TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION

FY 2016
Performance Reporting

Presented by
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What we'll cover

▸ Review
  ◦ Performance measures – The numbers
  ◦ The narrative

▸ Performance report submission
  ◦ Grant Management System (GMS)
  ◦ E-mail

Review – Performance Measures

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Resources

▸ Performance Reporting reference
▸ Custom performance measures
▸ Supporting documentation
▸ Grant Management System (GMS)
▸ Webinar – *Intro to Grants Management, Part 1— 2016 Performance Measures (9/10/15)*
  ◦ *https://www.tsl.texas.gov/ld/workshops/webinars/archivedannexfy2016.html*

The numbers – What we count

▸ Output measures (customized for each grantee)
  1. # materials provided
  2. # persons provided project-sponsored services
  3. # librarians trained or assisted
  4. # programs presented (**Texas Reads**)
  5. # Library cards (**Texas Reads**)

The numbers – What we count

▢ Measure 1 – Number of materials provided
  # of items added to a library collection or provided through programs funded by TSLAC grant (unique count)
  ◦ Books/e-books
  ◦ Subscription issues
  ◦ DVDs, CDs, other A/V materials
  ◦ Workshop materials
  ◦ Newsletters
  ◦ Webpages created
  ◦ Images digitized or made accessible

The numbers – What we count

- Measure 2 – 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
  - Circulation (e-books and e-readers) – separated out for Impact and Texas Reads
  - Reading Club logs
  - Hardware or software usage
  - Reference questions

The numbers – What we count

- Measure 3 – Number of librarians trained or assisted

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

  - Training – classroom instruction, webinars, online tutorials (instructional)
    - Documentation = sign-in sheets, electronic logs, registration/attendance logs, head counts

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The numbers – How we count

- Explanation of method and justification of measurement
  - *(How did you come up with the numbers reported? What? How?)*

  Examples:
  - # of classes with attendance of # at each class documented by sign-in sheets, head counts
  - Open house event with #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
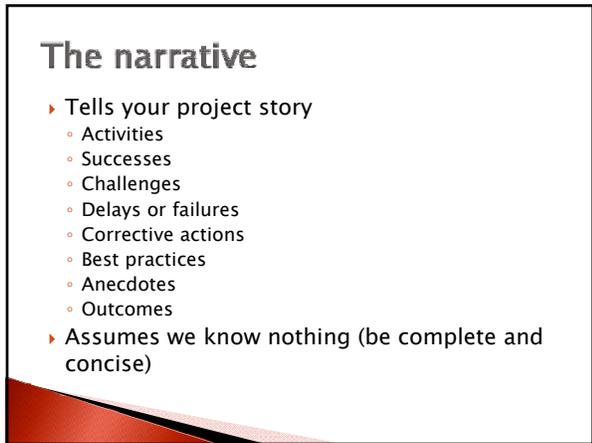
The numbers – How we count

▸ Documentation
  ◦ Must be auditable –
    · Communication logs/directories (cell phone, phone, e-mail)
    · Sign-in sheets
    · Head counts (two people counting)
    · Catalog records
    · Invoices or shipping manifest
  ◦ Must be explained
    · Method of measurement
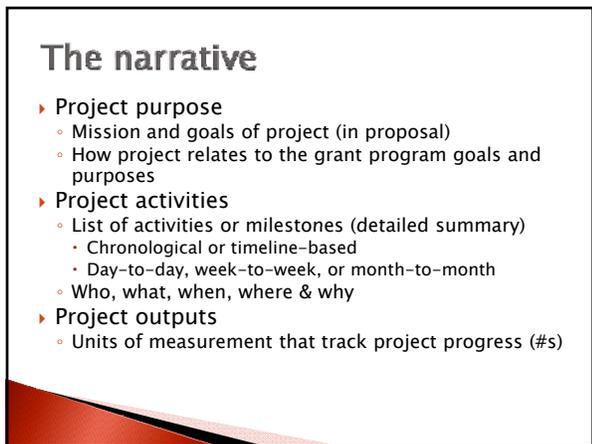   · Justification of measurement

The numbers – How we count

▸ Documentation
  ◦ Date
  ◦ Event name
  ◦ Location
  ◦ Description
  ◦ Audience
  ◦ Count
  ◦ Name, title of person responsible for count
  ◦ Sign off (initials, date)
▸ Record information
  ◦ Record data after each event in spreadsheet

Review – The narrative

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The narrative

▸ Tells your project story
  ◦ Activities
  ◦ Successes
  ◦ Challenges
  ◦ Delays or failures
  ◦ Corrective actions
  ◦ Best practices
  ◦ Anecdotes
  ◦ Outcomes
▸ Assumes we know nothing (be complete and concise)

The narrative

▸ Project purpose
  ◦ Mission and goals of project (in proposal)
  ◦ How project relates to the grant program goals and purposes
▸ Project activities
  ◦ List of activities or milestones (detailed summary)
    ▪ Chronological or timeline-based
    ▪ Day-to-day, week-to-week, or month-to-month
  ◦ Who, what, when, where & why
▸ Project outputs
  ◦ Units of measurement that track project progress (#s)

Submitting the report

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The numbers – When we report

Grant	#s
• Special Projects • Library Cooperation	4x/year (Dec, Mar, June, Sept)
•Texas Reads •Impact	2x/year (Mar and Sept)
•TexTreasures	1x/year (Sept)

*Refer to **Contract Section VII** for the deadlines for your particular grant.*

The narrative

Grant	Narratives
• Special Projects • Library Cooperation	2x/year (Mar and Sept)
•Texas Reads •Impact	1x/year (Sept)
•TexTreasures	4x/year (Dec, Mar, June, Sept)

*Refer to **Contract Section VII** for the deadlines for your particular grant.*

Submitting the report

▸ GMS (all except TexTreasures)
  ◦ Set up user accounts
  ◦ Choose correct role to "submit" reports
    · Grantee official
    · Program manager
▸ E-mail (TexTreasures)
  ◦ emccormick@tsl.texas.gov

GMS – Home page

GMS – Performance Reports

Library Cooperation & Special Projects Grants

GMS – Performance report (Coop/Special)

GMS – Performance report (Impact/Texas Reads)

Impact and Texas Reads (mid–year)

GMS – Performance report (Impact/Texas Reads)

Impact and Texas Reads (mid-year)

GMS – Performance report (Impact/Texas Reads)

Impact and Texas Reads (year-end narrative)

TexTreasures – Performance report (Q1–Q3)

Grantee Name:	Reporting Period (check appropriate period):
	_____ Q1 (9/1/15-11/30/15) _____ Q2 (12/1/15-2/29/16) _____ Q3 (3/1/16-5/31/16)
Completed by:	Date:

1. Summarize the project activities and progress this quarter. Please note if the project is on schedule.

2. Has the project encountered any challenges this quarter? If so, what actions have you taken or will you take to address them?

3. Is there additional information about the project that you would like to share with TSLAC? These might be anecdotes, links to relevant webpages or social media, unexpected discoveries in the materials, etc.

TexTreasures – Performance report (Q4/Final)

‣ *Q4 performance*
‣ *Final report*
  ◦ *Final Performance Measures*
    · *# items digitized*
    · *# items provided*
    · *# persons provided library project-sponsored services*
  ◦ *Final Project Narrative Report*

The process

‣ Grantee
  ◦ Fill in information in each section, if applicable
  ◦ Submit by due date

‣ TSLAC
  ◦ Reviews information and checks for consistency
  ◦ Approves or "sends back for review"

Contact me

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