



**TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION**

**FY 2019
Performance Reporting
In GMS**

Presented by
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Grants Administrator

November 14, 2018

WHAT WE'LL COVER

- Housekeeping
- Review
 - Performance measures
 - Documentation
 - The narrative
- Submitting reports in GMS

HOUSEKEEPING

- ❖ Review training webinars as needed
TSLAC (www.tsl.texas.gov) | Services for Libraries | Professional Development | Archived Webinars
 - Next Steps (8/3/18)
 - **Contract Overview (8/15/18)**
 - **Communications (8/22/18)**
 - **Financial Management and Reporting (8/29/18)**
 - **Performance Measures (9/5/18)**
 - Grants Q&A (10/17/18)
 - **Performance Reporting (10/14/18)**

MANDATORY

HOUSEKEEPING

- ❖ Submit grant contact changes to grants@tsl.texas.gov
 - Financial management contact (proxy)
 - Secondary program contact
- ❖ Include grant number on ALL TSLAC communication

PERFORMANCE MEASURES | REVIEW

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 (released 11/6/18)
- Custom performance measures
- Survey guidance
- Supporting documentation (counts, etc.)
- Grant Management System (GMS) access
- Webinar – *TSLAC Grants Management — 2019 Performance Measures (9/5/18)*
www.tsl.texas.gov/ld/workshops/webinars/archivedannexfy2019.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
- Web pages created
- Images/pages digitized and/or made accessible

THE NUMBERS – WHAT TO COUNT

b) Number of persons provided project-sponsored services

of people receiving 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
 - Books, e-books
 - E-readers
 - Kits

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 facilitate the program (non-unique count)

- ☐ Training – classroom instruction, webinars, online tutorials (instructional)

Documentation = sign-in sheets, electronic logs, registration/attendance logs, head counts

DOCUMENTATION

- ☐ Explanation of method and justification of measurement

How did you come up with the numbers reported? What?

- ☐ # 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

DOCUMENTATION

- ❖ Date
- ❖ Event name
- ❖ Location
- ❖ Description
- ❖ Audience (count)
- ❖ Name, title of person responsible for count
- ❖ Sign off (initials, date)

DOCUMENTATION

- 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

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 NARRATIVE | REVIEW

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

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

THE NARRATIVE

- Project activities
 - List of activities, events, or milestones (detailed summary)
 - Meetings, workshops, classes
 - Purchasing
 - Events
 - Who, what, when, where & why
 - Attendance

THE NARRATIVE

- Survey results
 - MANDATORY
 - Include in last performance report (P2/Q4) 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

SURVEYS (MANDATORY)

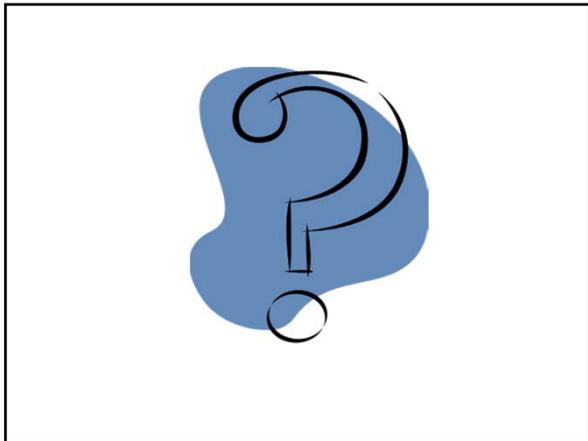
- ❖ Available at TSLAC website
www.tsl.texas.gov/agency/forms/grantforms
- ❖ Based on program/activity type
 - Instructional (public or staff)
 - Planning and evaluation (staff)
 - Content (staff)

SURVEYS (MANDATORY)

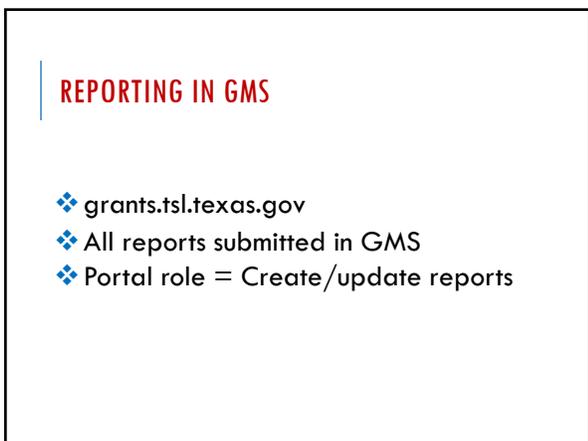
- ❖ Surveys (MANDATORY)
www.tsl.texas.gov/agency/forms/grantforms
 - Survey — Library Acquisitions and Content
 - Survey — Library Planning and Evaluation
 - Survey — Instructional Program for Library Staff
 - Survey — Instructional Program for Public
- ❖ Survey Tools
 - Survey Guidance
 - Survey Tool – Planning and Evaluation
 - Survey Tool – Instructional Program Info

SURVEY RESULTS (MANDATORY)

- ❖ Collect throughout program activities
 - At conclusion of program/event, series or set of services, project
- ❖ Report in last report **ONLY (P2/Q2)**
- ❖ Give total number of survey responses by program
- ❖ Calculate and report number and percentage of responses (agree/disagree, etc.) for each question
- ❖ Include any noteworthy comments or anecdotes







REPORTING IN GMS

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



GMS – PERFORMANCE REPORTS

Texas State Library and Archives Commission
Accounts ▾ Contacts ▾ Grants ▾ NC Grants ▾ RFF ▾ Performance Reports ▾



GMS – PERFORMANCE REPORTS

Select grant title from drop-down list.

The image shows the 'Performance Report' form. The 'Project Title' dropdown menu is circled in red. Other fields include: Grant Number, Grant Program, Sub Recipient, Performance Report Contact, and Period. A 'Save' button is at the bottom left.

GMS – PERFORMANCE REPORTS

Select report **contact** and reporting **period** from drop-down lists, and **Save**.

The screenshot shows a 'Performance Report' form with several fields. The 'Performance Report Contact' and 'Period' fields are circled in red. The 'Save' button is visible at the bottom left.

GMS – PERFORMANCE REPORTS

The screenshot shows a 'Performance Report' form with a green success message at the top: 'Record created successfully'. The form fields are grayed out, indicating they are auto-filled.

Form auto-fills grayed out boxes.

GMS – PERFORMANCE REPORTS

Grant Performance Reports

VIEW: All Grant Performance Reports

Report ID	Project Title	Period	Submit Date	Status Reason	Created On
1000113	476-18757 - Airt! no shipping us now	2018 Q1	1/5/2018	Submitted	1/5/2018 9:11 AM
1000125	476-18757 - Airt! no shipping us now	2018 Q1		New	1/26/2018 12:36 PM
1000460	476-18757 - Airt! no shipping us now	2018 Q4		New	6/27/2018 2:04 PM
1000464	749-18007 - Summer loves the sun	2018 Q3		New	8/31/2018 4:14 PM
1000518	749-18007 - Summer loves the sun	2018 Q1		New	10/8/2018 10:56 AM
1000546	749-18007 - summer loves to fly by heading!	2018 P1		New	11/13/2018 11:23 AM

GMS – SUBMITTED REPORTS

Record updated successfully

Performance Report

Project Title: TXR-19007 - sammie learns to fly by reading

Grant Number: TXR-19007

Grant Program: Texas Reads 2019

Sub Recipient: Texas State Library & Archives Commission

Performance Report Contact: Cassandra Carolan

Period: 2019 P1

Submit Report

Submit Date: 11/13/2018 11:49 AM

Report #: 100548

Final Performance Report

GMS – REPORT STATUS

Report ID	Project Title	Period	Submit Date	Status Reason	Created On
100213	479-18TST - AHT no stopping us now	2018 Q1	1/5/2018	Submitted	1/5/2018 9:11 AM
100215	479-18TST - AHT no stopping us now	2018 Q1		New	1/24/2018 12:36 PM
100860	479-18TST - AHT no stopping us now	2018 Q4		New	6/27/2018 2:04 PM
100464	TXR-19007 - Sammie loves the sun	2018 Q2		New	8/31/2018 4:14 PM
100556	TXR-19007 - Sammie loves the sun	2019 Q1		New	10/8/2018 10:55 AM
100548	TXR-19007 - sammie learns to fly by reading	2019 P1	11/13/2018	Submitted	11/13/2018 11:23 AM
100548	TXR-19007 - sammie learns to fly by reading	2019 P1	11/13/2018	Returned	11/13/2018 11:23 AM

GMS – REPORT STATUS

Grant Performance Reports

SEARCH

VIEW: All Grant Performance Reports

EXPORT

Report ID	Project Title	Period	Submit Date	Status Reason	Created On
100213	479-18TST - AHT no stopping us now	2018 Q1	1/5/2018	Submitted	1/5/2018 9:11 AM
100215	479-18TST - AHT no stopping us now	2018 Q1		New	1/24/2018 12:36 PM
100860	479-18TST - AHT no stopping us now	2018 Q4		New	6/27/2018 2:04 PM
100464	TXR-19007 - Sammie loves the sun	2018 Q2		New	8/31/2018 4:14 PM
100556	TXR-19007 - Sammie loves the sun	2019 Q1		New	10/8/2018 10:55 AM
100548	TXR-19007 - sammie learns to fly by reading	2019 P1		New	11/13/2018 11:23 AM

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
- Submits by due date

TSLAC

- Reviews information and checks for consistency
- Approves or returns it for revision

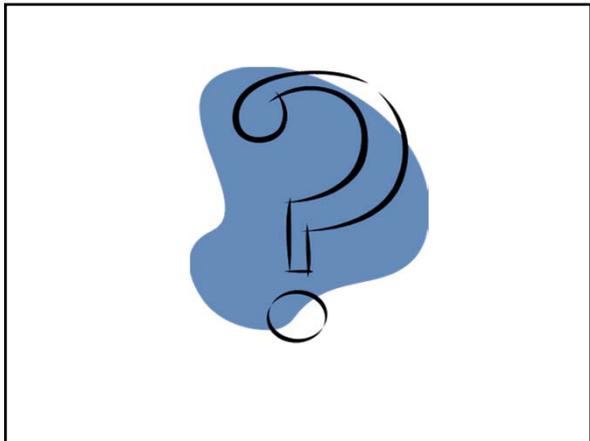
PET PEEVES (DO'S & DON'T'S)

Do's

- ❖ READ the instructions first.
- ❖ READ your guidance before you submit the report.
- ❖ Start EARLY.
- ❖ Ask questions when in doubt.
- ❖ Proof your report before submitting.
- ❖ Answer questions as fully and completely as possible.

Don't's

- ❖ Do not think you know it all.
- ❖ Do not submit a report without having read the guidance.
- ❖ Do not wait until the last minute.
- ❖ Do not go with your best guess.
- ❖ Do not submit without reading the report.
- ❖ Do not think the questions do not pertain to you.



CONTACT ME

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