Council on Library and Information Resources

Welcome!

We’re glad you’re here! There is no audio at the moment.
Feel free to introduce yourself in the chat box 👋
We’ll begin the webinar at 3pm ET.

Council on Library and Information Resources

Digitizing Hidden Collections Recipient Informational Webinar June 10, 2020

Website: clir.org/hiddencollections/

Email: hiddencollections@clir.org

Twitter: @CLIRHC

KRISTEN

Hello and welcome to the Recipient Informational Webinar for the Digitizing Hidden special collections and archives program. I'm Kristen Blair, Program Administrator at CLIR. and I'll be moderating this webinar today. I'm joined by my geographically colleagues who, along with me, make up the grants team. I'll let them introduce themselves now, telling you what they do and where they are today.

[Introductions: Joy, Becca, and Sharon]

We just want to start by saying "CONGRATULATIONS" to all of you, one more time. This is an extremely competitive grant program and if you're here, it's because reviewers believed that your project and your work on it will make an important contribution to scholarship. We are so excited to see these projects progress over the coming months and years.

The purpose of today's webinar is to walk you through the administrative processes associated with holding a Hidden Collections grant. These grants can start any time between January 1st and June 1st, so you're all in different stages of your projects. We've heard from many of you about challenges in the last few months that have already affected your projects. We hope you'll continue sharing with us.

We'll begin with a presentation, followed by time for questions and discussion at the end. We'll also be recording this webinar and uploading it to our website along with the slides and transcript so that you can revisit it in the future or share it with colleagues.

Before we get started we'd like to help everyone get oriented with the Zoom webinar space.

- For a better group listening experience, all participants are muted.
- If a chat box is not currently displaying on your screen, you can hover towards the bottom of your Zoom screen to open it. The default is set to send messages to presenters, so be sure to change that setting using the drop down menu to send a message to the entire group if you wish. We may also share links here that will also be captured as part of our recording for your reference later.
- We're gathering questions in the Q&A box, accessible in the same place as the chat box. Feel free to contribute questions in that space at any time. All participants are also able to "upvote" questions which helps us see if multiple individuals have the same question. At the end of the presentation we'll go over the questions.

Now I'll hand things over to Becca to get us started.

Webinar Overview

Part One

- Polls
- Intro to CLIR

Part Two

- Grant Modifications
- Reporting Requirements

Part Three

- Channels of Communication
- Questions/Discussion

BECCA

Today, we'll be covering the following topics:
In Part One, we'll do a few quick polls and cover an introduction to CLIR.

In Part Two, we'll transition to grant management and talk about grant modifications and reporting requirements—covering how to make changes to your project, and how and when to report on activities.

In Part Three, we'll move to questions. As we mentioned, feel free to type your questions into the Q&A box at any point, and we'll get to them during this portion of the presentation.

Part One

Polls and an Introduction to CLIR

To help us better understand how COVID-19 may be affecting your projects, we'd like to to take a few moments before we get too far into the presentation to conduct a few polls. We have 3 questions for you that will help us make sure we're providing the support you need over the next few months. We'll leave each question up for around 60 seconds. To respond, you'll simply click on the answer that's applicable to you when it pops up on your screen. Answering is optional, but will be really informative us especially as we plan for future applications through the Cycle 8 application process.

The first question...

- Do you currently have access to your collections? Yes, staff are allowed full access to the space/Yes, staff are allowed limited access to the space/No, but we have a timeline for reentry/No, and we don't know when we can return
- If using any vendors or contractors for your project, has your team been in touch with them since receiving the grant? yes/no/I don't know
- Are your vendors/contractors operating? Yes, fully operational/Yes, but at limited capacity/No, but they have a plan to reopen/No, and they don't know when they'll reopen/I don't know

CLIR is an independent, nonprofit organization that forges strategies to enhance research, teaching, and learning environments in collaboration with libraries, cultural institutions, and communities of higher learning.

We always like to start by reminding everyone of CLIR's mission: The Council on Library and Information Resources (or "CLIR") is an independent, nonprofit organization that forges strategies to enhance research, teaching, and learning environments in collaboration with libraries, cultural institutions, and communities of higher learning."

So what does that all mean?

- CLIR takes on a number of roles including publishing research, convening meetings, and running programs.
- As an independent nonprofit, we are not part of the federal government. We are also not a private foundation. Our activities are not funded by an endowment, but rather by a combination of grants and sponsorship which gives us the flexibility to operate our programs a bit differently than the federal funders. The Digitizing Hidden Collections program is generously supported by The Andrew W. Mellon Foundation and is one of many programs administered by CLIR.

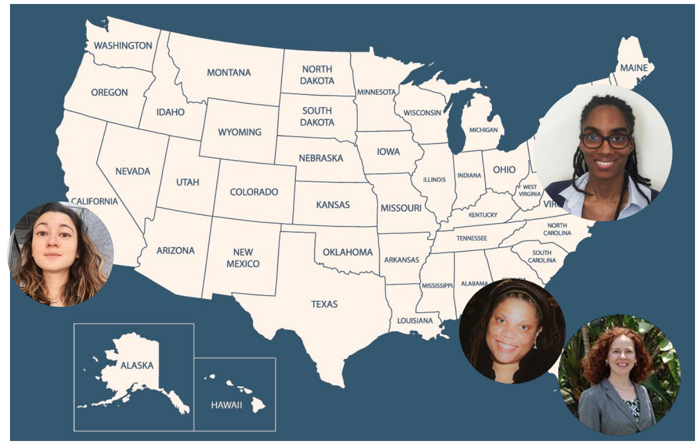
Intro to CLIR: Program Staff

Joy Banks
Program Officer

Kristen Blair
Program Administrator

Sharon Burney
Program Assistant

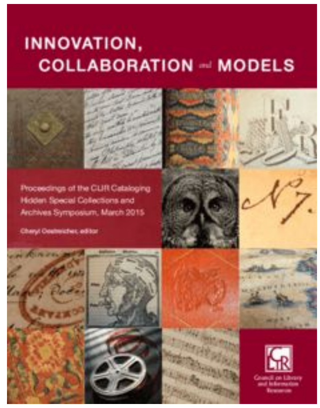
Becca Quon
Program Officer



Our work is accomplished by a relatively small staff of about 20 geographically distributed individuals with the greatest concentration living in the DC area, where our headquarters are located. Becca, Sharon, Kristen, and I make up the grants team, administering our two active regranting programs. Our team supports the entire grant cycle--from application to final report. Part of our work is the occasional site visit to recipient institutions, so we hope to resume those opportunities once we can do that safely again.

The Digitizing Hidden Collections program is a re-granting program, which means the funds for your projects were awarded from a grant to CLIR from The Andrew W. Mellon Foundation. CLIR reapplies periodically to Mellon for the funds to operate the Hidden Collections program and award new grants, so we can completely empathize with all of the work that you put in to get here.

CLIR Publications



Innovation, Collaboration, and Models

https://www.clir.org/pubs/reports/pub169

The Foundations of Discovery

https://www.clir.org/pubs/reports/pub169

We encourage you to take advantage of any of our resources that might be of use. CLIR has long been known for its free and open publication series, also known as its "burgundy books." CLIR has published on a range of topics, including but not limited to audio archiving, library and library service design, email archiving, 3D/VR visualization, data management, digital preservation, and more.

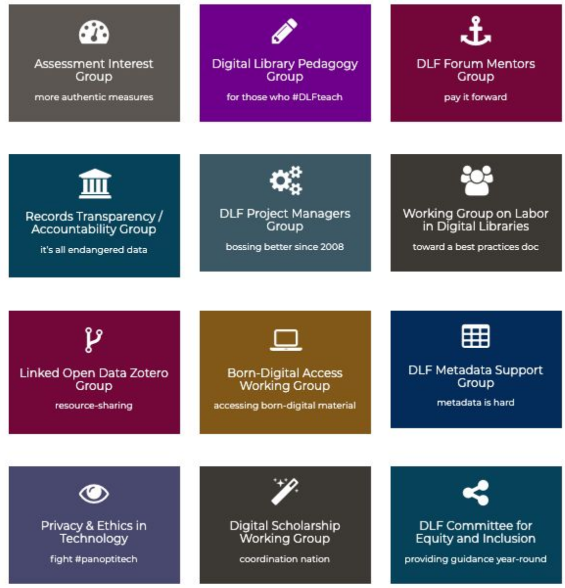
One publication we'd like to highlight is displayed here: *Innovation, Collaboration, and Models*. This was the capstone publication of our Cataloging Hidden Special Collections and Archives program, the predecessor to our current digitization program, and is meant to share the models and lessons learned from cataloging and processing grants funded between 2008-2014. This volume consists of a series of papers from a symposium and unconference held in March 2015 and is available for free on our website, and even though it dates from a few years ago, some of its content may be useful for you as you think about description, scholarly engagement, and outreach for your projects. We also recently published the full public report of the impact of all 128 projects that were funded through our cataloging grants over the program's history.

As some of you may have heard, we had plans to host a similar symposium for the the Digitizing Hidden Special Collections program this fall; however, we’ve had to delay that event until 2022, due to the pandemic. In its place, we will be hosting some smaller, virtual celebrations to mark the first five years of the program. We’ll keep everyone posted as plans progress.

Other Free Resources

Digital Library Federation Working Groups:

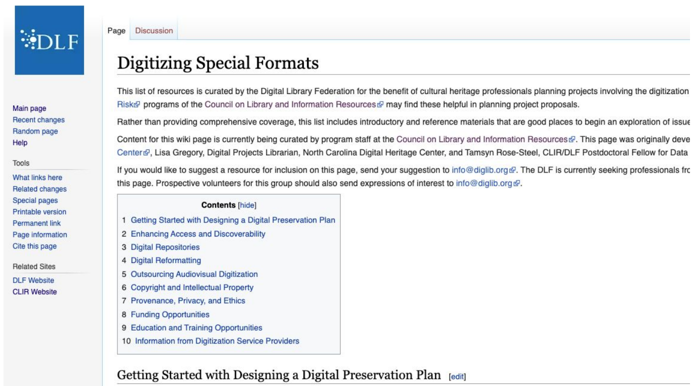
https://www.diglib.org/groups/



We also wanted to shout out the community of a sibling program, the Digital Library Federation. DLF's working groups are open to everyone, meet regularly, and tackle topics in digital libraries from assessment to records transparency to labor to a support group for working with metadata.

Other Free Resources

Digitizing Special Formats Wiki
wiki.diglib.org/Digitizing_Special_Formats



Finally, one last resource we would like to share is the **Digitizing Special Formats Wiki**. This is a project of the DLF and contains a growing collection of resources about planning and executing digitization projects. If there are additional resources you think would be helpful to include on the guide, email us at hiddencollections@clir.org and we'll pass along your suggestions.

Part Two

Grant Modifications & Reporting Requirements

Now that you know who we are and the range of things we do as an organization, we will move into a discussion about some key administrative information for you as the latest recipients of Digitizing Hidden Special Collections and Archives grants. This next section will cover grant modifications and reporting requirements. Joy?

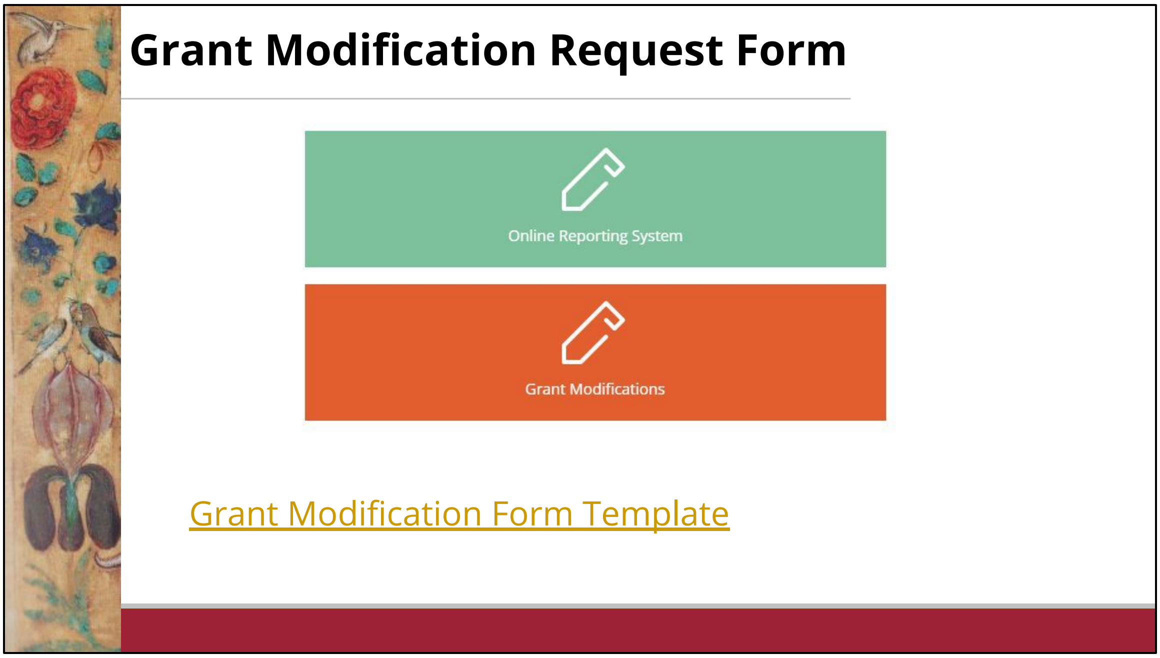
Grant Modifications

Joy

Although we hope (and expect) that project activities listed in the approved proposal will be executed as described, we understand that unanticipated issues can arise, which may require that you deviate from the original plans you submitted. Now more than ever, we realize that many of you still have no access to your collections, which is causing delays.

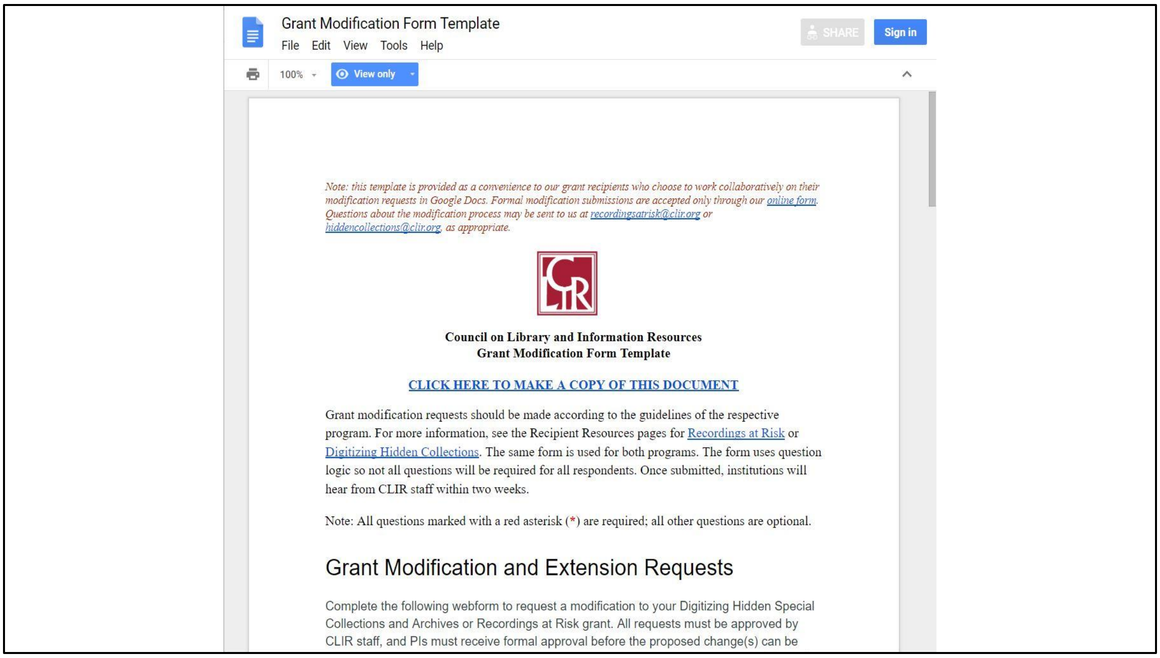
Some changes won't require pre-approval from CLIR, such as a change in project staff other than the principal investigators (PI) or small shifts in budget expenditures. Many small changes can be addressed in a project's interim narrative and financial reports. However, changes that affect the underlying terms of the grant must receive approval by CLIR. Examples include extensions of the project end date, changes to PIs, any changes to the collections being digitized through the project, and significant budget reallocations.

These modification requests are common for this program, and you should not hesitate to ask us for what you need to do to successfully complete your project. Program staff can always be reached by email at hiddencollections@clir.org. To move forward with a modification, CLIR has an online form through which recipients can notify us of modification requests. The form was designed to streamline the process and reduce the amount of time spent making and approving these requests.



Access to the Grant Modification and Extension Request form is available through a link at the top of the Recipient Resources web page (https://www.clir.org/hiddencollections/recipient-resources/). The same form is used across CLIR's grant programs and is designed to allow for the request of multiple types of modification requests. The form includes sections on descriptive information, questions about extension requests, other modification requests, and a space to provide a brief explanation and justification of the modification.

In order for you to prepare the necessary information for the modification request, we also provide a Grant Modification Form Template, linked to on this slide and also available on the Recipient Resources page.



Grant Modification Form Template

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Note: this template is provided as a convenience to our grant recipients who choose to work collaboratively on their modification requests in Google Docs. Formal modification submissions are accepted only through our online form. Questions about the modification process may be sent to us at recordingsatrisk@clir.org or hiddencollections@clir.org, as appropriate.

Council on Library and Information Resources
Grant Modification Form Template

CLICK HERE TO MAKE A COPY OF THIS DOCUMENT

Grant modification requests should be made according to the guidelines of the respective program. For more information, see the Recipient Resources pages for Recordings at Risk or Digitizing Hidden Collections. The same form is used for both programs. The form uses question logic so not all questions will be required for all respondents. Once submitted, institutions will hear from CLIR staff within two weeks.

Note: All questions marked with a red asterisk (*) are required; all other questions are optional.

Grant Modification and Extension Requests

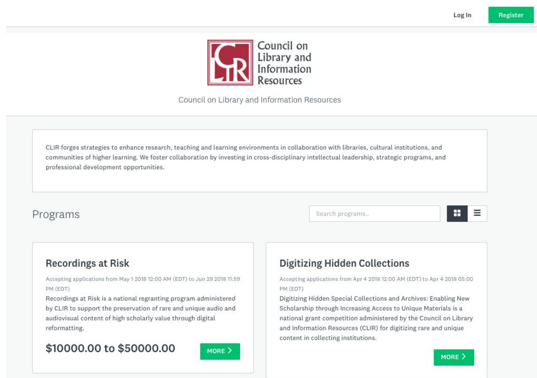
Complete the following webform to request a modification to your Digitizing Hidden Special Collections and Archives or Recordings at Risk grant. All requests must be approved by CLIR staff, and PIs must receive formal approval before the proposed change(s) can be

This shows the GoogleDoc template for the modification request form. The online form does involve some question logic, so you may not be required to answer all of the questions on the template depending on how you answer others.

A link is provided at the top of the document that allows you to create a personal copy of the template that you can share with anyone you're collaborating with. All modification requests should be submitted through the online form, so you will need to copy and paste your prepared responses into that space.

Reporting Requirements

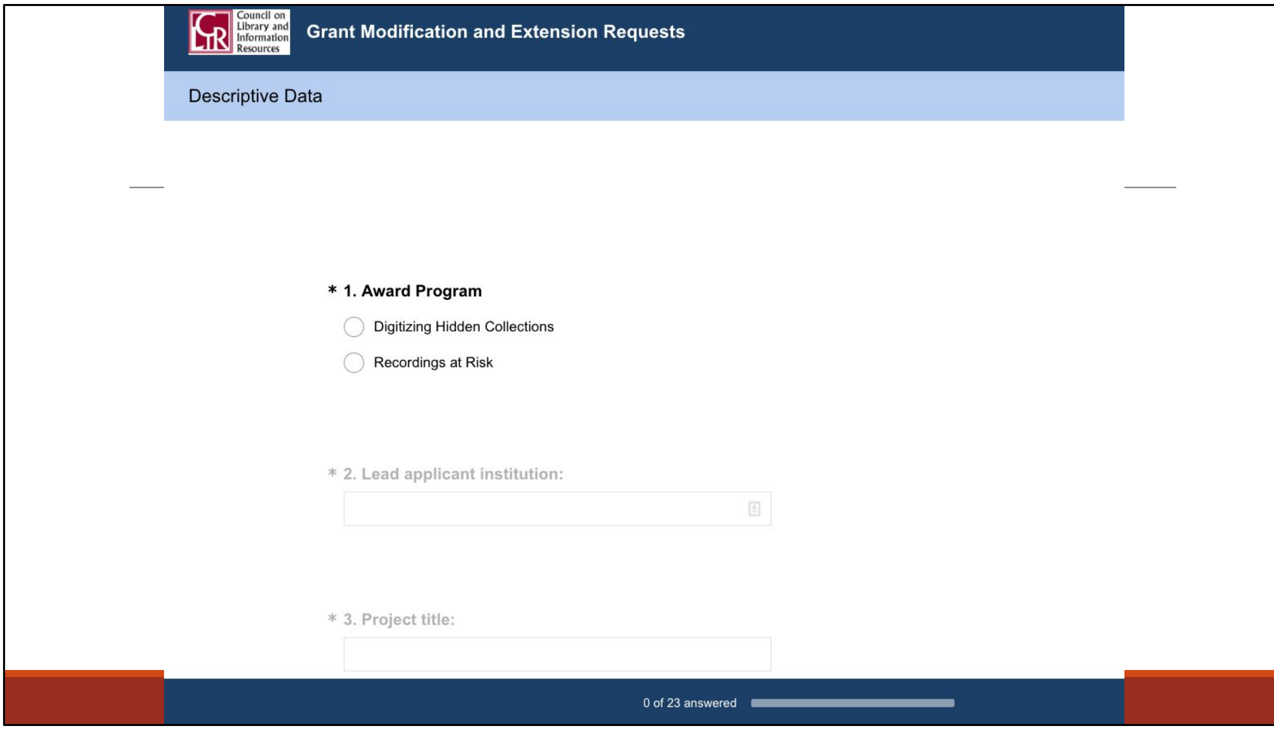
https://clir.smapply.io/



You will use the same system - SurveyMonkey Apply or SMApply - that was used to apply for your grant for reporting. We've linked to that that on this slide as well as on the Recipient Resources page. All communication and reminders for reporting will be sent to the primary principal investigator (or PI), so if there are any others involved in project work who need such notifications, you will need to send us names and contact information for those people. Please share this information as soon as possible so we can keep our records up to date.

It is a good idea to login to SM Apply at your soonest convenience **using the same email address and password you used to create your application**. If you use these same credentials, you should automatically see the reporting form for your project when you log in. If you forget these credentials or lose access to them for any reason (for example, if the person who created your application leaves your organization), you will need to contact us through the program email (hiddencollections@clir.org) so that we can link your report to the correct credentials.

One way to future-proof your team's access to the report would be to log in using the application credentials, hit "start" to pretend like you're starting your report, then add other team members' email addresses as "collaborators" on your report. Collaborators will then receive an automatic invitation to verify their email addresses and create their own passwords to access the system. Once they do this, they will also be able to login to view the report and enter data. One of the system's safety measures insures that only the account holder is able submit a report, so if one of the collaborators eventually needs to submit, that person will still need to contact us to make sure this can happen.



Here's a glimpse of what the online Grant Modification and Extension Request form looks like.

Once the form has been submitted and received, you should hear from CLIR staff within two weeks. For that reason, if you find you need a modification, it is important to request *at least* a few weeks (and ideally, a month) **before** the final end date for your grant. Some modifications, such as changes in Principal Investigators, should be requested immediately rather than waiting until the end of your project. Project end dates were included in the award letter emailed to PIs around the time that funds were distributed; if you ever need a reminder of your project end date or award number, just ask program staff.

In many cases, completing the form will be all you need to do to seek approval for a modification. However, under certain circumstances, additional documentation may be required in order to move forward with the request.

The guidelines for modification requests vary slightly between CLIR's different grant programs, so be sure to check the Recipient Resources pages for the most up to date information. If you have any questions about the process, CLIR staff is always available via email through our program email address: hiddencollections@clir.org.

No-Cost Extensions (NCEs)

- Request to push back project end date without requesting additional funding for unforeseen project delays
- Should be requested between 1-3 months prior to a project's end date
- Only one extension request per project
- Extensions **cannot be granted for projects whose approved end dates have already passed**
- The default extension for this program is 6 or 12 months
- Request using CLIR's Grant Modification Form

Now Becca will go into more detail about the different types of Modifications requests.

Becca

No cost extension requests are exactly what they sound like: a request to push back the project end date and final report, without requesting additional funding. These may be requested in the case of unforeseen project delays which may include prolonged personnel search due to staff turnover, delays when working with a vendor partner, or delays caused by institutional infrastructure issues.

No-cost extensions should be requested between 1-3 months prior to a project's end date. The reason we ask you to wait until these final months is that only one no-cost extension can be granted per project, and we have found that requests made closer to the end date provide more accurate estimates of the amount of extra time that's actually needed. We encourage you to take time now to set a calendar reminder for your team for 3 months before the end of your project so you'll know when it's time to request an extension if you need one. You may also want to set a similar reminder for your reporting deadlines.

It's important to note that extensions cannot be granted for projects whose end dates have already passed; we really cannot emphasize enough the importance of paying attention to this date. It's also worth noting that the project end date comes typically three months *before* your final report deadline, since some people have been confused about this in the past.

We recommend standard project extension lengths of either 12 or 6 months. On the request form, you are also able to enter a custom date, but we reserve the right to make an alternative recommendation.

Use the Grant Modification Form on the Recipient Resources page to request an extension. The form is often sufficient for staff to evaluate the request, but we may occasionally request additional information or documentation.

Change of Principal Investigators (PIs)

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

If one of the principal investigators, also known as PIs, changes during the period of the grant, the grantee must inform CLIR immediately by completing the Grant Modification Form. All of CLIR's grant management tasks require current contact details for every grant's principal investigators, so it is important we know when a principal investigator departs your organization and that their responsibilities have been transferred to someone else.

In order to complete the change of PI, you will also be required to supply via email a letter on institutional letterhead from the head of the institution or department. The letter doesn't need to be long, but should include the name and title of the new PI as well as the date the change will become effective. A CV for the new PI will also be required for our files.

Budget Reallocation Request

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

On occasion, grantees find it necessary to spend grant funds in a manner other than originally proposed in their application. Reallocations of grant funds are allowable, but these changes must be approved by CLIR staff prior to the reallocated funds being spent. To initiate this process, complete the online Grant Modification Form.

Any proposed use of reallocated funds should be aligned with the original goals and scope of the project and within the current guidelines for allowable and disallowed costs for the Hidden Collections program.

As a rule of thumb, for smaller Hidden Collections projects (defined as under $200K) CLIR generally doesn't require notification for reallocations that amount to less than 5% of a project's total budget. Larger projects (those over $200K), and all projects really, should contact CLIR about any reallocations that are over $10,000. When in doubt, just ask or go ahead and complete the Grant Modification Form.

When completing the Grant Modification Form, you'll be asked to provide the amount of funds remaining in the grant; how much, if any, of the original funds will remain at the close of the project; and, a brief description of how the funds will be spent. CLIR program staff may request additional information, such as a revised project budget, to complete review of the request.

Grant Modification Request

- For more information and instructions:
  - http://www.clir.org/hiddencollections/recipient-resources/
  - hiddencollections@clir.org

All of this information can be found on the Recipient Resources page. Should we update any of our grant modification procedures, we'll post the most up-to-date information there for your reference. Do be sure to share this webpage with all staff that may be involved in the management of your project over time.

CLIR program staff are available to answer any of your questions related to modifications, so don't hesitate to reach out via our program email account. Modifications are not uncommon with this program, and we always seek to find ways to make your projects successful. For more complicated grant modification requests, grant recipients may find it helpful to set up a phone call with a program officer prior to submitting their request. You can do this by writing to hiddencollections@clir.org to schedule a time to call.

Reporting Requirements

At this point, we'll shift into a discussion of reporting requirements. Joy?

Reporting Requirements

- Reporting deadlines are included in your award letters
- CLIR should receive one project report each year
- CLIR submits a report to The Andrew W. Mellon Foundation on June 30 each year which includes all reports submitted in the previous year
- Reports must be submitted through the online form

Joy
Recipients of the Hidden Collections grant are required to submit reports according to the schedule outlined in each of your award letters. Your first report is due a year and one month after the **start** date of your project, and then each interim report after that is due exactly one year after the previous one. Your final report is then due 3 months after your project end date. This means we should be receiving one report from you each year. If your project is only 12 months, you will just submit your final report 3 months after the end date of your project.

Your annual reports to CLIR are a deeply important part of the agreement between our grantees; CLIR; and our own funder, The Andrew W. Mellon Foundation. The Digitizing Hidden Collections staff compiles its own report on the Hidden Collections program each year, which we submit to Mellon on June 30th. This report also includes all of the reports we received from our recipients that year and communicates to Mellon the importance of the work that all of you are doing.

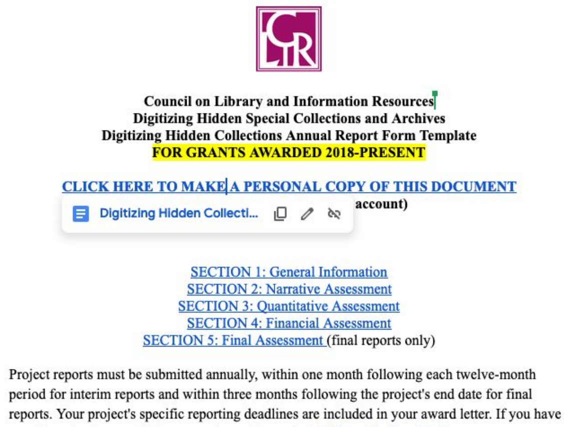
CLIR will accept reports for this program solely through an online form, which is linked to from our Recipient Resources page. Grantees are required to submit both narrative and financial reports **on or before** the due dates specified in your award letter. If you don't have access to a copy of your letter and need to know your designated report dates or any other information related to your report, do let us know at hiddencollections@clir.org. An email reminder from CLIR will be sent to the PIs on file around a month prior the due date for each of your annual interim reports and around three months prior to your project's end date. Login for reporting will be the same as that used to submit your proposal, so if that account was not made by the PI, be sure to keep track of that login information.

Just a few more words on reporting…

- Reports are not only a way to help us keep up with your progress but also a means for us to provide the best support to you as your project evolves. For instance, we may be able to suggest others in the Hidden Collections community who have faced similar challenges as the ones you report facing.
- Your reports can also help us to help you identify and mitigate potential issues in advance. For example, we may notice from your reports that you may need a no-cost extension and can remind you of that process. However, if an issue is time-sensitive or if you have a specific question, we encourage you to reach out about it directly to program staff at hiddencollections@clir.org.
- If you find that your report is likely to be late due to circumstances beyond your control, which we know can happen, let us know as soon as possible. We are glad to work with our grantees in these situations, but it’s important that we hear about them *before* your report is overdue, since your reports affect our own reporting to the Mellon Foundation.

Reporting Template

Collaborative Google Docs Template for Report Form



Council on Library and Information Resources
Digitizing Hidden Special Collections and Archives
Digitizing Hidden Collections Annual Report Form Template
FOR GRANTS AWARDED 2018-PRESENT

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account)

Digitizing Hidden Collecti...

SECTION 1: General Information
SECTION 2: Narrative Assessment
SECTION 3: Quantitative Assessment
SECTION 4: Financial Assessment
SECTION 5: Final Assessment (final reports only)

Project reports must be submitted annually, within one month following each twelve-month period for interim reports and within three months following the project's end date for final reports. Your project's specific reporting deadlines are included in your award letter. If you have

Teams of collaborators working on project reports can also reference our Collaborative Google Docs Template for Report Form, available on the **Recipient Resources** page, which includes the questions you'll be expected to answer on the reporting form. Note that there are two slightly different templates, one for 2015-2017 recipients, and another for 2018 and forward, so be sure to use the correct template. Using the template, you have the option to begin working on your draft report as early as you would like.

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

Reporting Form: Overview

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

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

The report form is organized into 4-5 sections:

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

When writing your report the first place to start is the final proposal you submitted to CLIR during the application process. All sections of the report should demonstrate the project's consistency with these original ideas. Of course, some variations are to be expected as the project adapts to real life scenarios and new opportunities. Small differences between the planned approach and actual project work can be explained in the narrative report. However, as mentioned earlier, grantees will need to request Grant Modifications for more substantive changes, particularly those regarding the budget, timeline, or deliverables. Overall, it is important to demonstrate to CLIR and the Mellon Foundation that the scope and goals of the project continue to reflect the proposal selected for funding by CLIR's independent review panel.

Reporting Form: General Information

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

We’re now going to do a quick walkthrough of the information you will be asked to include in your reports to CLIR.

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

- Award reference number (from your award letter)
- Project Title
- Institution/organization
- PI(s)
- Contact information of person submitting report

Narrative Assessment

- New Internal and public developments (checkboxes)
- Goals and deliverables
- Other outcomes and accomplishments
- Challenges
- Project personnel
- Presentations, publications, and other outreach
- Future plans
- Additional documentation

Section two is where you can provide a narrative assessment of your project.

The first thing we'll ask about are new internal and public developments. These are a series of checkboxes you can tick off.

Internal developments include things like:

- digitization metrics
- the implementation of new workflows, protocols, etc. for digitization and description,
- the implementation of new tools or systems,
- and new donations and/or grant applications

We also want to hear about **Public developments**, such as:

- The creation of new blogs, social media accounts, websites (or content created for existing ones!)
- Research guides, online/physical exhibitions, news articles
- Maybe the digitized materials are being incorporated into curricula somewhere?
- Perhaps there are publications arising from research using the digitized materials?

You'll also have a chance to summarize the project goals and objectives during the reporting period and explain any changes or additions to your original plans.

significant accomplishments and outcomes of the project, both for your institution, your professional community, and for the collections' users.

You can discuss challenges or setbacks you have experienced, whether expected or unexpected, and your strategies for addressing them.

You can tell us about the individuals who have made contributions to the project and briefly describe the role that each has played.

And finally, you can tell us about your outreach initiatives, future plans, and you can upload additional documentation related to the project, such as slides, workflows, training materials, assessment data, etc.

Quantitative Analysis

- Materials digitized and digital files created during the reporting period
- Materials digitized and digital files created to date
- Other quantifiable accomplishments

The next section of the report form will ask for information about three things: the quantity and types of materials you have proposed to digitize and the master digital files created through that digitization, the materials digitized and digital files created during the entire grant, and other quantities of deliverables you want to note for us, such as metadata records created, linked data URIs produced, authority records created, etc.

To complete this part of the report, it will be helpful to refer to your original proposal, so it's a good idea to check now to be sure that a copy of your proposal is stored somewhere that your reporting team can access it when the time comes.

Compiling these numbers will be much easier if you plan now to track them as your project proceeds, so setting up a shared document to do that will be something you'll thank yourself for later. CLIR does have an Excel template you can use for this if you wish, located on the Recipient Resources page.

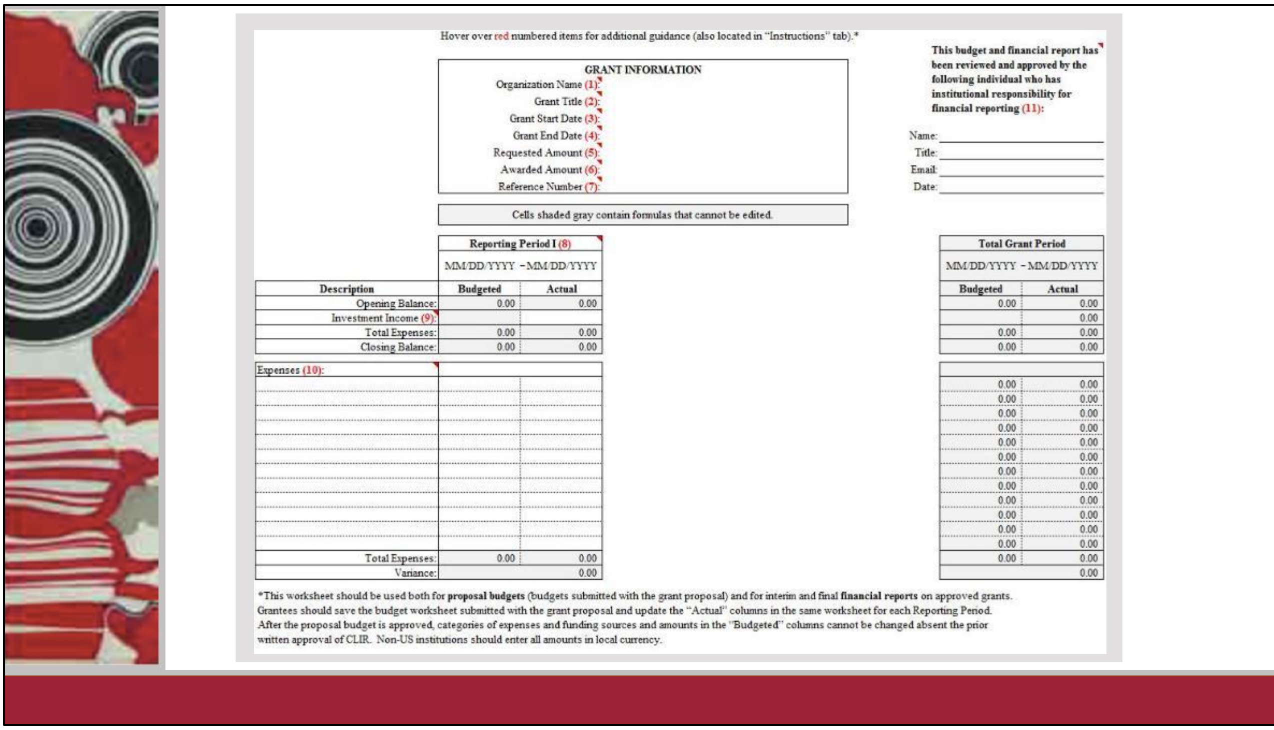
Financial Assessment

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

The next part of the Reporting Form that I want to touch on is The **Financial Assessment**, which comes in two parts.

The first is the **Financial Narrative**. In the Financial Narrative, you can comment on actual grant expenditures during the reporting period as they relate to your proposed budget. Every budget category should be addressed here and, if there are any variances of 5% or more between projected and actual spending, make sure to include a detailed explanation here. You should also discuss any approved budget modifications since your last report.

The second part is the **Financial Report**, which is an upload using the same budget and financial report form that you submitted with your proposal. The only difference is that you have *both* the Budgeted and Actual fields filled in this time, instead of just the budgeted column.



Hover over red numbered items for additional guidance (also located in "Instructions" tab).*

GRANT INFORMATION

Organization Name (1):
Grant Title (2):
Grant Start Date (3):
Grant End Date (4):
Requested Amount (5):
Awarded Amount (6):
Reference Number (7):

This budget and financial report has been reviewed and approved by the following individual who has institutional responsibility for financial reporting (11):

Name: ______
Title: ______
Email: ______
Date: ______

Cells shaded gray contain formulas that cannot be edited.

	Reporting Period I (8)		Total Grant Period	
	MM/DD/YYYY - MM/DD/YYYY		MM/DD/YYYY - MM/DD/YYYY	
Description	**Budgeted**	**Actual**	**Budgeted**	**Actual**
Opening Balance:	0.00	0.00	0.00	0.00
Investment Income (9):				0.00
Total Expenses:	0.00	0.00	0.00	0.00
Closing Balance:	0.00	0.00	0.00	0.00
Expenses (10):				
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
			0.00	0.00
Total Expenses:	0.00	0.00	0.00	0.00
Variance:		0.00		0.00

*This worksheet should be used both for **proposal budgets** (budgets submitted with the grant proposal) and for interim and final **financial reports** on approved grants. Grantees should save the budget worksheet submitted with the grant proposal and update the "Actual" columns in the same worksheet for each Reporting Period. After the proposal budget is approved, categories of expenses and funding sources and amounts in the "Budgeted" columns cannot be changed absent the prior written approval of CLIR. Non-US institutions should enter all amounts in local currency.

We've provided a screenshot of the budget detail template on this slide.

Final Project Assessment

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

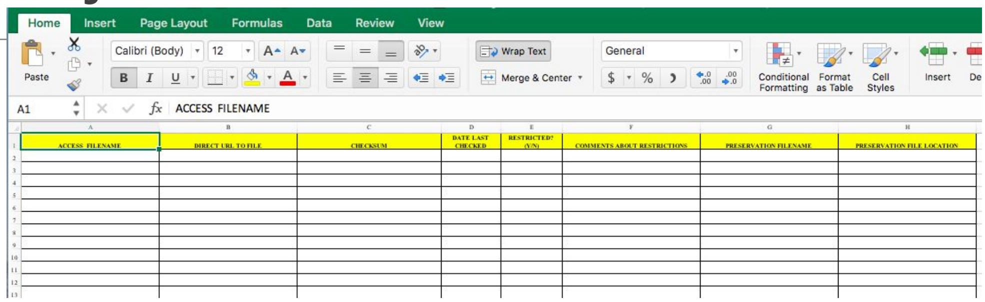
When it comes time to submit your *final* report (as opposed to your interim report(s)), you will include a final project assessment, which has four required components:

The first is the final project narrative: an overall assessment of your project, including the most significant outcomes and challenges, and the most valuable lessons learned.

The second is the final financial narrative and report, which will be similar to your interim reports.

For the last two components of your final project assessment, we will ask you to point us towards your digitized collections and metadata. The first of these will request the names and URLS of the catalogs/repositories/services through which the digitized files and associated metadata have been made available. The second component will be a Project Manifest, which will ask for URLs and filenames for the access copies of a representative sampling of the digital files created through your project.

Project Manifest



Complete and upload CLIR's template

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

Some more details on the project manifest: this is a spreadsheet which includes the names and locations of the digital files (normally, the access copies), as well as notations about any checksums and restrictions. We're requiring this because we are using a tool--a kind of web crawler--that will allow us to conduct periodic checks that the online files created through CLIR's digitization regranting programs remain, in fact, online.

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

Taking a look at this template now, and building completion of this document into your workflow, will help you save time later. For those of you who work with vendors, often your digitization vendor will return a spreadsheet to you that will be very similar to what you need to submit here, and you should be able to adapt the vendor's spreadsheet for this template. If you work out your file naming conventions at the start of your project and insure your vendor names your files exactly according to your needs, most of your work for this requirement will be done. If you leave it until the end, it might take some scrambling to pull it together, so we do strongly recommend coming up with a strategy for compiling this data during the course of project work.

Of all of the pieces of the final report, this document is what allows us to verify that you have created all the deliverables agreed upon when you accepted the grant. This evidence will be critical to our own reporting to the Mellon Foundation, so we really appreciate your help in making this possible for us.

Part Three

Channels of Communication

Questions + Discussion

The final section of our presentation is just some information about modes of communication before we turn over to questions and discussion. Becca?

Promoting Digitizing Hidden Collections Projects

CLIR Acknowledgement Guidelines
https://www.clir.org/fellowships/acknowledgment-guidelines

If discussing CLIR in press releases, our Director of Communication is happy to review: ksmith@clir.org

Becca

First, we want to let you know that we have organization-wide Acknowledgement Guidelines created by CLIR's Director of Communications, Kathlin Smith, that may be useful to you. These contain boilerplate language, information about the use of CLIR's logo, etc. The link on the slide will take you to those guidelines, and this resource is also linked to on the Recipient Resources page. These provide assistance for a variety of situations such as news releases, social media posts, press events, and so on. While not required, Kathlin, is happy to review any formal press releases for accuracy prior to their publication.

Finding Resources and Contacting CLIR

- Recipient Resources page
  - https://www.clir.org/hiddencollections/recipient-resources/
- Funded Project Page
  - https://www.clir.org/hiddencollections/funded-projects/
- Grants & Programs Newsletters
  - Subscribe: https://bit.ly/3hhhTqQ
- Email
  - hiddencollections@clir.org
- Twitter
  - @CLIRHC or #DigHC
- Instagram
  - @CLIRnews

CLIR's website contains quite a lot of information for you as you move into your grant recipient role. Just as you may have used the resources of the Applicant Resources page during the grant writing process, we have a similar **Recipient Resources** page that we've talked about quite a lot today as you work through your project. Here, you will find information on grant modification and reporting that we discussed earlier. Additionally, contact information for the CLIR Grants Team, templates, and information on citing CLIR are all contained on this page.

On the **Funded Projects** page, you can find descriptions of each of the projects that have been funded by the Hidden Collections program to date. If you have not already done so, please proofread the summary of your project that's currently posted there and send us any proposed changes.

The best way to contact us is through the hiddencollections@clir.org email box.

We also love to hear about your progress. If you are sharing updates on Twitter or Insta, please feel free to tag us or use #DigHC so we can repost. If there is something you would like us to share directly with our followers, just email us at hiddencollections@clir.org. We love to be able to amplify the amazing work you're doing. We also try to share your news in our Grants & Programs Newsletter.

Questions + a question for you: how has COVID affected your project?

Joy Banks
Program Officer

Kristen Blair
Program Administrator

Sharon Burney
Program Assistant

Becca Quon
Program Officer

Thank you all for joining us at our webinar today. We know that we've covered a lot of material. We'll now shift to answering any questions you've submitted during our presentation and allow a bit of space for conversation. Give us a moment to promote you all to presenter, which will allow you to activate your audio and video if you like. This will disable the Q&A box - a strange quirk of Zoom. For anyone that feels more comfortable typing a question or response, feel free to do so in the chat box.

Council on Library and Information Resources

Digitizing Hidden Collections Recipient Informational Webinar June 10, 2020

Website: clir.org/hiddencollections/

Email: hiddencollections@clir.org

Twitter: @CLIRHC

I'm not seeing any additional questions in our chat. Thank you all for joining us today. We'll be posting the recording and slides soon to our Recipient Resources page. In the meantime, if you think of any additional questions, you can always reach us at hiddencollections@clir.org. We really look forward to working with you and hope you all have a great day.