try to get to you as soon as possible.

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Sharon Burney: And on that note, Alyson, do you want to take the first one?

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Alyson Pope: Sure. Is this an LSO? I'm not sure exactly what this person means by LSO. If they mean a limited submission opportunity, then yes, in that we only allow one application per institution. So I guess yes.

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Alyson Pope: We do limit the submission to one application per institution per cycle.

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Sharon Burney: And as a reminder, this is a regranting grant from the Mellon Foundation.

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Sharon Burney: And we have an agreement with the Mellon Foundation and that's where we establish our rules. And one of the rules is one application, for this particular program, from each institution. If the organization, if you send two, we get two from the same because sometimes they're unaware that two of them are

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Sharon Burney: submitting one, we will send an email to all of them and ask them to choose which one wants to apply.

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Sharon Burney: Second question is, is there a list of vendors that the program has worked with before

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Sharon Burney: particularly those in the Southwest/West Coast? So we use an independent review panel and to not have any biases,

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Sharon Burney: we don't typically recommend vendors. The choice of a vendor is very particular to your specific project and your materials that you decide.

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Sharon Burney: Sometimes you may have a local vendor that fits the type of formats that you're working with.

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Sharon Burney: Or have specialties in the areas that you need. And sometimes you won't. You might have to go all the way across and ship it across the nation.

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Sharon Burney: We did share in the slides in will be on our [Apply for an Award](#) page The DLF organization, the Digital Library Federation organization has a [wiki page](#) where we give you information about choosing some vendors and the correct choices for those types of things.

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Sharon Burney: So we do recommend you check out our [Apply for Awards](#) page, which has a plethora of information that will assist you with this.

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Alyson Pope: I'm sorry, but where did you say we can find the list of eligible formats? There's a list of eligible formats on our [Apply for an Award](#) page. So again, you want to head back to the apply for an award page for resources. It is listed in the frequently asked questions section.

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Alyson Pope: Under the format. Sorry, Sharon. Yes.

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Sharon Burney: Hello, can I? Oh, go ahead. Are you done? Okay.

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Sharon Burney: Hello, How can I consult with you to find out if a project I would like to work on is acceptable?

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Sharon Burney:I have about 3,000 belts of dictaphone recordings from 1959 to 1963.

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Sharon Burney: They were impacted by the humidity caused by Hurricane Maria in 2017

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Sharon Burney: and we have them separated from the main collection. They need to be cleaned because they have fungus and transferred to a digital medium. This type of work is not done in Puerto Rico.

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Sharon Burney: And I requested a quote that came to me around $90,000.

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Sharon Burney:I imagine that costs are much higher right now. Could I prepare a proposal for CLIR for this project?

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Sharon Burney: So one, we have two open cycles right now and typically during open cycles, we are unable to meet one-on-one with people about projects.

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Sharon Burney: That's why our Apply for Award page is heavily informational with webinars and interviews and we do Q&A webinars and our inbox at recordingsatrisk@clir.org is always open to answer these type of questions.

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Sharon Burney: Do I think this is, from what you described, this is what this program was made for?

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Sharon Burney: Your formats are acceptable and allowed. And the detriment due to degradation is high risk.

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Sharon Burney: The problem is the cap on this particular program is $50,000.

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Sharon Burney: Some suggestions would be cost share if that's possible for their overage

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Sharon Burney: that you would do from your organization or from your organization. Or you might want to try to put together a smaller amount of materials that brings it in under the $50,000 limit.

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Sharon Burney: So maybe not all of it. You could do part one of the digitization project and then possibly work on doing that as a second option much later.

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Alyson Pope: Yeah, we have had projects successfully apply in phases to do chunks.

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Alyson Pope: I am curious about the distinction between institution-owned resources and personal ones. I'm a writer-producer for the public radio program AfroPop Worldwide.

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Alyson Pope: That is the applying entity and the owner of the vast majority of the tapes in question, but some of them relating directly to the work are mine.

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Alyson Pope: It is all part of one archive, but it is not all owned by APWW. Is this an issue?

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Alyson Pope: So all of the submitted proposals go through an IP review and the purpose of the IP review is to make sure that the institutions committing to doing the digitization and then making the materials accessible, actually have the rights to make those promises. So if APWW is not the rights holder for your materials, they don't actually have the ability to make those promises

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Alyson Pope: unless you were to grant them that ability. So you would probably want to look into some kind of documentation of a partial deed of gift or otherwise that would kind of spell out the rights that you intend to transfer to the organization, but there would need to be some kind of transfer of rights to put them in a position where they can make those long-term commitments.

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Sharon Burney: Unfortunately, the *Recordings at Risk* does not allow for collaborative projects.

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Sharon Burney: So we want to skip that question that was disregarded. How many projects awarded have had solo archivists? Was project design affected? Are there examples of awarded applications that we can review?

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Sharon Burney: So we do not have the entire application online, but we do have on our funded pages, on our *Recordings at Risk* tab,

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Sharon Burney: examples of projects. This is a very subjective question.

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Sharon Burney: Yes, we have had projects that have solo archivists. We like for you to already have an assessment of the collections list that you've done so you already have that done. It's a competitive

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Sharon Burney: grant opportunity and people who have an understanding of what their collections list looks like and the shape that they might be in, because you'll have to submit that with your application anyway.

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Sharon Burney: These are smaller projects that we expect to do outside digitization, so it can work depending on the quality and the knowledge that you have on your collections list. I think it's very feasible. Sometimes we have projects that don't even add salaries to it.

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Sharon Burney: Most of it is on digitization and that's what we expect. At least 50% of the project to be on the vendor services of the digitization of it.

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Sharon Burney: And so you could add a salary line in there and do it with one solo depending on how large your collection is. Alyson did you want to add anything?

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Alyson Pope: No, I think that's pretty good.

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Alyson Pope: These are smaller projects yeah so it's not, we don't never see a solo archivist.

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Alyson Pope: Can you talk more about basic metadata creation? What does this mean? Basic metadata creation means the creation of the kind of backend metadata records for these materials that you're digitizing that you're going to utilize in your platforms or in other platforms to describe them

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Alyson Pope: and make them discoverable. I think perhaps one of the reasons we say basic metadata creation is to confirm that we expect the focus of the program to be digitization. So while we do have some funds available for more extensive metadata work like

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Alyson Pope: In-depth transcription and translation work that isn't the program's focus. So to kind of maintain that balance that we expect to see at least half the funds on digitization, that's sort of why there are some limits on what we pay for from a metadata creation standpoint.

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Sharon Burney: Did you say that expanding access to the materials is not a focus for the selections of the projects awarded?

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Sharon Burney: We used an independent review panel and it's not the sole focus of the selection criteria.

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Sharon Burney: As stated previously, part of the selection criteria is the at-risk of the materials that have been nominated, what kind of, you know, are they going to be lost permanently and forever? We do like the scholarly impact and a broad geographic scope for

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Sharon Burney: the materials that are being nominated. We're trying to make this accessible to scholars so that they can continue to do the work that they do. So a broad appeal would be nice. It's not the major focus, though. It's a very cohesive

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Sharon Burney: storytelling. We tell you to tell the story of your application. Why are these collections important?

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Sharon Burney: What is the risk of being lost permanently? Is this a feasible

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Sharon Burney: project, fiscally feasible project? And do you have constraints to be able to do this work

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Sharon Burney: Without our help? And yes, we want the metadata to be made publicly accessible so that scholars can reach this. So that is important. Unless, you know, you can say, well, there's a reason we can't have public access to this because

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Sharon Burney: this is very sensitive materials and it would put the subjects and the materials at risk of harm et cetera, et cetera. But the explanation of all of this is what's most important.

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Alyson Pope: If both University (IRS code 115), and University Foundation (IRS code 501c3) are both eligible, which applicant would you prefer?

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Alyson Pope: We don't. It doesn't matter to us particularly. Whatever works better for your organization. I imagine you probably have some kind of grants office or an OSP, whatever is their preference, as long as both entities are eligible.

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Alyson Pope: We're going to loosely refer to you internally as the university, whether you're the foundation or the regents or the university itself.

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Alyson Pope: But we see those types of applications every year and whichever works best for your processes is fine

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Sharon Burney: Sorry. Yeah, thank you, Jane. Is reformatting CDs with photographs and allowable costs? We consider CDs born digital materials for the sake of this program.

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Sharon Burney: And the formats are basically audio and audio visual So we're thinking when we say that: reels to reels, VHS, 8mm, and things like that.

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Sharon Burney: Cassette tapes, DATs. But a collection with an entire collection of CDs would not be eligible.

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Alyson Pope: For government units, agencies, or instrumentalities, is it possible to receive a confirmation of eligibility through an abbreviated proposal before the full project proposal effort is undertaken? Or is a full submission (with a potential review panel disqualifying the application only at that time)?

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Alyson Pope: You can email us at recordingsatrisk@clir.org to ask basic eligibility questions. Most of the nuance around government units, agencies, or instrumentalities is the requirement that they're actually engaged in cultural heritage of some form. So typically it's a matter of what your department is and what are you trying to do. And it doesn't necessarily take

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Alyson Pope: an abbreviated proposal to tell us that. We just need to know who you are,

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Alyson Pope: what that agency does on a daily basis, and what they're trying to digitize. And we can answer that for you via email.

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Sharon Burney: Can you recommend other grants for preserving AV materials, especially for non-academic institutions? One, on our Apply for an Award page

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Sharon Burney: at the bottom, you will see a related funders section where we put links to other organizations that are providing grants possibly that would fit

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Sharon Burney: if your proposal doesn't fit ours. Secondly, our program is open to non-academic organizations, nonprofits, and any cultural heritage organizations

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Sharon Burney: Any organizations that the cultural heritage and preservation is a part of their main purpose.

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Alyson Pope: I would also just shout out some of the regional conservation centers.

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Alyson Pope: I think that's maybe federally funded, but like the Midwest Conservation Center, the Balboa Art Conservation Center, I think there's six for different regions and a bunch of them have AV preservation assistance.

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Alyson Pope: There are a sequence of questions here, so I'm going to try and answer some of them.

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Sharon Burney: You can do that.

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Alyson Pope: Will you explain what you mean by storing or providing metadata and its role in the digitization process or grants? We require that the metadata is made publicly accessible even if the materials are not so that people know that you have the materials, like researchers know of their existence and they can

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Alyson Pope: come to you to request access to them, even if they're not publicly accessible.

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Alyson Pope: So that is the requirement for metadata being public and Creative Commons licensed.

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Alyson Pope: Are we able to see previous grant recipients' budget spreadsheets? We have previous applicants on the website. I cannot remember off the top of my head if we include the budgets in those applications.

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Alyson Pope: Leave me look. Okay.

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Sharon Burney: We have examples of a budget. We have an example of what the budget looks like.

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Alyson Pope: Yeah, so you want to go to the [Apply for an Award](#) page for that. Are we able to purchase archival materials? Yes, rehousing materials are eligible.

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Alyson Pope: Or an allowable cost. For a complete list of the [allowable and disallowed costs](#), you'll want to check out our application guidelines.

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Alyson Pope: We'll drop a link to that, but that's definitely on the [Apply for an Award](#) page.

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Sharon Burney: Well, you want me to get this one?

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Sharon Burney: Yeah, that's what I was taught.

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Alyson Pope: Hold on, they have one more question. I don't know what the end of this last question is, but it seems like it's about partnership. So I just want to say that this particular grant is not open to collaborative partners in the way that Hidden Collections is. You only have one institution that applies, but you are allowed to use outside organizations as consultants or vendors.

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Alyson Pope: I think that's all that chunk. Sorry.

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Sharon Burney: Okay, thanks. So it's a lot. We submitted a CLIR application last year that was not awarded, but we had positive reviewer feedback.

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Sharon Burney: And it was recommended that we try again with the same project with the addition of an inventory.

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Sharon Burney: Will a resubmission like ours be reviewed in light also of the feedback from last year?

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Sharon Burney: Or should we mention this ourselves in our application? This is a great question. Most people do not get the grant on the first time around.

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Sharon Burney: We have a lot of resubmissions. And one of the first things the independent review panel will look for is did they take our advice from last year?

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Sharon Burney: So there's a part in the question that will ask you if this is a resubmission. And then it is on you to talk about what you have done differently from last year.

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Sharon Burney: Or show that you've taken the suggestions that the reviewers got.

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Sharon Burney: And make a better proposal this year. This is why we take the time to give feedback and comments to people so that they can reapply and hopefully take into consideration the suggestions that were given and

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Sharon Burney: create a better proposal for this year. So yes, you're on the right track.

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Alyson Pope: We're slightly over time, but I think we only have one more question.

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Sharon Burney: And… Okay.

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Alyson Pope: So I'm going to try and knock that out and then we'll put up the last slide.

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Alyson Pope: Would fees or other barriers include nominal fees typically charged by libraries for copying images? I would need you to ask me that more specifically. But if you mean the general fees that like a library charges for letting you use their Xerox, no. We mean if you have

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Alyson Pope: watermarked images or if you charge for the download of high resolution images, that is what we mean by nominal fees or other barriers.

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Alyson Pope: And…

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Jane Larson: Thank you everyone for joining us today to learn more about *Recordings at Risk*. Within the next two weeks, as we said, we'll have the slides, transcript.

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Jane Larson: Written responses to today's questions and the recording from the session on our program's Apply for an Award page. If you have any additional questions, you can always reach out to the CLIR Grants team at recordingsatrisk@clir.org.

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Jane Larson: And we'll monitor our program's inbox and do our best to reply to you promptly.

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Jane Larson: We ask if you can complete a survey about today's applicant webinar as we continue to ensure a successful experience for everyone.

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Jane Larson: Which we sent in the chat. And then don't forget that applications are due April 14th

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Jane Larson: and thanks to all of you for your interest in our program and for attending this session.

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Jane Larson: And we hope you have a great afternoon and happy grant writing.