


**TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION**


**FY 2018
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)




Housekeeping

- Surveys and guidance available in GMS under Public Documents
- Submit financial management contact info as requested to grants@tsl.texas.gov
 - Names, e-mail addresses, etc.
 - Proxy letter, if applicable
- Include grant number on ALL TSLAC communication




REVIEW – PERFORMANCE MEASURES



The outputs – When we report

Grant	Due
<ul style="list-style-type: none"> • Special Projects • Library Cooperation • TexTreasures 	Q1 – December 7 Q2 – March 7 Q3 – June 7 Q4 – September 7
<ul style="list-style-type: none"> • Texas Reads • Impact 	P1 – March 7 P2 – September 7



Resources

- Performance reporting guidance
- Custom performance measures
- Survey guidance
- Supporting documentation (counts, etc.)
- Grant Management System (GMS) access
- Webinar – *TSLAC Grants Management – 2018 Performance Measures (9/14/17)*
 – <https://www.tsl.texas.gov/ld/workshops/webinars/archivedannexfy2018.html>



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



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



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



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



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



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



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



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



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 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)




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






REVIEW – THE NARRATIVE




The narrative – when to report

Grant	Due
<ul style="list-style-type: none"> • Special Projects • Library Cooperation • TexTreasures 	Q2 – March 7 Q4 – September 7
<ul style="list-style-type: none"> • Texas Reads • Impact 	P2 - September 7




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 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


 **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

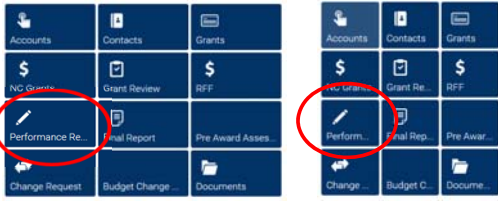



SUBMITTING THE REPORT



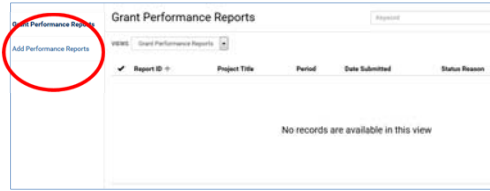
Reporting in GMS


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

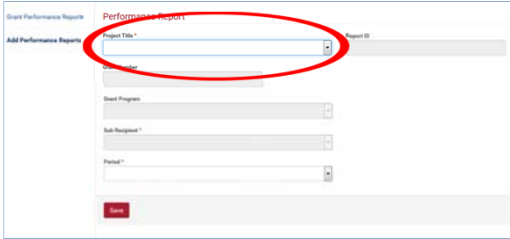




GMS – Performance reports



 **GMS – Performance Reports**




Select grant title from drop-down list.

 **GMS – Performance Reports**



Form auto-fills grayed out boxes.

 **GMS – Performance Reports**



Select reporting period from drop-down list and **SAVE**.

GMS – Performance Reports

Record created successfully

Performance report

Project Title: Too many stops, not enough calls

Report ID: 100008

Grant Number: 479-15001

Grant Program: Library Cooperation

Sub Recipient: Texas Lutheran University

Period: 2017 Q1

Submit Report

Date Submitted

GMS – Performance Reports

Grant Performance Reports

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

GMS – Performance Measures

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

Books: #s

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

2 Number of persons provided library project sponsored services

Persons Served: #s

Explanation: 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

Library Staff: #s

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

Due each reporting period.

GMS – Performance Measures

Due each reporting period.

GMS – Submitting Reports

Submit Report

Save

GMS – Submitted Reports

Record updated successfully.

Submit Report

Date Submitted: 11/16/2016 11:46 AM

GMS – Performance Reports

Report ID	Project Title	Period	Date Submitted	Status Reason	Created On
330008	Too many drops, not enough cats	2017 Q1	11/14/2016	Submitted	11/16/2016 10:57 AM

GMS – Returned Reports

Project Title: Too many drops, not enough cats | Report ID: 330008

Grant Number: 479-1-7003

Grant Program: Library Cooperation

Sub Program: Texas Lutheran University

Period: 2017 Q1

Submit Report

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

GMS – Editing

3 Number of library staff trained or assisted


Members Trained: 1 X

Explanation: library staff members trained on iPad and e-book downloads in 2 sessions. counts from signs or sheets

3 Number of library staff trained or assisted

Members 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 signs or sheets




GMS – Submitting Reports

Record updated successfully.

Performance Report

Project Title: Too many dogs, not enough cats	Report ID: 100008
Grant Number: 479-17001	
Grant Program: Library Cooperation	
Sub Recipient: Texas Lutheran University	
Period: 2017 Q1	
Submit Report	
Date Submitted: 11/16/2016 12:03 PM	



GMS – Status

Grant Performance Reports

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



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?

Notes 1

7,500 character limit


Question 2
Summary results (if applicable, include in your final report ONLY) - Summarize the results of savings administered during your programming activities (i.e., website).

Due for Q2/Q4 or P2 ONLY.





GMS input process

1. Add new record.
2. Save.
3. Input information.
4. Save.
5. Check "submit" box.
6. Save.



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





Contact me

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