0:12
Sharon Burney: Good afternoon, everyone! We're going to show you a brief video before with

0:19
Sharon Burney: vital Information then after we'll take some questions and answers, if

0:25
Sharon Burney: necessary. Also, at the end of the recording you'll see you'll hear a mention of some polls and we have

0:32
Sharon Burney: decided today to not utilize those polls. So congratulations once again and feel free

0:38
Sharon Burney: to introduce yourself in the

0:53
Sharon Burney: chat. Hello and welcome to the *Recordings at Risk* Recipient Informational Webinar. We'd like to begin

1:00
Sharon Burney: by congratulating you all once again on being selected as grant recipients for the *Recordings at Ris*k program! There are

1:08
Sharon Burney: a varied and remarkable collection of projects represented here, and we know

1:13
Sharon Burney: how much work has gone into them already. We're excited to share some information about what happens next, as your projects

1:22
Sharon Burney: begin. We're going to start off with some introductions—first to this platform, and then to our team.

1:28
Sharon Burney: then to our team. To start off, we want to share some notes about how you can use Zoom during this

1:35
Sharon Burney: meeting. A live transcript is being generated if you'd like to utilize it. To

1:41
Sharon Burney: turn on this feature, click the "CC Live Transcript" button at the bottom of your Zoom window. Attendees will be muted

1:48
Sharon Burney: throughout the presentation. However, you're welcome to use chat for general introductions and conversation. If a chat

1:55
Sharon Burney: box isn't already displaying on your Zoom screen, you can hover your mouse toward the bottom of the screen and open it

2:02
Sharon Burney: manually.  In order to send a message to everyone, remember to change the default from "All Panelists" to "All panelists and

2:10
Sharon Burney: attendees." Because of how busy chat can get, we ask that you use the separate Q&A

2:15
Sharon Burney: box to ask questions today, which can be opened the same way as the chat box. You

2:21
Sharon Burney: can submit questions at any point during the webinar and we'll get to them at the end of the webinar. If you're following

2:28
Sharon Burney: along with questions as they come in, you can "upvote" them if they're similar to your own to let us know that it would be

2:34
Sharon Burney: helpful to you to have them answered live. The session recording and transcript will be made available on the

2:41
Sharon Burney: [Manage an Award](#) page of our website within a

2:49
Sharon Burney: week.

2:50

Alyson Pope: We always like to start by reminding everyone of CLIR's mission: The Council on Library and Information

2:55
Alyson Pope: Resources (or "CLIR") is an independent, nonprofit organization that forges strategies to enhance research, teaching,

3:02
Alyson Pope: and learning environments in collaboration with libraries, cultural institutions, and communities of higher

3:08
Alyson Pope: learning." *Recordings at Risk* is just one of many programs administered by CLIR and is generously supported by The Mellon

3:16
Alyson Pope: Foundation. Cycle 11 was the second of three cycles we have to award through our current parent grant. Cycle 12's call

3:24
Alyson Pope: for proposals will open in January of 2025. The Grants Team also currently has

3:29
Alyson Pope: an open call for our other regranting program, *Digitizing Hidden Collections: Amplifying Unheard Voices*, that will

3:36
Alyson Pope: close October 30 2024. CLIR's work is accomplished by a

3:43
Alyson Pope: relatively small staff of about 20 geographically distributed individuals.

3:49
Alyson Pope: today's webinar is led by the grants team which administers CLIR's active regranting programs, offering support for

3:56
Alyson Pope: the entire grant cycle– from application to final report. Some are all of you may already know us

4:02
Alyson Pope: from applicant webinars or from email exchanges but the team is comprised of Sharon Burney, program officer from

4:09
Alyson Pope: Gainesville Florida. Myself, Alyson Pope, program officer from Pittsburgh, Pennsylvania. Jane Larson, a program

4:16
Alyson Pope: associate from Pittsburgh, Pennsylvania. Louisa Kwasigroch, the managing director from

4:21
Alyson Pope: Chicago, Illinois. And Lizzi Albert, the deputy director of oper operations based

4:27
Alyson Pope: in Washington, DC.

4:30
Sharon Burney: 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

4:39
Sharon Burney: many Indigenous peoples. I'd like to respectfully acknowledge and recognize the original and current caretakers

4:46
Sharon Burney: the land, water and air where I live: the Timucua and Seminole peoples and all of their

4:53
Sharon Burney: ancestors and descendants. I'm grateful to have the opportunity to live and work

4:58
Sharon Burney: on their homelands, and ask you to join me in acknowledging all Indigenous communities, their elders

5:05
Sharon Burney: both past and present, as well as future generations. May this acknowledgement and

5:10
Sharon Burney: the program we're speaking about today demonstrate CLIR's commitment to beginning the process of working to

5:16
Sharon Burney: dismantle the ongoing legacies of settler colonialism.

5:23
Alyson Pope: During today's session, we'll spend our time with an overview of some of the things you'll need to know about

5:28
Alyson Pope: managing your grant. We'll go over an introduction to your reporting requirements so that you can have them

5:33
Alyson Pope: in mind throughout the project. We'll cover how and why to request a modification and then turn to some final

5:40
Alyson Pope: notes, including advice from past recipients. We'll end with time for some

5:46
Alyson Pope: questions for you, as well as time for your questions for us. We especially want

5:52
Alyson Pope: to welcome staff who may not be overseeing these projects but working on them day to day. It's really important to

5:58
Alyson Pope: us that you hear about all of these details too, so that you understand how your work fits into your organization's

6:04
Alyson Pope: grant and into larger cultural heritage preservation efforts at CLIR. And so,

6:09
Alyson Pope: I'll turn the floor back over to Sharon.

6:12
Sharon Burney: The challenges you may encounter

6:14
Sharon Burney: could mean you'll need a project modification, and we'll get to that later in the presentation. For now we'll start

6:20
Sharon Burney: with CLIR's reporting requirements for grantees. Seeing what will be required at

6:25

Sharon Burney: the end of your project may help you decide how to document progress and keep metrics about the work. We hope this will

6:33
Sharon Burney: make reporting easier when your projects are complete. Your starting point will always

6:39
Sharon Burney: be the *Recordings at Risk* [Manage an Award](#) page. In much the same way as they Apply for an Award page helped guide

6:46
Sharon Burney: your proposal writing, the [Manage an Award](#) page is a one-stop shop for grant

6:51
Sharon Burney: recipients, with information on all the administrative components of holding a CLIR grant. Most of the information

6:58
Sharon Burney: we'll be covering today can be found there if you ever need a refresher on our policies. The recording of this

7:05
Sharon Burney: webinar will also be posted to this page. You were all awarded this grants

7:12
Sharon Burney: this spring in the 11th *Recordings at Risk* competition. For that reason you will hear us refer to you as a group as

7:19
Sharon Burney: our "Cycle 11 recipients." To keep things easy for everyone, we start by putting

7:24
Sharon Burney: everyone on the same 12-month timeline for completion of projects, regardless of

7:30
Sharon Burney: the project length you originally proposed. We hope this will set your projects up for success. Given the 12

7:37
Sharon Burney: month timeline, all of you have been assigned a project in date of August 31st

7:43

Sharon Burney: 2025. This is a date by which all approved project activities including

7:48
Sharon Burney: digitization, metadata creation, and providing whatever access you're providing should be complete. Grant funds

7:55
Sharon Burney: may only be expended during this 12-month period. To change this timeline, you'll need to get approval from us,

8:02
Sharon Burney: which we will cover shortly. Given the compact nature of your projects, we start by only requiring a final report. Final

8:11
Sharon Burney: reports are due within 30 to 90 days of project completion. So this would mean that the latest possible reporting

8:17
Sharon Burney: deadline would be November 30th 2025. You may find that your project ends

8:23
Sharon Burney: earlier than August 31st 2025 or that you're ready to submit your report earlier than November 30th 2025.

8:30
Sharon Burney: Submitting the final report early is welcomed. You'll just need to contact

8:36
Sharon Burney: the CLIR Grants Team at [recordingsatrisk@clir.org](mailto:recordingsatrisk@clir.org) so we can start the reporting process.

8:44
Alyson Pope: Grant reports are submitted through the online grant management system SM Apply, just like your proposal,

8:51
Alyson Pope: using the same login and password as your proposal submission. In addition to a narrative about your projects and

8:57
Alyson Pope: total materials digitized, we also require a full financial reporting. If

9:02

Alyson Pope: you forget the login credentials or lose access to them for any reason (for example, if the person who created your

9:09
Alyson Pope: application leaves your organization), you will need to contact us through the program email recordingsatrisk@clir.org

9:16
Alyson Pope: so that we can link your report to the correct credentials. One of the system's safety measures ensures that only the

9:22
Alyson Pope: primary account holder is able to submit a report, so if you've added collaborators to your proposal space and

9:29
Alyson Pope: one of them eventually needs to submit that person will still need to contact us to make sure this can happen. You can

9:36
Alyson Pope: also find a link to SM apply on the Manage an Award page. All communication

9:41
Alyson Pope: and reminders for reporting will be sent to the active PIs and any additional contacts you have provided to our

9:48
Alyson Pope: team. If there are any others involved in project work who need such notifications,

9:53
Alyson Pope: you will need to send the names and contact information for those people to our program email address. Please share

9:59
Alyson Pope: this information as soon as possible so we can keep our records up to date. We're now going to take you on a tour of the

10:05
Alyson Pope: final reporting form itself. If, due to a future modification to your project, you are required to submit an interim report

10:12
Alyson Pope: most elements will be the same. The first section of the report is

10:18
Alyson Pope: the quantitative assessment. Here you'll be entering information related to numbers and types of recordings

10:24
Alyson Pope: nominated for digitization, the number of archival master files produced, and variances between the estimated and

10:32
Alyson Pope: actual digitization numbers. To complete this part, it will be helpful to have access to your original proposal for

10:38
Alyson Pope: your project. Taking the time now to put a copy of your proposal in a place where all team members can access it is a good

10:45
Alyson Pope: idea. You can download a copy of your proposal by logging into the system using the same credentials you used to

10:52
Alyson Pope: create your application. If you don't know where to find a copy of your proposal, you can email us to ask for one.

11:01
Alyson Pope: The next reporting section includes space to document project developments, both internal and public. Internal

11:08
Alyson Pope: developments may include things like: digitization metrics such as tracking time data for steps in the project

11:14
Alyson Pope: workflow (preparing materials for shipping to the vendor, metadata creation, ingest, etc.), the implementation of new

11:21
Alyson Pope: workflows, standards, protocols, and/or procedures for digitization and description, the implementation of new

11:28
Alyson Pope: tools or systems, and new donations and/or grant applications. CLIR pulls together data

**11:34**
Alyson Pope: about the impact of its program for its own annual report to The Mellon Foundation, so providing as many details

**11:40**
Alyson Pope: as you can about the ways that this opportunity affected your organization, collections staff, and ways of working

**11:47**
Alyson Pope: will be very helpful to us. Taking notes somewhere about the impact of this grant will help you easily complete this

**11:56**
Alyson Pope: section. We also want to hear about public developments, such as: the creation of new blogs, social media

**12:03**
Alyson Pope: accounts, websites or even content created for existing ones; research

**12:08**
Alyson Pope: guides, online or physical exhibitions, or news articles; the incorporation of digitized materials into curricula at

**12:15**
Alyson Pope: any educational level, or publications or presentations about the project or arising from research using the

**12:22**
Alyson Pope: digitized materials. Again, keeping a file with copies of these kinds of documentation

**12:27**
Alyson Pope: will make the reporting process easy for you. You will also have a chance to append copies of these documents to your

**12:33**
Alyson Pope: report, demonstrating the varied and creative ways you will use your project to educate and serve others.

**12:46**
Sharon Burney: Here's a quick glimpse of what these impact questions look like on the reporting form. The report form includes

**12:52**

Sharon Burney: simple checkboxes to document activity which you'll then have the opportunity to explain further in the narrative

13:59
Sharon Burney: portion of your report. Here is the checklist for internal

13:07
Sharon Burney: impacts… and here is the checklist for public outcomes. Because *Recordings at Risk* is designed to support smaller-

13:14
Sharon Burney: scale efforts focused on preservation reformatting of audio and audio visual

13:19
Sharon Burney: materials over short periods of time, CLIR does not expect that all of these

13:24
Sharon Burney: things will happen in the course of your work. Most recipients just check two or three boxes here, and some don't check

13:31
Sharon Burney: any at all and that is okay. Check any boxes that do apply to you so we will

13:37
Sharon Burney: know to look for them in your narrative and to account for them in our own summary reporting to the Mellon

13:46
Sharon Burney: Foundation. Next, we ask grant recipients to share with us where users can go to find information about the digital

13:52
Sharon Burney: copies of the recordings reformatted through your project. Some of you will be

13:57
Sharon Burney: providing public access to both the digital files and the associated metadata created through your project,

14:05
Sharon Burney: and others may only be providing public access to the metadata - CLIR expects you to

14:10

Sharon Burney: provide access as you described in your proposal. This is a good place to remind

14:16
Sharon Burney: everyone that creating and providing access to metadata for the digital copies of the recordings created through

14:22
Sharon Burney: your project is a requirement of the program, unless a specific exception was

14:27
Sharon Burney: made in your proposal for cultural reasons. CLIR expects that you will create and publish online at least some

14:35
Sharon Burney: basic metadata for the digital copies of the recordings so people can learn about what you have. At the end of your project,

14:43
Sharon Burney: you may still have work to do to add richer descriptions, subject headings, or even transcriptions or captions, but we

14:50
Sharon Burney: do expect that some basic records about what you've done be posted somewhere

14:56
Sharon Burney: online. In the report section, you'll have the option to include up to 10 URLS.

15:01
Sharon Burney: We encourage you to provide a few highlevel links to the collections

15:06
Sharon Burney: rather than many lower level links. These links allow us to verify that you have made metadata accessible, at the least, as

15:14
Sharon Burney: well as verify that those of you who can make the digital surrogates of recordings available for streaming

15:21
Sharon Burney: online have done so. Again, we understand for some of you legal and ethical issues

15:28
Sharon Burney: will make it impossible to provide full access to copies of your recordings;

15:33
Sharon Burney: if this is the case you just need to provide one or more links to where your metadata is at the end of your project.

15:40
Sharon Burney: You can also provide more information about future locations for your metadata and files in the narrative sections of

15:47
Sharon Burney: your report. You'll then provide the contact

15:53
Sharon Burney: information to the project's PIs, service provider, and the person who should be

15:58
Sharon Burney: contacted if questions emerge about the report.

16:04
Alyson Pope: The final question in the report form is a financial narrative. In the financial narrative you should comment

16:10
Alyson Pope: on actual grant expenditures during the reporting period as they relate to your proposed budget. The financial narrative

16:17
Alyson Pope: is also where you are able to address any grant modifications that may have included budget

16:23
Alyson Pope: reallocations. Every budget category included in the original proposal budget should be addressed here and if there

16:29
Alyson Pope: are any variances of 5% or more between projected and actual spending make sure to include a detailed explanation here.

16:38
Alyson Pope: once you've completed all of the form prompts, you will either save this section of the form or mark it as

16:43
Alyson Pope: complete. At any point you can select "save and continue editing" if you need to

16:48
Alyson Pope: pause work on the report form. Marking the report form as complete

16:55
Alyson Pope: will take you to the review page, where you can double-check the information you entered and review the additional steps you need to take. There

17:02
Alyson Pope: are a few documents to upload before you'll be ready to submit your report. On the left of the screen, SM Apply displays

17:09
Alyson Pope: a list of buttons that will prompt you to upload the remaining components of the report, which will go over now one by one.

17:18
Sharon Burney: The first, and perhaps most important part of your report is the project narrative. This will be an uploaded

17:25
Sharon Burney: document of no more than 6 pages which will contain the types of information

17:31
Sharon Burney: listed here: a summary of the project and purpose of your grant, your progress

17:36
Sharon Burney: towards expected outcomes where you can explain the numbers, including any variances in your quantitative section,

17:44
Sharon Burney: any surprises setbacks and challenges that you faced, significant

17:49
Sharon Burney: accomplishments and lessons learned, and finally, your future plans. Ultimately

17:55
Sharon Burney: this is the information that will help us create resources that can be of use to other organizations wanting to

18:02
Sharon Burney: initiate their own AV digitization projects. We'll also share the lessons

18:07
Sharon Burney: learned from grantees with our founder, The Mellon Foundation, which receives a complete copy of every report. If you

18:15
Sharon Burney: take time to complete notes somewhere about these topics during the course of your project and save those notes in the

18:21
Sharon Burney: same place you keep your copy of the original proposal, you will thank yourself when the report deadline

18:28
Sharon Burney: approaches. Here's a screenshot of what the system

18:33
Sharon Burney: displays when you're asked to upload the form. The task instructions include

18:38
Sharon Burney: directions about all the topics your narrative report should cover. Select the

18:44
Sharon Burney: "Attached File" button to upload upload your complete PDF document and then

18:49
Sharon Burney: select the "Mark As Complete" button. Final reports require a project

18:56
Sharon Burney: manifest, a spreadsheet which includes the names and locations of the digital files (normally, the access copies), as well

19:05
Sharon Burney: as notations about any checksums and restrictions. This requirement allows us

19:10
Sharon Burney: to use an automated web crawler that CLIR has developed to conduct periodic

19:15
Sharon Burney: checks that the online files created through CLIR's digitization regranting programs are, in fact, online. Note that

19:23
Sharon Burney: CLIR's template for this has multiple tabs, including one with instructions, so

19:29
Sharon Burney: be sure to read through all of them. Taking a look at this template now,

19:34
Sharon Burney: and building in time to create this document into your workflow, will help you save time later. Normally, your digitization

19:42
Sharon Burney: vendor will return a spreadsheet to you that will be very similar to what you need to submit here, and you should be

19:49
Sharon Burney: able to adapt the vendor spreadsheet for this template. If you work out your file

19:54
Sharon Burney: name and conventions at the start and ensure your vendor names your files exactly according to your needs, most of

20:02
Sharon Burney: your work for this requirement will be done. If you leave it until the end, it might take some effort to pull it

20:08
Sharon Burney: together, so we do strongly recommend coming up with a strategy for complete

20:13
Sharon Burney: compiling this data during the course of project work. Of all the pieces of the final

20:20
Sharon Burney: report, this document is what allows us to verify that you have created all

20:26
Sharon Burney: the deliverables agreed upon when you received funding. If in the midst of your

20:31
Sharon Burney: project, issues arise that will affect your ability to reach the goals included in your application, reach out to the

20:38
Sharon Burney: CLIR grants team so we can help you decide the best course of action. we will

20:43

Sharon Burney: go over how to do that shortly, but first let's finish the report form…

20:50
Alyson Pope: The last required upload is the financial report. We already discussed

20:55
Alyson Pope: the financial narrative which is part of the report form task. The financial report is the upload task that supports

21:03
Alyson Pope: that narrative. This is an upload using the same budget and financial report template that you submitted with your

21:09
Alyson Pope: proposal. A copy of the financial report was emailed to all PIs at the same time

21:14
Alyson Pope: along with your award letters. Be sure to save that form to use for your future

21:19
Alyson Pope: report. The "budgeted" numbers are already complete, so you'll just need to fill in the "actual" fields of the template. If you

21:27
Alyson Pope: lose this file at any point, just let us know. It's very important that you use

21:34
Alyson Pope: this template for your financial report rather than any internal financial forms

21:39
Alyson Pope: your institution may use. Some of you may find that you do not spend all of the grant. This is okay. We will, however,

21:47
Alyson Pope: expect you to return any unexpended funds exceeding $100 to CLIR at the time you submit

21:53
Alyson Pope: your final report. Our [Manage an Award](#) page includes more information on

21:58
Alyson Pope: [CLIR's return of funds policy](#). To help facilitate collaborative

22:06

Alyson Pope: report drafting outside the online system we've also created a [Google doc template](#) that your team can use to

22:12
Alyson Pope: prepare your draft report. The document includes all of the information requested in the report, covering both

22:18
Alyson Pope: the questions on the form and the documents that will be added as uploads. Some of you may have used a

22:24
Alyson Pope: similar template when you prepared your applications. It's the same principal here: just make your own personal copy of

22:31
Alyson Pope: the document and save it somewhere your team members can find. Then when your team is happy with your responses, copy

22:38
Alyson Pope: and paste from the document into SM Apply to submit your report. You can access the Google Doc

22:44
Alyson Pope: template using the link on our *Recordings at Risk* [Manage an Award](#) page. To make a personal copy of the template

22:50
Alyson Pope: that you can edit, click on the text that says "click here to make a copy of this document." This copy can then be shared

22:57
Alyson Pope: with anyone who will be assisting on the draft report. We'll share the link to the template in the chat. You can just take a

23:04
Alyson Pope: look, or even make a copy now so you can keep your notes about your project in that space for easy drafting

23:13
Alyson Pope: later. Now I'll pass things back over to Sharon.

23:17

Sharon Burney: Now that we've made it through the reporting form we'll address how you can make changes to your plans if unforeseen delays, problems, or staffing

23:26
Sharon Burney: changes happening during the course of your work. Over the course of many grant projects we've seen that the need often

23:33
Sharon Burney: arises to request a modification due to the unpredictability of audio and audiovisual digitization

23:41
Sharon Burney: initiatives. Such requests are extremely common for this program, so please don't

23:46
Sharon Burney: hesitate to ask us for the changes you need to successfully complete your project. CLIR has an online modification

23:54
Sharon Burney: request form through which recipients can notify us of any modification requests such as no-cost extensions, PI

24:01
Sharon Burney: changes, and reallocation requests. The form was designed to streamline the

24:07
process and reduce the amount of time spent making and approving these

24:14
Sharon Burney: requests. Access to the [Grant Modification Extension Request Form](#) is available through a link at the top of

24:20
Sharon Burney: the [Manage an Award](#) web page, which is always the best place to access the most up to-date forms and information on

24:27
Sharon Burney: managing your award. The form is designed to allow for the request of multiple

24:33
Sharon Burney: types of modification requests at the same time. The form includes space for

24:38

Sharon Burney: you to submit budget information requested extension length if needed, and

24:44
Sharon Burney: to provide a brief explanation of the modification. In order for you to prepare

24:49
Sharon Burney: the necessary information for the modification request we also provide a [Google Doc Grant Modification Form](#)

24:56
Sharon Burney: template, also available on the [Manage an Award](#) page. This shows the Google do template

25:04
Sharon Burney: for the modification request form so you know the questions that you'll be asked and can draft responses. As with all of

25:11
Sharon Burney: our Google doc templates, a link is provided at the top of the document that allows you to create a copy of the

25:18
Sharon Burney: template for collaborative working. All modification request should be submitted

25:24
Sharon Burney: through the online form so you will need to copy and paste your prepared responses into that

25:33
Sharon Burney: space. Here's a glimpse of the current [grant modification and extension request form](#). In many cases completing the form

25:40
Sharon Burney: will be all you need to do to get approval for a modification. However, under certain

25:47
Sharon Burney: circumstances additional documentation may be required in order to move forward

25:52
Sharon Burney: with the request. Always be sure to check the [Manage an Award](#) page for additional

25:57
Sharon Burney: explanation of the various allowable modification requests in the most current policies and

26:04
Sharon Burney: procedures. Multiple types of modification requests can be submitted at the same time using the same form. For

26:11
Sharon Burney: example, if you need to request a no cost extension as well as a reallocation of funds, the form will accommodate both

26:19
Sharon Burney: requests. Once the form has been submitted and received, you should hear from CLIR staff within two weeks. If you

26:26
Sharon Burney: have any questions about the process, CLIR staff is always available via email through our program email address

26:34
Sharon Burney: [recordingsatrisk@clir.org](mailto:recordingsatrisk@clir.org). Now for some additional information about the types

26:40
Sharon Burney: of modification requests. No-cost extensions are allowed

26:46
Sharon Burney:in the case of unforeseen delays such as hiring or vendor processing delays. These

26:52
Sharon Burney: are very common, but is important to understand that you can only receive one

26:57
Sharon Burney: extension per project. It may be useful to set a calendar reminder now to help

27:03
Sharon Burney: you remember to evaluate whether or not you'll need to request an extension as your project end date approaches. For

27:11
Sharon Burney: those who may be new to grants, a project end date is not the same as the reporting deadline. The project end date

27:18
Sharon Burney: is the date by which all project work should be complete. It is important that extension requests are submitted about

27:25
Sharon Burney: four to six weeks prior to the project's end date, which is August 31st

27:32
Sharon Burney: 2025. Even if you have spent all the grant funds, you will need an extension if you require additional time to

27:39
Sharon Burney: complete your proposed project deliverables, including making the metadata for your project available

27:45
Sharon Burney: online. If all project deliverables are not complete by the end date you

27:51
Sharon Burney: will need an extension. If you need to update

27:56
Sharon Burney: principal investigators (or PIs), please let us know as soon as possible by completing the grant modification form.

28:03
Sharon Burney: All of CLIR's grant management tasks require current contact details so it is

28:09
Sharon Burney: important we know when a PI departs your organization and their responsibilities

28:14
Sharon Burney: are transferred to someone else. In order to complete the change of PI, you will also

28:21
Sharon Burney: be required to supply via email a letter from the head of the organization or

28:26
Sharon Burney: department on organizational letterhead. The letter should include the name,

28:33
Sharon Burney: title, and contact information of the new PI, as well as the date the change will

28:39
Sharon Burney: become effective. A CV or resume for the new PI will also be required for our files

28:48
Alyson Pope: On occasion grantees find it necessary to spend grant funds in a manner other than originally proposed in

28:54
Alyson Pope: their application. For example, vendor services may cause more or less than originally

28:59
Alyson Pope: budgeted. Reallocations of grant funds are allowable, but these changes must be

29:04
Alyson Pope: approved by CLIR staff prior to the reallocated funds being spent. In cases

29:10
Alyson Pope: where a budget surplus remains after the original deliverables have been met, you will have the option of either returning

29:16
Alyson Pope: the surplus funds to CLIR or submitting a budget reallocation request that proposes how the remaining funds will be

29:23
Alyson Pope: spent. Any proposed use of reallocated funds should be aligned with with the original goals in scope of the project

29:30
Alyson Pope: and within the current guidelines for allowable and disallowable costs for the *Recordings at Risk*

29:37
Alyson Pope: program. The first step for a reallocation request is completing the [Grant Modification Form](#) where you can

29:44
Alyson Pope: explain the rationale for the reallocation and how it is consistent with the original proposal. CLIR staff

29:50

Alyson Pope: encourages spending surplus funds on additional digitization of material or increase spending for another previously

29:56
Alyson Pope: approved line items in the project budget, rather than adding new line items. If a

30:02
Alyson Pope: mutually satisfactory reallocation solution cannot be found remaining funds must be returned to

30:09
Alyson Pope: CLIR. Note that small reallocations amounting to less than 5% of the total

30:14
Alyson Pope: project budget and within the program guidelines, do not require a formal reallocation request, but we do ask that

30:21
Alyson Pope: you explain these variances in your final report. If questions arise about whether or not you need official

30:27
Alyson Pope: approval of a reallocation request, we are always available through

30:35
Alyson Pope: email. In some rare instances, such as when a reallocation request involves a new budget line item, our team will

30:42
Alyson Pope: require the completion of an updated budget document. This is the same budget template for your application and

30:47
Alyson Pope: reporting. CLIR staff can provide a copy to you if needed. If approved, this

30:53
Alyson Pope: new budget will replace the one emailed to you along with your award letter. Some information will remain the same, such as

30:59
Alyson Pope: your project start date and award amount. You will need to update any lines where you are proposing a change in amount and

31:05

Alyson Pope: add any additional lines as needed. If you are proposing a new spending category. In some cases, reallocations may

31:13
Alyson Pope: happen within already approved line items. When that is the case, we likely will not require the submission of a new

31:19
Alyson Pope: budget. An explanation of the changes submitted through the grant modification form and your final report will suffice.

31:30
Alyson Pope: We've encountered a few other types of modifications in this program that are important to process with CLIR prior to

31:36
Alyson Pope: implementing the changes. From time to time, recipients find that the vendor they selected in

31:41
Alyson Pope: the application may not be able to fulfill the project after award. Or perhaps your organization has a policy

31:48
Alyson Pope: against pre-selection of a vendor, and your selection process post-award has identified a more suitable option. Or

31:55
Alyson Pope: maybe to help with processing, you'd like to add a second vendor. Any of these should be approved by CLIR prior to

32:01
Alyson Pope: starting work with a new vendor so that we are in agreement that the new vendor meets the digitization standards

32:06
Alyson Pope: approved in your application. As mentioned when we were discussing budget reallocations, you may

32:13
Alyson Pope: find that you have funds and capacity to add other in-scope materials to your project. Or perhaps digitization costs

32:19

Alyson Pope: are much higher than estimated and significant amounts of material now need to be cut from the project. Work with

32:26
Alyson Pope: CLIR through the modification process to agree on these changes. We've also supported the

32:31
Alyson Pope: addition of other allowable processing work, such as additional transcription, to help spend down remaining funds. These

32:39
Alyson Pope: are just a few examples of other types of modification. We may ask for additional supporting documentation to

32:45
Alyson Pope: help us understand and document the changes to your projects. We are always glad to answer any questions you might

32:53
Alyson Pope: have. As we near the end of our presentation, feel free to submit questions in the Q&A box for us to

33:00
Alyson Pope: address in a little bit.

33:06
Sharon Burney: Our recipients have shared so much with our team through their reports and

33:11
Sharon Burney: conversations. Here are some points stressed by them that may be useful to you as you get started: metadata creation

33:19
Sharon Burney: for audiovisual materials takes a lot longer than originally anticipated for

33:25
Sharon Burney: most recipients. For this reason, past recipients advise that new recipients

33:31
Sharon Burney: consider how they can lay the groundwork for creating project metadata while

33:36

Sharon Burney: waiting for materials to be returned from the vendor. Taking digital photographs of the containers for your

33:42
Sharon Burney: recordings may help expedite metadata creation while the vendor has them, so

33:48
Sharon Burney: consider whether it might be possible to do that. Two: Get your whole project team

33:54
Sharon Burney: together, including your vendor, as early as possible to make sure everyone understands

34:00
Sharon Burney: individual roles and responsibilities, even if their contributions will only be made late in

34:06
Sharon Burney: the project timeline. That way each team member can make room on their schedules to do what they need to do in a timely

34:13
Sharon Burney: and efficient manner. It is particularly important for people responsible for

34:18
Sharon Burney: ingesting digital files into storage systems or creating metadata for those

34:23
Sharon Burney: files to understand what will be expected of them, and for them to remain

34:28
Sharon Burney: aware of any changes to the project timeline. Don't forget it's okay to request a grant modification if it turns

34:35
Sharon Burney: out that the grant term is insufficient for creating metadata and making it

34:41
Sharon Burney: available online. Three: if the recordings to be digitized for your project are a part of a larger collection, set aside

34:49

Sharon Burney: some additional backup items from that collection to send to your vendor as well, just in case the digitization work

34:56
Sharon Burney: costs less than a originally estimated or the content of the materials is

35:02
Sharon Burney: unrecoverable. If you have extra funds left over, you can then submit a grant modification request to CLIR seeking

35:09
Sharon Burney: permission to authorize the vendor to digitize the backup items as part of the

35:14
Sharon Burney: project. And four: keeping notes and documentation for your project in one

35:19
Sharon Burney: common place for easy reference will make final reporting easier. Determining

35:25
Sharon Burney: how you're going to gather the information needed for the project manifest now, in particular, will save you valuable time.

35:36
Alyson Pope: We want to quickly share a couple

35:38
Alyson Pope: ways to get involved with CLIR's communities. The Digital Library Federation (or DLF) Virtual Forum is

35:46
Alyson Pope: October 22nd to the 23rd this year. We hope that you'll think about joining us.

35:52
Alyson Pope: We also invite you to sign up for our grants and programs newsletter if you aren't already. This occasional

35:58
Alyson Pope: newsletter shares updates across CLIR along with other things we think are interesting. We'll share that link in the

36:07
Alyson Pope: chat. Finally there are more than 10 amazing working groups coordinated by DLF, where practitioners meet regularly

36:14
Alyson Pope: on a variety of digital library topics. A couple I want to shout out in particular are the Metadata Support Group, which

36:21
Alyson Pope: runs a slack space for folks dealing with metadata, and the Digital Accessibility Working Group, which is

36:27
Alyson Pope: offering accessibility audits of websites and systems, which you can contribute to or take advantage of.

36:37
Sharon Burney: We love to boost the excellent work of our grantees. If there are exciting

36:41
Sharon Burney: developments you would like shared with a wider audience, don't hesitate to let us know. One of the easiest ways for us

36:49
Sharon Burney: to share your news and accomplishment is to tag us on Twitter @CLIRgrants so

36:55
Sharon Burney: that we can retweet you. If you happen to be describing the *Recordings at Risk* program in any formal press releases, we

37:03
Sharon Burney: appreciate you reviewing [CLIR's Acknowledgement Guidelines](#) linked to on our [CLIR Policies](#) page. We also want to

37:11
Sharon Burney: make sure we're representing you correctly. Your projects are now up on the [Funded Projects page](#) of our website.

37:18
Sharon Burney: please read how your project is described there and let us know if you'd like us to address any of the

37:24
Sharon Burney: information included. The project summaries are direct directly from your

37:30

Sharon Burney: proposals. Thank you all for attending this presentation. We know we've covered a lot of information here and we'll be

37:37
Sharon Burney: sure to post a recording of this webinar, as well as the slides, transcript, and Q&A

37:42
Sharon Burney: on our [Manage an Award](#) page, alongside many of the other documents we discussed.

37:48
Sharon Burney: We'd now like to ask a few quick poll questions before we shift to answering questions you've submitted during our presentation.

38:08
Alyson Pope: Hi, all. I think as we indicated we're going to skip the poll portion, but we do want to answer any questions that

38:13
Alyson Pope: we've received from you all so we're checking over the Q&A right now to start fielding those.

38:23
Sharon Burney: I'll start we have a question that

38:25
Sharon Burney: says, What type of instances would result in an interim report? So sometimes projects have

38:32
Sharon Burney: extenuating circumstances that delay the completion of your project within the one year time limit that you currently

38:40
Sharon Burney: have. If that happens you'll need to request a grant modification request for

38:46
Sharon Burney: a no cost extension and if this modification request is approved you might be required to submit an interim

38:53
Sharon Burney: report based on how long you ask for. Typically, we have to

38:58
Sharon Burney: submit reports to Mellon a few times a year for our various programs and we

39:03
Sharon Burney: want to have a report from everybody every year. So that's when you would

39:10
Sharon Burney:have to have an interim report added to your project and make sure that

39:16
Sharon Burney: you're requesting these modifications no sooner or no later than

39:24
Sharon Burney: four to six weeks prior to your project end date.

39:30
Alyson Pope: Will we be limited by a character or word count in our project and financial narratives? The picture

39:37
Alyson Pope: doesn't seem like it has one, but I wanted to double check. No, there are not word count caps for most of those

39:43
Alyson Pope: narratives. I do believe in the system, there is a page limit cap for the

39:49
Alyson Pope: project narrative. That's a cap of six pages. I don't know that anyone's actually ever submitted a project

39:55
Alyson Pope: narrative of six pages, but obviously you have a pretty fair amount of play there wording wise.

40:03
Sharon Burney: What is a checksum? So a checksum on a file is a digital fingerprint and

40:08
Sharon Burney: that's where the smallest change to the file will cause the checksum to change it completely.

40:15
Sharon Burney: What's most important is we want to be able to detect if the

40:21
Sharon Burney: contents of a file have changed and if we do it, then it won't tell us where that change has

40:27
Sharon Burney: occurred. We usually use this to check the submitted metadata in your

40:33
Sharon Burney: file manifest to make sure that your digitized files, the files that you will

40:38
Sharon Burney: be digitizing through this grant are accessible to the public so that's what that is.

40:46
Alyson Pope: Most of our vendor quotes states that cost may exceed the quote as they may have

40:51
Alyson Pope: to perform remediation work to digitize recordings. What happens if vendor costs exceed the quoted

40:58
Alyson Pope: amount? Most vendors have worked in a contingency estimate into their quotes

41:05
Alyson Pope: so you may see a contingency estimate in your quote. Frequently there are changes to vendor costs,

41:11
Alyson Pope: inclusive of increases and or decreases in the original estimate. This can be

41:16
Alyson Pope: due to various factors, but if this is not built into your grant, you will need to submit a grant modification to

41:24
Alyson Pope: reallocate funds from somewhere else in your proposal budget. Or if you go

41:29
Alyson Pope: entirely over your award amount, you would need to have your organization cover a cost share.

41:37

Sharon Burney: Is it possible to change the vendor now? If so, what is the process? If for some reason you need

41:44
Sharon Burney: to change your vendor now, you will still have to work it into the budget that

41:50
Sharon Burney: you originally submitted for the project, for the total project. We don't

41:56
Sharon Burney: add additional funds to project funds once you've been awarded and received your award letter. So if that

42:04
Sharon Burney: changes, just like she said previously, you'll either have to move your budget around to reallocate it, get it approved

42:10
Sharon Burney: by us, and also, possibly initiate a cost share. We'll also need a vendor

42:17
Sharon Burney: quote an email to us right now, as soon as possible, with your updated

42:24
Sharon Burney: vendor and vendor quote. So you will email us at recordingsatrisk@clir.org.

42:29
Sharon Burney: So best bet is to email us and the justification why.

42:37
Alyson Pope: Are any quarterly reports required during the course of the year? It sounds

42:41
Alyson Pope: like just the final report is required. Yeah, you're only required to do the yearly report, a final report, if you do

42:47
Alyson Pope: not submit for an extension. If you ended up with a lengthy no-cost extension, you could possibly have to do an interim report.

42:56
Sharon Burney: Also want to say that we may be reaching out to some of the

43:01

Sharon Burney: projects to do a six-month check-in just to see how everything is

43:06
Sharon Burney: going. If so we'll reach out to you in in advance to let you know and who we select to do

43:14
Sharon Burney: those. Alyson, do you want to take the next one?

43:17
Alyson Pope: I can really quickly say somebody followed up: Is there a preferred type of checksum? No, our IT department has built us a kind of

43:26
Alyson Pope: customized scrawler, crawler to handle these manifests. We do a yearly kind of

43:33
Alyson Pope: aggregate crawl with it and it can be rewritten to handle a variety of forms

43:41
Alyson Pope: of checksum to meet the needs of our variety of types of organizational recipients.

43:51
Sharon Burney: If a vendor compete completes their portion of the project and they were able to do the job and have grant

43:56
Sharon Burney: money left over, could we submit a reallocation for that or is this a return the funds situation? This

44:03
Sharon Burney: happens frequently if you find out that you were able to complete the project

44:08
Sharon Burney: and have money left over. You would submit a modification request for a

44:13
Sharon Burney: reallocation of funds. Then what you would state and

44:19
Sharon Burney: we'd ask for a few statements that will coincide with that

44:25

Sharon Burney: modification request. The newly digitized forms would have to be at the same standards as you proposed in your

44:31
Sharon Burney: original proposal, that the new materials that you are nominating to

44:38
Sharon Burney: have digitized also fits the original project scope, and also a statement, and

44:44
Sharon Burney: all of this would be a statement that you would send the email, that there are no known rights, ethics, or re-use issues

44:50
Sharon Burney: associate with the newly added materials.

44:58
Alyson Pope: Will you provide the links from the group chat to us outside of this webinar? Like via email or will this be found

45:04
Alyson Pope: alongside the recording in the webinar? So alongside of the recording in the webinar there will be both a transcript

45:10
Alyson Pope: of this session and since we actually got some substantive questions today, we have a companion Q&A document. Those

45:17
Alyson Pope: will be posted on our [Manage an Award](#) page and those two documents will contain the links that we've mentioned

45:23
Alyson Pope: here. However, almost everything that we've mentioned in this conversation is directly linked from our manage an

45:30
Alyson Pope: award page. So if you bookmark the [Manage an Award](#) page, all the other templates, webinars, reporting

45:37
Alyson Pope: information, modification links, and requirements, all those links can be found there.

45:44
Sharon Burney: And I think there were two that were already answered in the Q&A doc, but if you're not following along, I'll just say, Can we access the Manifest

45:52
Sharon Burney: from Mange an Award? I can't read the categories on the slide. It would be helpful to know them more fully. Yes,

45:59
Sharon Burney: you can find a copy of the Digitization File Manifest Template on the Manage an Award page. That Manage an Award page is

46:06
Sharon Burney: going to be your friend. We have links to all kind of templates, budget templates, the digital file manifest,

46:13
Sharon Burney: additional instructions, and assistance with everything that you're going to need, you will find on that manage an

46:18
Sharon Burney: award page. And then the other question was, could you please provide the link to the

46:24
Sharon Burney: return of the fund section on your website? That also is on the Manage an Award page. And then all

46:32
Sharon Burney: organizations are required to report to CLIR and return all unspent funds in

46:38
Sharon Burney: the amount greater than $100 by a check or an ACH to CLIR and

46:43
Sharon Burney: there's a CLIR Grants Returns of Funds policy that you can follow and it'll tell you exactly where to send that

46:52
Sharon Burney: stuff. Any other questions?

47:03
Sharon Burney: Oh right, here we go. There's another one.

47:07
Alyson Pope: These kinds of.. Oh, I should

47:11
Alyson Pope: read the question so everybody knows. If the number of film reels to be digitized is adjusted but the total footage remains

47:19
the same, would a grant modification be needed assuming there's not a change in

47:24
Alyson Pope: cost? If you've like miscounted your materials from the start and they're not

47:32
Alyson Pope: and there's not an issue of discrepancy with like a collections inventory, like some of our

47:38
Alyson Pope: collections, some of you don't necessarily know exactly how many things

47:43
Alyson Pope: you have and in that instance, a little bit of discrepancy either

47:49
Alyson Pope: way is not something that requires a modification. If you have submitted a

47:57
Alyson Pope: inventory list to us and you are swapping out items from that inventory list, then we would want a

48:04
Alyson Pope: modification to adjust your list of collections. I believe that's accurate, Sharon?

48:10
Sharon Burney: Yeah, sounds accurate. Your collections list would probably need updating more so than anything else.

48:19
Alyson Pope: But there are certainly awardees that say we have X number of feet or X number

48:24
Alyson Pope: of boxes and they end up with slightly more or less actual files than intended and that

48:29
Alyson Pope: is not something that requires a modification.

48:32
Sharon Burney: and that's something that happens frequently so there's no need to

48:35
Sharon Burney: worry about that.

48:42
Sharon Burney: Any other questions?

48:49
Sharon Burney: All right. Going once. All right we're good. All right, congratulations once again and

48:56
Sharon Burney: as always, if you have any other questions for us, you can always email us directly

49:01
Sharon Burney: at recordingsatrisk@clir.org and we will have

49:07
Sharon Burney: the copy of these questions and answers, along with the transcript and the video, on our website soon.

49:15
Sharon Burney: Have a good day.

49:21
Alyson Pope: Thanks y'all.