

2

00:00:04.740 --> 00:00:20.259

Sharon Burney: It's 2:00 o'clock, and we're gonna get started. The first thing we're gonna start with in order to provide our applicants the most cohesive experience possible, we've created a couple of short polls that we'd like

3

00:00:20.440 --> 00:00:27.159

Sharon Burney: for you to participate in. And we're gonna share the polls with you now.

4

00:00:29.150 --> 00:00:37.980

Sharon Burney: So the first poll we're gonna ask you to do one at the beginning and one at the end. So this is the first of one of two polls that we're gonna ask you to participate in.

5

00:00:39.140 --> 00:00:39.950

Cool.

6

00:00:57.450 --> 00:00:59.290

Sharon Burney: Almost done.

7

00:01:03.220 --> 00:01:04.250

Sharon Burney: Okay?

8

00:01:07.120 --> 00:01:11.320

Sharon Burney: Everybody's finishing them up.

9

00:01:12.700 --> 00:01:14.630

Sharon Burney: All right. You're gonna end that poll.

10

00:01:21.220 --> 00:01:33.739

Hi everyone, and welcome to the first webinar for those who've been invited to submit a final application to CLIR's *Digitizing Hidden Special Collections and Archives: Amplifying Unheard Voices* program.

11

00:01:34.480 --> 00:01:51.280

I'm Sharon Burney, program officer for the CLIR grants team, and I just want to congratulate you all again on making it to this stage of the application. This was a competitive initial application round, and each of your proposed projects made a positive impression on our review panel.

12

00:01:51.390 --> 00:02:01.549

Today's session will give you an overview that will orient you to the process of turning your initial submission into a competitive final application.

13

00:02:03.410 --> 00:02:10.270

So we're going to start off with some introductions, first to this platform and then to our team.

14

00:02:12.330 --> 00:02:26.580

To start off, we want to share some notes about using Zoom. During this session a live transcript is being generated if you'd like to utilize it. To turn on this feature, click the CC live transcript button at the bottom of your Zoom window.

15

00:02:26.690 --> 00:02:40.599

Attendees will be muted throughout the presentation. However, you're welcome to use chat for general introductions and conversation. If a chat box isn't already displaying on your zoom screen, you can hover over your mouse toward

16

00:02:41.160 --> 00:03:10.030

toward the bottom of the screen and open it manually in order to send a message to everyone. Remember to change the default from all panelists to all panelists and attendees. We ask that you use the separate Q&A box to ask questions. This can be opened the same way as the chat box. Because we have limited time together, please feel free to follow along with questions as they come in and upvote them to let us know that it would be helpful to you to have them answered live.

17

00:03:10.170 --> 00:03:22.129

We will do our best to answer all of the questions live, but we will also share responses to all questions alongside the recording. This session is being recorded. The slides, Q&A,

18

00:03:22.190 --> 00:03:29.700

recording, and transcript will be made available on the [Apply for an Award](#) page of our website in the next two weeks.

19

00:03:31.930 --> 00:03:52.819

Before we move into our program content, we would like to center today's conversation by acknowledging that as residents of the US, we are speaking to you from unseeded land of many indigenous peoples, we recognize the long standing history that has brought us to reside on this land, and we seek to have greater understanding of our place within that colonial history.

20

00:03:53.000 --> 00:04:08.369

We denounce any acts of terrorism, colonialism, and environmental disregard, both past and present. In particular, we like to respectfully acknowledge and recognize the original and current caretakers of the land, water, and air where we live,

21

00:04:08.790 --> 00:04:24.540

all indigenous peoples, and all 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.

22

00:04:24.590 --> 00:04:42.009

May this acknowledgement and our ongoing work demonstrate CLIR's commitment to beginning the process of working to dismantle the ongoing legacies of settler colonialism. If you haven't done so already, we'd love for you to introduce yourself in the chat and share a land acknowledgment for the area where you live if you would like.

23

00:04:44.070 --> 00:05:04.149

Our work is accomplished by a relatively small staff of about 20 geographically distributed individuals with the greatest concentration living in the DC area. The Grants Team is made up of Sharon Burney and Alyson Pope, the program officers as well as myself [Jane Larson] and Jada Wright-Greene, who are program associates, supervised by Louisa Kwasigroch.

24

00:05:04.340 --> 00:05:10.119

Together we administer our 2 active regranting programs from application to final report.

25

00:05:12.030 --> 00:05:26.250

This is the first in a series of sessions that will provide guidance and advice to those preparing final applications. Over the next 40 minutes or so we will walk through the final application, including the updated Application Guidelines,

26

00:05:26.290 --> 00:05:37.930

and touch on what the review process looks like. We'll share details about the resources and support that are available to you over the next few months and answer any questions that you might have at this point.

27

00:05:41.010 --> 00:05:48.600

Ok, we'll take some time now to introduce the expanded Application Guidelines and walk through the tasks required in the final application.

28

00:05:51.600 --> 00:06:07.409

The resource pages you used for your initial application have now been updated for the final application phase. The website has all of the most recent resources, including templates from many of the required uploads. So be sure that you are using those resources.

29

00:06:07.490 --> 00:06:18.960

As we mentioned, the recording slides and a transcript of questions and answers from this webinar and future ones in the series will be posted on the [Apply for an Award](#) page within two weeks of taking place,

30

00:06:18.990 --> 00:06:21.019

so you can reference them later.

31

00:06:24.000 --> 00:06:42.470

As in the initial application phase, your primary resource for the final application will be the Application Guidelines. This has been completely updated to provide instructions and insights for this phase of the process, integrating some lessons and advice we've already learned from the initial application phase.

32

00:06:42.700 --> 00:06:56.480

The Guidelines also serve as a space for you to draft responses to questions prior to adding them to our online grant platform. A view only Google Doc is linked to from the [Apply for an Award](#) program page.

33

00:06:56.600 --> 00:07:13.050

Users without a Google account can access this version and download the document in whatever file format they wish. Using the file menu, for those with a Google account, you'll also find a link to create your own copy of the document where you can work on answers directly.

34

00:07:13.130 --> 00:07:30.619

Be sure you are referencing the version, dated February 1st, 2024. Included in the introduction to the Guidelines is an outline application overview, showing at a glance the difference between the initial and final application, and what questions or uploads are new requirements.

35

00:07:30.800 --> 00:07:41.409

The online application section in the Guidelines includes accessibility information for the structure of the document, including the formatting and hex codes for the important task text.

36

00:07:43.890 --> 00:07:58.430

The final application is designed to build upon your initial application, and asks you to expand on your earlier responses as much as possible, allowing you to import and edit them instead of completely rewriting information you submitted to us in November.

37

00:07:58.560 --> 00:08:12.789

The project details sections of the initial application are expanded with a combination of form responses and document uploads. The Application Guidelines addresses each task in much greater detail, but we'll cover a few important points today.

38

00:08:15.020 --> 00:08:43.239

The first task asks you to reconfirm the eligibility you indicated in your initial application of your organization and any collaborating organizations in your project. Additionally, this section now adds the conditions of award acceptance, including the requirement to sign a grant agreement to dedicate any metadata and software that you create to the public domain, with exceptions for culturally sensitive metadata, and to claim no additional rights on digital files that you create.

39

00:08:43.400 --> 00:09:02.130

These details are also available on our website and in the Guidelines. As a note, this year we will only require documentation of nonprofit status, such as an Irs termination letter, or equivalent proof from organizations nominated for funding. So that does not need to be included in your application at this time.

40

00:09:04.270 --> 00:09:19.040

The final applicant information task offers you the option to prepopulate the fields with all of the information supplied in the initial application. This will be especially useful for any projects that involve collaborators, as you'll be able to skip reentering all of that data.

41

00:09:19.320 --> 00:09:35.209

If you do choose to have the system auto populate this task, which we highly recommend, you still have the option to edit all of the fields. For example, you may have reevaluated your collaborators, or changed who might be serving as your principal investigators, or PIs.

42

00:09:35.550 --> 00:09:53.799

Those changes can be made and saved. This task is exactly the same as in the initial application. No new questions have been asked. The Guidelines include additional instructions on what you'll encounter in the system. But do let our team know if you experience any issues making your desired edits, and will be happy to assist

43

00:09:55.600 --> 00:10:06.059

in the final project overview task. You'll notice many of the fields already populated with responses from the initial application without you needing to do anything.

44

00:10:06.110 --> 00:10:22.809

All of these fields are editable. Should you need to make any adjustments, for example, many applicants have more information about project costs or expected timeline, feel free to edit the size of the request or project length in line with the program's guidelines.

45

00:10:22.870 --> 00:10:48.419

We know and expect that some of this information will have changed since your application was initially submitted. As you are preparing your application, be sure to double check that the numbers and dates you enter here match the work plan upload and budget documents. We've refined our instructions for budgets in the final application phase in line with what will happen once funds are awarded.

46

00:10:48.560 --> 00:11:02.450

Please note that all requests should be made in US dollars. Projects that are led by Canadian organizations will then receive funds in Canadian dollars based on the exchange rate at the time of award.

47

00:11:02.770 --> 00:11:19.159

New in this task is a brief reflection on the adjustments that you've made to your proposal, based on the reviewer comments you received, anything you learn during the webinar series, or changes that occurred in the time between your initial and final application submission.

48

00:11:19.490 --> 00:11:26.889

This will help the review panel to understand these changes clearly and orient themselves in their assessment.

49

00:11:31.920 --> 00:11:50.740

The final application is designed to help you connect with our program's core values at every stage of your application. The Application Guidelines include specific instructions and insights to help you develop your responses with reminders about how each component of the application relates to these values.

50

00:11:50.790 --> 00:12:00.319

As we continue our overview of the remaining components of the final application, we'll also highlight how the core values might relate, relate to each task

51

00:12:06.930 --> 00:12:26.350

in the material's task. You are asked to expand your initial response about the materials you are nominating for digitization. The information you supply here should start revealing how your proposed project supports the program's core values of public knowledge and broad representation. But you will also go into much greater detail on those values in the next task.

52

00:12:26.800 --> 00:12:42.360

Our reviewers will look to this section to understand the physical materials, their condition, type, scope, and quantities. This task includes two uploads. The first is a list of collections which should be supplied on the spreadsheet template that CLIR provides.

53

00:12:42.500 --> 00:12:58.570

This will provide a high level overview of the collection or collections that are included in your project, any existing descriptions, their general condition, material types, how much of the collection will be digitized, and any rights or access restrictions that might apply.

54

00:12:58.850 --> 00:13:11.720

You will have an opportunity to explain more about those rights restrictions in the rights, ethics and reuse task. For some applicants this list may only have a single collection entry, while others may have dozens of collections included.

55

00:13:12.230 --> 00:13:23.530

Our team is happy to answer questions as you complete this requirement, and we hope to share some samples of completed versions to our website soon. The second upload is your representative samples.

56

00:13:23.690 --> 00:13:44.600

Final applications should include at least three, and up to ten samples that will help the reviewers see the types of materials you propose to digitize. We find that looking at these examples helps reviewers develop a more concrete understanding of the value of the materials, and why your approach to digitization is the right one, given their unique characteristics

57

00:13:45.230 --> 00:13:56.170

to support the list of collections. The application also includes a question asking for total estimated quantities of materials that will be digitized by the type or format of the original.

58

00:13:56.510 --> 00:14:13.729

For example, while your list of collections might include three collections at different organizations that include a mix of manuscripts, photographs, and artifacts in this question, you'll provide your best estimate of the total amounts of the manuscripts, photographs, and artifacts you propose to digitize.

59

00:14:13.960 --> 00:14:23.459

The Guidelines includes additional instructions on this question, and our next session on March 13th will get into greater detail about assessing collections for digitization.

60

00:14:25.230 --> 00:14:39.619

After you've described the original materials, the next section asks you to tell the story of these materials. This task builds on the first and should support the program's core values of public knowledge, broad representation, and authentic partnerships.

61

00:14:40.010 --> 00:14:51.030

Where the materials task answered the question, what will be digitized? This starts answering the question, the whys? Why now? Why these materials? Why this program?



62

00:14:51.760 --> 00:15:04.649

The task includes two elements expanding your initial response to the prompt 'Whose voices will this project amplify?' And uploading at least one, and up to four external letters of support.

63

00:15:05.060 --> 00:15:20.120

Together these materials should help the reviewers understand the voices represented in your proposed project. The potential impact on the various communities represented in the materials and involved in the project work and the partnerships and relationships that you've already established.

64

00:15:20.380 --> 00:15:31.030

More so than any other section of the application, this gives you the space to share your passion with the reviewers, so they are as excited as you at the prospect of digitizing the proposed materials.

65

00:15:32.210 --> 00:15:43.919

The external letters of support should help build your case, and will be an extremely important component in the reviewers' assessment. These should not be confused with the internal letters of commitment, which we'll cover in a bit.

66

00:15:44.370 --> 00:15:56.019

Letter authors may include members of communities represented in the materials, and any others who will use them for public programming, research, teaching, learning, or other journalistic or creative work.

67

00:15:56.520 --> 00:16:11.290

Do not include letters from individuals directly involved in the project. or who would benefit financially should the project be funded. We recommend starting to solicit these letters now to give plenty of time for your letter writers to respond.

68

00:16:11.560 --> 00:16:31.350

The Application Guidelines on our website include additional resources to help you solicit the most compelling letters. We recommend you share CLIR's Guidelines for Authors of Letters of Support as well as details of your project, so authors can provide strong, relevant letters specific to your application and proposed project.

69

00:16:33.650 --> 00:16:49.679

In the rights, ethics, and re-use task, you'll be providing much greater detail on any legal or ethical ethical concerns than need to be considered, related to the included materials as well as any restrictions you may plan to help facilitate community centered access.

70

00:16:50.010 --> 00:17:12.370

The task begins with a series of checkboxes that should reflect any rights or access restrictions that you indicated in your list of collections upload. You'll note that several restrictions, such as watermarks and the charging of fees, are strongly discouraged by the program, and must be specifically and strongly justified in your narrative response and optional appendices for this section.

71

00:17:12.550 --> 00:17:28.080

Even when no restrictions are expected, applicants need to explain why this assumption has been made. This statement should not be generic organizational language, but rather tailored to your specific project, and the materials being nominated for digitization.

72

00:17:28.380 --> 00:17:45.109

As noted, this task does allow for the upload of an optional rights, ethics and re-use appendix. Applicants may want to include donor agreements relevant to the collections policy documents that provide additional explanation or other documents that support the claims made in the narrative.

73

00:17:45.390 --> 00:18:01.510

This is especially important for those materials that do have access restrictions due to legal or ethical concerns. Session 4 of this event series on April 3rd will include more details and conversation on rights, ethics and re-use related to digitization projects.

74

00:18:04.660 --> 00:18:19.719

The project details—outcomes task asks for more information about the intended outcomes of your project and the audience you aim to reach. In this section, continue to show how your proposed project supports the core values of public knowledge,

75

00:18:19.740 --> 00:18:30.380

authentic partnerships, sustainable infrastructures, and community centered access. After expanding your initial response, you'll be asked to respond to two additional prompts.

76

00:18:30.760 --> 00:18:41.409

The first is providing the quantities, formats and specifications for the unique preservation quality digital files you will recreate over the course of your project.

77

00:18:41.600 --> 00:18:52.789

This response should correspond to the quantities and formats of the original materials that you supply in the earlier materials task. The Guidelines include detailed instructions on completing this prompt.

78

00:18:53.150 --> 00:19:03.729

We also include additional resources on our webpage, such as the DLF Digitizing Special Formats Wiki for anyone who may be new to digitization project design.

79

00:19:04.010 --> 00:19:16.160

Since the primary priority of this program is creating community-centered access to fuel the creation and dissemination of our digitized special collections and archives as a public good,

80

00:19:16.210 --> 00:19:31.830

you'll also be asked to provide at least one and up to ten portals where users will be able to access the digitized files and the related metadata. The Guidelines include additional instructions, especially for those of you who may be creating new portals for access

81

00:19:32.260 --> 00:19:45.239

in this section. You may also want to consider how you can create links to other related collections, and include portals that aggregate collections or metadata as best suited for the unique content of the proposed materials.

82

00:19:45.770 --> 00:19:57.120

Session 3 of this event series on March 20th will include some more information on determining the best digitization outcomes for an achievable sustainable digitization plan.

83

00:20:02.000 --> 00:20:12.739

The workplan upload is perhaps one of the most critical components of the final application and an opportunity to show all of the program's core values are integrated at every project stage.

84

00:20:12.950 --> 00:20:23.569

This upload expands on the initial timeline and should include the basic information that a project manager would need to know on day one of the project to set the team up for success.

85

00:20:24.040 --> 00:20:41.450

The requirement combines your presentation of the scheduled work with all of the activities, individuals, organizations, and technology you plan to use along the way. For collaborative projects, you'll want to show the engagement of the partners and what work can happen concurrently, or branch off

86

00:20:41.650 --> 00:20:56.359

rather than supplying separate work plans for each collaborating partner. This document should illustrate the holistic plan for the entire project, indicating differences in staffing or equipment at the various organizations as necessary.

87

00:20:56.610 --> 00:21:19.440

For those engaging with communities or advisory boards, be sure to show where and how they will be integrated into your project development and work initially. All applicants are asked to provide brief, no more than 250 word statements on risk mitigation measures you will implement, and how you plan to address delays should they arise.

88

00:21:19.730 --> 00:21:36.209

Your team's assessment plan for measuring and documenting your progress will determine success at the conclusion of the project. and how the project deliverables, including technical infrastructure and specifications, will be made secure, usable and discoverable for the long term.

89

00:21:36.570 --> 00:21:47.539

The Application Guidelines contain detailed instructions on this upload requirement. We've also supplied an optional template for you for your use, or just to get you started.

90

00:21:48.020 --> 00:21:54.310

Session 3 of this webinar series will also be useful to help inform your completion of this task.

91

00:21:58.190 --> 00:22:12.569

In the capacity task, you will be sure more about the capacity and strength of your team. Both those you have and those who you hope to build. After expanding your initial response, you'll be asked to provide three uploads.

92

00:22:12.900 --> 00:22:33.210

The first is supplying a letter of commitment from a head administrator of the lead applicant organization, and if applicable, each collaborative organization. In the Guidelines we provide examples of who the head administrator might be, since this person will likely vary, depending on your organizational structure.

93

00:22:33.300 --> 00:22:49.749

Essentially, you'll want the letter to come from an individual empowered to make a statement of your organization's commitment to support your project. For collaborative projects, you should upload each letter separately, and you should have as many letters as you have collaborating organizations.

94

00:22:49.890 --> 00:23:00.609

As with the external letters of support, we recommend that you start soliciting these letters now, and provide your letters writers with CLIR's Guidelines for Authors of Letters of Support.

95

00:23:00.890 --> 00:23:17.789

Details of your project will also be useful, so authors can provide strong relevant letters to your application and proposed project. Next are resumes or CVs for each of the main project PIs, which you're allowed up to three,

96

00:23:17.880 --> 00:23:29.360

and other resumes, CVs, or job descriptions for key project staff, either existing or new. In this section you must provide at least one, and up to five uploads.

97

00:23:29.420 --> 00:23:41.269

The Guidelines includes additional instructions for the uploads, including instructions about the inclusion of salaries, wages, and fringe benefits for any job, descriptions that will be covered by award funds.

98

00:23:41.330 --> 00:24:02.870

For large collaborations especially we know this limits your ability to celebrate all of the individuals employed involved in a proposed project. We recommend highlighting any additional

key personnel involved in your workplan, and possibly linking to their resumes in that document and using the space to focus on the PIs and new hires.

99

00:24:03.220 --> 00:24:21.109

In all of these requirements, reviewers will be looking for evidence of why this is the right team for the project you propose, how you are engaging with your broader community, and how the staff and support structure of your organization clearly show broad representation and authentic partnerships.

100

00:24:25.370 --> 00:24:37.870

And finally, the last tasks ask you to reflect on the need for support through this program. As with the workplan, all of the core values should be infused throughout the components of this task.

101

00:24:38.080 --> 00:25:08.180

Applicants are asked to expand on your initial response, answering why you need support from this specific program. We refined this question a bit and expanded the instructions and insights to help guide your response. Rather than providing general language about the need for funding, reviewers will look to see evidence of why the mission values and priorities of the applicant organizations align with the funding priorities and core values of this program.

102

00:25:08.480 --> 00:25:28.829

Your response should state clearly why the activities included in your proposal cannot be supported by the applicant organization. For collaborative projects, be sure to explain how external funds from this program will be distributed equitably to support authentic partnerships between all involved organizations.

103

00:25:28.910 --> 00:25:42.450

Next, you'll supply a budget detail on the template that CLIR provides. This shows a line item summary of how the award funds will be spent according to eight defined allowable budget categories.

104

00:25:42.530 --> 00:25:57.899

The Guidelines include additional instructions on completing this template. All funds should be requested in US dollars. For projects that are awarded funds, you'll be able to use the same template for budget reporting throughout your project.

105

00:25:58.190 --> 00:26:12.610

Expanding on your budget detail, you'll also supply a budget narrative. We provided a budget narrative template to assist you in developing this upload, and be sure that you're supplying all of the necessary

106

00:26:12.620 --> 00:26:27.860

detail in this document. While the use of that template is not required, it may be useful to reference. All expenses should align with the allowable costs of the program detailed in Appendix A: Budget

107

00:26:28.160 --> 00:26:47.479

of the Application Guidelines. If you plan to include cost share, those should only be included in the budget narrative and clearly marked as cost share, so reviewers know exactly what will be covered by award funds. As a note cost share is not a requirement of this program.

108

00:26:47.740 --> 00:27:01.170

For those who may be using vendors or other service providers with a cost greater than \$5,000, you are required to upload estimates or quotes to support the cost included in your budget documentation.

109

00:27:01.420 --> 00:27:24.130

Each upload should be accompanied by a brief justification for your selection of that vendor or service provider. If your organization has a policy against selecting a vendor prior to the award of grant funds, explain this in the available description field, and select a tentative choice to support the estimated costs listed in the budget detail.

110

00:27:24.680 --> 00:27:36.719

It may be useful to reference CLIR's Guidelines for Grants Involving Consultants or Subcontractors for more information on soliciting service provider proposals and quotes.

111

00:27:38.480 --> 00:27:54.990

And that's all of the tasks. Once you've completed all of the required tasks in the online system, you'll have the option to review and submit your proposal. This gives you one last chance to look over everything that you've written and uploaded, and go back to edit any errors you might spot.

112

00:27:55.070 --> 00:28:23.229

Once you're confident your application is complete, click the submit your application button, and click submit again if prompted. Once submitted, you'll see your application in the my application space, and be able to download a copy for your records. A confirmation email will be sent from the SM Apply system. Be sure to check spam folders if you don't see that within 24 hours.

113

00:28:23.270 --> 00:28:35.569

The Grants Team is always happy to answer any questions about the application submission process. The deadline for submission of final applications is May 8th, 2024,

114

00:28:38.240 --> 00:28:56.669

As in the initial application guidelines, we provided a rubric for the assessment of final applications. The final assessment will allow the reviewers to rank applications more granularly over the core values of the program. So keep in mind those connections we've made today

115

00:28:56.800 --> 00:29:13.960

and look for the markers we've provided throughout the Guidelines to be sure you are clearly communicating how your project embodies all 5 core values. All applications will be read by at least three reviewers and an additional reviewer focusing on rights and ethics.

116

00:29:13.980 --> 00:29:25.039

We do our best to keep the review process consistent between the initial and final rounds, so expect that at least two reviewers will have read your application in the initial round.

117

00:29:25.470 --> 00:29:40.660

CLIR has 4 million US dollars to award in this round of funding. The number of awards made will depend on the size of the individual requests, but based on our historical data, we estimate funding between twelve and twenty-five projects.

118

00:29:43.140 --> 00:29:50.220

In our last section, we'll talk about some additional resources and support as you move through your final application writing.

119

00:29:54.710 --> 00:30:06.080

Our first resource is this webinar series. Each session will cover topics identified in the review of the initial applications as potential areas of concern needing additional support.

120



00:30:06.320 --> 00:30:16.500

We planned the series to flow with how you might work on your final applications, but we welcome you to work on your submissions in a way that best suits you and anyone helping with the process.

121

00:30:16.830 --> 00:30:29.600

While none of the webinars are required for submission, we strongly encourage engagement with the process as we work to offer you practical tips and suggestions and time to start drafting responses and space to ask questions.

122

00:30:29.770 --> 00:30:43.430

We'll drop the link where you can view and register for each of these sessions in the chat. This support is one of the new components of our program redesign, and we hope that it will offer a benefit to all of you that wasn't really a part of the program in the past.

123

00:30:43.570 --> 00:30:58.940

Something like a continuing education course in digital project design and competitive grant writing. After each webinar, we'll invite you to complete a survey to collect your feedback on content in the overall series to help inform our continued assessment of the program.

124

00:31:01.000 --> 00:31:14.929

The next session will be next Wednesday, March 13th. Dr. Mitch Froz, the senior curator for special collections at the Kislak Center for special collections, rare books, and manuscripts at the University of Pennsylvania libraries will be presenting.

125

00:31:15.140 --> 00:31:25.260

We'll drop the link where you can read more about the series and register for any of the upcoming sessions in the chat, and we will send a reminder email about upcoming sessions about halfway through the series.

126

00:31:29.310 --> 00:31:50.189

Please remember to check out the additional resources on our website. If you need guidance on components of your application, we've mentioned our guidelines for letter writers and proposals involving subcontractors or consultants, and we also include information about CLIR's indirect cost policy and other information that may be helpful.

127

00:31:50.390 --> 00:32:07.140

We'll be posting the recording and slides for each upcoming support session to this page as well as a sample grant agreement. We also offer a few general resources about rights statements, digitizing project design and digital preservation which may be helpful.

128

00:32:22.080 --> 00:32:30.189

Sharon Burney: Thank you. So we'll get ready to take some of your questions. Now please remember to put them in the Q&A Box, if possible.

129

00:32:31.860 --> 00:32:46.269

Sharon Burney: Apologies if this was already covered. But when can applicants expect to hear final decisions. The review panel will be meeting in July, and we hope to have our decisions to you before September the 1st.

130

00:32:50.490 --> 00:33:14.409

Alyson Pope: A colleague is very concerned that all digitized materials will need to be publicly available online, while my interpretation is that the descriptive metadata for all digitized materials needs to be publicly available. And it is okay for some digital files to be for on site access only, can you please confirm or clarify. So yes, you have the correct understanding of that.

131

00:33:14.410 --> 00:33:27.590

Alyson Pope: The metadata needs to be publicly available. It is okay for some portion of the digital files to be restricted. We would want to see that restriction of access

132

00:33:27.590 --> 00:33:47.380

Alyson Pope: addressed in the rights, ethics and re-use section of the application. So we would know why you intend to restrict access, how you may provide other access on site or otherwise, upon request, and what proportion of the materials it may cover.

133

00:33:53.730 --> 00:34:04.609

Sharon Burney: Is there a maximum or cap for community consultant fees? In what capacity can they serve? Digitization, metadata, creation, outreach.

134

00:34:05.130 --> 00:34:24.810

Sharon Burney: There are a variety of consultant fees that we go in to these projects. Sometimes they're indigenous elders. We'd like to see equitable pay for the time, the reviewers like to look at the going rate

135

00:34:24.909 --> 00:34:44.309

Sharon Burney: for certain staffing types of positions or services, and we want those we will, and they will check them for the area that you lived in. So we always wanna make sure that people that are getting equitable pay. So we don't. It depends on which you're listing that in the budget. If it's staffing, we don't have a limit on that

136

00:34:44.370 --> 00:35:03.590

Sharon Burney: If it's a vendor, then, after \$5,000, if you're paying them as a vendor. We wanna see a vendor quote, and we have information on that on our website for vendors and service providers which would be very beneficial in this part. Some people use it in outreach

137

00:35:03.590 --> 00:35:17.749

Sharon Burney: creation. Sometimes people have graduate students or interns that they use to help for the digitization and the metadata creation part. It's gonna be unique to your particular project and your needs.

138

00:35:17.750 --> 00:35:27.470

Sharon Burney: But if you have a certain capacity in which you think you're going to use them, and you're unsure of, if that's an allowable cost or amount,

139

00:35:27.470 --> 00:35:38.110

Sharon Burney: please don't hesitate to contact us with your specific details at [hiddecollections@clir.org](mailto:hiddecollections@clir.org).

140

00:35:38.140 --> 00:35:40.520

Sharon Burney: And we'd be happy to answer your email.

141

00:35:43.590 --> 00:35:51.630

Alyson Pope: We are a Canadian Institute, the budget would be in US dollars. Is there a certain guideline which exchange rate to use?

142

00:35:52.570 --> 00:36:03.699

Alyson Pope: We will use, if a Canadian organization is awarded, we use the exchange rate at the time of the disbursement of funds.

143

00:36:03.730 --> 00:36:15.200

Alyson Pope: You all actually would have a separate budget template that we build out if you are awarded that kind of has dual sections, and so the the

144

00:36:15.780 --> 00:36:28.410

Alyson Pope: award, the exchange rate at disbursement is what the exchange rate would be for the giving of the award, and then we will use the exchange rate at the close, to look at any return of funds necessary.

145

00:36:29.930 --> 00:36:34.199

Sharon Burney: Looks like we have a couple of letters of support

146

00:36:35.610 --> 00:36:51.260

Sharon Burney: questions. First, one is, can letters of support come from a member of the Advisory Board if they are not paid. For example, we have a professor that is not connected to the project partners, but we would like to have them on the Advisory Board because they are an interested researcher.

147

00:36:52.160 --> 00:37:05.229

Sharon Burney: So I'm trying to understand if this person is already on the board of your organization, and they're like writing a letter of support. Is, this is a very competitive program, and

148

00:37:06.800 --> 00:37:11.960

Sharon Burney: I don't want to say it wouldn't be included. But I would also include other letters of support

149

00:37:12.230 --> 00:37:25.339

Sharon Burney: along with that. So that is no, there's no sense of bias that's attached to your project and your application. You want to have letters of support that show

150

00:37:25.530 --> 00:37:44.520

Sharon Burney: to the reviewers why the nominated materials and your project, has broad, scholarly appeal hits all of the core values that's listed in our program. And it can speak to your overall project in a very competitive way.

151

00:37:44.730 --> 00:37:56.649

Sharon Burney: So I want to say no, but I want to say you don't want to inhibit your project from the reviewers approval in any way, shape or form.

152

00:37:56.720 --> 00:38:04.309

Sharon Burney: So if you do use somebody on the board, I would add, I would suggest that you get a couple of more outside of them.

153

00:38:09.480 --> 00:38:34.420

Alyson Pope: And I'm gonna answer this kind of a follow up. Thanks for this. Would it be okay to have a letter of support from someone involved in one of the platform portals. Yes, that could be okay if they're not part of the project team. And if you're not paying any kind of vendor fees or ingest fees to that platform portal. As an example, I know we have a large collaborative project operating right now, and a lot of the materials are going to go and

154

00:38:34.420 --> 00:38:41.909

Alyson Pope: into the Plateau People's portal and it would be relevant to have someone from that

155

00:38:42.070 --> 00:39:04.350

Alyson Pope: group speak to the importance of the research. But it needs to be, it's critical that they're not basically a vendor, that they're not being paid through any part of the grant process. And as Sharon has already talked about you wanna make sure that you have kind of a broader scope of voices in your external letters of support.

156

00:39:07.350 --> 00:39:20.299

Sharon Burney: I've heard some grant organizations discourage the use of graduate assistants in favor of project archivists because they are more expensive. What is CLIR's stance on that?

157

00:39:21.050 --> 00:39:27.580

Sharon Burney: Okay, I know there's some...

158

00:39:27.970 --> 00:39:40.930

Sharon Burney: We don't have...we can only speak for CLIR. We encourage equitable, equitable pay, regardless of who is doing the work, whether it's graduate students or archivists. That's what we encourage.

159

00:39:40.970 --> 00:39:55.239

Sharon Burney: We find reviewers do get excited when we see a combination of using professionals and graduate students. We're always supportive of PE more people coming into this profession

160

00:39:55.240 --> 00:40:13.499

Sharon Burney: and utilizing them. What's important is that you tell the story of your project and your project, narrative and budget, and why it makes sense for your organization, this project. This new iteration was created to break down some barriers and increase equity.

161

00:40:13.550 --> 00:40:29.100

Sharon Burney: And so in such as long as that makes sense to your budget, that your budget narrative describes your budget, and it makes sense in your outreach components and your digitization project.

162

00:40:29.990 --> 00:40:34.339

Sharon Burney: Then, where the reviewers have always been

163

00:40:34.580 --> 00:40:38.219

Sharon Burney: very amicable to seeing graduate students.

164

00:40:38.610 --> 00:40:49.929

Sharon Burney: So sometimes it might include a combination of both the archives and graduate students. Sometimes it makes more sense just to have graduate students. That's for your story to tell, and and then to justify it

165

00:40:50.530 --> 00:40:56.669

Sharon Burney: in every aspect of your application. That's our stance is equitable pay for equitable work.

166

00:40:57.800 --> 00:41:08.319

Alyson Pope: And just a quick note that we don't allow tuition remission for student employees. That's not an allowable cost. That's a Mellon Foundation guideline.

167

00:41:08.580 --> 00:41:09.580

Alyson Pope: So

168

00:41:10.300 --> 00:41:20.540

Sharon Burney: Yeah, we don't do. Yeah. But if if you hire graduate students that are working for you, yes, but we don't do tuition really much sorry

169

00:41:21.870 --> 00:41:45.479

Alyson Pope: On the slide for project details--capacity...I'm both glad and sad that you asked this, Julia. You mentioned a new upload of board/trustees list. I do see that, but I don't see it further down in the Guidelines under that section. Can you let us know if there are additional details about this upload? So we have gone back and forth about the board/trustees lists the last few years, and this cycle we decided at

170

00:41:45.730 --> 00:41:58.849

Alyson Pope: the last hour that we were ready to pull it. So it has been removed from the application, and unfortunately I failed to catch that on the slide until just now watching it. And I was like, oh, no

171

00:41:58.950 --> 00:42:07.410

Alyson Pope: it says Board/Trustee List. Maybe nobody will notice. But that didn't happen, somebody noticed. But no, you don't need to worry about that. It's no longer included.

172

00:42:10.530 --> 00:42:18.140

Sharon Burney: Here's one. Are there any thoughts about the redaction of personal names, addresses, and some materials?

173

00:42:18.950 --> 00:42:45.890

Sharon Burney: We have signs and newsletters created by LGBTQ groups at a time when these materials circulate only within these groups, we want to be respectful of privacy when these are made accessible online. And this is a small enough collection that we are prepared to do this work prior to upload. We did something similar with another collection and altered collections are fully accessible for researchers in person. This is a great question. And we, we concur.

174

00:42:46.300 --> 00:43:03.040

Sharon Burney: We understand, especially with the new subject specific iteration, that there will be some culturally sensitive materials that do need to be redacted. Or there'll be a reason that you can't make those accessible. And the reviewers want to see that you have a plan for that.

175

00:43:03.550 --> 00:43:19.670

Sharon Burney: That you've addressed these needs ethically, and that you may have a takedown plan in case that is necessary. So. Yeah, those are our thoughts is that you will know what's best for your communities

176

00:43:19.730 --> 00:43:27.860

Sharon Burney: and and your nominated materials, and that you create a plan to address those concerns in an ethical way.

177

00:43:31.280 --> 00:43:47.800

Alyson Pope: Apologies for going back to letters of support. Our project is meant to digitize records for seven different nations. But you mentioned that there is a cap of four. Do you have any advice for how we can show the support of all the nations? So I first, wanna-

178

00:43:48.580 --> 00:44:17.700

Alyson Pope: I'm not, I don't know which project this is. So I just wanna clarify the difference between letters of support and letters of commitment. If the nations are on the proposal as collaborating organizations, they would not be providing letters of support. They would be providing letters of commitment, and we would want one from every single one of them. So every single collaborating partner should provide a letter of commitment.

179

00:44:17.780 --> 00:44:34.339

Alyson Pope: So I feel like that may be actually what we're getting at here. But if that's not what we're getting at, and they're not collaborative partners, we do have a cap there of four but we do have space to add additional uploads

180

00:44:34.340 --> 00:45:01.439

Alyson Pope: at the end of the application for any sort of like ancillary materials that you feel like may be helpful to the reviewers. Now there's a limit to how much the panel digs into things, and the extent to which they will read extensive ancillary documents. But that could be a place that you address that if you cannot do it within the four letters of support limit.

181

00:45:04.120 --> 00:45:16.289



Sharon Burney: if we are planning to hire an archivist who is affiliated with our org as a consultant, can we include transportation and other expenses for her travel? Yeah, there there is.

182

00:45:16.350 --> 00:45:22.589

Sharon Burney: There's a room in the budget for up to \$7,500, I believe. Is that correct, Alyson?  
For travel

183

00:45:23.170 --> 00:45:24.590

Sharon Burney: expenses?

184

00:45:24.630 --> 00:45:46.220

Sharon Burney: That sounds like there is room. I can't remember what the cap is I believe that's what it is. I could be wrong. It might be as high as \$10,000, but I know it's at least \$7,500 off the top of my head for travel, that our expenses that are affiliated with the project and project outreach, and that, you know the archivists would be included in that.

185

00:45:52.330 --> 00:45:54.460

Alyson Pope: Hmmmm, I just want to clarify. I just want to confirm that. Yes, Sharon, you're correct. The max for that is \$7,500.

186

00:45:57.060 --> 00:46:06.469

Sharon Burney: Yeah, great, thank you.

187

00:46:07.220 --> 00:46:08.249

Alyson Pope: Yeah

188

00:46:08.900 --> 00:46:26.049

Alyson Pope: I have two questions. We have samples via links to similar documents digitized from the collection, and have written contexts related to each sample as well. I believe this is allowable. Is this correct?

189

00:46:26.090 --> 00:46:47.819

Alyson Pope: This could probably be something that you include in the list of collections area or the representative samples. So within the representative samples, we do sometimes have

people link to previously digitized materials, or to records for the materials that they are intending to digitize, moving forward.

190

00:46:50.180 --> 00:47:11.740

Alyson Pope: Also, while the digitized portion of the collection under the grant will be a hundred percent publicly accessible, the samples are password protected. We plan to include the database link and the sign in credentials on the sample document. Is this appropriate? I think that is really largely

191

00:47:12.580 --> 00:47:18.070

Alyson Pope: a question for your organization and their

192

00:47:18.080 --> 00:47:25.870

Alyson Pope: IT protocols. That's not something that we would prohibit. But it's also not something.

193

00:47:26.270 --> 00:47:41.580

Alyson Pope: that we would necessarily be the people to make the decisions around. So regarding that, I think that is a question for your organization rather than one for us to answer. But no, it's not something that we would strike from the application.

194

00:47:43.080 --> 00:47:54.640

Sharon Burney: Do we need letters of commitment from vendors in addition to quotes. No, you do not. You just need the quote, and the quote should clearly reflect

195

00:47:54.710 --> 00:47:59.670

Sharon Burney: what is in your budget narrative and detail as far as vendor expenses.

196

00:48:02.560 --> 00:48:09.370

Alyson Pope: You responded to a similar question before, can we please have clarification on the percentage of the budget that we can allocate

197

00:48:09.390 --> 00:48:30.469

Alyson Pope: (whoops, it moved) for digitization, metadata, creation, community outreach engagement and travel, etc. So you will wanna check our Final Application Guidelines for, like

the full breakdown of allowable and disallowable costs by category. We do not prescribe a percentage of the budget

198

00:48:30.470 --> 00:48:54.879

Alyson Pope: in this program. We do in our *Recordings at Risk* program, but that's because that program requires an outside vendor. When digitization is happening in-house that can kind of be hidden, because perhaps, like, it's really you're doing salary rather than like a vendor pay. So we don't look for that kind of balance there. But, the overarching

199

00:48:55.250 --> 00:48:59.519

Alyson Pope: kind of limits are that we do not allow indirect costs.

200

00:49:00.020 --> 00:49:20.660

Alyson Pope: We do allow fringe benefits with salary. There's a \$10,000 limit for administrative support. There's a \$10,000 limit for supplies, equipment and materials. That's an important one that comes up fairly regularly. That's \$10,000, and there's a \$7,500 limit for

201

00:49:20.690 --> 00:49:36.950

Alyson Pope: conference registration and related travel expenses. So those are the only ones that have kind of defined caps within the overall budget. But you will definitely want to check out the appendix, Appendix A in the Application Guidelines for a full breakdown of that.

202

00:49:40.200 --> 00:49:42.710

Alyson Pope: Oh, Sharon, did you want to run another poll?

203

00:49:43.430 --> 00:49:47.939

Sharon Burney: Yes, let's run another poll right now, before we take the last few questions.

204

00:50:03.320 --> 00:50:05.090

Sharon Burney: Hold this launch.

205

00:50:32.630 --> 00:50:36.530

Sharon Burney: Yeah. 41, 49 participants. Okay.

206

00:50:38.190 --> 00:50:43.619

Alyson Pope: Thanks to all for participating in those to keep help us keep track of what we're

207

00:50:43.820 --> 00:51:00.409

Sharon Burney: doing, what we mean to be doing in here. Yes, okay. Allowable cost questions. Are we able to include stipends for PIs, if if you list them as a budget and they are consultant, or they have a justifiable

208

00:51:00.620 --> 00:51:11.250

Sharon Burney: role that you have substantiated within the allowed and disallowed cost in your project, narrative and budget. Then yes, you can.

209

00:51:11.320 --> 00:51:18.630

Sharon Burney: Can we use modest funds to designate and create marketing flyers for the digitized collection.

210

00:51:19.020 --> 00:51:33.069

Sharon Burney: If that's part of a salary that you're doing, or you create a service vendor that's gonna help you with outreach, then you could define it as that is in your budget. Possibly. Yes.

211

00:51:33.120 --> 00:51:36.000

Sharon Burney: If you have a

212

00:51:36.710 --> 00:51:58.519

Sharon Burney: project staff line that you create that helps with the outreach, and that's part of their duties. Then you could put that in as a salary, in your duties, or you have a service vendor that you're applying for. Everything in your budget should be substantiated in your budget narrative in your budget detail, and it should show up in your project timeline

213

00:51:58.610 --> 00:51:59.910

Sharon Burney: and workplan.

214

00:52:01.070 --> 00:52:02.979

Sharon Burney: So I could see that. Yes.

215

00:52:04.280 --> 00:52:08.170

Sharon Burney: We don't pay for copies.

216

00:52:12.680 --> 00:52:41.669

Alyson Pope: What happens if a co-PI moves to another institution during the granting period? Can they still remain as a co-PI, and how do they inform CLIR of this? If a co-PI moves to another institution, and they are still actively working on the project in the same capacity they were in the original institution, then that is not necessarily an issue. We like to be informed of just where people are, and when you all have updated email addresses so that we're able to get in touch with you. But it's not

217

00:52:42.060 --> 00:52:43.550

Alyson Pope: something that

218

00:52:43.650 --> 00:53:05.459

Alyson Pope: we would have a problem with as long as they're still directly working with the project. And it's not, it's something that happens not infrequently. If a co-PI moves to another institution, and they can no longer work on the grant, for whatever reason, we do have a modification process so that you can replace them with a new PI.

219

00:53:06.940 --> 00:53:19.020

Sharon Burney: After submitting our original application, another organization asked if we could include their materials, a small amount that we are happy to support, that they were not included in our initial application.

220

00:53:19.160 --> 00:53:29.270

Sharon Burney: Can we include their materials, and it should not make a significant change to our budget, and we are happy to include their materials. First of all,

221

00:53:29.710 --> 00:53:41.779

Sharon Burney: one, do they qualify as an eligible organization? Are they located within United States and its Territories? Are they a nonprofit whose main focus and purpose is the cultural heritage preservation?

222

00:53:41.820 --> 00:53:45.399

Sharon Burney: That becomes the question. The second question.

223

00:53:46.500 --> 00:53:53.909

Sharon Burney: do they own and hold their materials? Do they own and hold their materials.

224

00:53:54.320 --> 00:54:00.860

Sharon Burney: And then it becomes, did you apply as, is your original application a collaborative,

225

00:54:00.920 --> 00:54:08.630

Sharon Burney: as a collaborative project? And you don't necessarily have to change it to a collaborative project.

226

00:54:08.840 --> 00:54:20.089

Sharon Burney: But do the materials nominated fit the iteration of the program? Do they hit the core values of the program subject is the subject the subject area that you're trying to amplify,

227

00:54:22.330 --> 00:54:51.029

Sharon Burney: will it fit? If your entire project you have to make your try it has to have a cohesive thought. Right? Your project has to have cohesive thought. So I'll do these materials fit within the cohesive thought that you nominated in your original app initial application. Is it an extension of a project that you've already created? Then that makes sense? The theme is already there. You're expanding on a team you do own, and you hold them. They own and hold them. It may make sense

228

00:54:51.030 --> 00:54:59.630

Sharon Burney: for them to be a collaborating partner, but not necessarily an official one. So those are the things you might want to think about.

229

00:55:00.940 --> 00:55:03.649

Alyson Pope: And I realize we're in an open,

230

00:55:03.760 --> 00:55:22.339

Alyson Pope: we're in, like, an open environment right now. But regarding this last question, if you want to provide more specific information to us, you can email us at [hidencollections@clir.org](mailto:hidencollections@clir.org) and we can more directly answer that question for you. This is a lot of if yeah.

231

00:55:23.190 --> 00:55:46.410

Alyson Pope: If we were planning to hire an archivist who was affiliated with our org as a consultant. Can we include transportation and other? Oh, I'm sorry we didn't get that marked. I'm sorry, I see that there is a \$10,000 cap on equipment. The scanner we need for this project to project oversized materials far exceeds this cap. How would you recommend we proceed in our budget narrative.

232

00:55:49.230 --> 00:55:50.080

Alyson Pope: The

233

00:55:53.320 --> 00:55:55.049

Alyson Pope: I don't really have

234

00:55:55.700 --> 00:56:01.329

Alyson Pope: a great answer for you on that, because we do enforce that cap

235

00:56:01.690 --> 00:56:22.139

Alyson Pope: pretty stringently. So if you need a piece of equipment that is \$30,000, then you will only be able to get \$10,000 out of the grant. It could be something where you look at using a vendor rather than buying the equipment, because we will pay for outside digitization services,

236

00:56:22.140 --> 00:56:36.319

Alyson Pope: and that is not limited in the same way. So if it's maybe leasing it during, yeah, if you can find a way to do it within the budget, or, if you can find a way to do it out of house.

237

00:56:36.320 --> 00:56:54.180

Alyson Pope: What I would probably recommend trying to think of some other options. The only other option I could think of is to maybe hit the \$10,000 with that and your institution or organization does the rest as a cost share. Yeah. But within the grant funds

238

00:56:54.300 --> 00:56:59.939

Alyson Pope: you will not be able to get equipment funds beyond \$10,000. Sorry.

239

00:57:01.750 --> 00:57:09.260

Alyson Pope: So it looks like that is all of our questions. I know we have a

240

00:57:09.360 --> 00:57:12.470

Alyson Pope: survey that we would

241

00:57:12.600 --> 00:57:19.329

Alyson Pope: like y'all to fill out for us if you don't mind. So we've dropped that in the chat,

242

00:57:19.660 --> 00:57:44.460

Alyson Pope: and I'll put up our little screen that asks you to take our survey. But we'd like to thank you all for participating today and encourage you to come to the rest of the sessions. If you check out the [Apply for an Award](#) page, you can find more information about all of them, and registration links for all the separate sessions. And again, once the sessions are accomplished,

243

00:57:44.460 --> 00:57:53.659

Alyson Pope: completed, we will have them loaded onto that page as well. The recording, the Q&A, and the transcript.

244

00:57:53.660 --> 00:57:55.340

Alyson Pope: Do you want to add anything, Sharon?

245

00:57:55.480 --> 00:58:09.699

Sharon Burney: Now, when you come to the sessions, please take advantage of these applicant support sessions that at that time you should have started working on your application, and you can bring more specific questions for the experts to assist you with.

246

00:58:10.590 --> 00:58:11.790

Alyson Pope: Thanks, all.