



**TEXAS STATE LIBRARY  
AND  
ARCHIVES COMMISSION**

**FY 2017  
Performance Reporting  
In GMS**

Presented by  
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**What we'll cover**

- Housekeeping
- Review
  - Performance measures
  - The narrative
- Submitting reports
  - Grant Management System (GMS 2017)



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**Housekeeping**

- Surveys and guidance available in GMS 2017 under Public Documents
- Submit financial management info as requested
  - Names
  - Proxy letter, if applicable
- Wrong webinar was linked to the 9/7 financial management archived webinar
- Include grant number on ALL TSLAC communication



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**REVIEW – PERFORMANCE MEASURES**



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**The outputs – When we report**

Grant	Due
• Special Projects • Library Cooperation • TexTreasures	Q1 – December 7 Q2 – March 7 Q3 – June 7 Q4 – September 7
• Texas Reads • Impact	P1 – March 7 P2 - September 7



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**Resources**

- Performance Reporting reference
- Custom performance measures
- Supporting documentation
- Grant Management System (GMS 2017) access
- Webinar - *Intro to Grants Management – 2017 Performance Measures (9/22/16)*  
– <https://www.tsl.texas.gov/ld/workshops/webinars/archivedannexfy2017.html>



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### The numbers – What to count

- Output measures (customized for each grantee)
  - a) # materials provided
  - b) # persons provided project-sponsored services, # circulations attributed to program (if applicable), and # sessions presented
  - c) # librarians trained or assisted



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### The 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



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### The numbers – What to count

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



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### The numbers – What to count

- b) 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



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### The numbers – What to count

- b) Number of circulations attributed to project
  - Items purchased with grant funds
  - Items circulated to target audience
  - Examples
    - E-books
    - E-readers



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### The numbers – What to count

- c) Number of librarians trained or assisted
  - # of librarians, library staff, volunteers, 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 – Other info

- Number of sessions presented
  - Session title
  - Session length in minutes
  - Number of sessions in program
  - Average number in attendance per session
  - Number of times program/presentation administered




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### The numbers – How to count

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

Examples:

- # of classes with attendance 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




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### 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




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### The numbers – How to count

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



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### 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 using data sheet or spreadsheet



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**REVIEW – THE NARRATIVE**



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**The narrative – when to report**

Grant	Due
• Special Projects • Library Cooperation • TextTreasures	Q2 – March 7 Q4 – September 7
• Texas Reads • Impact	P2 - September 7



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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)



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**The narrative**

- Project activities
  - List of activities, events, or milestones (detailed summary)
  - Who, what, when, where & why
- Survey results (if applicable; include in final report ONLY)
- Project outcomes (beyond survey results)
  - changes in program participants' knowledge, skills, behavior, attitude, status, or life condition;
  - number and percentage of participants experiencing these changes;
  - trends/changes or how outcomes were measured if available



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**The narrative**

- Anecdotal information
  - Stories or comments received from program participants, staff, or others related to the programming.
- Best practices
  - What advice do you have for others?
  - What have you learned in this experience that would help others wanting to do the same?
- Other results
  - accomplishments, impacts, links to relevant webpages or social media, etc., not captured in outcomes or anecdotes



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## SUBMITTING THE REPORT



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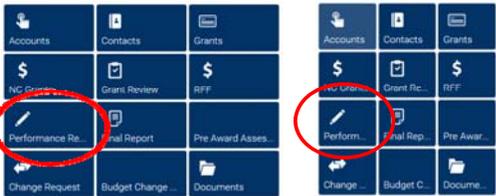
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## Reporting in GMS

From **Home Page** in GMS 2017, select "Performance Reports."



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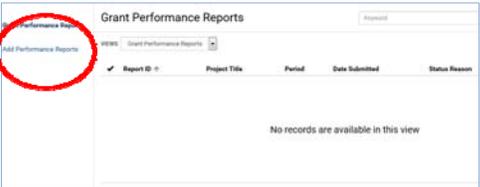
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## GMS – Performance reports



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## GMS – Performance Reports

The screenshot shows a web form titled "Add Performance Report". The "Project Title" dropdown menu is highlighted with a red circle. Other fields include "Grant Program", "Sub Recipient", and "Period". A "Save" button is at the bottom.

Select grant title from drop-down list.



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## GMS – Performance Reports

The screenshot shows a "Performance Report" form. The "Project Title" dropdown is selected with "Too many dogs, not enough cats". Other fields are auto-filled: "Grant Program" is "Library Cooperation", "Sub Recipient" is "Texas Lutheran University", and "Period" is empty.

Form auto-fills grayed out boxes.



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## GMS – Performance Reports

The screenshot shows the "Performance Report" form with the "Period" dropdown menu open, displaying options: "2017 Q1", "2017 Q2", "2017 Q3", and "2017 Q4".

Select reporting period from drop-down list and SAVE.



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## GMS – Performance Reports

**Record created successfully**

Performance report

Project Title\*  
Too many dupes, not enough cats

Report ID  
100008

Grant Number  
476-1584

Grant Program  
Library Operations

Ask Response\*  
Texas Lutheran University

Period\*  
2017 Q1

Submit Report

Date Submitted



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## GMS – Performance Reports

Grant Performance Reports

VIEW  Grant Performance Reports

Report ID	Project Title	Period	Date Submitted	Status Reason	Created On
<input type="checkbox"/> 100008	Too many dupes, not enough cats	2017 Q1		New	11/16/2016 10:57 AM



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## GMS – Performance Measures

1 Number of books and other library materials purchased with grant funds

Measure ID: #s

Justification/explanation for #s provided; how were #s calculated

2 Number of persons provided library project sponsored services

Measure ID: #s

Justification/explanation for #s provided; how were #s calculated; include relevant circulation #s and # of programs/sessions/events

3 Number of library staff trained or assisted

Measure ID: #s

Justification/explanation for #s provided; how were #s calculated



Due each reporting period.

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### GMS – Performance Measures

**1 Number of books and other library materials purchased with grant funds**

Books	25	Explanation: 8 paper purchased for 2 iPads + 10, 15 e-books purchased counts taken from invoice
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**2 Number of persons provided library project-sponsored services**

Persons Served	25	Explanation: iPads circulated 10 times, e-books circulated 15 times total counts taken from circulation system
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**3 Number of library staff trained or assisted**

Literacies Trained	8	Explanation: Library staff members trained on iPad and e-book downloads in 2 sessions, counts from sign-in sheets
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*Due each reporting period.*



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### GMS – Submitting Reports

**Performance Report**

Project Title \*  
Too many digits, not enough cats

Report ID  
100008

Grant Number  
479-17001

Grant Program  
Library Cooperation

Sub Recipient \*  
Texas Lutheran University

Period \*

Submit Report



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### GMS – Submitted Reports

Record updated successfully

**Performance Report**

Project Title:  
Too many digits, not enough cats

Grant Number:  
479-17001

Grant Program:  
Library Cooperation

Sub Recipient:  
Texas Lutheran University

Period:

Submit Report

Date Submitted:  
11/16/2016 11:48 AM

**1 Number of books and other library materials purchased with grant funds**

Books	25	Explanation: 8 paper purchased for 2 iPads + 10, 15 e-books purchased counts taken from invoice
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**2 Number of persons provided library project-sponsored services**

Persons Served	25	Explanation: iPads circulated 10 times, e-books circulated 15 times total counts taken from circulation system
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**3 Number of library staff trained or assisted**

Literacies Trained	8	Explanation: Library staff members trained on iPad and e-book downloads in 2 sessions, counts from sign-in sheets
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## GMS – Performance Reports

Report ID	Project Title	Period	Date Submitted	Status Reason	Created On
100008	Too many drops, not enough cats	2017 Q1	11/16/2016	Submitted	11/16/2016 10:57 AM

Report ID	Project Title	Period	Date Submitted	Status Reason	Created On
100008	Too many drops, not enough cats	2017 Q1	11/16/2016	Returned	11/16/2016 10:57 AM



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## GMS – Returned Reports

Project Title: Too many drops, not enough cats  
Grant Number: 47917001  
Grant Program: Library Cooperation  
Sub-Project: Texas Lutheran University  
Period: 2017 Q1  
 Submit Report  
11/16/2016 11:48 AM



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## GMS – Editing

3 Number of library staff trained or assisted  
Library Trained:  Explanation: library staff members trained on iPad and e-book downloads in 2 sessions. counts from sign-in sheets.

3 Number of library staff trained or assisted  
Library Trained: 3 Explanation: library staff members trained on iPad and e-book downloads in 2 sessions. 3 in one session, 4 in another. counts from sign-in sheets.



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## GMS – Submitting Reports

Record updated successfully

**Performance Report**

Project Title: Too many dogs, not enough cats Report ID: 100006

Grant Number: 479-17001

Grant Program: Library Cooperation

Sub Recipient: Texas Lutheran University

Period: 2017 Q1

Date Submitted: 11/16/2016 12:03 PM



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## GMS – Status

Grant Performance Reports

Report ID	Project Title	Period	Date Submitted	Status Reason	Created On
100006	Too many dogs, not enough cats	2017 Q1	11/16/2016	Submitted	11/16/2016 10:57 AM

Grant Performance Reports

Report ID	Project Title	Period	Date Submitted	Status Reason	Created On
100006	Too many dogs, not enough cats	2017 Q1	11/16/2016	Returned	11/16/2016 10:57 AM



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## GMS – Narrative Reports

**Narrative Project Report**

Question 1  
Project activities – Summarize the activities and events that have taken place during the specified grant period to meet the goals of the grant project. What have you done so far?

Answer 1  
7,500 character limit

Question 2  
Survey results (if applicable, include in your final report ONLY) – Summarize the results of surveys administered during your programming activities (i.e., surveys).



*Due for Q2/Q4 or P2 ONLY.*

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## The process

- Subrecipient
  - Fills in information as required for grant period;  
revises information as requested
  - Submit by due date
- TSLAC
  - Reviews information and checks for consistency
  - Approves or returns it for review



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## Contact me

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