WEBVTT

1
00:00:04.080 --> 00:00:17.260
Sharon Burney: Greetings, everyone. Welcome to the *Digitizing Hidden Collections: Amplifying Unheard Voices* Recipient Webinar, and we are going to start with a short video presentation.

2
00:00:20.890 --> 00:00:27.720
Louisa Kwasigroch: Hello, and welcome to the Recipient Webinar for the *Digitizing Hidden Collections: Amplifying Unheard Voices* program.

3
00:00:28.050 --> 00:00:33.689
Louisa Kwasigroch: We want to begin by congratulating you all again on being selected as grant recipients for the program.

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00:00:33.860 --> 00:00:39.290
Louisa Kwasigroch: It is a truly remarkable collection of projects, and we know how much work has gone into them already.

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00:00:39.630 --> 00:00:43.879
Louisa Kwasigroch: We are so excited to see these projects progress over the coming months and years.

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00:00:46.620 --> 00:00:53.989
Louisa Kwasigroch: During today's session, we'll briefly explain what you may need to know as your grant project begins. We'll be covering the following topics.

7
00:00:54.670 --> 00:01:03.610
Louisa Kwasigroch: In Part 1, we'll talk about CLIR, our team, and you, the 2025 Recipients of *Digitizing Hidden Collections: Amplifying Unheard Voices* grants.

8
00:01:03.920 --> 00:01:09.830
Louisa Kwasigroch: In Part 2, we'll transition to grant management and discuss grant modifications and reporting requirements.

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00:01:10.370 --> 00:01:15.060

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

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00:01:15.520 --> 00:01:21.339
Louisa Kwasigroch: In Part 3, we'll discuss ways to stay in touch throughout your project and answer any questions you may have.

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00:01:21.830 --> 00:01:27.779
Louisa Kwasigroch: Feel free to type your questions into the Q&A box, and we'll address them during this third portion of the webinar.

12
00:01:28.280 --> 00:01:41.700
Louisa Kwasigroch: We especially want to welcome staff who may not oversee these projects, but will work on them daily. 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

13
00:01:41.890 --> 00:01:45.159
Louisa Kwasigroch: and larger cultural heritage preservation efforts at CLIR.

14
00:01:45.440 --> 00:01:48.020
Louisa Kwasigroch: So, with that, let's get started.

15
00:01:50.770 --> 00:01:56.170
Louisa Kwasigroch: We'll start our time together with some introductions, first to this platform, and then to CLIR.

16
00:01:59.020 --> 00:02:02.599
Louisa Kwasigroch: Here are some notes about how you can use Zoom during this session.

17
00:02:02.910 --> 00:02:08.849
Louisa Kwasigroch: You can click the CC Show Captions button at the bottom of your Zoom window to turn on the live transcript.

18
00:02:09.360 --> 00:02:19.770

Louisa Kwasigroche: You're welcome to use chat for general introductions and conversation. In order to send a message to everyone, remember to change the default from hosts and panelists to everyone.

19
00:02:20.360 --> 00:02:26.340
Louisa Kwasigroch: Use the separate Q&A feature to ask questions. We'll have a dedicated time to answer questions at the end.

20
00:02:26.740 --> 00:02:36.829
Louisa Kwasigroch: And finally, the session is being recorded. The recording, slides, and transcript will be made available on the Manage an Award page of our website within 2 weeks of this webinar.

21
00:02:40.040 --> 00:02:46.590
Lizzi Albert: CLIR's work is accomplished by a relatively small staff of about 20 geographically distributed individuals.

22
00:02:46.610 --> 00:03:03.160
Lizzi Albert: Today's webinar is led by the Grants Team, which administers CLIR's active regranting programs, offering support for the entire grant cycle from application to final report. Some or all of you may already know us from applicant webinars or from email exchanges, but we'll do some quick introductions.

23
00:03:03.710 --> 00:03:08.249
Lizzi Albert: Our team includes Sharon Burney, program officer based in Midlothian, Virginia.

24
00:03:08.310 --> 00:03:26.560
Lizzi Albert: Alyson Pope, Program Officer, based in Pittsburgh, Pennsylvania. Jane Larson, Senior Program Associate, based in Pittsburgh, Pennsylvania. Lizzi Albert, Community Relations Manager, based in Washington, D.C, and Louisa Kwasigroch, Managing Director, based in Chicago, Illinois.

25
00:03:30.800 --> 00:03:40.719
Lizzi Albert: Our team would like to center today's conversation by acknowledging that, as residents of the United States, we are speaking to you from unceded land of many Indigenous peoples.

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00:03:40.750 --> 00:03:52.800
Lizzi Albert: I'd like to respectfully acknowledge and recognize the original and current caretakers of the land, water, and air where I live, the Piscataway and Anacostan peoples, and all of their ancestors and descendants.

27
00:03:52.980 --> 00:04:12.929
Lizzi Albert: I am grateful to have the opportunity to live and work on their homelands, and ask you to join me in acknowledging all Indigenous communities, their elders, both past and present, as well as future generations. May this acknowledgement remind us of our shared commitment to beginning the process of working to dismantle the ongoing legacies of settler colonialism.

28
00:04:15.310 --> 00:04:34.900
Lizzi Albert: On this slide, we've listed all the organizations participating in awarded grants in this cycle. You are a broadly experienced group, and we know that there are many others who are helping you as partners, too. You will often hear us refer to you as the program's 2025 grant recipients of Amplifying Unheard Voices, Cohort 3.

29
00:04:34.970 --> 00:04:38.309
Lizzi Albert: Please feel free to introduce yourself and your role in the chat.

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00:04:40.390 --> 00:04:58.119
Lizzi Albert: For those new to CLIR, we'd like to begin with a reminder of our mission. The Council on Library and Information Resources is an independent nonprofit organization that forges strategies to enhance research, teaching, and learning environments in collaboration with libraries, cultural institutions, and communities of higher learning.

31
00:04:58.300 --> 00:05:00.200
Lizzi Albert: So what does that all mean?

32
00:05:00.220 --> 00:05:22.800
Lizzi Albert: CLIR takes on a number of roles, including publishing research, convening meetings, and running programs. As an independent nonprofit, we are not part of the federal government. We are also not a private foundation. Our activities are not funded by an endowment, but rather by a combination of grants and sponsorship, which gives us the flexibility to operate our programs a bit differently than government funders or private foundations.

33

00:05:23.490 --> 00:05:42.560
Lizzi Albert: The Digitizing Hidden Collections program is a re-granting program, which means the funds for your projects were awarded as part of a grant to CLIR from the Mellon Foundation. CLIR reapplies periodically to Mellon for funds to operate the Hidden Collections program and award new grants, so we can empathize with all of the work that you put in to get here.

34
00:05:45.180 --> 00:06:07.880
Alyson Pope: Digitizing Hidden Collections is just one of many programs administered by CLIR. In 2021, with the Mellon Foundation's support, the program transitioned to a new thematic focus, *Amplifying Unheard Voices*. There are many metrics by which the program measures its progress, including but absolutely not limited to the number of funded projects, awarded funds, and digitization outputs.

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00:06:07.880 --> 00:06:21.649
Alyson Pope: As a historical overview, since the program began in 2015, CLIR has awarded $35.9 million to fund 149 projects and generate more than 10.6 million master digital files.

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00:06:21.740 --> 00:06:28.320
Alyson Pope: 49 of those projects were funded through *Amplifying Unheard Voices*, and the program is currently in its fourth cycle.

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00:06:30.270 --> 00:06:55.269
Alyson Pope: We also wanted to shout out a community facilitated by another CLIR program, the Digital Library Federation. There are more than 10 amazing working groups coordinated by DLF, where practitioners meet regularly on a variety of digital library topics. A couple I want to point to in particular are the Metadata Support Group, which runs a Slack space for folks dealing with metadata, and the Digital Accessibility Working Group, who are currently offering accessibility

38
00:06:55.270 --> 00:07:00.149
Alyson Pope: audits of websites and systems, which you can contribute to or take advantage of.

39
00:07:00.410 --> 00:07:04.189
Alyson Pope: DLF's working groups meet regularly and are open to everyone.

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00:07:05.810 --> 00:07:26.360

Alyson Pope: Finally, one last resource we would like to share is the Digitizing Special Formats Wiki. This is a project of DLF and contains a growing collection of resources about planning and executing digitization projects. If there are additional resources you think would be helpful to include on the guide, it's an ever-evolving document open for contributions.

41
00:07:35.250 --> 00:07:49.010
Sharon Burney: Now that you know who we are and the range of things we do as an organization, we will move into a discussion about some key administrative information for you as the latest recipients of *Digitizing Hidden Collections: Amplifying Unheard Voices* grants.

42
00:07:49.230 --> 00:08:08.409
Sharon Burney: We realize that this webinar will contain a lot of information that may not seem relevant now, but we'll be sharing the recording and transcript online so that you can reference it later or share it with others. In this next section, we'll describe processes for grant modifications and reporting requirements.

43
00:08:09.450 --> 00:08:24.409
Sharon Burney: Although we hope and expect that project activities listed in your approved proposals will be executed as described, we understand that unanticipated issues can arise that may require that you deviate from the original plans you submitted.

44
00:08:24.620 --> 00:08:30.120
Sharon Burney: We realize that many of you will face operational hurdles that may cause delays.

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00:08:30.150 --> 00:08:48.200
Sharon Burney: We hope you understand that our job is to support your teams as you encounter the unexpected during your project timelines. Some project changes won't require pre-approval from CLIR, such as a change in project staff other than the Principal Investigators, which we refer to as PIs,

46
00:08:48.320 --> 00:09:04.930
Sharon Burney: or small shifts in budget expenditures. Generally, some small changes can be addressed in a project's interim narrative in financial reports. However, changes that affect the underlying terms of the grant must receive prior approval by CLIR.

47
00:09:05.120 --> 00:09:10.140

Sharon Burney: Examples include extensions of the project end date, changes to PIs,

48
00:09:10.140 --> 00:09:25.559
Sharon Burney: any changes to the collections being digitized through the project, and significant budget reallocations. Modification requests are common for this program, and you should not hesitate to ask us for what you need to do to successfully complete your project.

49
00:09:25.710 --> 00:09:37.859
Sharon Burney: Program staff can always be reached by email at hiddencollections@clir.org. To move forward with a modification, CLIR has an online form through which recipients can initiate modification requests.

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00:09:39.280 --> 00:09:46.240
Sharon Burney: Access to the Grant Modification and Extension Request Form is available through a link at the top of the Manage an Award page.

51
00:09:46.360 --> 00:09:51.470
Sharon Burney: The form is designed to allow for the submission of multiple types of modification requests.

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00:09:51.600 --> 00:10:04.710
Sharon Burney: The form includes sections on descriptive information, questions about extension requests, other types of modification requests, and a space to provide a brief explanation and justification of the modification.

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00:10:05.080 --> 00:10:20.560
Sharon Burney: Once the form has been submitted and received, you should hear from CLIR staff within 2 weeks. For that reason, if you need a modification, it is important to request at least 1 to 3 months before the final end date of your grant.

54
00:10:20.760 --> 00:10:38.270
Sharon Burney: Some modifications, such as changes in principal investigator, should be requested immediately, rather than waiting until the end of your project. Project end dates were included in the grant agreement, and if you ever need a reminder of your project end date or award number, just ask.

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00:10:38.600 --> 00:10:50.200
Sharon Burney: In many cases, completing the form will be all you need to do to seek approval for a modification. However, sometimes, additional documentation may be required in order to move forward with the request.

56
00:10:50.310 --> 00:11:08.129
Sharon Burney: The guidelines for modification requests vary slightly between CLIR's different grant programs, so be sure to check the [Manage an Award](#) page for the most up-to-date information. If you have any questions about the process, CLIR's staff is always available via our program email address.

57
00:11:09.300 --> 00:11:19.699
Sharon Burney: In order for you to prepare the necessary information for the modification request, we also provide a [grant modification form template](#), also available on the [Manage an Award](#) page.

58
00:11:19.720 --> 00:11:38.150
Sharon Burney: The online form does involve some question logic, so you may not be required to answer all of the questions on the template, depending on how you answer others. A link is provided at the top of the document that allows you to create a personal copy of the template that you can share with anyone you're collaborating with.

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00:11:38.170 --> 00:11:46.549
Sharon Burney: All modification requests should be submitted through the online form, so you will need to copy and paste your prepared responses into that space.

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00:11:50.240 --> 00:11:59.270
Lizzi Albert: No-cost extensions are exactly what they sound like, a request to push back the project end date and final report without requesting additional funding.

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00:11:59.390 --> 00:12:15.020
Lizzi Albert: No-cost extensions may be requested in the case of unforeseen project delays, which may include prolonged personnel searches, staff turnover, delays when working with a vendor partner, illnesses, or delays caused by institutional infrastructure issues.

62
00:12:15.100 --> 00:12:29.790

Lizzi Albert: No-cost extensions should be requested between 1 and 3 months prior to a project's end date. The reason we ask you to wait until these final months of the project is that only one no-cost extension can be granted per project.

63
00:12:30.180 --> 00:12:49.879
Lizzi Albert: We have found that requests made closer to the end date provide more accurate estimates of the amount of extra time that's needed. We encourage you to take time now to set a calendar reminder for your team for your end date, and for 3 months before the end of your project, so you'll know when it's time to request an extension if you need one.

64
00:12:49.890 --> 00:12:54.040
Lizzi Albert: You may also want to set similar reminders for your annual reporting deadlines.

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00:12:55.100 --> 00:13:11.619
Lizzi Albert: Keep in mind that your end date and your final reporting deadline are two different dates. The end date is the point at which all work on your project must be completed, and all grant funds expended. You cannot spend grant funds after your end date without first being granted an extension.

66
00:13:11.620 --> 00:13:19.649
Lizzi Albert: Your final reporting deadline is set 3 months after your end date, so that you have time to reflect upon your work and complete final accounting for your grant.

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00:13:20.220 --> 00:13:27.049
Lizzi Albert: It's important to note that extensions cannot be granted for projects whose end dates have already passed.

68
00:13:27.190 --> 00:13:32.769
Lizzi Albert: We really cannot emphasize enough the importance of paying attention to your project end date.

69
00:13:33.400 --> 00:13:44.020
Lizzi Albert: We recommend requesting the standard project extension length of 12 months. On the request form, you are also able to enter a custom date, but we may choose to make an alternative recommendation.

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00:13:46.760 --> 00:13:57.299
Lizzi Albert: If one of the principal investigators, also known as PIs, changes during the grant, the grantee must inform CLIR immediately by completing the grant modification form.

71
00:13:57.440 --> 00:14:15.219
Lizzi Albert: All of CLIR's grant management tasks, including setting up our grant management system to accept your reports, require current contact details for all principal investigators. So, it is important we know when a principal investigator departs your organization, and that their responsibilities have been transferred to someone else.

72
00:14:15.930 --> 00:14:25.690
Lizzi Albert: In order to complete a change of PI, you will also be required to supply the program email, a letter on institutional letterhead from the head of your organization or department.

73
00:14:27.100 --> 00:14:40.130
Lizzi Albert: The letter doesn't need to be long, but should include the name, title, and contact information of the new PI, as well as the date the change will become effective. A CV for the new PI will also be required for our files.

74
00:14:42.500 --> 00:14:49.360
Alyson Pope: On occasion, grantees find it necessary to spend grant funds in a manner other than that originally proposed in their application.

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00:14:49.680 --> 00:15:03.119
Alyson Pope: Reallocations of grant funds are allowable, but these changes must be carefully reviewed and approved by CLIR staff prior to the reallocated funds being spent. Again, you will complete the grant modification form to initiate this process.

76
00:15:03.510 --> 00:15:17.940
Alyson Pope: Any proposed use of reallocated funds should be aligned with the original goals and scope of the project, and within the program guidelines and limits for allowable and disallowed costs for [AUV Cohort 3 of the Digitizing Hidden Collections Program](#).

77
00:15:18.230 --> 00:15:25.870
Alyson Pope: Any requests to reallocate funds from salary and benefit lines to other areas of a grant budget will undergo additional scrutiny.

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00:15:26.230 --> 00:15:31.570
Alyson Pope: CLIR strongly prefers that funds approved for staff support be spent on staff support.

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00:15:32.250 --> 00:15:46.719
Alyson Pope: As a rule of thumb, CLIR generally doesn't require notification for reallocations that amount to less than 5% of a project's total budget. However, all projects should contact CLIR about any reallocations that are over $10,000.

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00:15:47.270 --> 00:15:51.820
Alyson Pope: When in doubt, ask us or go ahead and complete the grant modification form.

81
00:15:52.190 --> 00:16:13.189
Alyson Pope: When completing the grant modification form, you'll be asked to provide the amount of funds remaining in the grant, how much, if any, of the original funds will remain at the close of the project, and a brief description of how the funds will be spent. CLIR program staff may request additional information, such as a revised project budget, to complete review of the request.

82
00:16:16.220 --> 00:16:26.609
Alyson Pope: All of this information can be found on the [Manage an Award](#) page. Should we update any of our grant modifications procedures, we'll post the most up-to-date information there for your reference.

83
00:16:26.750 --> 00:16:32.110
Alyson Pope: Do be sure to share this webpage with all staff who may be involved in the management of your project.

84
00:16:32.550 --> 00:16:47.379
Alyson Pope: CLIR Program staff are available to answer any of your questions related to modifications, so don't hesitate to reach out via our program email. As we mentioned, modifications are not uncommon with this program, and we always seek to find ways to make your project successful.

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00:16:47.380 --> 00:16:58.600

Alyson Pope: For more complicated grant modification requests, you may find it helpful to set up a conversation with a program officer prior to submitting your request. We'll be happy to talk through any possible changes.

86
00:17:03.310 --> 00:17:26.450
Alyson Pope: At this point, we'll shift into a discussion of reporting requirements. Recipients of the Hidden Collections Grant are required to submit reports, both narrative and financial, through [our online system](#) on or before the dates outlined in your grant agreements. If you don't have access to a copy of your letter and need to know your designated report dates or any other information related to your report, do let us know.

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00:17:26.839 --> 00:17:36.979
Alyson Pope: Your first report is due a year and two months after the start date of your project, and then each interim report after that is due exactly one year after the previous one.

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00:17:37.630 --> 00:17:41.999
Alyson Pope: Your final report is then due 3 months after your project end date.

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00:17:42.230 --> 00:17:46.020
Alyson Pope: This means we should be receiving one report from you each year.

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00:17:46.180 --> 00:17:53.189
Alyson Pope: If your project is only 12 months, you will just submit your final report 3 months after the end date of your project.

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00:17:53.620 --> 00:18:07.790
Alyson Pope: Your annual reports to CLIR are a deeply important part of the agreement between our grantees, CLIR, and our own funder, the Mellon Foundation. Our team compiles its own reports on the Hidden Collections Program each year, which we submit to Mellon annually.

92
00:18:07.910 --> 00:18:16.549
Alyson Pope: This report also includes all of the reports we received from our recipients in the previous 12 months, and communicates to Mellon the importance of the work that all of you are doing.

93
00:18:17.240 --> 00:18:19.530

Alyson Pope: Just a few more words on reporting.

94
00:18:19.880 --> 00:18:27.510
Alyson Pope: Reports are not only a way to help us keep up with your progress, but also a means for us to provide the best support to you as your project evolves.

95
00:18:27.510 --> 00:18:40.689
Alyson Pope: Your reports can also help us to help you identify and mitigate potential issues in advance, and if you find that your report is likely to be late due to circumstances beyond your control, which we know can happen, let us know as soon as possible.

96
00:18:40.690 --> 00:18:47.079
Alyson Pope: We are glad to work with our grantees in these situations, but it's important that we hear about them before your report is overdue.

97
00:18:50.420 --> 00:19:08.950
Alyson Pope: To submit your reports, you will use the same system that your team used to apply for your grant, [SM Apply](#). You can find this linked on the [Manage an Award](#) page. All communication and reminders for reporting will be sent to the PIs on file, so if there are any others involved in the project work who will need such notifications.

98
00:19:08.950 --> 00:19:12.779
Alyson Pope: You will need to send us names and contact information for those folks.

99
00:19:12.780 --> 00:19:17.620
Alyson Pope: Please share this additional contact information as soon as possible so we can keep our records up to date.

100
00:19:18.170 --> 00:19:26.470
Alyson Pope: It is a good idea to log into SM Apply at your earliest convenience using the same email address and password you used to submit your application.

101
00:19:26.470 --> 00:19:44.240
Alyson Pope: If you use these same credentials, you should automatically see the reporting form for your project when logged in. If you forget these credentials or lose access to them for

any reason, for example, if the person you created your application leaves your organization, you will need to contact us so that we can link your report to the correct credentials.

102
00:19:44.720 --> 00:19:57.279
Alyson Pope: One way to future-proof your team's access to the report would be to log in using the application credentials, hit start, and then add other team members' email addresses as collaborators on your report.

103
00:19:57.460 --> 00:20:05.030
Alyson Pope: Collaborators will then receive an automatic invitation to verify their email addresses and create their own passwords to access the system.

104
00:20:05.360 --> 00:20:11.989
Alyson Pope: Once they accept the invitation and create their credentials, they will also be able to log in to view the report and enter data.

105
00:20:12.330 --> 00:20:34.800
Alyson Pope: One of the system's safety measures ensures that only the proposal owner is able to submit a report, so if one of the collaborators eventually needs to submit, that person will need to contact us to make sure this can happen. Collaborators do not have to be limited to PIs. If your financial reporting is handled by a research office or grant manager, you may want to add them as well.

106
00:20:37.860 --> 00:20:44.220
Sharon Burney: Teams of collaborators working on project reports can also reference our report form template Google Doc.

107
00:20:44.490 --> 00:20:52.509
Sharon Burney: Also available on the Manage an Award page. This document includes the questions you'll be expected to answer on the reporting form.

108
00:20:52.690 --> 00:21:01.929
Sharon Burney: For now, we'll just briefly cover the components of the report so that you are prepared with the relevant information you need when the time comes.

109
00:21:03.170 --> 00:21:17.610

Sharon Burney: The report form is organized into four to five sections. General information, narrative assessment, quantitative assessment, financial assessment, and final project assessment (final reports only).

110
00:21:18.260 --> 00:21:21.989
Sharon Burney: When writing your report, the first place to start

111
00:21:22.100 --> 00:21:33.190
Sharon Burney: is the final proposal you submitted to CLIR during the application process. All sections of the report should demonstrate the project's consistency with these original ideals.

112
00:21:33.460 --> 00:21:47.979
Sharon Burney: Of course, some variations are to be expected as the project adapts to real-life scenarios and new opportunities. Small differences between the planned approach and actual project work can be explained in the narrative report.

113
00:21:48.070 --> 00:22:01.120
Sharon Burney: However, as mentioned earlier, grantees will need to request grant modifications for more substantive changes, particularly those regarding the budget, timeline, or deliverables.

114
00:22:01.150 --> 00:22:14.010
Sharon Burney: Overall, it is important to demonstrate to CLIR and the Mellon Foundation that the scope and goals of the project continue to reflect the proposals selected for funding by CLIR's independent review panel.

115
00:22:15.600 --> 00:22:26.959
Sharon Burney: If you are working through the report and need to take a break, just scroll to the bottom of whichever page you are on within the report form, and you will find the option to save and continue editing.

116
00:22:28.700 --> 00:22:35.739
Sharon Burney: With that overview in mind, we're now going to do a quick walkthrough of the information you will be asked to include in your reports to CLIR.

117
00:22:35.910 --> 00:22:39.989

Sharon Burney: The first section of our report covers general information about the project.

118
00:22:40.110 --> 00:22:43.909
Sharon Burney: Grant reference number, just provided in your grant agreement.

119
00:22:44.170 --> 00:22:45.580
Sharon Burney: Project title.

120
00:22:45.790 --> 00:22:49.750
Sharon Burney: Institution/organization. PIs.

121
00:22:49.940 --> 00:22:53.390
Sharon Burney: Contact information of person submitting the form.

122
00:22:54.430 --> 00:23:04.879
Sharon Burney: The first three elements, grant reference number, project title, and institution/organization, will be pre-populated from your final application, and cannot be edited.

123
00:23:05.090 --> 00:23:10.589
Sharon Burney: If you encountered any errors in that information, contact us to have it corrected.

124
00:23:10.830 --> 00:23:18.229
Sharon Burney: There will be additional sections of the report that are pre-populated from your final application, which we'll touch on shortly.

125
00:23:18.300 --> 00:23:35.050
Sharon Burney: These sections are also indicated in the aforementioned Google Docs reporting template with a blank asterisk. So if you're working collaboratively in that document ahead of time, please remember that these will be areas that you do not need to fill out.

126
00:23:35.370 --> 00:23:48.799
Sharon Burney: Enter names and email addresses for current project PIs. Changing PIs will require a formal grant modification submission. If you have made any modifications or personal changes.

127
00:23:49.050 --> 00:23:54.480
Sharon Burney: You'll want to mention this in the progress and impact question under the narrative assessment.

128
00:23:56.980 --> 00:24:05.530
Lizzi Albert: The narrative assessment provides space for the project team to summarize your progress toward the project goals and objectives during the reporting period.

129
00:24:05.530 --> 00:24:18.520
Lizzi Albert: Emphasizing how this progress has exemplified the core values of the Amplifying Unheard Voices program: public knowledge, broad representation, authentic partnerships, sustainable infrastructures, and community-centered access.

130
00:24:18.950 --> 00:24:27.579
Lizzi Albert: You will also want to discuss any challenges or setbacks you have experienced in this reporting period, and any strategies that have proven successful in addressing them.

131
00:24:27.790 --> 00:24:32.350
Lizzi Albert: And finally, you will want to describe your future plans for the remainder of the project.

132
00:24:34.570 --> 00:24:43.489
Lizzi Albert: All questions in the assessment section have space for text-based responses and are word-limited. The word limit is indicated above the text box.

133
00:24:43.520 --> 00:24:58.189
Lizzi Albert: You may find it easier to draft your responses elsewhere, such as in the Google template, and paste them here, rather than drafting and editing in the report space. The system will generate an error when you try to save and move forward if you enter more words than are allowed.

134
00:25:00.300 --> 00:25:12.380
Lizzi Albert: The next section of the report form will ask for information about three things. 1. The quantity and types of materials you propose to digitize compared to what has actually been digitized during the reporting period.

135
00:25:12.460 --> 00:25:25.840
Lizzi Albert: 2. The preservation file formats and quantities proposed compared to what has actually been created during the reporting period, and 3. Information about the creation and accessibility of metadata records for the files you have created.

136
00:25:28.840 --> 00:25:46.799
Lizzi Albert: To complete this part of the report, questions referring to the original quantities proposed will be pre-populated with the information you entered in your final application. These questions will be locked for editing and hidden from view until you choose a number of categories of source materials from the quantity dropdown.

137
00:25:47.110 --> 00:25:58.409
Lizzi Albert: The instructions will indicate to you how many categories were originally proposed, so you don't have to remember. You will be able to consult the figures you proposed, then share what you actually digitized during the reporting period.

138
00:25:59.110 --> 00:26:15.819
Lizzi Albert: Begin by selecting the number of categories of source materials you actually digitize. Up to 10 categories are allowed, but unless you have added materials to your project plan, you will probably need the same number of categories you proposed, or fewer, if you haven't yet started working on some types of materials.

139
00:26:16.320 --> 00:26:23.349
Lizzi Albert: Categories should match the order of the categories defined in your final application, and those auto-generated within the report.

140
00:26:23.550 --> 00:26:29.579
Lizzi Albert: Once the number of categories is entered, the same number of populated category fields will appear below.

141
00:26:30.740 --> 00:26:39.680
Lizzi Albert: The questions regarding preservation file formats will be structured the same way, with the information regarding what you originally proposed pre-populated from your final application.

142

00:26:40.300 --> 00:26:49.879
Lizzi Albert: Compiling these numbers will be much easier if you plan now to track them as your project proceeds, so setting up a shared document to do that will be something you'll thank yourself for later.

143
00:26:49.990 --> 00:26:56.680
Lizzi Albert: CLIR does have a file manifest template you can use for this if you wish, located on the Manage an Award page.

144
00:26:59.870 --> 00:27:13.029
Alyson Pope: Next up is the financial assessment, which comes in two parts. The first is the financial narrative. In the narrative report, this is a place for you to comment on actual grant expenditures during the reporting period as they relate to your proposed budget.

145
00:27:13.130 --> 00:27:30.329
Alyson Pope: Every budget category should be at least mentioned here, and if there are any variances of 5% or more between projected and actual spending, make sure to include a detailed explanation of the reasons for that over or under expenditure. You should also discuss any approved budget modifications since your last report.

146
00:27:31.090 --> 00:27:55.699
Alyson Pope: The second part is the financial report itself, which is an upload using the same budget detail spreadsheet that you submitted with your proposal. The only difference is that you will have both the budgeted and actual fields filled in this time for the current reporting period, instead of just the budgeted column. A budget detail specific to your project was sent to project PIs and financial contacts via email, and will also be attached to future report reminder emails.

147
00:27:55.700 --> 00:27:58.059
Alyson Pope: And this is the file you should edit and submit.

148
00:27:58.350 --> 00:28:08.220
Alyson Pope: If you have any budget reallocations or no-cost extensions approved in the course of your project, we will provide you with an updated budget detail to use that reflects the approved changes.

149
00:28:10.750 --> 00:28:15.409

Alyson Pope: This screenshot of the budget detail template is just a reminder of what this looks like.

150
00:28:15.410 --> 00:28:38.379
Alyson Pope: If you ever lose track of this file, email us and our team can provide you with a replacement. Note the field for investment income on this sheet. All CLIR grantees are expected to keep grant funds in a secure, interest-bearing account, and to report on interest income here. Interest earned on grant funds may be used to support direct costs for your project, so you should be prepared to indicate how much interest has been earned each period and how that interest has been spent.

151
00:28:39.270 --> 00:28:50.980
Alyson Pope: The template is cumulative and will be built upon over the course of the project. Grantees are expected to update this spreadsheet with the actual spending for the period in question, which may vary from the amount budgeted.

152
00:28:50.980 --> 00:29:00.150
Alyson Pope: Canadian recipients will need to enter the exchange rate they received at disbursement in order to complete the financial report tab of their budget form in Canadian dollars.

153
00:29:02.800 --> 00:29:26.580
Alyson Pope: When it comes time to submit your final report, as opposed to your interim reports, you will include a final project assessment, which has four required components. The final project narrative, which will be an overall assessment of your project, including the most significant outcomes, challenges, and lessons learned. The final financial narrative and report, which will show all actual expenses, interest earned, and indicate and explain any remaining award funds.

154
00:29:26.640 --> 00:29:31.160
Alyson Pope: These will have to be returned to CLIR as directed by CLIR's returned funds policy.

155
00:29:31.840 --> 00:29:49.139
Alyson Pope: URLs or other instructions to access the digitized collections and metadata in any catalogs, repositories, or services you've used. And finally, a project manifest, which is a spreadsheet containing a sampling of URLs linking to actual digital files created through your project.

156
00:29:51.360 --> 00:30:05.980
Sharon Burney: The project manifest is a spreadsheet which includes the names and locations of a representative sampling of the digital files, normally the access copies, as well as notations about any checksums and restrictions for those files.

157
00:30:05.980 --> 00:30:21.320
Sharon Burney: We're requiring this because we are using an automated tool, a kind of web crawler, that allows us to conduct periodic checks that the online files created through CLIR's digitization regranting programs remain, in fact, online.

158
00:30:21.930 --> 00:30:30.599
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.

159
00:30:30.690 --> 00:30:48.449
Sharon Burney: Taking a look at this template now, and building completion of this document into your workflow will help you save time later. For those of you who work with vendors, often your digitization vendor will return a spreadsheet to you that will be very similar to what you need to submit here.

160
00:30:48.470 --> 00:30:53.330
Sharon Burney: And you should be able to adapt the vendor's rep spreadsheet for this template.

161
00:30:53.570 --> 00:31:05.399
Sharon Burney: If you work out your file naming conventions at the start of your project, and ensure your vendor names your files exactly according to your needs, most of your work for this requirement will be done.

162
00:31:05.480 --> 00:31:16.909
Sharon Burney: If you leave it until the end, it may take some scrambling to pull it together. So we do strongly recommend coming up with a strategy for compiling this data during the course of the project work.

163
00:31:17.250 --> 00:31:27.919

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

164
00:31:28.080 --> 00:31:36.489
Sharon Burney: This evidence is critical to our own reporting to the Mellon Foundation, so we really appreciate your help in making this possible for us.

165
00:31:37.650 --> 00:31:56.140
Sharon Burney: Once all report tasks are completed in SMApply for either the interim or final report, there is a final step necessary in order to submit your report to CLIR. Click the green Submit button once you have reviewed all answers and documents and are ready to submit.

166
00:31:56.320 --> 00:32:02.100
Sharon Burney: Once you hit submit the first time, you will be prompted to hit submit again,

167
00:32:02.180 --> 00:32:05.060
Sharon Burney: or given one last chance to review.

168
00:32:05.130 --> 00:32:18.249
Sharon Burney: A quick warning, if you choose review, then you are presented with all of the content associated with the application - initial application, final application, and all related forms and reports.

169
00:32:18.300 --> 00:32:25.950
Sharon Burney: You'll need to scroll down a bit to see the newly completed task if you'd like to review the parts of the report you've just completed.

170
00:32:26.140 --> 00:32:37.249
Sharon Burney: As we mentioned, there can be multiple collaborators within one project reporting space. However, only the application owner is given the option to submit.

171
00:32:37.370 --> 00:32:47.379
Sharon Burney: If you have completed the report and need to submit it to CLIR, but do not see the option to submit, that indicates that you are not the application owner.

172

00:32:47.450 --> 00:32:59.380
Sharon Burney: Contact us to complete submission for you in instances where the application owner is not available to do so, or if the project team is unsure who owns the application.

173
00:33:01.990 --> 00:33:13.449
Lizzi Albert: We know all of that was a lot of information, but we've now reached the final section of our presentation to share some brief information about modes of communication before we turn over to questions and discussion.

174
00:33:17.410 --> 00:33:22.960
Lizzi Albert: CLIR's website contains quite a lot of information for you as you move into your grant recipient role.

175
00:33:23.110 --> 00:33:34.759
Lizzi Albert: Just as you may have used the resources of the Apply for an Award page during the grant writing process, we have a similar page as you work through your project, the Manage an Award page, which we've talked about quite a lot today.

176
00:33:34.900 --> 00:33:44.769
Lizzi Albert: Here, you will find information on the grant modification and reporting process, including reporting templates, information on siting CLIR, and where we will post a link to this webinar.

177
00:33:45.230 --> 00:34:01.699
Lizzi Albert: On the Funded Projects page, you can find descriptions of each of the projects that have been funded by the Hidden Collections Program to date. If you have not already done so, please review your project title, organizations, and project summary that's currently posted there, and send us any proposed changes.

178
00:34:02.700 --> 00:34:12.650
Lizzi Albert: On CLIR's policy page, you will find the acknowledgement guidelines for recipients of grants or fellowships. If discussing CLIR in press releases, you will want to review these guidelines.

179
00:34:13.060 --> 00:34:18.359
Lizzi Albert: The best way to contact us is through the program email, hiddencollections@clir.org.

180
00:34:18.679 --> 00:34:30.399
Lizzi Albert: We also love to hear about your progress. If you are sharing updates on Blue Sky, please feel free to tag us so we can repost. If there is something you would like us to share directly with our followers, just email the team.

181
00:34:30.400 --> 00:34:41.729
Lizzi Albert: We love to be able to spread the word about the amazing work you're doing. We also try to share your news in CLIR's Grants and Programs newsletter, so check our website for details on how to subscribe to that if you haven't already done so.

182
00:35:08.230 --> 00:35:20.050
Sharon Burney: We're gonna get ready to submit some questions for any question and answers. Please put your questions in the Q&A box, and then we'll be able to answer them in order.

183
00:35:21.280 --> 00:35:38.949
Sharon Burney: First question, are there any restrictions on purchase or use of relevant technologies for projects? As far as purchases for your project, that should have already been put in your budget that was approved by the review panel when you were awarded your grant.

184
00:35:39.100 --> 00:35:44.810
Sharon Burney: As always, you should check our disallowed and allowable costs

185
00:35:44.960 --> 00:35:50.639
Sharon Burney: document to make sure that you are not spending anything on anything

186
00:35:50.860 --> 00:35:59.670
Sharon Burney: That's not… that's disallowed, but that would have already been checked when we did our tech review.

187
00:36:09.700 --> 00:36:11.269
Sharon Burney: Next question?

188
00:36:20.870 --> 00:36:35.429

Alyson Pope: When will the funding be dispersed? The funding has been dispersed and should have been received. It is not dispersed in installments, it is given as a full award by the start date of the

189
00:36:35.950 --> 00:36:38.840
Alyson Pope: grant, so if you've not yet

190
00:36:39.370 --> 00:36:46.070
Alyson Pope: received your full award, you should contact us at hiddencollections@clir.org.

191
00:36:47.300 --> 00:37:00.400
Sharon Burney: Also, if you're at a larger institution, maybe somebody else at your institution has already received the payment and has not notified your department, so check with your funding department.

192
00:37:04.230 --> 00:37:09.079
Sharon Burney: Could you please share what the biggest changes are from previous years in the reporting?

193
00:37:09.810 --> 00:37:14.420
Sharon Burney: I don't think we've had any big changes in the last few years.

194
00:37:15.040 --> 00:37:17.420
Sharon Burney: It's been the same for a few years now.

195
00:37:20.930 --> 00:37:27.890
Alyson Pope: Are the grant interest funds returned? Currently, we have the interest, considered as a part of the…

196
00:37:28.160 --> 00:37:42.960
Alyson Pope: Return of funds policy, we are reviewing that, so it may change in the course of these projects, and if so, we will notify you all and supply you with a different budget detail that removes it from the reporting, but that has not been decided on as of yet.

197
00:37:42.960 --> 00:37:48.559

Alyson Pope: So currently, that is considered as part of the return of funds policy, which you can find on our

198
00:37:48.680 --> 00:37:51.079
Alyson Pope: CLIR.org Policies page.

199
00:38:12.600 --> 00:38:14.619
Sharon Burney: Any other questions?

200
00:38:16.680 --> 00:38:19.959
Alyson Pope: We're just gonna hang out here and give you guys a few moments.

201
00:38:22.850 --> 00:38:25.230
Alyson Pope: To process the info dump.

202
00:38:31.410 --> 00:38:37.890
Sharon Burney: The recording and transcript will be posted later… no later than next week.

203
00:38:38.210 --> 00:38:48.780
Sharon Burney: I would also encourage, and we stated this in a video, for you to share that with other members of your team, and especially any

204
00:38:48.920 --> 00:38:52.310
Sharon Burney: of your financial or reporting personnel.

205
00:38:53.890 --> 00:38:58.070
Alyson Pope: And these resources will all be aggregated on our Manage an Award page.

206
00:38:59.050 --> 00:39:01.169
Sharon Burney: Next one is…

207
00:39:01.630 --> 00:39:14.170
Sharon Burney: For the budget reallocations, is the 5% guidance on needing prior approval or not a cumulative one, or is it per reallocation? It's 5% of the total budget,

208
00:39:15.370 --> 00:39:18.350
Sharon Burney: Of your personal total budget.

209
00:39:37.630 --> 00:39:48.910
Sharon Burney: And yes, it's per reallocation, so it's for the overall budget. So, you may have two reallocations, so that should… if it's 5% or more of your total budget, then yes.

210
00:39:49.110 --> 00:39:51.740
Sharon Burney: You have to get prior approval.

211
00:40:33.700 --> 00:40:36.590
Alyson Pope: Thank you, guys. We got a thank you.

212
00:40:37.000 --> 00:40:40.799
Sharon Burney: Thank you. Oh, 30th anniversary, congratulations.

213
00:40:40.800 --> 00:40:41.849
Alyson Pope: Yeah, nice.

214
00:40:43.120 --> 00:40:45.000
Sharon Burney: We wish we could fund everyone.

215
00:40:45.690 --> 00:40:47.890
Sharon Burney: And these projects were amazing.

216
00:40:48.200 --> 00:40:52.730
Sharon Burney: And it's nice to see the intersectionality in all of the… projects.

217
00:40:57.460 --> 00:40:59.470
Alyson Pope: Do we think that's all the questions?

218
00:41:00.270 --> 00:41:02.369

Alyson Pope: I don't want to take up y'all's time.

219
00:41:02.530 --> 00:41:03.520
Sharon Burney: Yeah.

220
00:41:04.900 --> 00:41:06.690
Alyson Pope: Let me put our last slide up.

221
00:41:18.870 --> 00:41:20.680
Alyson Pope: And I think there's some…

222
00:41:21.290 --> 00:41:23.829
Lizzi Albert (she/hers): Yes, I am speaking now.

223
00:41:24.200 --> 00:41:25.449
Alyson Pope: Thank you, Lizzi.

224
00:41:25.790 --> 00:41:37.999
Lizzi Albert (she/hers): Sorry, y'all. Before we go, we want to note a short survey about the webinar. This is part of our program assessment, so your honest feedback on the webinar will help us in our future support efforts.

225
00:41:38.240 --> 00:41:46.180
Lizzi Albert (she/hers): Thank you all for joining us today. We'll be posting the recording and slides soon to our Manage on Award page, which we've been linking to throughout this

226
00:41:46.560 --> 00:41:59.200
Lizzi Albert (she/hers): Webinar. In the meantime, if you think of any additional questions, you can always reach us at hiddencollections@clir.org. We really look forward to working with you, and hope you all have a wonderful day. Thank you so much for joining us.

227
00:41:59.810 --> 00:42:01.549
Sharon Burney: Thank you, bye!

228

00:42:01.550 --> 00:42:02.630
Alyson Pope: Thanks, guys!