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TSLAC Grant Management Series: Performance Measures

Hi Everyone. Welcome to the Performance Measures piece of the TSLAC Grant Management Series of training webinars. I'm Bethany Wilson, The Grants Administrator for the Texas State Library and Archives Commission

There should be a slide deck handout available on the training site that you can print and use to follow along and take notes if you like. There should also be cheat sheets on LSTA performance measures and reporting guidance and LSTA survey guidance for you to use when you begin creating your reports.

Agenda

- ❑Overview
- ❑The outputs
  - Activities
  - Numbers
- ❑Narrative
- ❑Surveys

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Let's jump right into what we'll cover today in the training. Basically, you're going to be getting an overview of the performance measures that you are required to track as you roll out your grant. Outputs are referring to activities and numbers that you'll be tracking over the course of your grant that you'll want to include in your performance reports. We'll discuss the narrative sections of the report and what to include there and we'll cover the different survey options available for you to use with staff and the public.

Okay, the basics about why we report. Why do we have to do it? Well, for a couple reasons. One, you need to report to us so that we can monitor your progress in meeting the goals you set for yourself in your grant application. In turn, we are responsible for reporting the progress and success of your program to a few other organizations. At the end of each calendar year, we are responsible for reporting to our federal funder, the Institute of Museum and Library Services. We also have to report on grant activities quarterly to the state legislative budget board using the information you provide to us in your performance reports. We also report for your purposes so your local governing entity, your community, and your patrons can see what you've been doing with the grant funds and how the program is progressing toward meeting grant goals.

WHAT We Report

- Grant-related activities during the reporting period
  - Planning & preparation
  - Events
  - Programs
  - Meetings
  - Other
- Numbers (outputs)*
- Narratives (outcomes +)*

*Measurements and tools provided by TSLAC.

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Moving on to WHAT we report. We report on all activities related to the grants. So, we want to know about any planning & preparation, events, programs, meetings, etc that you conducted in an effort to meet your grant goals during your grant year.

Now there are two things that get reported. Numbers and narratives. Numbers are your outputs and refer to how many folks you served. Narrative refers to how you served them and includes details about the event and how you met outcomes through those events, programs, meetings, etc.

TSLAC will provide you with the measurements and tools you'll use to track those outputs and outcomes. This is a good time to talk about the handouts attached to this presentation. These are going to be essential for you to have handy when you begin creating your performance reports. The first is the FY24 LSTA competitive grant performance measures and reporting handout. This is a six-page document that details exactly what we're looking for when we ask for numbers on outputs, what you should include in your narrative sections, and how you should report your outcomes using the survey instruments that we'll provide for you.

The second attachment is the survey guidance document and it discusses the surveys in detail. IMLS requires that all TSLAC competitive grant programs meeting certain criteria deliver surveys to library staff and patrons who are beneficiaries of the TSLAC grant-funded program. So basically, you're going to survey any staff or patrons who are benefitting from the grant program using the IMLS approved surveys that we'll be providing you. This document talks about those surveys and what information they include.

The last thing you'll receive is your individual performance measures. These are written by me and are specific to you grant. We've included a sample one so you can see what it includes. These will tell you what specifically you need to measure, and which survey or surveys you should be using with your patrons and/or staff, if any.

WHEN We Report

Grant	Due
• Special Projects • TexTreasures • ILS Cooperative	Q1 – October 30 Q2 – January 30 Q3 – April 30 Q4 – July 30
• Texas Reads	P1 – March 7 P2 - September 7

So now, WHEN do we report. So for Special Projects, TexTreasures, and ILS Cooperative grants, you'll be reporting on a quarterly basis. The quarters are broken up starting on July 1st. You can find the exact dates each quarter is supposed to cover in your contract or on the grants timeline tracker I sent out with your contracts. Your reports are always due on the 30th. If the 30th falls on a weekend or a holiday, then your report will be due the next business day.

Texas Reads runs a bit differently. If you received a Texas Reads grant, you are only reporting twice over the course of the grant cycle and your reports are due on the 7th. Same rules apply. If the 7th falls on a weekend or a holiday, then your report will be due the next business day. Again, check your contract or your grants timeline tracker for the exact dates each of those reporting periods will cover.

Reporting Resources

- ❑GMS (grants.tsl.texas.gov)
- ❑Performance measures and reporting guidance
  - *FY 2024 LSTA Competitive Grants Performance Measures & Reporting* (reference)
  - *Grant Performance Reporting* (individual)
- ❑Surveys
- ❑Attendance records
- ❑Calendars
- ❑Publicity/promotions

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So the resources that you have at your disposal are the GMS or grants management system. That's where you're going to be creating, populating, and submitting your performance reports. The next resources would be those documents we discussed earlier. That six-page document you can use for reference when you begin writing your report , and then your individual performance measures that I'll be creating for you.

These last four are items that you'll need for reference when you begin writing your report. There are the IMLS surveys that were alluded to earlier, attendance records that you're going to need to keep if you're having any kind of interaction with the public. You can use event calendars that you may put out for the community, and you'll want to keep any publicity or promotion that you did for your programs. All of these last four items are considered artifacts of your grant program and should be kept per your contract. There is also a section in the performance report where you can attach copies of these types of artifacts produced each quarter. IMLS loves to see those when TSLAC makes our final report to them in January.

THE OUTPUTS

Activities

Numbers

Activities

- ❑Patron events and services (planning, implementation, results)
- ❑Project meetings/planning sessions
- ❑Staff training
- ❑Acquisitions
- ❑Successes (info purposes only)
- ❑Challenges and delays (info purposes only)
- ❑Corrective actions (info purposes only)

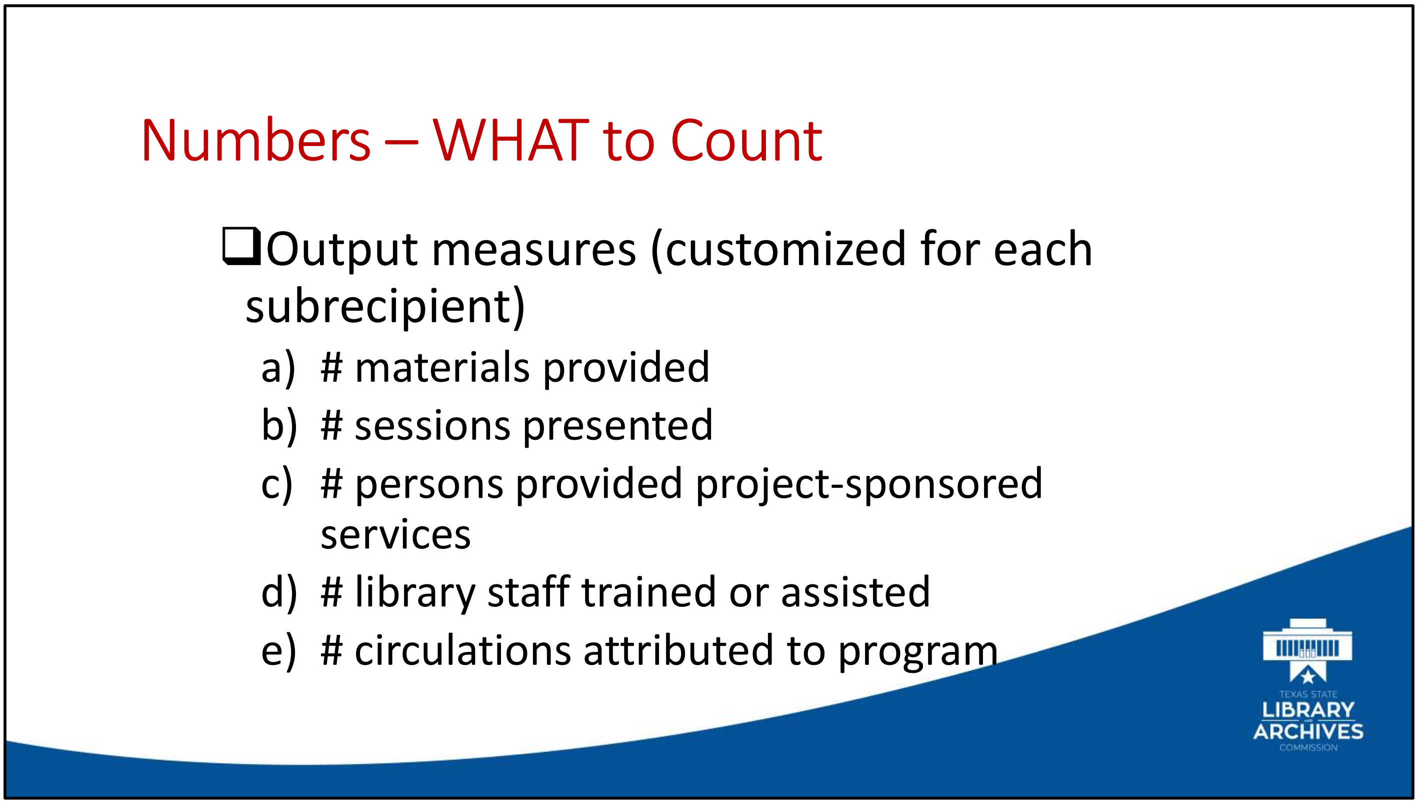
Let's start with the activities you'll want to collect information about. Obviously, any patron events and services. That includes the planning, implementation, and results. You'll want to collect information on project meetings and planning sessions. Any staff training. When you buy stuff to support project goals. You'll want to jot down any notable successes or patron comments that seem to support your grant goals. You'll want to make note of any challenges you faced while trying to implement your program and how you navigated those. Anything you stumbled on and how you corrected it. All of this can be used to answer questions you'll find inside the performance reporting document.

Numbers – WHEN to Count

At each

- Event
- Program
- Milestone
- Activity

So for the numbers, when do you count? You'll be counting at every event, every program, at every milestone you've reached, and every activity that you are holding that's related to your grant and you reaching your grant goals. If you are serving someone, you are counting.



As I mentioned before, all of you will be receiving individual performance measures. I'll take a look at the program you detailed in your grant application and create measures for you explaining what you should be tracking. These are a few of the things you might be instructed to count and track in your individual performance measures.

Number of materials provided is normally referring to items you've put in circulation or that patrons have access to without the assistance of a librarian. For example, a book they can check out would be counted, or a kit they can check out counts as one item. Quick note on kits. You wouldn't count every single item in the kit, just the kit itself. So if you bought some construction paper, markers, stickers, scissors, and other craft supplies to make up 50 storytime kits for patrons to take and make, you would only report that as 50 materials on your performance report.

Numbers of sessions presented is self explanatory. Number of persons provided project-sponsored services means anyone that is benefitting from grant funded services. For example, if you used grant funds to purchase a self-checkout station, I would probably ask you to report on usage numbers for that kiosk. Library staff trained or assisted. So, let's say you got that self-checkout station and you trained all 15 of your staff and 5 of your volunteers on how to operate it. You would report that training on your performance report stating that 20 (15 staff and 5 volunteers) were trained.

The last one is number of circulations attributed to the program. That's pretty easy. How many times did the items you bought to support your program or help you reach your goals circulate? This all should be tracked.

Keep in mind that all of these might not be relevant to your program. That's why I will create measures based on your individual program. So, for example if you bought hotspots with your grant funds, I'm probably going to tell you that I need to know how many hotspots you purchased and provided for public use and then ask you to keep track of the circulation numbers for those hotspots. You'd put that information into the number of materials provided and number of circulations attributed to the program categories.

Numbers – WHAT to Count

- Unique vs. non-unique
  - Unique = each item counted only once (i.e., acquisitions)
  - Non-unique = individual items/persons counted multiple times (i.e., circulation, class attendance)
- Cumulative vs. non-cumulative
  - Cumulative = total including previously reported totals
  - Non-cumulative = total for the period in question only

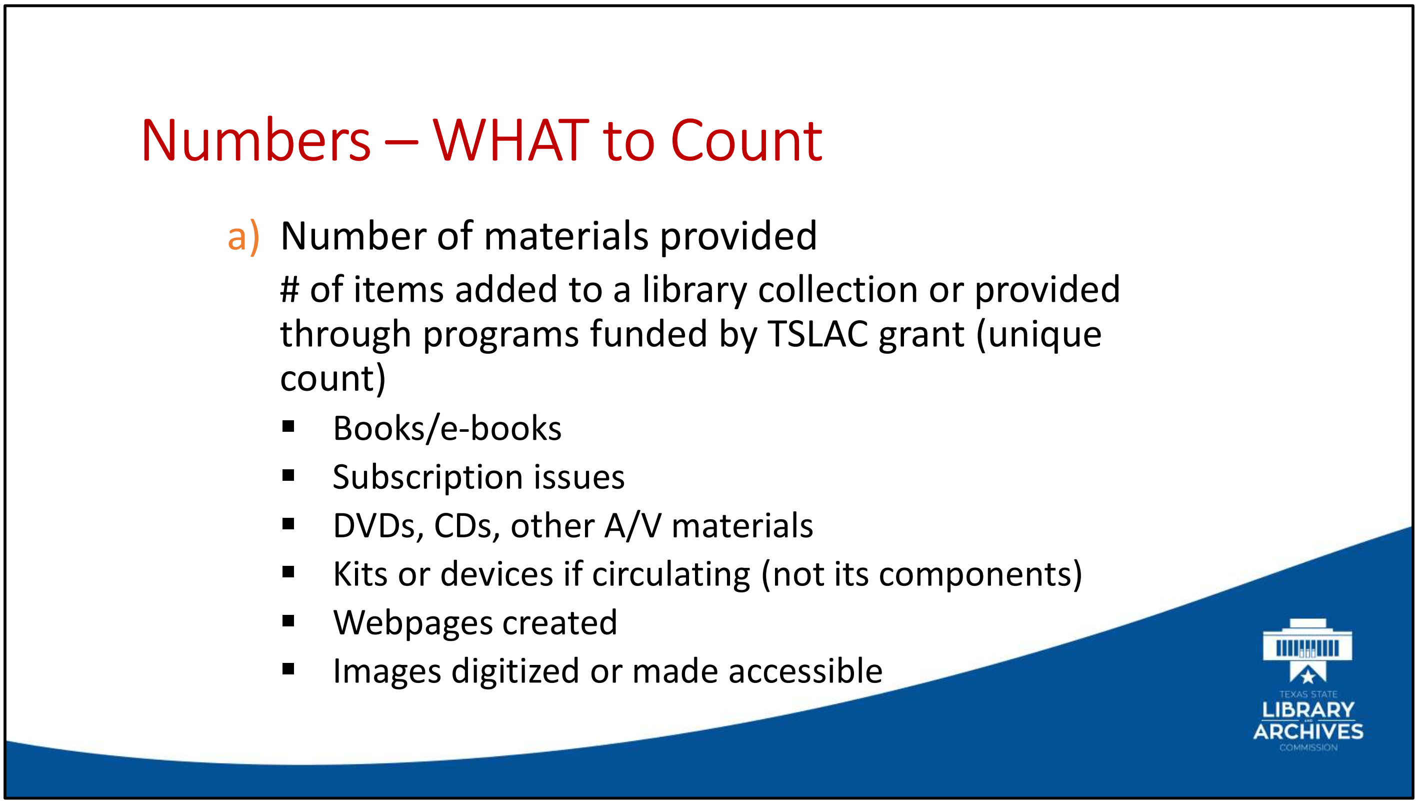
To get into the nitty gritty of HOW you need to count, we need to clarify the difference between unique and non-unique and cumulative and non-cumulative. Let's start with the difference between unique and non-unique. A unique count would be something you count one time and one time only. Items purchased would be a good example. If you purchase 100 books in the first quarter, you would report that 100 books one time.

A non-unique count is something that can be counted multiple times. Event attendance would be a good example. So, if you schedule a series of classes, and there are five people that register for every class in the series and those five people come back for each class, your attendance for the series would be 25. That's a non-unique number, so count it multiple times. So, circulations, class attendance, those types of things are non-unique.

Let's take a look at cumulative versus non-cumulative. For non-cumulative we're talking about the period or quarter in which you are counting. So, let's say you have a Special Projects grant and you are reporting on a quarterly basis. You purchase a bunch of things for your grant between August 1st and September 15th. Those dates fall within the reporting range for your quarter 1 report due on October 30th. You would only include information about those purchases in that Q1 report. When you get to the quarter 2, you're only counting and including information about things you did between the date ranges of quarter 2.

If we asked for a cumulative count, we would want you to add everything from your quarter 1 report to what you have collected for your quarter 2 report. When you got to quarter 3, you would collect information or quarter 3 and then stack your quarter 1 and quarter 2 numbers on top of that. That's cumulative.

Nothing we ask you for in your performance reports will be cumulative. We only want to know about the numbers you collected and activities you performed for the quarter or period on which you are reporting. We don't want you to stack your numbers.



Let’s get into specifics related to those five items that you could be instructed to count. Numbers of materials provided. We’re talking about the number of items you have added to the collection or provided through your programs funded by your TSLAC grant. This is a unique count, so we’re talking about books and ebook titles, subscription issues, dvds, cds, or any other AV materials, kits or devices if circulating. Like I mentioned earlier, we aren’t talking about the individual items in the kit. If your goal was to circulate a kit, we want to know how many kits you created and how many times those kits have circulated.

The number of web pages created. If one of your grant tasks was to create a web presence for your project, we want to know how many web pages you created. Images digitized or made accessible. That most often refers to TexTreasures grantees and what they are doing, but could apply to other grants. An example would be if your project was to digitize issues of a local newspaper and provide access to those online, we’d want to know how many pages you digitized and how often those pages were accessed by the public once they were made available online.

Numbers – WHAT to Count

b) Number of sessions presented

- Session title
- Session length in minutes
- Number of sessions in program
- Number of people who attended each session
- Number of times program/presentation administered

Number of sessions presented. So, let's say you're going to do a digital literacy course comprised of five separate sessions. We would want to know the course name and the title of each session. We'd want you to track how long each session lasted (30 minutes, 60 minutes, 120 minutes), and we need to know how many people attended each session. We also want to know if you are presenting this course more than once. If you are presenting the course in the spring and the fall, let us know so we can expect those numbers in subsequent performance reports.

Numbers – WHAT to Count

c) Number of persons provided project-sponsored services

# of instances persons receive services as a result of the project *(non-unique count)*

- Program attendees (classes, showings, displays)
- Webpage views
- Reading Club logs
- Hardware or software usage
- Reference questions
- Circulations*

Number of persons provided project sponsored services. This is the number of instances that people or your patrons receive services as a result of your grant project. Remember that this one will be a non-unique count.

You'll want to track program attendance for anything that was grant related. That includes classes, events, displays, showcases, that sort of thing. If you built a webpage for your program, you'll want to track webpage views. If you have a Texas Reads grant and you are running a Summer Reading program, count how many reading logs you gave out and how many came back completed.

Hardware or software usage. For hardware, if you got a self-checkout station for your library, track how many people are using it. For software, if you got a subscription to a database like Learning Express Library or something like that to support your program, count usage statistics for that database.

If you are receiving reference questions related to your program, keep track of those.

Circulations in this instance is referring not only to what you put into circulation with grant funds, but also those things that you might have already had in circulation that are receiving attention because of your grant program. For example, if part of your grant program included classes on parenting, and now you are seeing an uptick in circulation of your parenting books related to your program topic. If you have a way to sequester that information so you can report on it, we want to know about that.

Numbers – WHAT to Count

d) Number of circulations attributed to project

- Items purchased with grant funds
- Items circulated to target audience
- Examples
  - Books, e-books
  - E-readers, circulating tablets

Number of circulations attributed to the project. We've already discussed that we want you to track circulation of items you purchased with grant funds. Items circulated to target audience. This is stuff you might already have on the shelf. An example would be if you are teaching technology classes to seniors, and you begin to see an uptick in seniors checking out technology books or circulating tablets at your library, keep track of that information for your report.

Numbers – WHAT to Count

e) Number of library staff trained or assisted

# of librarians, library staff, volunteers, and others who **RECEIVE** training or assistance to help improve library services *(non-unique count)*

- Training (instructional) – classroom instruction, webinars, online tutorials, articles, conferences, e-mails (i.e., instructor-led, self-paced, recorded, etc.)
- Documentation = sign-in sheets, electronic logs, registration receipts, attendance logs/certificates, head counts

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Number of librarians trained or assisted. This means librarians, library staff, volunteers, or any others who RECEIVE training or assistance to help improve library services related to the activities in your grant program. That could include governing officials, your city manager, or your administration. If you offer them a demonstration on how your program works and why they need to support it, that counts. This is also a non-unique count.

So, let's say you're getting a new 3D printer and the manufacturer is going to come out and train all your staff and volunteers on how to operate this piece of equipment. They are going to offer a morning session and an afternoon session so everyone can make it to one of them. You'll count attendance for both sessions and remember, this is a non-unique count. So if your volunteer, John, wanted to attend both sessions, he would be counted as an attendee at both sessions. He would count once for morning and once for afternoon.

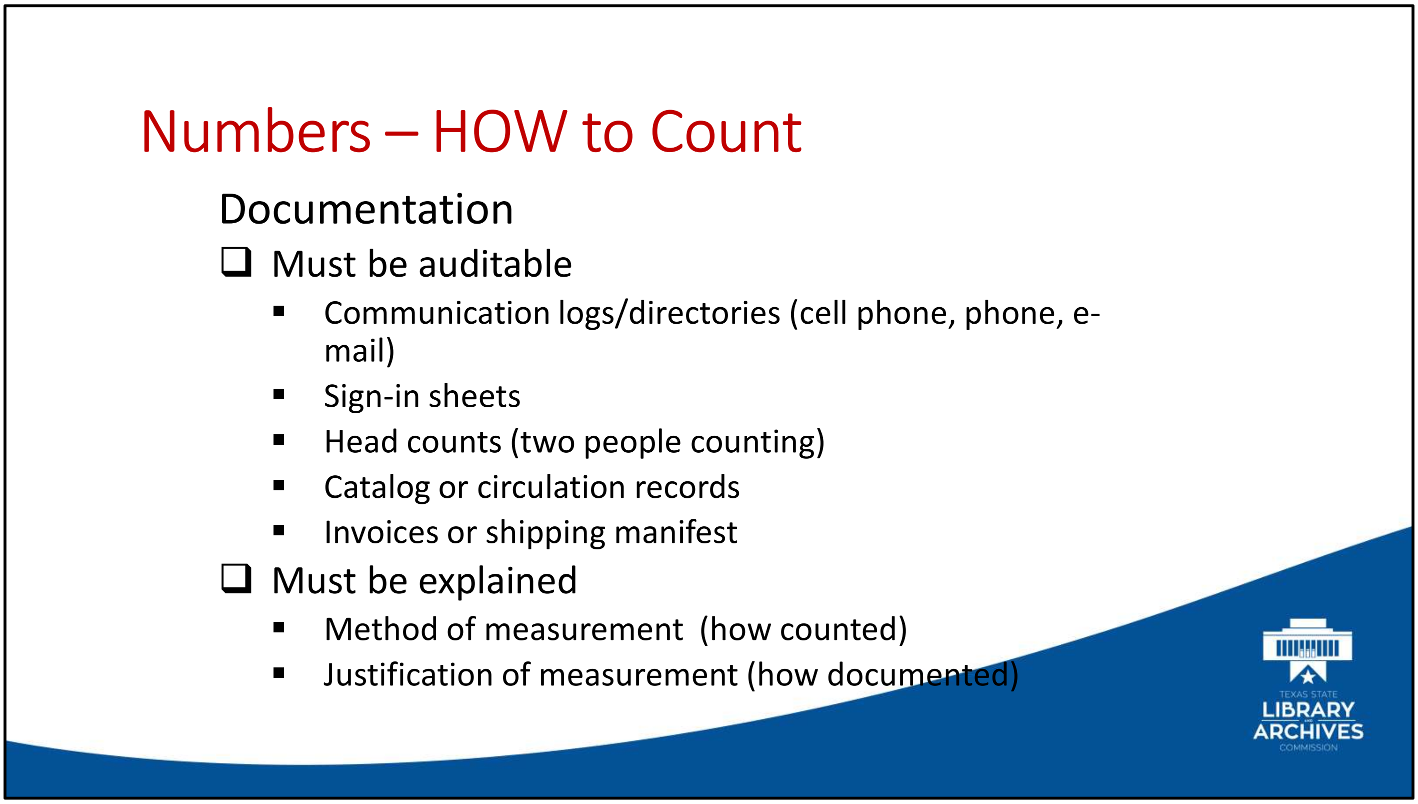
You need to keep documentation verifying your counts. That can be a sign-in sheet, registration receipts, maybe you make yourself a headcount sheet and have two people verify it. There needs to be some sort of dated documentation on how you kept count. That way, if we ask you how you know there were 12 people at your training or event, you can produce a dated document proving it.

Numbers – HOW to Count

- Explanation of method and justification of measurement *(How did you come up with the numbers reported?)*
  - # of classes with attendance at each class documented by sign-in sheets, head counts
  - Open house event with # of visitors recorded by door counter
  - Staff training by vendor on new software as indicated by sign-in sheets
  - # of activity logs submitted for activity
  - # of materials given away or checked out based on circulation records or # of materials remaining

To elaborate on justifying your counts, you should be able to explain your method for keeping counts and justify the numbers you are reporting. You should keep track of the number of classes with attendance at each class using a sign-in sheet or headcounts. For a large event like a comic-con or an open house, track and record the door count. You can track staff training using sign-in sheets. Keep any activity logs submitted for your reading clubs. Use your circulation records or materials remaining to keep track of check outs or how many of an item you've given out. For example, if you made 100 storytime kits to pass out and you have 60 remaining, you know you passed out 40 of them.

Basically, you should have some sort of tangible documents, either paper or electronic, to support your reported numbers. For the door count, take a picture of your event flyer alongside your door counter or something like that.



The reason you need tangible documentation is because it must be auditable. If for some reason your grant award gets audited, you will need to be able to prove what you reported in your performance reports. It's better to have too much documentation rather than not enough. So, keep your communications logs, any sign-in sheets for events or meetings, I'd make a little template to track headcount that has a space to put in the headcount and a space for two people to initial it. Keep your circulation records for items purchased with grant funds and put into circulation. Keep invoices and shipping manifests proving you ordered what you said you ordered and received it.

It all goes back to justification through method of measurement. You should be able to explain to an auditor the system you came up with for counting something and then provide tangible evidence of your measurement. For example, if you had a staff training for your grant funded self-checkout station, you could use a sign-in sheet to track how many attended. You would report the number of attendees in your performance report, indicate that you used a sign-in sheet to track attendance, and file sign-in sheet with your grant documentation. (You do not need to submit the sign-in sheets to TSLAC; just keep them with your supporting documentation.)

THE NARRATIVE

The Narrative

- ❑Tells your project story
  - Successes and challenges
  - Delays or failures
  - Best practices
  - Anecdotes
  - Outcomes
- ❑Assumes TSLAC knows nothing (be complete and concise)

The narrative portion of the performance report tells your project story. That includes your successes and challenges, any delays or failures you encountered, best practices and anecdotes you could pass on to someone who might want to do a project similar to yours, and how you are progressing toward meeting the desired outcomes for the project.

When you're writing the narrative portions, assume that TSLAC knows absolutely nothing about your grant program. Be concise, but complete. Please don't just give us a one sentence response to these narrative questions. Paint us a picture. If you bought something with grant funds, don't just say, "We bought a 3D printer and put it in our Makerspace". Give us some details. What kind of 3D printer was it and how did you choose it? Did you have any issues receiving it? Did you have training on it from the vendor? When did you receive it and when did you put it out for public use? How did you market it to the public? Did you create any programs or classes around it?

Narrative Questions

- ❑Activities
- ❑Survey results
- ❑Project outcomes
- ❑Anecdotes
- ❑Best practices
- ❑Other results (i.e., accomplishments, impacts) not captured in anecdotes/outcomes

The narrative questions have to do with activities, survey results, project outcomes, anecdotes, best practices and any other results which could include any other stuff we didn't' really ask about that you thought was neat and want to include. That could include accomplishments, awards, if you have a TexTreasures grant, maybe it could be something cool you found in a document you sent for digitization. Basically, stuff not covered in anecdotes and outcomes.

Activities

- ❑Summarize what has taken place during the **specified grant period** (i.e., What have you done this period?)
  - Who
  - What
  - When
  - Where
  - Why
  - For Whom

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Remember that all of your counts and all of your responses to the narrative questions are non-cumulative. They will be specific to the period in which you are reporting. So, if you are creating your quarter 2 performance report, you don't need to include anything you did in quarter 1. It will only cover activities and purchases you made in quarter 2.

You might find it helpful to keep a word document saved on your computer where you can go jot down details about any activities, events, or programs you have throughout the quarter right after they happen when they are fresh in your mind. Then, by the end of the quarter, you've got a good start on writing your performance report and you don't have to rack your brain for details on stuff that happened three months ago.

Maybe include the who, what, when, where, why and for whom prompts on your word doc and then fill it out. If you had an anecdote, jot it down. If you learned something from running that particular event, jot it down. Now you've got a start on responses for the anecdotes and best practices questions on your report. This method really takes the pressure off of you when you get that reminder email letting you know you have a performance report due. You'll be ready to go and won't feel pressured.

Surveys

- ❑ REQUIRED by IMLS
- ❑ Based on program/activity type
  - Instructional (public or staff)
  - Planning and evaluation (staff)
  - Content (staff)
- ❑ Available at TSLAC website
  https://www.tsl.texas.gov/ldn/grants/forms-tools

You're required by IMLS to capture certain information through surveys for certain types of programs. There are several different kinds of surveys IMLS provides for you to use when collecting information. The surveys could be formatted to collect information from attendees at your programs. They could be focused on getting information from library staff members who are working on planning grant activities, or library staff or patrons who are receiving instruction on a topic tied to your grant goals. There is a survey focused on gathering information about something you bought to help you roll out your grant. There's also one that has questions focused on content creation activities and how you think those activities will expand library services.

You can find links to all of the surveys mentioned at the link here on the slide.

Survey Resources

- Available at TSLAC website
  https://www.tsl.texas.gov/ldn/grants/forms-tools
  - Survey Guidance (handout)
  - Survey — Library Acquisitions and Content
  - Survey Tool — Planning and Evaluation
  - Survey — Library Planning and Evaluation
  - Survey Tool — Instructional Program Info
  - Survey — Instructional Program for Library Staff
  - Survey — Instructional Program for Public

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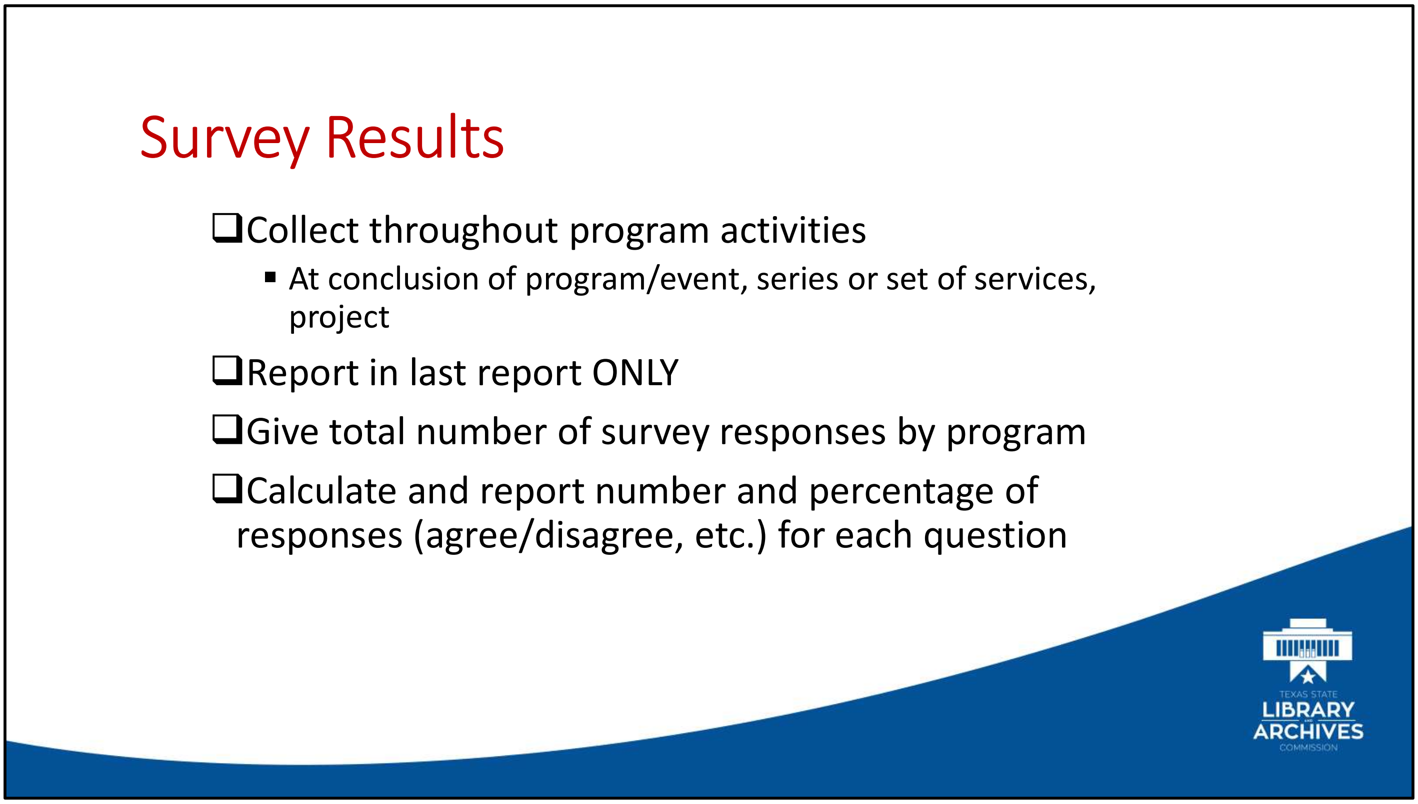
Again, here is the link to get to the IMLS surveys and below that is a list of the available surveys. You might be wondering how you'll know which one to use and what stuff to measure. I'll be looking at all of your programs individually and creating your individual performance measures. Those will lay out the details about what you should be measuring and which survey you should be using to get that measurement. It may be that you don't have anything that needs measuring you won't be instructed to survey at all. You'll know all of that when you get your individual performance measures from me though.

On the website, you'll find four surveys, two tools, and one guidance handout. The surveys are library acquisitions and content, library planning and evaluation, instructional program for library staff, and instructional program for the public. The planning tools are used to aggregate all of the information you gathered with the surveys. So, for example, if you were presenting a series of five different hands-on programs about the different tools in your Makerspace and how to use them, you would use the instructional program for the public survey to gather responses from participants at each of those 5 programs in the series. After the series was over, you would use the survey tool for instructional program information to compile all of the survey responses you gathered for the program series.

The survey guidance handout basically walks you through how to use the surveys, explains the survey categories, and lists the questions you'll find in each survey. It also explains how to use the survey tools to tally up your survey responses.



You're going to collect information at each program or event, or series of events as instructed in your individual performance measures. You'll hand out the surveys at the conclusion of the program, event, or series. Let me clarify something here. I hope it doesn't just confuse everyone. When you survey during a series of classes depends on how the series is set up. So, in the example from the previous slide, I mentioned you might do a 5-part series of interactive classes on different Makerspace equipment. For something like that, you'd survey after every class since they are stand alone classes and don't build on one another. For example, maybe one class was on the 3D-printer and one was on the Laser Cutter. You don't need to go to the 3D printer class to understand what's happening in the Laser Cutter class. They are independent and should be surveyed independently. On the flip side, if you are doing a series of 5 classes on coding and a person needs to attend each class in order to understand what's happening in the next class, you would survey at the very end of the series of classes since the program doesn't actually "conclude" until the last class in the series.

You don't have to turn in your surveys each quarter. In fact, we don't really want your surveys at all. Once you've gathered the surveys from a program, event, or series of events or whatnot, you'll use the respective survey tool to tally up the survey results. Then, in your last performance report, you'll submit the results from those survey tools. You will keep the actual surveys and tools in your grant file for back up.

Survey Scale

- ❑Strongly Agree
- ❑Agree
- ❑Neither Disagree or Agree
- ❑Disagree
- ❑Strongly Disagree

Survey Response	NR	SD	D	NA/ND	A	SA
# Responses		5	3		5	2

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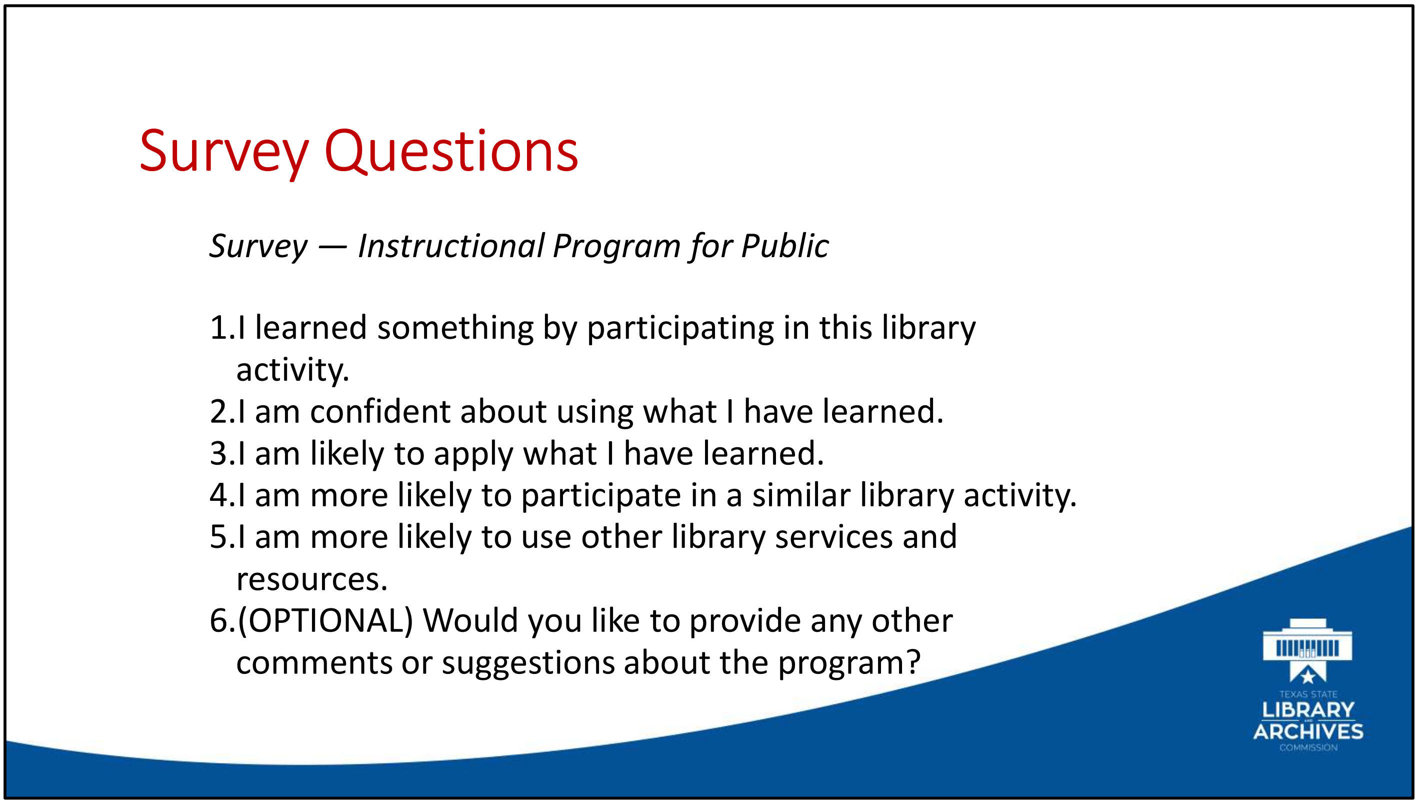
The surveys use a Likert scale to gather responses. I'm sure everyone is familiar with these since we've all taken a survey with these responses on it at some point. When you get ready to complete your survey tool, you'll count up all of the surveys you collected and there will be a box for you to report that information on the tool. For each of the questions on the survey, the tool will give you a survey response grid like the one pictured on the slide. You'll count up how many people responded "strongly agree" and put that number on the grid, then you'll do the same for each of the other responses. "NR" stands for no response. Once you finish tallying up the responses for each question, it should equal the number of surveys you collected. So, in the example grid above, let's say you collected 15 surveys. You can see from the breakout in the grid that 5+3+2+5 is 15 so you know you accounted for every survey response.



These are the questions you'll find on the instructional program for public survey. I'll show you the questions for the other three surveys as well. You'll notice that they do repeat so you know there are certain things IMLS is looking for. You'll likely be assigned to collect the instructional program for the public survey if you are sponsoring hands-on, interactive type programs for the public with your grant funds. An example might be those makerspace programs or that coding series we mentioned earlier. Respondents will use the likert scale responses we went over to rate responses to the following statements.

1. I learned something by participating in this library activity.
2. I am confident about using what I have learned.
3. I am likely to apply what I have learned.
4. I am more likely to participate in a similar library activity.
5. I am more likely to use other library services and resources.

And then the optional sixth question: Would you like to provide any other comments or suggestions about the program?

You are not limited to asking just these questions. If there is something specific you would like to know, you can add questions to the survey. But, you MUST keep these questions in the mix.

Survey Questions

Survey — Instructional Program for Library Staff

1. I learned something by participating in this library activity.
2. I am confident about using what I have learned.
3. I am likely to apply what I have learned.
4. Applying what I learned will help improve library services to the public.
5. (OPTIONAL) Would you like to provide any other comments or suggestions about the program?

The questions on the instructional program for library staff look pretty similar to the survey for the public. The first three questions are the same and then they want to know if applying what they learned will help them improve library services to the public. Then they have that same optional opportunity to provide other comments or suggestions. Again, you can add questions here if there is something specific you would like to know.

Survey Questions

Survey — Questionnaire for Library Staff about Content (acquisition and creation activities only)

1. I am satisfied that the resource is meeting library needs.
2. Applying the resource will help improve library services to the public.
3. (OPTIONAL) Would you like to provide any other comments or suggestions about the program?

Questionnaire for library staff about content is for acquisition and creation activities only. So, if you're just buying stuff with your grant funds and not offering any classes or activities, you'd likely use this survey. Examples would be buying materials to create kits to circulate or buying hotspots to circulate. This survey is for library staff only and there are two required questions on this survey with the same optional third question you'll find on all the surveys and then opportunity to add your own questions if you want.

Survey Questions

Survey — Questionnaire for Library Staff about Planning and Evaluation

1. I believe the planning or evaluation addresses library needs.
2. I am satisfied with the extent to which the plan or evaluation addresses library needs.
3. I believe the information from the plan or evaluation will be applied to address library needs.
4. (OPTIONAL) Would you like to provide any other comments or suggestions about the planning or evaluation activity?

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If you're doing a planning and evaluation grant that just involves staff, you'd use the Questionnaire for library staff about planning and evaluation. This survey has three required questions. I believe the planning or evaluation addresses library needs. I am satisfied with the extent to which the plan or evaluation addresses library needs. I believe the information from the plan or evaluation will be applied to address library needs. Then you have the optional fourth question and then any you want to add.

Project Outcomes

- ❑ Measure achievements, benefits, changes for patrons/community; how attendees have been impacted or changed as result of project
  - Skills
  - Knowledge
  - Behavior or attitude
  - Status or life condition

We've been talking a lot about outputs which are mostly counting stuff and aggregating numbers. But let's talk a bit about outcomes. Project outcomes can be measured either quantitatively and qualitatively. This slide deals with qualitative measurement. You can prove your project was successful by providing qualitative measurements focused on achievements, benefits, or changes in your patrons or community that you observed as a result of your program. Qualitative measures are most often communicated in story form. So, if you heard from a patron that they landed an interview after they participated in your resume writing class, or you noticed a change in behavior and an increase in skill as a group of teens worked through a project together. Those types of stories would be a considered a qualitative outcome.

Project Outcomes

- Measured (survey-based)
  - Beyond TSLAC/IMLS survey questions
  - Pre- and post-data most effective indicator
  - Impacts NOT Satisfaction

Measured outcomes or outcomes you get through surveys or percentages are quantitative outcomes. Remember, you aren't limited to the IMLS questions on the surveys. You have to ask those, but you can also add in your own questions. So, for example, if you were doing the series of makerspace programs we talked about before and one of the outcomes you wanted for that series was that 50% or more of your audience was teens between the ages of 12 and 18, you could add a question on the survey that requested the respondent's age. Then, you could track that see if you hit your 50% goal. That would be a quantitative outcome.

Another way to get a quantitative outcome measuring an increase in knowledge after your program would be to have everyone take a pre-test on the program topic and then a post-test at the end of the program. You could do a comparison of those tests and come up with a percentage. Maybe you saw a 30% increase in knowledge based on those pre and post tests.

Outcomes aren't really concerned with measuring satisfaction. Outcomes are interested in impacts. How did this class or program or experience impact that participant. You can communicate that with the qualitative success stories or with the quantitative measurements using numbers and percentages.

Anecdotal Information

- ❑Patron stories
- ❑Collection highlights
- ❑Comments

Anecdotal Information. This section would cover patron stories or suggestions they made about how you could improve your programs or stuff they would like to see in the future. Things they liked or didn't like. Comments they wrote on their surveys. Comments you overheard during or after programs. That sort of thing. Just jot that down to include in your reports.

Best Practices

- ❑Recommended programs
- ❑Words of wisdom (what worked, what did not, what you wish you had known)
- ❑Simple to complex (procedures to equipment)
- ❑Model program to be replicated

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What you put into the best practices section of your reports is details you would communicate to someone who might be thinking about launching a program similar to the one you're doing. You'd want to include information on programs you recommend they try and any details about how to organize them. Words of wisdom on what worked and what didn't work. Stuff you wish you'd known going into the program. What you put into this section of your report can be as simple as a basic timeline for rolling out the program or something complex like working with certain vendors or where to learn about how to operate and maintain technology equipment.

Other Results

- Not already covered
  - Accomplishments
  - Impacts
  - Unexpected findings or results

There is a space in your performance report to list other results. These would be things not covered in best practices or anecdotes you want to share with us. That could include information on maybe how you built a partnership with someone in your community as a result of the program, or trends you noticed in check-outs as a result of the program that resulted in the creation of a display or additions to the existing collection, or even additional programs. Any surprising findings you learned over the course of rolling out the program would be added here as well.

Outcome-Based Evaluation

- IMLS resources
  - Outcomes Logic Model Template
    www.tsl.texas.gov/ldn/grants/forms-tools
  - Outcome-based Evaluation
    www.imls.gov/applicants/outcome_based_evaluations
    - OBE Basics
    - OBE Purposes
    - OBE Webography
    - OBE Presentations

IMLS has a whole section on outcome-based evaluation on their webpage. We also have a logic model template on the TSLAC webpage. The logic model helps you think out each step of your project in terms of short term, immediate, and long-term goals. What are your goals for the project and what are your objectives for reaching that goal? What results do you expect to have at the completion of this project?

Often, starting with identifying what success would look like for your program can help you work backward to create the goals and objectives you will need to meet to get there. Again, you will want many of your goals and objectives to be measurable in numbers and percentages. For instance, if you are rolling out a Makerspace and one of your objectives is to increase teen presence in the library with the introduction of the Makerspace, you would probably want to track your current teen patron attendance for a couple months before you roll out the program to get a baseline, then see if that number increases after you open the Makerspace.

Final Report

- ❑ Due with your last performance report
- ❑ Who benefitted from program
  - Targeted (families, immigrants/refugees, low income, unemployed, people w/disabilities, library staff, limited literacy) or general population
  - Urban, suburban, or rural
  - Age groups
  - Ethnic or minority populations
  - Other groups not listed

Let's talk about the Final Report. Not to be confused with your last performance report. Your final report and your last performance report get confused a lot. On your last performance report, there is a check box that says "final report" and you'll want to click that before you hit save and submit. BUT, there is also something called the final report that is completely separate from your last performance report. The final report is required by IMLS and has its very own button on the red task bar after you log into GMS. The IMLS final report is due on the same day as your last performance report.

The final report is structured very differently though and it shouldn't take you long to complete it. It's more like a survey. It wants to know who your grant was targeted to, what best describes the geographic area in which the program was rolled out, what age groups it served, what ethnic and minority populations it was intended for and includes a spot for other groups not listed. This is just basic broad strokes information for IMLS about your project. I'll send out due date reminders for all of your performance reports AND the final report so you'll know when they're coming up.

Contact

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That about covers it for performance measures. I'll be working on creating and sending out your individual performance measures if you haven't received those already. Once you have those, you will know what you need to track and survey and can begin gathering information for your performance reports.

If you have any questions about what we covered today, please feel free to contact me at bwilson@tsl.texas.gov or by phone at 512-463-5527. Thanks everyone!