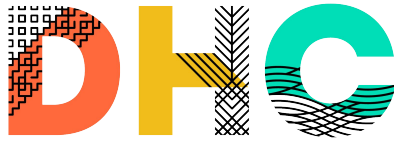*Digitizing Hidden Collections*
Applicant Support Series–Session 4:
Staffing & Budget
April 2, 2025

Welcome! We're glad you're here.
There is no audio at the moment. Feel free to introduce yourself in the chat box. 👋

We'll begin at 2pm ET | 11am PT.

Council on Library and Information Resources

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Introductions

Our Webinar Platform

- Click 'CC Show Captions' to turn on captions
- All attendees are muted
- Set chat to "Everyone"
- Submit questions in Q&A box
- Recording in progress

Kaskaskia
Kickapoo
Mascogo
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ᏌᎤᏓᎤᏃᎠ ᏥᎣᏆᏂ ᏓᏂᏓᎠ ᎣᎤ^ᏃᎤ^(Osage)
Peoria
Potawatomi
Seminole
Shawandasse-Tula
Timucula

Visit Native-Land.ca to learn about Indigenous Lands where you live.

Session outline:

- ✓ Overview + introductions
- Presentation
- *Break* (5 minutes)
- Presentation
- Q/A
- Wrap up

Final Application Tasks + Uploads

- Task: Project Details—Capacity
  - Upload: Resumes and/or Job Descriptions
- Task: Project Details--Need for Support
  - Upload: Subcontracts
  - Upload: Budget Detail
  - Upload: Budget Narrative
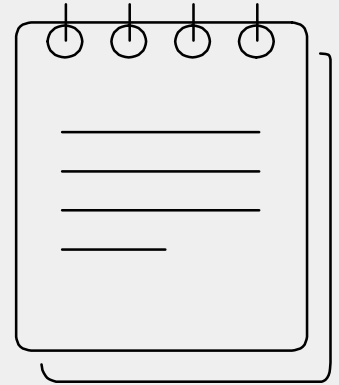
Introductions

Megan Friedel

Lead Archivist, Rare and Distinctive Collections

University of Colorado at Boulder

Welcome!

Megan K. Friedel (she/her)

Lead Archivist,

University of Colorado Boulder Libraries

CLIR Grant Reviewer

Overview

What we'll cover today

1. Staffing considerations
2. Offering a compelling case for need in a budget narrative
3. Using a budget narrative to build justified budget detail
4. Connecting budgets to community-centered outcomes

Core Values

5 Core Values

1. **Public Knowledge**
2. **Broad Representation**
3. **Authentic Partnerships**
4. **Sustainable Infrastructures**
5. **Community-Centered Access**

Application Guidelines

General things to remember

1. **Thoroughly read and follow the directions in the Application Guidelines!**
2. **Reach out to CLIR program officers if you have questions**
3. **Make sure to complete <u>all</u> required sections**
4. **Upload <u>all</u> required documents**
5. **Review all allowable and disallowed costs**
6. **Where templates are provided, USE THEM!**

Task: Project Details—Capacity

"What capacity and strengths will you bring to this project, and what capacity and strengths do you hope to build?" (700 words)

How does this relate to Staffing & Budget?

- Focus on your **team's current strengths**
- Describe how additional staffing/budget provided by the grant funds can build **future capacity** in your team
- Relate those Staffing & Budget requests to the **core values**
- Note where Staffing & Budget requests will specifically **support underrepresented groups**
- Note **related past projects** that demonstrate capacity
- Demonstrate **post-grant sustainability**

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Remember:

Permanent staff who are currently employed by the lead institution or collaborating institutions can only be supported by grant funds for **work directly related to the project,** and this cost must be **appropriately justified** in the budget narrative.

Upload: Resumés and/or Job Descriptions

What to upload:

- **Resumé/CV** (brief) for each of the named project principal investigators, as well as key project staff covered by funds
- **New positions** that will be supported with grant funds: job description, including duties; required/preferred qualifications; **pay rate**; benefits package if applicable; & term of position (if not permanent)
- **Student work** job description (if applicable)
- Job descriptions can be uploaded together as one PDF. Resumé/CVs need to be uploaded separately.

Let's talk about pay rate!

- Equitable
- Competitive
- Acknowledges the precarity of temporary/contingent labor
- Takes into consideration geographic location(s) and cost of living in these areas
- <u>Must</u> match salary/wages/benefits listed in Budget Detail and Budget Narrative

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Task: Project Details—Need for Support

Required elements:

1. "Why do you need support from CLIR's program to undertake this project?" (700 words)
2. Budget Detail
3. Budget Narrative

"Why do you need support from CLIR's program to undertake this project?" (700 words)

GUIDANCE:

- How do funds support **DHC's mission and core values** → this is key!
- How does **your institution's mission and values** match DHC's theme and core values?
- Why **grant funds are essential** (as opposed to applicants' existing funding)
- How **collaborators are committed** to supporting the project → reference support letters!

"Why do you need support from CLIR's program to undertake this project?" (700 words)

GUIDANCE (continued):

- How/if the project builds off **existing budgets** for building digital collections
- Whether there will be plans for sustained funding post-grant
- **When private foundations are lead applicant**: need additional justification
- Collaborations: **authentic and equitable partnerships**

Authentic & Equitable Collaborations

Authentic: "The program prioritizes projects that foreground **meaningful engagement with the underserved communities whose stories the source materials tell**, and that build **inclusive teams** across institutional and geographic boundaries." *(Core Value: Authentic Partnerships)*

Equitable:
1. Are collaborators being equitably compensated for their project time?
2. Do the requested funds equitably support this project across collaborators?

Upload: Budget Detail

Use the Budget Detail templates!

➔ Linked in the Application Guidelines in "Project Details – Need for Support"
➔ **Do not** create your own spreadsheets
➔ Follow instructions for use
➔ Make sure everything you add into the Budget Details spreadsheet is mentioned and justified in the Budget Narrative

**Additional Instructions:** CLIR **"Apply for an Award"** page
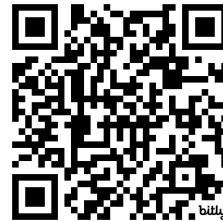
Budget Detail

➔ Choose 12mo, 24mo, or 36mo template
➔ Break into 12mo reporting periods
➔ Assign each line item from drop-down list
➔ Funds are ONLY dispersed to lead applicant in US or Canada → not to multiple organizations
➔ Do NOT include cost shares
➔ Canadian lead applicants: budget detail must be in US dollars

Appendix A: Budget

Allowable Costs

- Staff salaries, wages, benefits for those dedicated to project → permanent staff funding must be justified (no max)
- Staff training and/or consultant fees (no max)
- **Collaborative projects ONLY:** Admin support for personnel who will coordinate or implement project **(max: $10,000)**
- Equipment/supplies for digitization, metadata, rehousing **(max: $15,000)**

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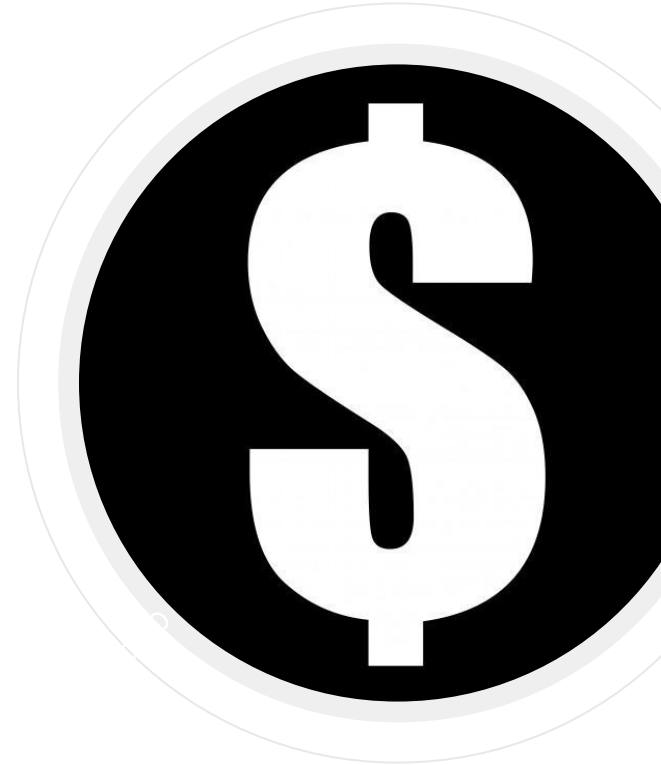
Allowable Costs (continued)

- "Other services" related to project, such as digitization vendors, equipment rental, server time, one-time digital preservation costs, etc. (no max)
- Funds for travel necessary to complete project (no max)
- Conference registration and related travel expenses specifically related to project outreach **(max: $7,500)**

CLIR's Indirect Cost Policy

The Council on Library and Information Resources **does not pay indirect costs.** Indirect cost recovery is the result of negotiations between the federal funding agencies and universities who carry out government-sponsored research. The Council on Library and Information Resources is not a federal funding agency supporting "sponsored research" and it is our policy to fund direct costs only.

Disallowed Costs (Selected)

- **INDIRECT COSTS ARE NOT ALLOWED**
- "Miscellaneous" or otherwise unspecified costs
- General purpose items that can be used after the project (e.g. furniture)
- Collection assessment
- Conservation or preservation <u>beyond</u> stabilization for digitization
- Film or film transfer
- Oral history collection <u>except</u> if necessary for metadata creation

Disallowed Costs (Selected, continued)

- Extensive processing
- Digital forensics or data recovery
- Copyright assessment or research
- Tuition reimbursement for student employees

Upload: Budget Narrative

Budget Narrative

- Strongly recommend using the **template** linked in the Application Guidelines
- For each line item (listed in template), explain how it was estimated and justify costs → Follow all "Instructions" in Application Guidelines

Budget Narrative: Key Things to Remember

- Vendors (if applicable): Include brief rationale for vendor selection + description of costs
- In-house digitization/metadata creation is allowable: explain cost estimates
- Cost share is NOT required but, if used, should be explained here
- Grant management must be explained
- **Canadian applicants:** Explain conversion/exchange rate

Budget Narrative: Key Things to Remember (continued)

- Private foundation applicants need additional funding justifications
  - Identify major funding sources and why project cannot be supported by these funds
- **Collaborations:** Explain distribution of funds, emphasis on equitable distribution → if one partner is funded significantly more, explain why and how this will benefit all partners
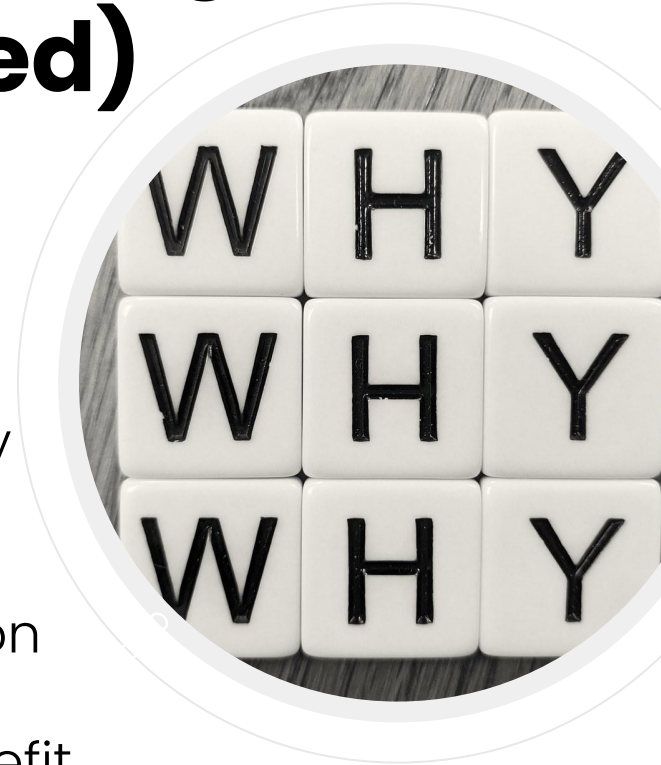
Break

Upload: Subcontracts

Vendors vs. In-House

DHC allows for EITHER in-house digitization projects -OR- projects that are outsourced to digitization vendors.

See CLIR's **"Guidelines for Grant Proposals Involving Subcontractors or Consultants"**

Uploading Service Estimates/Quotes

- **Required ONLY if the service proposal exceeds $5,000**
- Include brief justification in Budget Narrative about vendor selection and how the vendor will respect DHC core values
- Estimates/quotes need to clearly delineate <u>ALL costs and digitization specs</u>
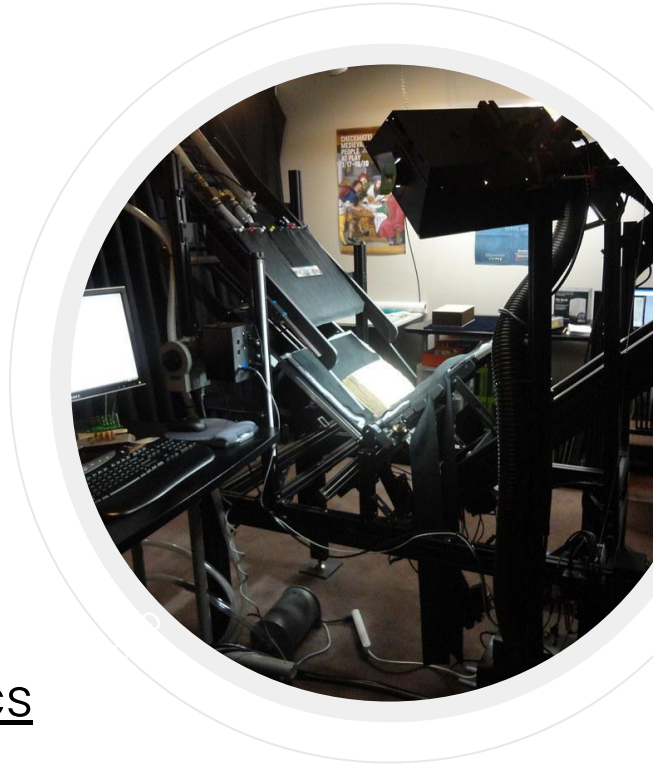
Final Thoughts

Things to Remember

- Demonstrate your projects' commitment to the DHC core values
- Demonstrate your need for support and your ability to complete the project
- **Budget Detail should match your Budget Narrative**, which should <u>also</u> match other narrative areas of the application.
- Justify all costs in the narrative sections
- Review your application against the **Final Application Review Rubric**

Resources

CLIR Core Values:
https://www.clir.org/hiddencollections/

DHC Application Guidelines:
https://bit.ly/4ji7yu1

DHC Online Application Form:
https://clir.smapply.io/prog/digitizing_hidden
_collections_amplifying_unheard_voices/

Question + Answer

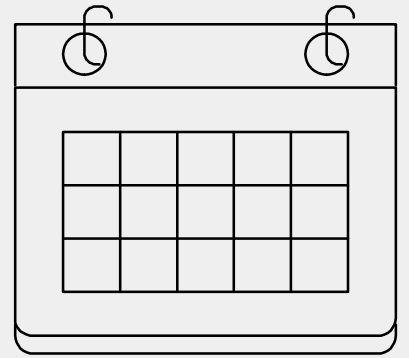Submit questions using Q&A box

Wrap up:

Session 5:
Q&A

April 9
2:00–3:00 PM ET

Register for final session:
clir.org/hiddencollections/apply-for-an-award/

👍 **Thank you!**

Please take a moment to complete a survey about this session.

Questions? hiddencollections@clir.org