FY 2019 COMPETITIVE GRANTS

Q & A

Presented by
Erica A. McCormick, TSLAC Grants Administrator

October 17, 2018
WHAT WE’LL COVER

- Action items
- Contracts
- Calendar
- Publicity
- Performance measures
- Financial reporting
- Grant Management System (GMS)
ACTION ITEMS

- Check status of contracts
- Make note of SAM registration expiration date; notify TSLAC of any updates
- Review webinars as needed
- Review grant contacts and related roles/functions in GMS
  - Email Grants Administrator with revisions
CONTRACT

- Sections I-V — Who, when, what, how much
- Sections VI-VIII — Equipment, reporting, other requirements
- Sections IX-XIII — Housekeeping, governing statutes, signatures
**CONTRACT PROCESS**

**Subrecipient**
1. Print a copy for authorized person to sign.
2. Upload signed copy into grant file in GMS.
3. Notify TSLAC of upload.

**TSLAC**
1. Director and librarian will sign (fully executed).
2. Upload the copy to grant file in GMS.
3. Notify subrecipient when final copy is loaded.
WHAT DO YOU DO NEXT?

- Contracts e-mailed August 17.
- Process the contract.
- Await the fully executed copy.
- Mark ALL contract dates on your calendar(s).
- Forward contract as necessary to business office.*
- Store the final copy in your grant file.*
CALENDAR
FUNDING PERIOD

Grant period

- State Fiscal Year 2019 (SFY 2019)
- Activities: September 1, 2018-August 31, 2019
- Spending: September 1, 2018-July 31, 2019
- Funds must be expended or encumbered within the grant period; not before, not after
**TIMELINE**

- **August 2018**: Contracts issued
- **September 1, 2018**: Projects begin
- **October 1, 2018**: Contracts due
- **December 7, 2018**: Q1 reports due
- **March 7, 2019**: Q2/P1 reports due
- **June 7, 2019**: Q3 reports due
- ***July 31, 2019***: Spending ends
- ***August 1, 2019***: Final RFF due
- **August 31, 2019**: Activities end
- **September 7, 2019**: Q4/P2 reports due
- ***September 30, 2019***: Final documents due
- **December 31, 2026**: Retention period ends
TRAINING

❖ Mandatory

❖ Webinars
  ▪ Contract Overview (8/15/18)
  ▪ Grant Communications (8/22/18)
  ▪ Financial Management and Reporting (8/29/18)
  ▪ Performance Measures (9/5/18)
  ▪ Performance Reporting
    Wednesday, November 14, 2018, 10:30-11:30 a.m.

❖ Recorded and archived on TSLAC website
  www.tsl.texas.gov/ld/workshops/webinars/archived.html
PUBLICITY
PUBLICITY

- Announcing the grant/program
  - Press releases, social media, web sites, media events

- Audience
  - Partners, legislators, patrons (target audience)

- Collateral
  - Web sites, metadata, reports, publications, finding aids, etc.
  - Promotional items (signage, brochures, textiles, etc.)

- Logo usage (TSLAC and IMLS)
Training webinar

- *Grant Communications (8/22/18)*
  - [www.tsl.texas.gov/ld/workshops/webinars/archived.html](http://www.tsl.texas.gov/ld/workshops/webinars/archived.html)
- TSLAC archived webinars
- *Writing Good Press Releases and Working with the Media*
- *The Accidental Library Marketer*
ACKNOWLEDGMENT

Acknowledge IMLS and/or TSLAC in **all** grant-related publicity/communication

- This project is made possible by a grant from the **Institute of Museum and Library Services** to the Texas State Library and Archives Commission under the provisions of the Library Services and Technology Act. (2019)
- Funded by the U.S. Institute of Museum and Library Services through a grant to the Texas State Library and Archives Commission. (2019)
- This project is made possible by a grant from the U.S. Institute of Museum and Library Services. (2019)
PERFORMANCE REPORTING
PERFORMANCE MEASURES

Numbers and narratives

- Tell what you did during the reporting period
- Measurements customized for specific grant and provided by TSLAC
- Training webinar (archived) – 9/5/18
PERFORMANCE REPORTING

Numbers and narratives

- Tell what you did during the reporting period
- Measurements provided by TSLAC
- Due on 7th of each reporting month in GMS

<table>
<thead>
<tr>
<th>Grant</th>
<th>#s</th>
<th>Narratives</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Special Projects</td>
<td>4x/year (Dec, Mar, June, Sept)</td>
<td>2x/year (Mar and Sept)</td>
</tr>
<tr>
<td>• Library Cooperation</td>
<td></td>
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<tr>
<td>• TexTreasures</td>
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<tr>
<td>• Texas Reads</td>
<td>2x/year (Mar and Sept)</td>
<td>1x/year (Sept)</td>
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<tr>
<td>• Impact</td>
<td></td>
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</tbody>
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Training webinar – November 14, 2018, 10:30-11:30 a.m.
## PERFORMANCE REPORTS

<table>
<thead>
<tr>
<th>Grant</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Special Projects</td>
<td>Q1 – December 7</td>
</tr>
<tr>
<td>• Library Cooperation</td>
<td>Q2 – March 7 (narrative due)</td>
</tr>
<tr>
<td>• TexTreasures</td>
<td>Q3 – June 7</td>
</tr>
<tr>
<td></td>
<td>Q4 – September 7 (narrative due)</td>
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<td>• Impact</td>
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</table>
ACTION ITEM

 Bookmark TSLAC Grant Forms & Tools page
 https://www.tsl.texas.gov/agency/forms/grantforms

 • Grant Performance Surveys
 • Common Forms and Tools
FINANCIAL REPORTING
RFF IMPORTANT DATES

- RFFs can only be submitted once every 30 days.
- RFFs are due by end of month following payment period
  - Grants up to $10,000 report quarterly
    - December (September-November)
    - March (December-February)
    - June (March-May)
    - September (June-August)
  - Grants greater than $10,000 report monthly
FINANCIAL REPORTING

- Request for funds (RFF)
  - Submitted every 30 days or at least quarterly

- Financial status
  - Spend-down plans released in May 2019

- Training webinar – 8/29/18
RFF IMPORTANT DATES

- **May 15, 2019** – last date to submit spending plan
- **June 1, 2019** – last date to request an advance
- **June 15, 2019** – last date to request a revision
- **July 31, 2019** – last date to obligate or encumber funds
- **August 1, 2019** – last date to request a reimbursement (final RFF)
- **September 15, 2019** – last date to liquidate or pay all obligations and encumbrances (advances)
Gather all supporting documentation

- paid invoices
- receipts
- time sheets
- payroll registers
- general ledgers

*Note: If only part of the invoice or receipt is being reimbursed, circle/mark the items and amounts to be reimbursed.*
GMS

- TSLAC Grants Management System (GMS) (https://grants.tsl.texas.gov)
  - Grant applications
  - Performance reports
  - Requests for funds (RFFs)
  - Change requests (budget and program)
  - FINAL report
ADMINISTRATION — ROLES

- Grant functions in GMS
  - Create/update/NO submit application
  - Create/update/submit application
  - Create/update reports
  - Create/update/NO submit RFF
  - Create/update/submit RFF (requires proxy)
  - Read only RFFs
  - Read only ALL
Program issues, allowable costs, budget/program revisions, performance reports

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Requests for funds and payment information

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Grants Accountant
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