WEBVTT

1
00:00:16.630 --> 00:00:24.100
Louisa Kwasigroch: Hello, and welcome to the Recordings at Risk Recipient Webinar. I'm Louisa Kwasigroch, Managing Director at CLIR.

2
00:00:24.500 --> 00:00:31.960
Louisa Kwasigroch: We'd like to begin by congratulating you all once again on being selected as grant recipients for the *Recordings at Risk* program.

3
00:00:32.369 --> 00:00:39.769
Louisa Kwasigroch: There are a varied and remarkable collection of projects represented here, and we know how much work has gone into them already.

4
00:00:39.970 --> 00:00:44.889
Louisa Kwasigroch: We're excited to share some information about what happens next as your projects begin.

5
00:00:45.190 --> 00:00:48.559
Louisa Kwasigroch: We're going to start off with some introductions to our team.

6
00:00:51.350 --> 00:00:57.920
Louisa Kwasigroch: CLIR's work is accomplished by a relatively small staff of about 20 geographically distributed individuals.

7
00:00:58.400 --> 00:01:08.900
Louisa Kwasigroch: Today's webinar is led by the Grants Team, which administers CLIR's active regranting programs, offering support for the entire grant cycle, from application to final report.

8
00:01:09.260 --> 00:01:18.090
Louisa Kwasigroch: Some or all of you may already know us from applicant webinars or from email exchanges, but we'll do some quick introductions so you can put names with faces.

9
00:01:18.490 --> 00:01:22.650
Louisa Kwasigroch: Sharon Burney is a program officer from Midlothian, Virginia.

10
00:01:22.780 --> 00:01:26.720
Louisa Kwasigroch: Alyson Pope is a program officer from Pittsburgh, Pennsylvania.

11
00:01:26.900 --> 00:01:31.080
Louisa Kwasigroch: Jane Larson is a Senior Program Associate in Pittsburgh, Pennsylvania.

12
00:01:31.230 --> 00:01:40.469
Louisa Kwasigroch: Lizzi Albert is Community Relations Manager in Washington, D.C, and I, again, am Louisa Kwasigroch, Managing Director, based near Chicago, Illinois.

13
00:01:41.200 --> 00:01:48.999
Louisa Kwasigroch: In terms of future grant cycles, we'd like you to know that *Recordings at Risk* Cycle 13 call for proposals will open in November 2025.

14
00:01:49.650 --> 00:01:59.720
Louisa Kwasigroch: Currently, there is also an open call for our other re-granting program, *Digitizing Hidden Collections: Amplifying Unheard Voices*, that will close October 20th, 2025.

15
00:01:59.870 --> 00:02:03.660
Louisa Kwasigroch: Both programs are generously supported by the Mellon Foundation.

16
00:02:06.470 --> 00:02:29.889
Alyson Pope: Our team would like to center today's conversation by acknowledging that, as residents of the United States, we are speaking to you from unceded land of many Indigenous peoples. I'd like to respectfully acknowledge and recognize the original and current caretakers of the land, water, and air where I live, the Shawnee and Osage peoples, and all of their ancestors and descendants. I am grateful to have the opportunity to live and work on their homelands.

17
00:02:29.890 --> 00:02:45.750
Alyson Pope: And I ask you to join me in acknowledging all Indigenous communities, their elders, both past and present, 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.

18

00:02:51.740 --> 00:02:57.980
Alyson Pope: During today's session, we'll spend our time with an overview of some of the things you'll need to know about managing your grant.

19
00:02:57.980 --> 00:03:12.569
Alyson Pope: We'll go over an introduction to your reporting requirements so that you can have them in mind throughout the project. We'll cover how and why to request a modification, and then turn to some final notes, including advice from past recipients. We'll end with time for your questions.

20
00:03:12.570 --> 00:03:32.899
Alyson Pope: We'll ask that you use the separate Q&A box to ask questions today. This box can be opened the same way as the chat box. If we don't have time to get to all the questions, we'll compose responses to the remaining ones and post all the answers along with the session transcript. The session recording and transcript will be made available on the [Manage an Award](#) page of our website within a week.

21
00:03:33.580 --> 00:03:50.840
Alyson Pope: We especially want to welcome staff today who may not be overseeing these projects, but working on them day to day. It's really important to us that you hear about all of these details, too, so that you understand how your work fits into your organization's grant and into larger cultural heritage preservation efforts at CLIR.

22
00:03:54.130 --> 00:04:17.189
Alyson Pope: Your starting point will always be the *Recordings at Risk* [Manage an Award](#) page. In much the same way as the Apply for an Award page helped guide your proposal writing, the Manage an Award page is a one-stop shop for grant recipients, with information on all the administrative components of holding a CLIR grant. Most of the information we'll be covering today can be found there, and if you ever need a refresher on our policies.

23
00:04:17.190 --> 00:04:21.189
Alyson Pope: The recording of this webinar will also be posted to this page.

24
00:04:23.080 --> 00:04:38.819
Sharon Burney: We'll start with CLIR's reporting requirements for grantees. Seeing what will be required at the end of your project may help you decide how to document progress and keep metrics about the work. We hope this will make reporting easier when your projects are complete.

25
00:04:40.740 --> 00:04:51.040
Sharon Burney: You were all awarded grants in the 12th *Recordings at Risk* competition. For that reason, you will hear us refer to you as a group as our Cycle 12 Recipients.

26
00:04:51.120 --> 00:05:05.670
Sharon Burney: Your project end date is August 31st, 2026. This is the date by which all approved project activities, including digitization, metadata creation, and providing whatever access you're providing should be complete.

27
00:05:05.890 --> 00:05:18.089
Sharon Burney: Grant funds may only be expended during this 12-month period. To change this timeline, you'll need to get approval from us, which we will cover shortly.

28
00:05:18.340 --> 00:05:24.580
Sharon Burney: Final reports are due within 90 days of project completion, November 30th, 2026.

29
00:05:24.610 --> 00:05:37.400
Sharon Burney: You may find that your project ends earlier than August 31st, 2026, or that you're ready to submit your report earlier than November 30th, 2026. Submitting the final report early is welcomed.

30
00:05:37.410 --> 00:05:45.499
Sharon Burney: You'll just need to contact the CLIR's Grants Team at recordingsatrisk@clir.org so we can start the reporting process.

31
00:05:47.360 --> 00:06:00.649
Sharon Burney: Grant reports are submitted through SM Apply, using the same login and password as your proposal submission. In addition to a narrative about your projects and total materials digitized,

32
00:06:00.690 --> 00:06:08.729
Sharon Burney: we also require full financial reporting. If you forget the login credentials or lose access to them for any reason,

33
00:06:08.730 --> 00:06:23.739
Sharon Burney: you will need to contact us through the program email recordingsatrisk@clir.org so that we can link your report to the correct credentials. One of the system's safety measures ensures that only the primary account holder is able to submit a report.

34
00:06:24.140 --> 00:06:42.440
Sharon Burney: You can also find a link to SM Apply on the Manage an Award page. All communication and reminders for reporting will be sent to the active PIs and any additional contacts you have provided to our team. If there are any others involved in the project who need such notifications.

35
00:06:42.440 --> 00:06:48.029
Sharon Burney: You will need to send the names and contact information for those people to our program email address.

36
00:06:48.230 --> 00:06:53.719
Sharon Burney: Please share this information as soon as possible so we can keep our records up to date.

37
00:06:53.920 --> 00:06:59.090
Sharon Burney: We're now going to take you on a tour of the final reporting form itself.

38
00:06:59.290 --> 00:07:07.689
Sharon Burney: If due to a future modification to your project, you are required to submit an interim report, most elements will be the same.

39
00:07:10.570 --> 00:07:20.349
Jane Larson: The first section of the report is the quantitative assessment. Here you'll be entering information related to the numbers and types of recordings nominated for digitization.

40
00:07:20.440 --> 00:07:28.049
Jane Larson: The number of archival master files produced and variances between the estimated and actual digitization numbers.

41
00:07:28.120 --> 00:07:44.610

Jane Larson: To complete this part, it will be helpful to have access to your original proposal for your project. You can download a copy of your proposal by logging into the system using the same credentials used to create your application. If you don't know where to find a copy of your proposal, you can also email us to ask for one.

42
00:07:47.550 --> 00:07:56.680
Jane Larson: The next reporting section includes space to document project developments, both internal and public. Internal developments may include things like

43
00:07:56.860 --> 00:08:02.140
Jane Larson: Digitization metrics such as tracking time data for steps in the project workflow.

44
00:08:02.250 --> 00:08:07.070
Jane Larson: Preparing materials for shipping to the vendor, metadata creation, ingest, etc.

45
00:08:07.460 --> 00:08:14.879
Jane Larson: The implementation of new workflows, standards, protocols, and or procedures for digitization and description.

46
00:08:15.360 --> 00:08:18.949
Jane Larson: The implementation of new tools or systems.

47
00:08:19.100 --> 00:08:22.249
Jane Larson: And new donations and or grant applications.

48
00:08:22.860 --> 00:08:42.610
Jane Larson: We also want to hear about public development, such as the creation of new blogs, social media accounts, websites, or even content created for existing ones. Research guides, online or physical exhibitions, or news articles. The incorporation of digitized materials into curricula at any educational level.

49
00:08:42.669 --> 00:08:56.399
Jane Larson: or publications or presentations about the project, or arising from research using the digitized materials. CLIR pulls together data about the impact of its program for its own annual report to the Mellon Foundation.

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00:08:56.400 --> 00:09:04.620
Jane Larson: So providing as many details as you can about the ways that this opportunity affected your organization, collections, staff, and ways of working

51
00:09:04.620 --> 00:09:11.820
Jane Larson: will be very helpful to us. Taking notes somewhere about the impact of this grant will help you easily complete this section.

52
00:09:11.940 --> 00:09:26.119
Jane Larson: Keeping a file with copies of project documentation may also be helpful. You will have a chance to append copies of these documents to your report, demonstrating the varied and creative ways you will use your project to educate and serve others.

53
00:09:28.580 --> 00:09:44.599
Lizzi Albert: Here's a quick glimpse of what these impact questions look like on the reporting form. The report form includes simple checkboxes to document activity, which you'll then have the opportunity to explain further in the narrative portion of your report. Here is the checklist for public outcomes.

54
00:09:44.710 --> 00:09:58.699
Lizzi Albert: Because *Recordings at Risk* is designed to support smaller-scale efforts, CLIR does not expect that all of these things will happen in the course of your work. Most recipients just check 2 or 3 boxes here, and some don't check any. That is okay.

55
00:09:58.750 --> 00:10:07.130
Lizzi Albert: Just check any boxes that do apply to you, so we will know to look for them in your narrative and to account for them in our own summary reporting to the Mellon Foundation.

56
00:10:11.180 --> 00:10:20.079
Lizzi Albert: Next, we ask grant recipients to share with us where users can find information about the digital copies of the recordings reformatted through your project.

57
00:10:20.230 --> 00:10:34.779
Lizzi Albert: Some of you will be providing public access to both the digital files and the associated metadata created through your project, and others may only be providing public access to the metadata. CLIR expects you to provide access as you described in your proposal.

58
00:10:35.390 --> 00:10:50.300
Lizzi Albert: This is a good place to remind everyone that creating and providing access to metadata for the digital copies of the recordings created through your project is a requirement of the program, unless a specific exception was made in your proposal for cultural or ethical reasons.

59
00:10:50.540 --> 00:10:59.589
Lizzi Albert: CLIR expects that you will create and publish online at least some of the basic metadata for the digital copies of the recordings, so people can learn about what you have.

60
00:11:00.970 --> 00:11:05.439
Lizzi Albert: In this report section, you'll have the option to include up to 10 URLs.

61
00:11:05.480 --> 00:11:22.439
Lizzi Albert: We encourage you to provide a few high-level links to the collections, rather than many lower-level links. These links allow us to verify that you've made metadata accessible at the least, as well as verify that those of you who can make the digital surrogates of recordings available for streaming online have done so.

62
00:11:22.730 --> 00:11:36.610
Lizzi Albert: Again, we understand that for some of you, legal and ethical issues will make it impossible to provide full access to copies of your recordings. If this is the case, you just need to provide one or more links to where your metadata is at the end of your project.

63
00:11:36.680 --> 00:11:43.479
Lizzi Albert: You can also provide more information about future locations for your metadata and files in the narrative sections of your report.

64
00:11:46.050 --> 00:11:54.820
Lizzi Albert: You'll then provide the contact information for the project's PIs, service provider, and the person who should be contacted if questions emerge about the report.

65
00:11:57.020 --> 00:12:07.120

Alyson Pope: The final question in the report form is a financial narrative where you should comment on actual grant expenditures during the reporting period as they relate to your proposed budget.

66
00:12:07.120 --> 00:12:27.059
Alyson Pope: The financial narrative is also where you are able to address any grant modifications that may have included budget reallocations. Every budget category included in the original proposal budget should be addressed here, and if there are any variances of 5% or more between projected and actual spending, make sure to include a detailed explanation.

67
00:12:27.440 --> 00:12:39.190
Alyson Pope: Once you've completed all of the form prompts, you will either save this section of the form or mark it as complete. At any point, you can select save and continue editing if you need to pause work on the report form.

68
00:12:39.540 --> 00:12:48.220
Alyson Pope: Marking the report form as complete will take you to the review page, where you can double-check the information you entered and review the additional steps you need to take.

69
00:12:48.540 --> 00:13:01.809
Alyson Pope: There are a few documents to upload before you'll be ready to submit your report. SM Apply will display a list of buttons on the left-hand side of the screen that will prompt you to upload the remaining components of the report, which we'll go over.

70
00:13:03.980 --> 00:13:27.709
Alyson Pope: The first and perhaps most important part of your report is the project narrative. This will be an uploaded document of no more than 6 pages, which will contain the types of information listed here. A summary of the project and purpose of your grant, your progress toward expected outcomes, where you can explain the numbers, including any variances in your quantitative section, any surprises, setbacks, and challenges that you faced.

71
00:13:27.900 --> 00:13:42.489
Alyson Pope: Significant accomplishments and lessons learned, and finally, your future plans. Ultimately, this is information that will help us create resources that can be of use to other organizations wanting to initiate their own AV digitization projects.

72
00:13:42.490 --> 00:13:49.570

Alyson Pope: We'll also share the lessons learned from grantees with our funder, the Mellon Foundation, which receives a complete copy of every report.

73
00:13:53.250 --> 00:14:07.660
Sharon Burney: Final reports require a project manifest, a spreadsheet which includes the names and locations of the digital files, normally the access copies, as well as notations about any checksums and restrictions.

74
00:14:07.660 --> 00:14:20.910
Sharon Burney: This requirement allows us to use an automated web crawler that CLIR has developed to conduct periodic checks that the online files created through CLIR's digitization re-granting programs are, in fact, online.

75
00:14:21.240 --> 00:14:29.320
Sharon Burney: Note that CLIR's template for this has multiple tabs, including one with instructions, so be sure to read through all of them.

76
00:14:29.400 --> 00:14:48.649
Sharon Burney: Taking a look at this template now, and building in time to create this document into your workflow, will help you save time later. Normally, your digitization vendor will return a spreadsheet to you that will be very similar to what you need to submit here, and you should be able to adapt the vendor's spreadsheet for this template.

77
00:14:48.760 --> 00:15:00.070
Sharon Burneye: If you work out your file naming conventions at the start, and ensure your vendor names your files exactly according to your needs, most of your work for this requirement will be done.

78
00:15:00.180 --> 00:15:11.490
Sharon Burney: If you leave it until the end, it might take some effort to pull it together, so we do strongly recommend coming up with a strategy for compiling this data during the course of the project work.

79
00:15:11.930 --> 00:15:22.119
Sharon Burney: Of all the pieces of the final report, this document is what allows us to verify that you have created all the deliverables agreed upon when you received funding.

80
00:15:22.360 --> 00:15:40.929
Sharon Burney: If, in this midst of your project, issues arise that will affect your ability to reach the goals included in your application, reach out to CLIR Grants Team so we can help you decide the best course of action. We will go over how to do that shortly, but first, let's finish the report form.

81
00:15:42.010 --> 00:15:50.399
Sharon Burney: The last required upload is the financial report. The financial report is the upload task that supports the financial narrative.

82
00:15:50.460 --> 00:15:55.539
Sharon Burney: This is an upload using the same budget detail that you submitted with your proposal.

83
00:15:55.550 --> 00:16:12.859
Sharon Burney: A copy of the budget detail was emailed to all PIs at the same time as the award letters. Be sure to save that form to use for your future report. The budgeted numbers are already complete, so you'll just need to fill in the actual fields of the template.

84
00:16:13.020 --> 00:16:16.579
Sharon Burney: If you lose this file at any point, just let us know.

85
00:16:16.970 --> 00:16:31.100
Sharon Burney: It is important that you use this template for your financial report, rather than any internal financial forms your institutions may use. Some of you may find that you do not spend all of the grant. This is okay.

86
00:16:31.100 --> 00:16:45.989
Sharon Burney: We will, however, expect you to return any unexpended funds exceeding $100 to CLIR at the time you submit your final report. Our Manage an Award page includes more information on CLIR's return of funds policy.

87
00:16:49.420 --> 00:17:00.699
Jane Larson: To allow collaborative report drafting, we've also created a Google Doc template that your team can use to prepare your draft report. The document includes all the information requested in the report.

88
00:17:00.700 --> 00:17:10.080
Jane Larson: Covering both the questions on the form and the documents that will be added as uploads. Some of you may have used a similar template when you prepared your applications.

89
00:17:10.099 --> 00:17:16.860
Jane Larson: It's the same principle here, just make your own personal copy of the document, and save it somewhere your team members can find.

90
00:17:16.890 --> 00:17:23.089
Jane Larson: Then, when your team is happy with your responses, copy and paste from the document into [SM Apply](#) to submit your report.

91
00:17:23.310 --> 00:17:31.499
Jane Larson: You can access the Google Doc template using the link on our *Recordings at Risk [Manage and Award](#)* page. We'll share the link to the template in the chat.

92
00:17:35.510 --> 00:17:45.659
Jane Larson: Now that we're through the reporting form, we'll address how you can make changes to your plans if unforeseen delays, problems, or staffing changes happen during the course of your work.

93
00:17:46.110 --> 00:17:57.279
Jane Larson: Over the course of many grant projects, due to the unpredictability of audio and audio-visual digitization initiatives, we've seen that the need often arises to request a modification.

94
00:17:57.460 --> 00:18:02.640
Jane Larson: Please don't hesitate to ask us for the changes you need to successfully complete your project.

95
00:18:02.760 --> 00:18:15.540
Jane Larsone: CLIR has an [online modification request form](#) through which recipients can notify us of any modification requests, such as no-cost extensions, principal investigator or PI changes, and reallocation requests.

96
00:18:18.500 --> 00:18:31.649
Jane Larson: Access to the grant modification and extension request is available through the link at the top of the Manage an Award page. The form is designed to allow for the request of multiple types of modification requests at the same time.

97
00:18:31.650 --> 00:18:40.550
Jane Larson: The form includes space for you to submit budget information, request extension length if needed, and to provide a brief explanation of the modification.

98
00:18:40.700 --> 00:18:51.099
Jane Larson: In order for you to prepare the necessary information for the modification request, we also provide a Google Doc Grant Modification Form template, also available on the Manage an Award page.

99
00:18:53.700 --> 00:19:01.139
Lizzi Albert: This shows the Google Doc template for the modification request form, so you know the questions that you'll be asked and can draft responses.

100
00:19:01.270 --> 00:19:17.219
Lizzi Albert: As with all of our Google Doc templates, a link is provided at the top of the document that allows you to create a copy of the template for collaborative working. All modification requests should be submitted through the online form, so you will need to copy and paste your prepared responses into that space.

101
00:19:21.300 --> 00:19:26.100
Lizzi Albert: Here's a glimpse of the current grant modification and extension request form.

102
00:19:26.300 --> 00:19:40.319
Lizzi Albert: Multiple types of modification requests can be submitted at the same time using the same form. For example, if you need to request a no-cost extension as well as a reallocation of funds, the form will accommodate both requests.

103
00:19:40.740 --> 00:19:45.359
Lizzi Albert: Once the form has been submitted and received, you should hear from CLIR staff within 2 weeks.

104
00:19:45.450 --> 00:20:03.499
Lizzi Albert: Always be sure to check the Manage an Award page for additional explanation of the various allowable modification requests and the most current policies and procedures. If you have any questions about the process, CLIR staff is always available via our program email address, recordingsatrisk@clir.org.

105
00:20:03.940 --> 00:20:08.230
Lizzi Albert: Now for some additional information about the types of modification requests.

106
00:20:10.790 --> 00:20:17.149
Louisa Kwasigroch: No cost extensions are allowed in the case of unforeseen issues such as hiring or vendor processing delays.

107
00:20:17.450 --> 00:20:22.140
Louisa Kwasigroch: It is important to understand that you can only receive one extension per project.

108
00:20:22.330 --> 00:20:31.730
Louisa Kwasigroch: It may be useful to set up a calendar reminder now to help you remember to evaluate whether or not you'll need to request an extension as your project end date approaches.

109
00:20:32.390 --> 00:20:37.719
Louisa Kwasigroch: For those who may be new to grants, a project end date is not the same as the reporting deadline.

110
00:20:38.070 --> 00:20:42.260
Louisa Kwasigroch: The project end date is the date by which all project work should be complete.

111
00:20:42.580 --> 00:20:51.269
Louisa Kwasigroch: It's important that extension requests are submitted 4 to 6 weeks prior to the project's end date, which is August 31st, 2026.

112
00:20:51.670 --> 00:21:03.260

Louisa Kwasigroch: Even if you have spent all the grant funds, you will need an extension if you require additional time to complete your proposed project deliverables, including making the metadata for your project available online.

113
00:21:03.470 --> 00:21:08.609
Louisa Kwasigroch: If all project deliverables are not complete by the end date, you will need an extension.

114
00:21:10.320 --> 00:21:13.960
Louisa Kwasigroch: If you need to update the principal investigators, or PIs.

115
00:21:14.080 --> 00:21:18.639
Louisa Kwasigroch: Please let us know as soon as possible by completing the grant modification form.

116
00:21:18.930 --> 00:21:29.860
Louisa Kwasigroch: All of CLIR's grant management tasks require current contact details, so it is important we know when a PI departs your organization and their responsibilities are transferred to someone else.

117
00:21:30.390 --> 00:21:40.470
Louisa Kwasigroch: In order to complete the change of PI, you will also be required to supply via email a letter from the head of the organization or department on organizational letterhead.

118
00:21:40.790 --> 00:21:48.370
Louisa Kwasigroch: The letter should include the name, title, and contact information of the new PI, as well as the date the change will become effective.

119
00:21:48.640 --> 00:21:53.369
Louisa Kwasigroch: A CV or resume for the new PI will also be required for our files.

120
00:21:55.360 --> 00:22:20.190
Alyson Pope: On occasion, grantees find it necessary to spend grant funds in a manner other than originally proposed in their application. For example, vendor services may cost more or less than originally budgeted, reallocations of grant funds are allowable, but these changes

must be approved by CLIR staff prior to the reallocated funds being spent. In cases where a budget surplus remains after the original deliverables have been met,

121
00:22:20.190 --> 00:22:40.349
Alyson Pope: you will have the option of either returning the surplus funds to CLIR, or submitting a budget reallocation request that proposes how the remaining funds will be spent. Any proposed use of reallocated funds should be aligned with the original goals and scope of the project, and within the current guidelines for allowable and disallowed costs for the *Recordings at Risk* program.

122
00:22:41.020 --> 00:22:51.089
Alyson Pope: The first step for a reallocation request is completing the grant modification form, where you can explain the rationale for the reallocation and how it is consistent with the original proposal.

123
00:22:51.130 --> 00:23:09.699
Alyson Pope: CLIR staff encourages spending surplus funds on additional digitization of material, or increased spending for another previously approved line item in the project budget, rather than adding new line items. If a mutually satisfactory reallocation solution cannot be found, remaining funds must be returned to CLIR.

124
00:23:10.770 --> 00:23:23.819
Alyson Pope: Note that small reallocations amounting to less than 5% of the total project budget and within the program guidelines do not require a formal reallocation request, but we do ask that you explain these variances in your final report.

125
00:23:23.930 --> 00:23:30.769
Alyson Pope: If questions arise about whether or not you need official approval of a reallocation request, we are always available through email.

126
00:23:32.460 --> 00:23:48.300
Alyson Pope: In some instances, such as when a reallocation request involves a new budget line item, our team sends an updated budget detail to be used for your reporting. CLIR Staff can provide a copy to you if needed, and this new budget detail will replace the one emailed to you along with your award letter.

127
00:23:50.120 --> 00:23:59.050

Sharon Burney: We've encountered a few other types of modifications in this program that are important to process with CLIR prior to implementing the change.

128
00:23:59.180 --> 00:24:06.759
Sharon Burney: From time to time, recipients find that the vendor they selected in an application may not be able to fulfill the project award.

129
00:24:07.660 --> 00:24:25.130
Sharon Burney: Or maybe, to help with processing, you'd like to add a second vendor. Any of vendor changes should be approved by CLIR prior to starting work with the new vendor, so that we are in agreement that the new vendor meets the digitization standards approved in your application.

130
00:24:25.360 --> 00:24:35.130
Sharon Burney: As mentioned, when we were discussing budget reallocations, you may find that you have the funds and capacity to add other in-scope materials to your project.

131
00:24:35.260 --> 00:24:47.750
Sharon Burney: Or perhaps digitization costs are much higher than estimated, and significant amounts of material now need to be cut from the project. Work with CLIR through the modification process to agree on these changes.

132
00:24:47.850 --> 00:25:01.460
Sharon Burney: We've also supported the addition of other allowable processing work, such as additional transcription, to help spend down remaining funds. These are just a few examples of other types of modifications.

133
00:25:01.480 --> 00:25:08.070
Sharon Burney: We may ask for additional supporting documentation to help us understand and document the changes to your projects.

134
00:25:09.810 --> 00:25:16.760
Sharon Burney: As we near the end of our presentation, feel free to submit questions in the Q&A box for us to address in a bit.

135
00:25:19.980 --> 00:25:30.469

Jane Larson: Our recipients have shared so much with our team through their reports and conversations. Here are some points stressed by them that may be useful to you as you get started.

136
00:25:30.920 --> 00:25:37.670
Jane Larson: Metadata creation for audio-visual materials takes a lot longer than originally anticipated for most recipients.

137
00:25:37.910 --> 00:25:48.060
Jane Larson: For this reason, past recipients advise that new recipients consider how they can lay the groundwork for creating project metadata while waiting for materials to be returned from the vendor.

138
00:25:48.230 --> 00:25:59.460
Jane Larson: Taking digital photographs of the containers for your recordings may help expedite metadata creation while the vendor has them, so consider whether it might be possible to do that.

139
00:26:00.100 --> 00:26:12.939
Jane Larson: Two, get your whole project team together, including your vendor, as early as possible to make sure everyone understands individual roles and responsibilities, even if their contributions will only be made late in the project timeline.

140
00:26:13.090 --> 00:26:18.940
Jane Larson: That way, each team member can make room on their schedules to do what they need to do in a timely and efficient manner.

141
00:26:19.330 --> 00:26:27.399
Jane Larson: It is particularly important for people responsible for ingesting digital files into storage systems, or creating

142
00:26:27.670 --> 00:26:44.869
Jane Larson: metadata for those files to understand what would be expected of them, and for them to remain aware of any changes to the project timeline. Don't forget, it's okay to request a grant modification if it turns out that the grant term is insufficient for creating metadata and making it available online.

143
00:26:45.740 --> 00:26:55.979
Jane Larson: 3. If the recordings to be digitized for your project are part of a larger collection, set aside some additional backup items from the collection to send to your vendor as well.

144
00:26:55.980 --> 00:27:13.709
Jane Larson: Just in case the digitization work costs less than originally estimated, or the content of the materials is unrecoverable. If you have extra funds left over, you can then submit a grant modification request to CLIR, seeking permission to authorize the vendor to digitize the backup items as part of the project.

145
00:27:14.220 --> 00:27:21.689
Jane Larson: 4. Keeping notes and documentation for your project in one common place for easy reference will make final reporting easier.

146
00:27:21.820 --> 00:27:29.640
Jane Larson: Determining how you're going to gather the information needed for the project manifest now in particular will save you valuable time.

147
00:27:33.460 --> 00:27:36.690
Alyson Pope: Given our experience with the *Recordings at Risk* program,

148
00:27:36.980 --> 00:27:40.630
Alyson Pope: we know that you're likely to encounter challenges during your project work.

149
00:27:40.760 --> 00:27:45.700
Alyson Pope: We have 3 questions for your team to discuss to make sure your projects are off to a good start.

150
00:27:46.360 --> 00:27:51.780
Alyson Pope: First, has your team been in touch with your vendor since you received funding?

151
00:27:52.580 --> 00:27:58.819
Alyson Pope: If yes, is your vendor anticipating any delays in getting work done at this time?

152

00:27:59.490 --> 00:28:05.619
Alyson Pope: And lastly, do you have a plan in place to address project challenges when they come up?

153
00:28:06.480 --> 00:28:13.269
Alyson Pope: We hope part of your plan will be contacting us if challenges arise, so we can figure out how best to support the project.

154
00:28:17.290 --> 00:28:30.240
Lizzi Albert: We want to quickly share a couple ways to get involved with CLIR's communities. The Digital Library Federation, or [DLF, Forum](#), is November 16th - 19th in Denver, Colorado, and we hope that you'll think about joining us.

155
00:28:30.810 --> 00:28:39.680
Lizzi Albert: Additionally, there are more than [10 amazing working groups coordinated by DLF](#), where practitioners meet regularly on a variety of digital library topics.

156
00:28:39.840 --> 00:28:49.490
Lizzi Albert: A couple I want to shout out in particular are the Metadata support group, which runs a Slack space for folks dealing with metadata, and the Digital Accessibility Working Group,

157
00:28:49.600 --> 00:29:06.599
Lizzi Albert: which is offering accessibility audits of websites and systems, which you can contribute to or utilize. We also invite you to sign up for our [Grants and Programs Newsletter](#) if you haven't already. This occasional newsletter shares updates across CLIR, along with other things that we think are interesting.

158
00:29:10.640 --> 00:29:24.180
Lizzi Albert: We love to boost the excellent work of our grantees. If there are exciting developments you would like shared with a wider audience, don't hesitate to let us know. One of the easiest ways for us to share your news and accomplishments is to tag us on [Bluesky](#).

159
00:29:24.540 --> 00:29:35.689
Lizzi Albert: If you happen to be describing the *Recordings at Risk* program in any formal press release, we appreciate you reviewing CLIR's Acknowledgement guidelines, linked to on [CLIR's policy page](#).

160
00:29:36.060 --> 00:29:51.960
Lizzi Albert: We also want to make sure we're representing you correctly. Your projects are now up on the Funded Projects page of our website. Please read how your project is described there, and let us know if you'd like us to adjust any of the information included. The project summaries are directly from your proposals.

161
00:30:13.330 --> 00:30:30.709
Sharon Burney: So thank you all for attending this presentation. We know we've covered a lot of information, but we'll be sure to post a recording of this webinar, as well as the slides and transcript on our Manage an Award page, alongside the many documents that we discussed today.

162
00:30:30.790 --> 00:30:39.310
Sharon Burney: So we can now shift to answering any questions that you submitted during our presentation, or want to submit in the Q&A box.

163
00:30:49.500 --> 00:31:00.009
Alyson Pope: So far we just have one question. Hello, I recently had a meeting with the director of my institution and the audio-visual consultant for the project due to various issues.

164
00:31:00.400 --> 00:31:24.549
Alyson Pope: They have decided to replace the project service provider originally selected and are interested in hiring the second contractor presented in the proposal. What should be done in this case? So you're going to want to fill out a grant modification request form, because the vendor change is a grant modification. So you'll submit a modification request

165
00:31:24.550 --> 00:31:38.679
Alyson Pope: with the relevant information, just so we can just, review the acceptability of the replacement vendor, assuming it's fine, especially since it was already in your proposal, and then we would approve that change and you can move forward.

166
00:31:39.430 --> 00:31:42.019
Sharon Burney: And if that changes your budget.

167
00:31:42.420 --> 00:31:45.659
Sharon Burney: We'll have to change your budget detail, too.

168
00:31:45.660 --> 00:31:58.409
Alyson Pope: Yeah, let us know that. Sometimes we also see there are schools that they're not allowed to actually pick their vendor, certain public universities, so if you have to make a change of selection because of that, just make a modification request.

169
00:32:07.440 --> 00:32:09.500
Sharon Burney: Any other questions?

170
00:32:20.370 --> 00:32:37.850
Sharon Burney: Is learning from your selected vendor that they'll need more money than they estimated to digitize your collection a valid reason for a budget revision? And if so, would CLIR fund the difference? So once we have sent you the award letter and the amount that we sent you in the award letter, we do not make any

171
00:32:37.870 --> 00:32:53.000
Sharon Burney: additional payments for your budget. If your vendor is charging more than you want, you'll probably have to reduce any other lines, or opt for another vendor that stays within your budget, or you could take that line.

172
00:32:53.190 --> 00:32:59.399
Sharon Burney: If it puts you over budget, your organization will have to pay for the difference as a cost share.

173
00:33:00.150 --> 00:33:04.990
Alyson Pope: Or sometimes people have to do a slightly smaller number of items.

174
00:33:04.990 --> 00:33:10.030
Sharon Burney: Yeah. You might have to reduce the amount of materials that you offer to digitize, too.

175
00:33:27.340 --> 00:33:35.050
Alyson Pope: I'm going to give another minute or two in case folks have questions. We know you guys are busy, but we want to make sure that we address anything that you need addressed.

176
00:33:41.130 --> 00:33:45.099
Sharon Burney: While we wait on questions, one of the things we see often,

177
00:33:46.210 --> 00:33:49.889
Sharon Burney: Can you provide the email address used for award notice?

178
00:33:53.030 --> 00:33:57.820
Sharon Burney: to track down the funding… the budget form?

179
00:34:00.840 --> 00:34:07.480
Sharon Burney: Jennifer, we'll email you again the budget that you submitted with your application.

180
00:34:14.630 --> 00:34:16.979
Sharon Burney: We'll be in touch from the program box.

181
00:34:17.389 --> 00:34:30.490
Sharon Burney: One of the mistakes that we see often, too, is as you get about 6… about 6 weeks out from your project end date

182
00:34:31.179 --> 00:34:36.969
Sharon Burney: I think it's time for the whole team to make an assessment of whether you would need an extension or not.

183
00:34:38.909 --> 00:34:46.869
Sharon Burney: We require that those modification requests come in about 4 to 6 weeks prior to the project end date.

184
00:34:47.650 --> 00:34:55.809
Sharon Burney: Often people wait until the end date is passed, and then they send a modification request, and that's too late.

185
00:35:05.160 --> 00:35:06.210
Alyson Pope: Alrighty.

186
00:35:06.970 --> 00:35:08.350
Sharon Burney: No questions?

187
00:35:13.570 --> 00:35:20.250
Jane Larson: If you ever do have any questions, you can always contact us at the
recordingsatrisk@clir.org.

188
00:35:20.550 --> 00:35:33.070
Jane Larson: A few final reminders. If additional members of your team should be getting information from us, and we don't already have their information, you want to email us that right away.

189
00:35:33.320 --> 00:35:47.590
Jane Larson: And then, just, our team is here to support you, so you can get in touch with us at any time, and we may also reach out to you from time to time to check in about how things are going, and as we assess the program and plan for the future.

190
00:35:48.820 --> 00:36:01.720
Sharon Burney: We got one more in, we'll go ahead and answer. Yeah. Where is the form to request a vendor change on the platform? The form that you will use is a grant modification form, and that is on the Manage and Award page.

191
00:36:14.050 --> 00:36:14.920
Alyson Pope: All set?

192
00:36:15.840 --> 00:36:19.150
Alyson Pope: Jane, did we cover all the end pieces? Okay.

193
00:36:21.060 --> 00:36:22.500
Alyson Pope: Thanks, everyone!

194
00:36:22.500 --> 00:36:23.630
Sharon Burney: Thank you!