Digitizing Hidden Collections
Recipient Informational Webinar
June 6, 2018

https://www.clir.org/hiddencollections/

hiddencollections@clir.org

@CLIRHC

Program Staff

Nikki Ferraiolo
Senior Program Officer

Joy Banks
Interim Grants Officer

Kristen Blair
 Program Administrator

Amy Lucko
Director of Program Administration

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Webinar Overview

- **Part One**

  - Introduction to CLIR

  - Publications

  - Other CLIR Programs

- **Part Two**

  - Grant Modifications

  - Reporting Requirements

  - Channels of Communication
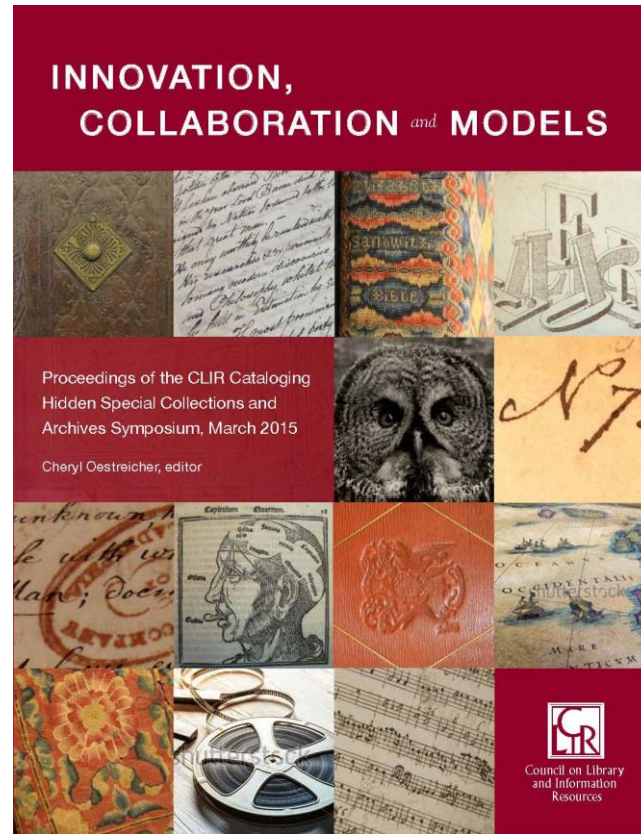
  - Questions?

 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.

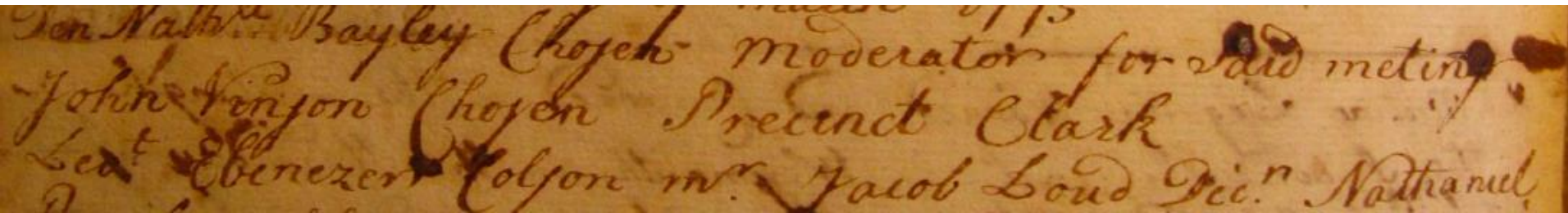# CLIR Publications

Innovation, Collaboration, and Models

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

INNOVATION,
COLLABORATION *and* **MODELS**

Proceedings of the CLIR Cataloging
Hidden Special Collections and
Archives Symposium, March 2015

Cheryl Oestreicher, editor

Council on Library
and Information
Resources

Other CLIR programs

- Recordings at Risk

- Postdoctoral Fellowship Program

- Mellon Dissertation Fellowship Program

- Leading Change Institute (LCI)

- Digital Library of the Middle East (DLME)

- Digital Library Federation (DLF)

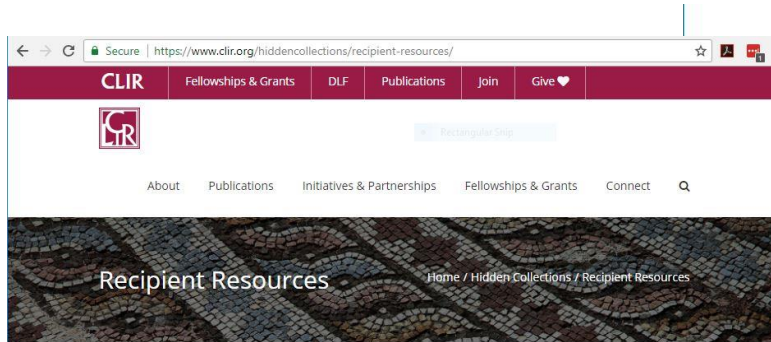# Grant Modifications, Reporting Requirements, and Communication

Grant Modifications

clir.org/hiddencollections/recipient-resources/

Grant Modifications

No-Cost Extensions

It may occasionally be necessary for a grantee to request a no-cost extension due to unforeseen project delays. No more than one no-cost extension will be granted per project.

No-cost extensions should be requested between 1-3 months prior to a project's end date; extensions cannot be granted for projects whose approved end dates have already passed. Extension requests should be emailed to program officer Nicole Ferraiolo and the grants team and must include the following information:

1. A letter addressed to Nicole Ferraiolo on institutional letterhead outlining the reasons behind and need for the request. Requests to use remaining funds to catalog or digitize new collections should provide a brief description of each additional collection and explain how it aligns with the original project's goals and the overall goals of the Hidden Special Collections and Archives program.

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

- Extensions cannot be granted for projects whose approved end dates have already passed

To Request an NCE

- Email hiddencollections@clir.org with:
  - Written explanation for the request
  - Revised project plan, including an updated timeline
  - A revised budget, using CLIR's template
- Important to demonstrate consistency with original proposal

Change of PI

- Must inform CLIR in writing of change of PI

- Requests include
  - CV of new PI
  - Letter on institutional letterhead from head of institution or department noting change and effective date

Budget Reallocation Request

- To allocate funds in a manner different than the original budget approved by CLIR

- Brief email describing desired change and how much money you wish to reallocate

- If necessary, you will be invited to submit a formal request

Reporting Requirements
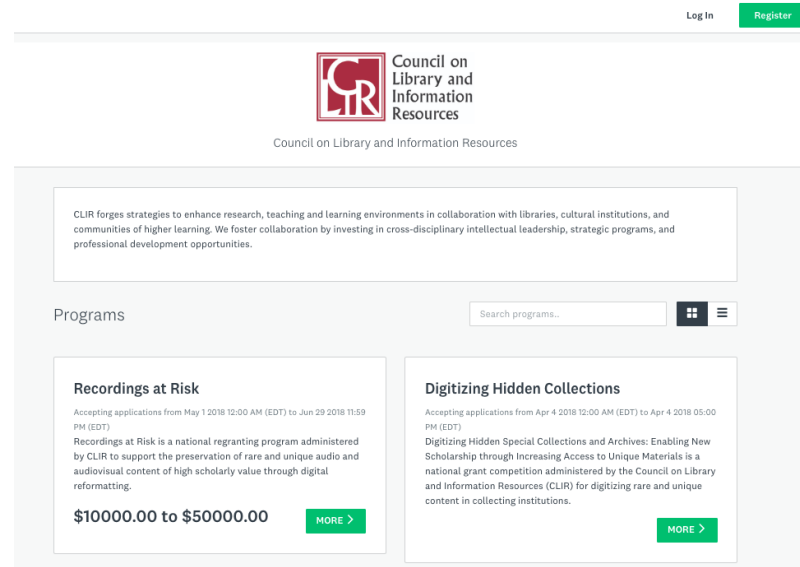
- Reporting deadlines are included in your award letters

- CLIR should receive one report from recipient institutions each year

- CLIR submit a report to The Andrew W. Mellon Foundation on June 30 each year which includes all reports submitted

- Reports must be submitted through the online form

Reporting Requirements

https://clir.smapply.io/

Reporting Template

Collaborative Google Docs Template for Report Form

Reporting Form: General Information

- Award reference number
- 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

Quantitative Analysis

1) Digital Files Created

2) Materials Digitized

3) Other Accomplishments

Digitization Cost Calculator

About the Project

The Digitization Cost Calculator collects and make freely available a large set of data on the time it takes to perform various tasks involved in the digitization process, in order to assist organizations in digitization project planning and benchmarking.

Optional Data Contribution

Are you interested in contributing data from your project to the DLF's Digitization Cost Calculator? You can learn more about the Cost Calculator and how to contribute data here. For more information, contact Joyce Chapman: *joyce.chapman@duke.edu*.

Note that although the Digitization Cost Calculator is not accepting data pertaining to audio and video collections at this time, the project leaders are planning to expand the project to accommodate this data and so are seeking partners interested in sharing information about their work.

○ Yes

○ No

http://dashboard.diglib.org/

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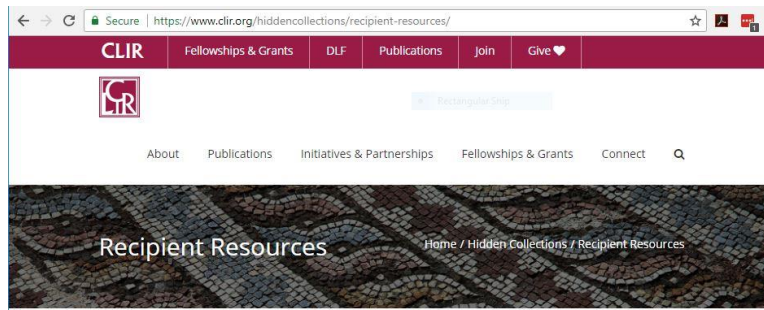
Hover over red numbered items for additional guidance (also located in "Instructions" tab).*

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):	

Name: _____
Title: _____
Email: _____
Date: _____

Cells shaded gray contain formulas that cannot be edited.

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

	Total Grant Period	
	MM/DD/YYYY – MM/DD/YYYY	
Budgeted	**Actual**	
0.00	0.00	
	0.00	
0.00	0.00	
0.00	0.00	

Expenses (10):		
Total Expenses:	0.00	0.00
Variance:		0.00

Budgeted	**Actual**
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
0.00	0.00
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.

Final Project Assessment

- Final project narrative
- Accessing the digitized collections
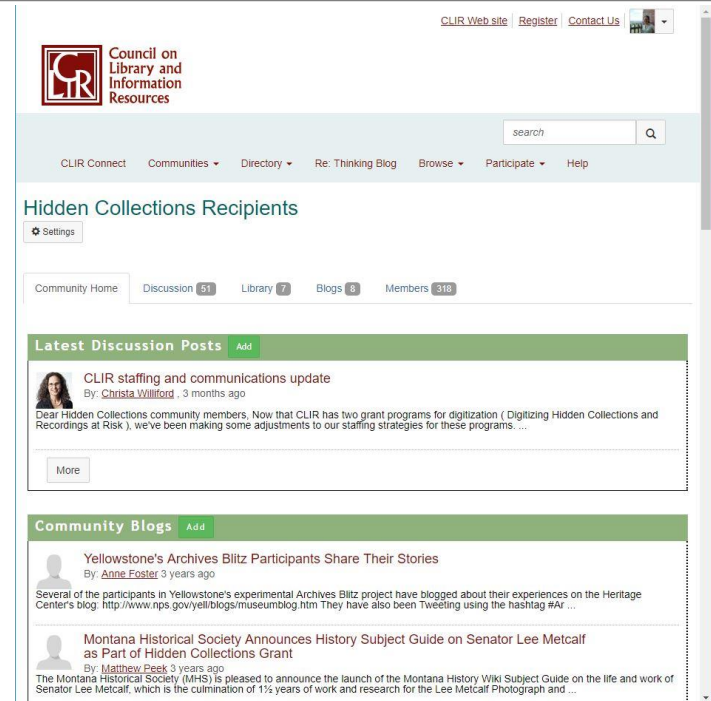 - Repository name
  - URL

CLIR Connect

https://www.clir.org/hiddencollections/recipient-resources/

Additional Channels of Communication

- Recipient Resources page
  - https://www.clir.org/hiddencollections/recipient-resources/
- Funded Project Page
  - https://www.clir.org/hiddencollections/funded-projects/
- Registry
  - http://registry.clir.org/

- Email
  - hiddencollections@clir.org
- Twitter
  - @CLIRHC or #DigHC
- Digitizing Special Formats Wiki
  - https://wiki.diglib.org/Digitizing_Special_Formats

Thank You!

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