

Digitizing Hidden Special Collections and Archives: Amplifying Unheard Voices

Session 4: Staffing & Budget
April 2, 2025



Links mentioned:

- [Program Homepage](#)
- [Core Values](#)
- [Apply for an Award](#)
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- [Application Guidelines \(view only\)](#)
- [Application Guidelines \(make a copy, Google account required\)](#)
- [Guidelines for Grant Proposals Involving Subcontractors or Consultants](#)
- [Projects funded through Digitizing Hidden Collections, 2015-2020 and DHC: Amplifying Unheard Voices, 2022-2024](#)
- [Registration for the Applicant Support Series Session 5, April 9](#)
- [Webinar Survey](#)

Questions and Answers

All questions asked in chat and via the Q&A box during the live webinar are copied below. Some questions were answered live during the April 2, 2025, webinar and are marked. Any questions answered live may include additional references or clarification. Consider using the “Find” feature in this document to search for a word or phrase to find a more specific question topic. If you have any other questions, email the CLIR Grants team at hidencollections@clir.org.

Q: In the document, "Guidelines for Grant Proposals Involving Subcontractors or Consultants", on page 3 it states: "All consultants and subcontractors should sign confidentiality and work-for-hire agreements (where applicable), and affirm they have no conflicts of interest." Our project will involve an Internet Archive vendor who will be performing scanning work- do they need to sign an agreement too? Do you have a template for such an agreement or do we use our own?

A (Program Officers): We don't have a contract template, because vendor needs will vary from project to project. You should create your own contract and explain in detail how much you are paying the vendor and the services they will provide. If the total is over \$5,000 you'll have to upload a quote to your application, which should include these details. Adding details will make your proposal most compelling for reviewers.

In terms of the [Application Guidelines](#), you will find both requirements and recommendations of best practices. This is a recommendation of best practices. You'd hold this internally for your

own administration of the project. We don't require you to submit a confidentiality agreement with your vendor to us as part of your proposal.

Q: How much additional detail are you looking for in the final application regarding capacity? Assuming there was nothing flagged in the initial grant feedback.

A (Megan Friedel): The key thing for grants like this when you're moving on into the final round is to make sure you're still addressing capacity, even if you addressed it in the first application. Within your 700 word limit you still need to be addressing capacity and you will want to relate it back to the program's core values as you answer this question.

Q: Should we include resumes or CVs for contractors or vendors?

A (Program Officers): You don't have to include resumes or CVs for your contractors or vendors. You will just need to include the quote if it is over \$5,000. If you are using a specialized vendor that you have a relationship with that is not necessarily nationally known, you may want to provide additional information about them and/or justification as to why you are selecting this vendor.

Q: If you send me a quote to create a proposal in Spanish, can I include it or do I have to translate it into English?

A (Program Officers): Most of our reviewers will only speak English, so we ask that you please translate any quotes you are submitting.

Q: If we're applying for a multi-year grant, are you expecting annual cost-of-living (COLA) pay increases for each staff member?

A (Megan Friedel): This is not required, but it's great to include this. It helps demonstrate the equity piece and address those core values. Some institutions require you to include COLA pay increases, especially in multi-year grants. Our benefit rates at my own institution change every year so we work with our grant office to estimate what those will be. You will want to find a measure you can use for COLA increases. Don't pull the number out of thin air.

(Program Officers): If you're thinking of doing that or know your institution requires it, it's good to build that in, because we won't issue additional funds down the road after your initial award.

Q: Is there a preference for using funds for current staff rather than hiring part time positions?

A (Megan Friedel): There's no preference, but you do have to go the extra mile to justify those costs for current staff and ensure that the grant funds are only covering their time on the project, not their full salary. At my institution, we have a percentage rate that we use for how much time would be spent on the grant as opposed to other time for other work duties. You will want to consider this and determine the right balance. There is an inherent precariousness with part-time positions. There are labor and equity considerations with hiring part-time positions so maybe you do want to use current staff. A third option would be to hire a permanent staff member who would continue beyond the grant, but remember the funds are only available for

that person for the duration of the grant project, so you'd need to demonstrate the position's sustainability beyond the grant period.

Q: If student salaries are supported by our existing student employment budget, should we still include a JD for student employees?

A (Program Officers): Yes.

Q: If we have in-house digitization staff/equipment that would allow us to do the project more cost-effectively than with a vendor, would it be appropriate for the whole budget to be staff time?

A (Megan Friedel): If your whole budget is being spent on digitization, that is good as the focus of this grant is digitization. However, you will also want to include why you aren't spending money on anything else. A budget with only one line item can trigger more conversation among the review panel on whether the applicant has thoroughly considered other costs that may come up as part of the project. Again, when you are budgeting for in-house digitization, you only want to budget for the time staff members will be spending on the project. You want to be including what they are specifically doing on the project. And you want to think about other costs on the project, such as metadata.

Q: May we charge overhead to cover employee benefits?

A (Megan Friedel): Employee benefits need to be included. If it's current employees, you can charge the percentage of their benefits that corresponds to the percentage of their time spent on the project. "Overhead" typically means indirect costs, which are not allowed. But if a permanent employee is spending e.g. 25% of their time on the project, you can charge 25% of their fringe benefits to the grant.

Q: If a symposium/conference about the subject of the newly available digitized material, using the digitized items as a component of the symposium, is planned as an outreach activity, is the max for this activity \$7,500?

A (Program Officers): No. \$7,500 is the conference travel maximum. So if you're going to a conference(s) during the grant period to present on your work, the travel, registration, hotels, etc. need to be under the \$7,500 limit. What you are describing is education, promotion, and outreach, which falls under a different category and is not limited by that maximum.

Q: When we submit personnel costs, is it acceptable to include a year-to-year increase for a 24-month or 36-month grant?

A (Program Officers): Yes, please see the answer above regarding COLA increases.

Q: Can projects that engage Indigenous tribes as consultants allow the tribes to determine the cost for their services within the budget? My institution has a monetary limit on honorariums, which may not adequately reflect the value of the tribes' work on the project.

A (Megan Friedel): Yes, absolutely. You will need to justify that and explain it. If you're reaching out to a collaborator in a tribal organization and getting their input on appropriate compensation,

make sure your budget reflects that and your budget narrative explains the compensation in detail and how you arrived at that cost.

Q: We will be using decades-old equipment to do some of the digitization for our project. Some of these machines have been in more or less continuous use since the 1980s, and need frequent repairs and/or parts replacements. Would it be reasonable to include an estimated cost for a portion of the cost of machine upkeep during the project as part of the budget?

A (Program Officers): There's a \$15,000 limit for equipment and supplies, which could also include buying some new equipment. People sometimes include service subscriptions, which is allowed. If you have a maintenance or repair service subscription, that could be a way to charge the grant under the vendors/contractors budget line. If you can replace equipment, you could do that under your equipment/supplies budget line. Just be sure it's explained clearly in the budget narrative.

Q: I have 3 questions. 1. The 15k max that Megan referred to for "rehousing" materials - would acid-free folders for refiling materials post-digitization fall under that category? 2. In the work plan, can I include references to non-funded activities, i.e. activities that aren't allowed to be funded through CLIR, but that are part of our work plan? 3. Collection assessment is not allowed. Would post-digitization collection assessment be allowed to decide how to further break down our collections into sub-collections on the website?

A 1 (Megan Friedel): Yes, for sure. However, it's not a bad idea to explain somewhere in your budget narrative briefly what housing the materials are currently in. It's not a big trigger if we see acid-free folders or re-housing, but the panel will want to know how they're currently being maintained and have you explain why you specifically need the acid-free folders.

2 (Program Officers): You're not prohibited from including non-funded activities. I would be very clear in how you do that, similar to how Megan discussed some ways of considering in-kind cost share. You will want the work plan, budget narrative and budget detail to be very clear. So if there are activities that are funded institutionally rather than being funded by the grant, this should be easy for the panel to recognize the difference.

3 (Program Officers): I think this is a matter of what you're doing and how you describe it. Primarily when we talk about collections assessments, we are thinking of external collections assessments you are paying a consultant or IP specialist to assist with. You may be talking about systems design or a form of metadata; I wouldn't consider this an automatically disallowed cost, but I wouldn't refer to it as collections assessment because that's not what we typically mean by that phrase. Post-processing is allowed. Such as, detailing your metadata into very specific sub-collections. If you're using an outside vendor, have the vendor include this cost within their quote. If you email the program inbox hiddecollections@clir.org with more specifics on your project, we may be able to answer this question in more detail.

Q: Our plan calls for outreach within multiple communities in another country by a scholar consultant. The scholar's trips are not conferences, but are specifically dedicated to project outreach within multiple communities. Does the \$7500 travel

maximum apply to this travel? Or, does the \$7500 maximum only apply to conferences?

A (Program Officers): The \$7,500 maximum only applies to conference travel expenses. However, if this travel is a part of your outreach or necessary project travel, you need to be fiscally responsible and detailed in your budget narrative. Ensure you are defining and justifying why you need to spend a certain amount of money for your outreach. The review panel is going to want to see a budget detail and narrative that makes sense and how it is included in your work plan. They don't want it too extensive in one area and not in another.

(Megan Friedel): Would travel be allowed outside the US and Canada?

(Program Officers): Materials need to be in the United States and/or Canada, and digitization has to be in the United States and/or Canada. We have never seen travel outside of the US or Canada, but don't believe it is disallowed.

Q: If we know who we will hire for a term position, do we also need to upload a corresponding job description in addition to their resume?

A (Megan Friedel): My question is, if you already know who you're going to hire, is this someone who already exists within your organization, but you're hiring them for additional duties? If so, and you're hiring them for additional duties, you can upload their resume or CV. If it's a position that hasn't yet been created, you may want to consider the equity issues as far as hiring someone into a new position. Is it supposed to be a competitive hire? If you have someone in mind, and you're going to just hand it to someone, you may need to justify that.

(Program officers): Sometimes you are using an archival professional, and you're really using them as a consultant to provide an outside service, but not hiring them. If they are providing an outside service, they would be a consultant and you want to categorize them appropriately in the budget detail, etc. as not your employee. You want to be sure the salary is commensurate with their experience and the work they are doing.

Q: Do we need to include the entire project budget? OR just the requested amount? (Megan was saying before that a request for JUST salaries was concerning, but what if that applicant was asking for CLIR funding for salaries only, even if project costs far exceeded that)

A (Megan Friedel): You are going to have to mention this. If other project elements are a cost share, it is going to trigger some alarms if you are not talking about how the digitization is going to be handled. If there are other parts of the project that your institution will cover, you will want to include that in the cost-share section of the budget narrative. Again, cost-shares are not required, but you will want to include if your institution is going to bear the cost of other project deliverables.

(Program Officers): You want to be sure you are covering the core values, so what activities are you doing to support outreach of this program. We also want to clarify around cost-share. As Megan described, if this project costs more than you're asking for, talk about that cost-share in your budget narrative. If you assign an amount of money to that cost-share, do not include that

money in your budget narrative total or your budget detail. It's important to explain in your budget narrative if you are doing a cost share, but do not include it in your budget detail because then your budget detail will not match your award request amount. Budget narrative, budget detail, and award request should all match.

Q: You said to note how the staffing requests will support underrepresented groups. Is it acceptable to mention these categories specifically, e.g., types of neurodiversities; the ways someone is differently abled, etc.?

A (Megan Friedel): Yes, this is fine. If it's a request for new staff, I would highly recommend making sure that you mention that hiring will be inclusive of all different identity types, including but not limited to neurodiversity, differently abled applicants, etc. If this is a request for funds to cover a current staff person who already works for your organization or a collaborating institution, I would strongly recommend making sure that you have the permission of that person to share that identity-based information. They may consider it to be sensitive, private information - which applies for any identity-sharing you are doing in your application. Make sure you are asking staff included in the application to put their identities in their own words, within the limits of whatever they are comfortable sharing publicly. And it's okay if they don't feel comfortable sharing that publicly.

Q: I'm applying as the PI/Lead on behalf of my institution and handling most of the work related to digitization. I will be working with another staff member who is outside my direct unit, but within the overall department. I will be working with this coworker on the outreach component after items are digitized, though that will largely be her responsibility and the activities will require requested funds. Is she considered a partner/collaborator, requiring PI status, CV, etc or can I just remain the lead with the responsibility of distributing funds?

A (Program Officers): If these activities take place during the project period and this person is located within your organization, even if in a different department, they can be listed as a PI on the application. However, this is not required. Each application can have up to three named PI(s). If you name them as a PI, you will need to upload a CV. A collaborator refers to a collaborating institution outside of your institution that will be working closely on the project who also meets the eligibility requirements.

Q: Our plan calls for outreach within multiple communities in another country by a scholar consultant. We are estimating an amount to rent multiple venues and A-V equipment when necessary and provide light refreshments. We are not able to get specific quotes beforehand. Is this acceptable?

A (Program Officers): Any vendor/consultant services over \$5,000 require a quote. Any expenses included in your budget under that amount can be an estimate, and must be explained clearly in the budget detail and budget narrative.

Q: I understand CLIR won't fund Indirect costs, including overhead. Our institution does charge a small percentage (I think its 2%) as a one time advancement fee or a gift

processing fee that's used for donations, stewardship etc. What are CLIR policies on such a gift processing fee?

A (Program Officers): This is considered an indirect cost and is disallowed.

Q: We propose to hire a term position through a temp agency per our university's guidelines for hiring temporary staff. We were critiqued because the temp agency charges a 32% overhead fee similar to the overhead that would be charged by the university if it was a university position (34%). (Note: The temp agency does provide basic benefits.) Is this temp agency fee allowable? If so, how can we best position this solution, given the need to use the temp agency?

A (Program Officers): If your definition of overhead costs includes anything other than fringe benefits it is considered an indirect cost. As described, the 32% overhead fee from the temp agency is considered an indirect cost and is disallowed. One solution is that the 32% fee could be paid by your organization as a cost share and not included in your project ask (but reflected in the cost share section of the budget narrative). Again, any overhead costs that include anything other than fringe benefits is considered an indirect cost and is disallowed. Standard fringe benefits in conjunction with salaries are an allowable cost for organizations.

Q: Are volunteers allowed - obviously not within the budget - but within the narrative to show that we have capacity?

A (Program Officers): Yes, you can include volunteers in your project proposal.

A (Megan Friedel): Yes, demonstrating capacity is always nice to see. However, please consider fair labor and equity when you are including volunteers. The review panel may want to understand more about why you are providing free labor support and not paying these volunteers equitably for their contribution to the project. If you have room within your budget, you might want to consider compensation for volunteers, or at least make a good, equity-based justification in your narrative why it is not necessary to financially compensate your volunteers.

Q: Is rental of space for the project considered overhead? Our organization is struggling to identify space within our current footprint to allocate for CLIR funded activities.

A (Program Officers): Rental space is considered an indirect cost and is disallowed.