

## ***Digitizing Hidden Collections: Amplifying Unheard Voices***

### **Recipient Webinar**

**January 12, 2026**

Welcome! We're glad you're here.

There is no audio at the moment. 🙋

**We'll begin the webinar at 2pm ET.**

**CLIR**

Council on Library &  
Information Resources



# Recipient Webinar

January 12, 2026

A program of

**CLIR**

Council on Library &  
Information Resources

Hello and welcome to the Recipient Webinar for the *Digitizing Hidden Collections: Amplifying Unheard Voices* program.

We want to begin by congratulating you all again on being selected as grant recipients for the program. It is truly a remarkable collection of projects and we know how much work has gone into them already.

We are so excited to see these projects progress over the coming months and years.

# Overview

## Part One: Introductions

- Getting to know CLIR (and one another!)
- Resources

## Part Two: Grant Management

- Grant Modifications
- Reporting Requirements

## Part Three: Project Support

- Ways to stay in touch with CLIR
- Questions/Discussion

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:

In Part One, we'll talk about CLIR, our team, and you—the 2025 recipients of *Digitizing Hidden Collections: Amplifying Unheard Voices* grants.

In Part Two, we'll transition to grant management and discuss grant modifications and reporting requirements. We'll cover how to make changes to your project and how and when to report on activities.

In Part Three, we'll discuss ways to stay in touch throughout your project and answer any questions you may have. Feel free to type your questions into the Q&A box, and we'll address them during this third portion of the webinar.

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 and larger cultural heritage preservation efforts at CLIR.

So, with that, let's get started.



# Part One

## Introductions

We'll start our time together with some introductions - first to this platform and then to CLIR.

# The Webinar Platform

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



Here are some notes about how you can use Zoom during this session.

- You can click the "CC Show Captions" button at the bottom of your Zoom window to turn on the live transcript.
- 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 "Host and Panelists" to "Everyone".
- Use the separate Q&A feature to ask questions. We'll have a dedicated time to answer questions at the end.
- 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 two weeks of this webinar.

# Program Staff



6

CLIR's work is accomplished by a relatively small staff of about 20 geographically distributed individuals.

Today's webinar is led by the Grants Team, which administers CLIR's active regranteeing 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.

- Sharon Burney | Program Officer | Midlothian, VA
- Alyson Pope | Program Officer | Pittsburgh, PA
- Jane Larson | Senior Program Associate | Pittsburgh, PA
- Lizzi Albert | Community Relations Manager | Washington, D.C.
- Louisa Kwasigroch | Managing Director | Chicago, IL

A graphic consisting of several concentric circles on the left, partially overlapping a large, light gray circle on the right. The text is centered within the gray circle.

Bodwéwadmí (Potawatomi)  
Kaskaskia  
Kiikaapoi (Kickapoo)  
Myaamia  
Nacotchtank (Anacostan)  
ᖃᐱᐱᐱᐱ ᖅᐅᐅᐅ ᐸᐅᐸᐱ ᐅᐱᐱᐱᐱ (Osage)  
Monacan  
Peoria  
Piscataway  
Shawandasse Tula (Shawanwaki/Shawnee)

Visit [Native-Land.ca](https://native-land.ca) to learn about  
Indigenous lands where you live.

7

<https://native-land.ca/>

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 Piscataway and Anacostan peoples and all of their ancestors and descendants. 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.

# Grant Recipients (you!)

- The ArQuives: Canada's LGBTQ2+ Archives
- Duke University; David M. Rubenstein Rare Book Manuscript Library, Duke University; Briscoe Center for American History, University of Texas at Austin; Albert and Shirley Small Special Collections Library, The Rector and Visitors of the University of Virginia; William and Mary Swem Library, Special Collections Research Center; Saving Slave Houses; Virginia Museum of History & Culture
- Fisk University
- Historical Society of Pennsylvania (HSP); 1838 Black Metropolis
- Internet Archive; Auburn Avenue Research Library on African American Culture and History; Rochester Public Library; Pikes Peak Library District; San Francisco Public Library; The ArQuives; Invisible Histories
- KYUK
- Pennhurst Memorial & Preservation Alliance
- The Red Nation Celebration
- Rochester Institute of Technology (RIT)
- Sand Creek Massacre Foundation; Sand Creek Massacre National Historic Site
- Tsartlip First Nation Stewardship Department
- UCLA Library
- University of Texas at Austin; McNeese State University; The University of Texas at Arlington; Imperial Calcasieu Museum; Southwest Louisiana Genealogical and Historical Library, Calcasieu Parish Public Libraries; Calcasieu Parish Clerk of Court; North Carolina State University
- University of Toronto, Scarborough Library
- Visual AIDS
- Washington College; Maryland Center for History & Culture; American Antiquarian Society; Kennard African American Cultural Heritage Center; Bellevue Passage Museum; Barratt's Chapel & Museum

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 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* (AUV) Cohort 3. Please feel free to introduce yourself and your role in the chat.





For those new to CLIR, we like to begin with a reminder of our mission: The Council on Library and Information Resources (or “CLIR”) 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.”

So what does that all mean?

- 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.
- 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.

# About

**49**

Funded digitization projects  
under AUV

**US\$11,883,315**

Awarded under AUV

**100**

Funded digitization projects  
under DHC

**US\$24,011,355**

Awarded under DHC

**10.6 million +**

Master digital files created in total

10

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 numbers of funded projects, awarded funds, and digitization outputs. As a historical overview, since the program began in 2015, CLIR has awarded \$35.9 million dollars to fund 149 projects and generate more than 10.6 million master digital files. 49 of those projects were funded through *Amplifying Unheard Voices*, and the program is currently in its fourth cycle.

# Join a **DLF** Working Group



## Assessment Interest Group

From cultural assessment to user needs, costs, and re-use, the AIG has a sub-group for you.

[Learn More](#)



## DLF Committee for Equity and Inclusion

Aiming to build and support more inclusive, diverse, and equitable communities of practice.

[Learn More](#)



## Digital Library Pedagogy Group

Building community around teaching in/with digital libraries; staff as perpetual learners.

[Learn More](#)



## DLF Project Managers Group

Sharing methods, tools, and best practices in project management.

[Learn More](#)



## Linked Open Data Zotero Group

Low-key information sharing on Linked Open Data for Libraries, Archives, and Museums. A DLF/LITA joint.

[Learn More](#)



## Born-Digital Access Working Group

Producing research on and advancing the practice of providing access to born-digital collections.

[Learn More](#)



## DLF Metadata Support Group

Metadata is hard. Join us in Slack to get help!

[Learn More](#)



## Working Group on Labor in Digital Libraries

Currently working on issues of contingency, precarity, and valuing labor.

[Learn More](#)

[www.diglib.org/groups/](http://www.diglib.org/groups/)

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 audits of websites and systems, which you can contribute to or take advantage of. DLF's working groups meet regularly and are open to everyone.

# The DLF Digitizing Special Formats Wiki



The screenshot shows the 'Digitizing Special Formats' page on the DLF website. The page has a blue header with the DLF logo and a navigation bar with 'Page' and 'Discussion' tabs. The main content area is titled 'Digitizing Special Formats' and contains a paragraph about the list of resources, a paragraph about the page's purpose, and a paragraph about how to suggest resources. A 'Contents' table of contents is visible, listing 10 items. The page is edited by 'Getting Started with Designing a Digital Preservation Plan'.

Page [Discussion](#)

## Digitizing Special Formats

This list of resources is curated by the Digital Library Federation for the benefit of cultural heritage professionals planning projects involving the digitization [Risks](#) programs of the Council on Library and Information Resources [CLIR](#) may find these helpful in planning project proposals.

Rather than providing comprehensive coverage, this list includes introductory and reference materials that are good places to begin an exploration of issue

Content for this wiki page is currently being curated by program staff at the Council on Library and Information Resources [CLIR](#). This page was originally developed by Lisa Gregory, Digital Projects Librarian, North Carolina Digital Heritage Center, and Tamsyn Rose-Steel, CLIR/DLF Postdoctoral Fellow for Data

If you would like to suggest a resource for inclusion on this page, send your suggestion to [info@diglib.org](mailto:info@diglib.org). The DLF is currently seeking professionals for this page. Prospective volunteers for this group should also send expressions of interest to [info@diglib.org](mailto:info@diglib.org).

**Contents** [\[hide\]](#)

- 1 Getting Started with Designing a Digital Preservation Plan
- 2 Enhancing Access and Discoverability
- 3 Digital Repositories
- 4 Digital Reformatting
- 5 Outsourcing Audiovisual Digitization
- 6 Copyright and Intellectual Property
- 7 Provenance, Privacy, and Ethics
- 8 Funding Opportunities
- 9 Education and Training Opportunities
- 10 Information from Digitization Service Providers

[Getting Started with Designing a Digital Preservation Plan](#) [\[edit\]](#)

[wiki.diglib.org/Digitizing\\_Special\\_Formats](http://wiki.diglib.org/Digitizing_Special_Formats)

Finally, one last resource we would like to share is the [Digitizing Special Formats Wiki](http://wiki.diglib.org/Digitizing_Special_Formats). 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.



# Part Two

## Grant Management

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. 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.

# Grant Modifications



*Citizen(s) Yasui: Illuminating the Japanese American Experience through the Yasui Family Collections (Funded 2024)*  
Oregon Historical Society

14

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. We realize that many of you will face operational hurdles that may cause delays. 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 (PIs) or small shifts in budget expenditures. Generally, such small changes can be addressed in a project's interim narrative and financial reports. However, changes that affect the underlying terms of the grant must receive **prior** approval by CLIR. Examples include extensions of the project end date, changes to PIs, 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. Program staff can always be reached by email at [hiddeencollections@clir.org](mailto:hiddeencollections@clir.org). To move forward with a modification, CLIR has an online form through which recipients can initiate modification requests.

# Grant Modification Request Form



## Submit a Report

Log in and submit your project report.

Log in



## Request a Grant Modification

Request changes to your timeline, deliverables, budget, or P.I(s).

Complete the Form



## Get in Touch

Ask questions, share good news, or request a report extension.

Email us

### JUMP TO A SECTION

[Grant Modifications](#)

[Reporting Requirements](#)

[Remaining Funds](#)

[Citing CLIR](#)

[Informational Webinars](#)

<https://www.clir.org/hiddencollections/manage-an-award/>

15

Access to the [Grant Modification and Extension Request form](#) is available through a link at the top of the [Manage an Award](#) page. The form is designed to allow for the submission of multiple types of modification requests. 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.

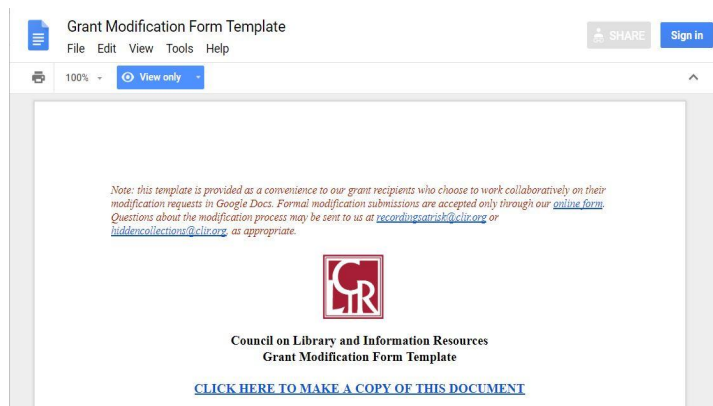
Once the form has been submitted and received, you should hear from CLIR staff within two weeks. For that reason, if you find you need a modification, it is important to request *at least 1-3 months before* the final end date for your grant. Some modifications, such as changes in Principal Investigators, should be requested **immediately** rather than waiting until the end of your project. Project end dates were included in the grant agreement; if you ever need a reminder of your project end date or award number, just ask.

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. 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 staff is always available via our program email address.



# Grant Modification Template



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. 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. All modification requests should be submitted through the online form, so you will need to copy and paste your prepared responses into that space.

# No-Cost Extensions (NCEs)

- Any request to push back a project's end date without requesting budgetary changes
- Should be requested between 1-3 months prior to a project's end date
- Only one extension request per project
- Your project end date and your final reporting deadline are two different dates
- Extensions **cannot be granted for projects whose approved end dates have already passed**
- The default extension for this program is 12 months

18

No-cost extension requests are exactly what they sound like: a request to push back the project end date and final report, without requesting additional funding. 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.

**No-cost extensions should be requested between 1-3 months prior to a project's end date.** The reason we ask you to wait until these final months of project is that *only one* no-cost extension can be granted per project. 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. You may also want to set similar reminders for your annual reporting deadlines.

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. Your final reporting deadline is set three months after your end date so that you have time to reflect upon your work and complete final accounting for your grant.

It's important to note that extensions **cannot** be granted for projects whose end dates have already passed; we really cannot emphasize enough the importance of paying attention to your project end date.

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.

# Change of Principal Investigators (PIs)

- Notify CLIR of changes to PIs through the Grant Modification Form **as soon as possible**
- In addition to the form, be prepared to supply the following via email:
  - CV of new PI
  - Letter on institutional letterhead from head of organization or department noting change and effective date

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. 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.

In order to complete a change of PI, you will also be required to supply to the program email, a letter on institutional letterhead from the head of your organization or department. 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.



# Budget Reallocation Request

- To allocate funds in a manner different than the original budget approved by CLIR
- Request budget reallocations through the Grant Modification Form prior to making any new, unbudgeted expenditures
- New activities should be aligned with the goals and scope of the original proposal and be within program guidelines
- Prior approval is not necessary for reallocations less than 5% of the total project budget and/or are less than \$10,000.

On occasion, grantees find it necessary to spend grant funds in a manner other than originally proposed in their application. 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.

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](#). Any requests to reallocate funds from salary and benefit lines to other areas of a grant budget will undergo additional scrutiny. CLIR strongly prefers that funds approved for staff support be spent on staff support.

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. When in doubt, ask us or go ahead and complete the Grant Modification Form.

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.

# Grant Modification Request

- For more information and instructions:
  - <https://www.clir.org/hiddencollections/manage-an-award/>
  - [hiddencollections@clir.org](mailto:hiddencollections@clir.org)

All of this information can be found on the [Manage an Award page](#). Should we update any of our grant modification procedures, we'll post the most up-to-date information there for your reference. Do be sure to share this webpage with all staff who may be involved in the management of your project.

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 projects successful. 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.

# Reporting Requirements

- Reports must be submitted through SMaply
- Reporting deadlines are included in your grant agreements
- CLIR should receive one project report each year
- CLIR submits a report to the Mellon Foundation each year which includes all reports submitted in the previous year



*Digitizing the Photographs of Horace and Evelyn Stewart, 1897-1978 (Funded 2024)*  
The University of Akron Archives & Special Collections

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. 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. Your final report is then due 3 months after your project end date. This means we should be receiving one report from you each year. If your project is only 12 months, you will just submit your final report 3 months after the end date of your project.

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 annual. 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.

Just a few more words on reporting...

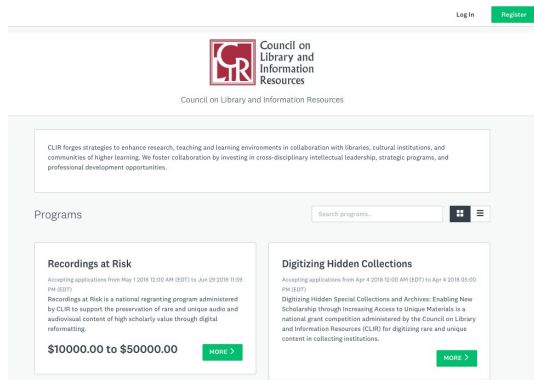
- Reports are not only a way to help us keep up with your progress but also a



- means for us to provide the best support to you as your project evolves.
- Your reports can also help us to help you identify and mitigate potential issues in advance.
- 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. 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.

# Report Submission Form

<https://clir.smapply.io/>



The screenshot shows the CLIR SmApply website interface. At the top, there is a navigation bar with "Log In" and "Register" buttons. Below the navigation bar is the CLIR logo and the text "Council on Library and Information Resources". A banner below the logo states: "CLIR forges strategies to enhance research, teaching and learning environments in collaboration with libraries, cultural institutions, and communities of higher learning. We foster collaboration by investing in cross-disciplinary intellectual leadership, strategic programs, and professional development opportunities." Below the banner is a "Programs" section with a search bar. Two program cards are visible: "Recordings at Risk" and "Digitizing Hidden Collections". Each card includes a description, a funding range, and a "More" button.

Log In Register

Council on Library and Information Resources

Council on Library and Information Resources

CLIR forges strategies to enhance research, teaching and learning environments in collaboration with libraries, cultural institutions, and communities of higher learning. We foster collaboration by investing in cross-disciplinary intellectual leadership, strategic programs, and professional development opportunities.

Programs

Search programs

**Recordings at Risk**  
Accepting applications from May 1 2018 12:00 AM (EST) to Jun 28 2018 11:59 PM (EST)  
Recordings at Risk is a national reporting program administered by CLIR to support the preservation of rare and unique audio and audiovisual content of high scholarly value through digital reformatting.  
\$10000.00 to \$50000.00 [More >](#)

**Digitizing Hidden Collections**  
Accepting applications from Apr 4 2018 12:00 AM (EST) to Apr 6 2018 00:00 PM (EST)  
Digitizing Hidden Special Collections and Archives: Enabling New Scholarship through Increasing Access to Unique Materials is a national grant competition administered by the Council on Library and Information Resources (CLIR) for digitizing rare and unique content in collecting institutions. [More >](#)

To submit your reports, you will use the same system that your team used to apply for your grant - [SMApply](#). 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 project work who need such notifications, you will need to send us names and contact information for those people. Please share this additional contact information as soon as possible so we can keep our records up to date.

It is a good idea to login to SMApply at your earliest convenience **using the same email address and password you used to submit your application**. 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 who created your application leaves your organization), you will need to contact us so that we can link your report to the correct credentials.

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. Collaborators will then receive an automatic invitation to verify their email addresses and create their own passwords to access the system. Once they accept the invitation and create their credentials, they will also be able to login to view the report and enter data. One of the system's

safety measures insures that only the proposal owner is able 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.

# Report Template



Council on Library and Information Resources  
Digitizing Hidden Collections Annual Report Form Template  
**FOR AMPLIFYING UNHEARD VOICES GRANTEES**

[CLICK HERE TO MAKE A PERSONAL COPY OF THIS DOCUMENT](#)  
(must be logged into a Google account)

Teams of collaborators working on project reports can also reference our [Report Form Template Google Doc](#), also available on the Manage an Award page. This document includes the questions you'll be expected to answer on the reporting form.

For now, we will just briefly cover the components of the report so that you are prepared with the relevant information you need when the time comes.

# Reporting Form: Overview

- Section 1: General Information
- Section 2: Narrative Assessment
- Section 3: Quantitative Assessment
- Section 4: Financial Assessment
- Section 5: Final Project Assessment (Final Reports only)

It is important to frame your accomplishments around your application proposal and demonstrate consistency with the goals and scope that were selected for funding by CLIR's review panel.

The report form is organized into 4-5 sections:

- General Information
- Narrative Assessment
- Quantitative Assessment
- Financial Assessment
- Final Project Assessment (Final Reports only)

When writing your report the first place to start 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 ideas. 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. However, as mentioned earlier, grantees will need to request Grant Modifications for more substantive changes, particularly those regarding the budget, timeline, or deliverables. Overall, it is important to demonstrate to CLIR and the Mellon Foundation that the scope and goals of the project continue to reflect the proposal selected for funding by CLIR's independent review panel.

# Reporting Form: Overview

SAVE & CONTINUE EDITING

NEXT

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 & continue editing.



# Reporting Form: General Information

- Grant reference number
- Project Title
- Institution/organization
- PI(s)
- Contact information of person submitting report

31

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.

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

- Grant reference number (provided in your grant agreement)
- Project Title
- Institution/organization
- PI(s)
- Contact information of person submitting report

The first three elements (grant reference number, project title, and institution/organization) will be pre-populated from your final application and cannot be edited. If you encounter any errors in that information, contact us to have it corrected.

There will be additional sections of the report that are pre-populated from your final application, which we'll touch on shortly. These sections are also indicated in the aforementioned [Google docs reporting template](#) with a black 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.

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 personnel changes, you'll want to mention this in the Progress and Impact question under the Narrative Assessment.





# Narrative Assessment

- Progress and impact
- Challenges
- Future plans

The narrative assessment provides space for the project team to:

- Summarize your progress toward the project goals and objectives during the reporting period, 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).
- 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.
- And finally, you will want to describe your future plans for the remainder of the project.

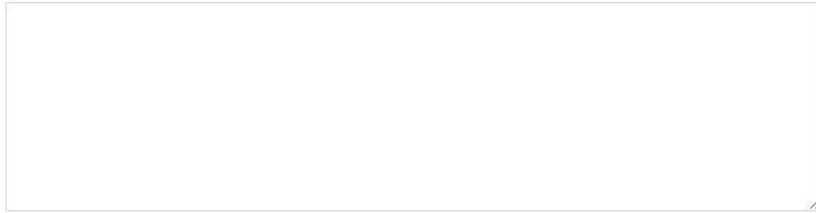


# Narrative Assessment

## Progress and Impact

Summarize your progress toward the project goals and objectives during the reporting period, 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). If relevant, explain any changes or additions to project goals and objectives made during the reporting period.

1,000 word limit



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. 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.



# Quantitative Analysis

- Digitization proposed and actual
- Preservation files proposed and actual
- Metadata creation

The next section of the report form will ask for information about three things:

1. the quantity and types of materials you proposed to digitize compared to what has actually been digitized during the reporting period,
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.

# Quantitative Analysis

## Section Three: Quantitative Assessment

### Quantities and Types of Source Materials Originally Proposed for Digitization

In the final proposal for this project 3 categories of source material to be digitized were proposed. Please select that same number in the dropdown below to populate this section of the report from your final application.

3 ▾

#### Category #1\*

Type of materials	artworks
Other format (optional)	mural
Amount of material	3
Unit of measurement	items
Additional information (optional)	10' x 18'

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. 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.

Begin by selecting the number of categories of source materials you actually digitized. 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. Categories should match the order of the categories defined in your final application and those auto-generated within the report. Once the number of categories is entered, the same number of populated category fields will appear below.

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.

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. CLIR does have an [File Manifest Template](#) you can use for this if you wish, located on the [Manage an Award](#) page.



# Financial Assessment

- Narrative Report: explanation of actual grant expenditures vs. proposed.
  - Address each budget category
  - Include detailed explanation of variances of 5% or more
- Financial Report: Budget submitted with proposal, updated to reflect actual expenditures

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. 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.

The second part is the **Financial Report**, 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, and this is the file you should edit and submit. 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.

# Financial Report Budget

[illegible]

This screen shot of the budget detail template is just a reminder of what this looks like. 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.

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. 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.

# Final Project Assessment

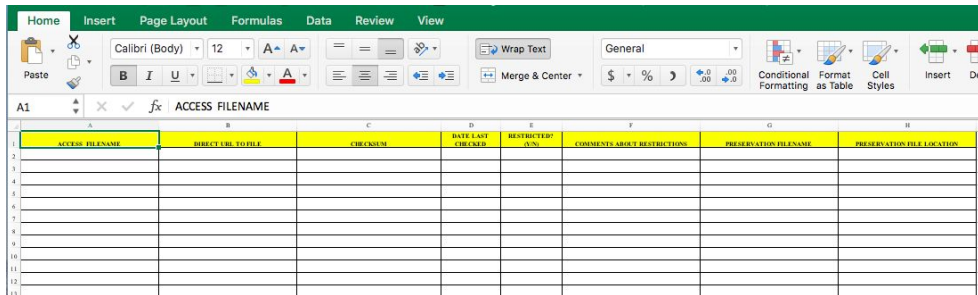
- Final project narrative
- Final financial narrative and report
- Collection access URLs
- Project Manifest, including URLs for access copies to digital files created through the project

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:

1. The final project narrative, which will be an overall assessment of your project, including the most significant outcomes, challenges, and lessons learned
2. The final financial narrative and report, which will show all actual expenses, interest earned, and indicate and explain any remaining award funds (these will have to be returned to CLIR as directed by [CLIR's Returned Funds Policy](#))
3. URLs or other instructions to access the digitized collections and metadata in any catalogs, repositories or services you've used, and finally
4. A Project Manifest, which is a spreadsheet containing a sampling of URLs linking to actual digital files created through your project



# Project Manifest



ORIGINAL FILENAME	DIRECT URL TO FILE	CHECKSUM	DATE LAST CHECKED	RESTRICTIONS (if any)	COMMENTS ABOUT RESTRICTIONS	PRESERVATION FILENAME	PRESERVATION FILE LOCATION

Complete and upload CLIR's template

- File name and location (URL), checksums, and restrictions (if any)
- Covers access copies only

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. 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.

Note that CLIR's template for this has multiple tabs, including one with instructions, so be sure to read through all of them.

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, and you should be able to adapt the vendor's spreadsheet for this template. If you work out your file naming conventions at the start of your project and insure your vendor names your files exactly according to your needs, most of your work for this requirement will be done. If you leave it until the end, it might 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 project work.

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. This evidence is critical to our own reporting to the Mellon Foundation, so we really appreciate your help in making this possible for us.

# Report Submission

The screenshot displays the 'Report Submission' interface. On the left, a sidebar contains a 'Back to application' link, the application title 'Digitizing Hidden Collections: Amplif...', the ID '0000000450', and a list of tasks. The tasks are 'Awarded Y1 Follow Up DHC: AUV' and 'DHC:AUV Y1 Financial Report', both marked as complete with green checkmarks. A progress bar shows '2 of 2 tasks complete'. At the bottom of the sidebar are 'REVIEW' and 'SUBMIT' buttons. The main content area on the right shows the 'DHC:AUV Y1 Financial Report' with a completion timestamp of 'Jul 11 2022 03:42 PM (EDT)'. Below this is a 'Task Instructions' section with a 'Show' link. A file upload section displays 'CLIR-financial-report-sample' with the filename 'CLIR-financial-report-sample.xlsx' and the upload date 'Jul 11 2022'.

Once all report tasks are completed in SMaply 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. Once you hit Submit the first time, you will be prompted to hit Submit again or given one last chance to review. 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. You'll need to scroll down a bit to see the newly completed tasks, if you'd like to review the parts of the report you've just completed.

As we mentioned, there can be multiple collaborators within one project's reporting space. However, only the application **owner** is given the option to submit. 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. 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.



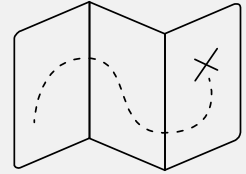
# Part Three

## Project Support

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.

# Finding Resources + Contacting CLIR

- [Manage an Award](#)
- [Funded Projects](#)
- [Policy Page](#)
- Email: [hiddencollections@clir.org](mailto:hiddencollections@clir.org)
- Bluesky [@clirnews.bsky.social](#)
- Subscribe to our [Grants & Programs Newsletter](#)



45

CLIR's website contains quite a lot of information for you as you move into your grant recipient role. 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. Here, you will find information on the grant modification and reporting process, including reporting templates, information on citing CLIR, and where we will post a link to this webinar.

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.

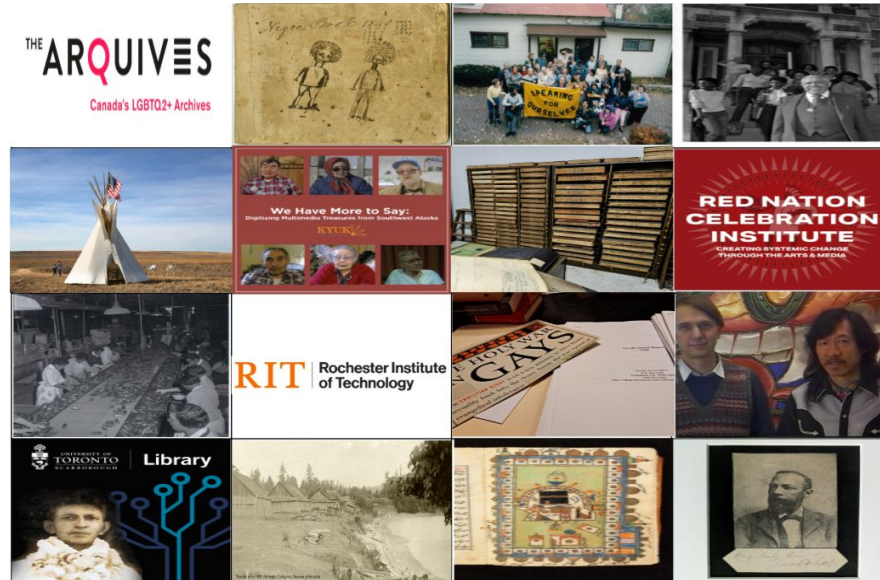
On the [CLIR's Policy page](#), you will find the [Acknowledgment Guidelines for Recipients of Grants or Fellowships](#). If discussing CLIR in press releases, you will want to review these guidelines.

The best way to contact us is through the program email: [hiddencollections@clir.org](mailto:hiddencollections@clir.org).

We also love to hear about your progress. If you are sharing updates on [Bluesky](#), 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. 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 & Programs Newsletter](#), so check our website for details on how to subscribe to that if you haven't already done so.

# Questions + Discussion



Images courtesy of 2025 grant recipients

38

Thank you all for joining us at our webinar today. We know that we've covered a lot of material. We'll now shift to answering any questions you've submitted during our presentation.



Louisa Kwasigroch | Managing Director  
Sharon Burney | Program Officer  
Alyson Pope | Program Officer  
Jane Larson | Senior Program  
Associate  
Lizzi Albert | Community Relations  
Manager

✉ [hiddencollections@clir.org](mailto:hiddencollections@clir.org)

Before we go, we want to note of 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.

Thank you all for joining us today. We'll be posting the recording and slides soon to our [Manage an Award](#) page. In the meantime, if you think of any additional questions, you can always reach us at [hiddencollections@clir.org](mailto:hiddencollections@clir.org). We really look forward to working with you and hope you all have a great day.

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