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

<table>
<thead>
<tr>
<th>Grant</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Special Projects</td>
<td></td>
</tr>
<tr>
<td>• Library Cooperation</td>
<td></td>
</tr>
<tr>
<td>• TexTreasures</td>
<td>Q1 = December 7</td>
</tr>
<tr>
<td></td>
<td>Q2 = March 7</td>
</tr>
<tr>
<td></td>
<td>Q3 = June 7</td>
</tr>
<tr>
<td></td>
<td>Q4 = September 7</td>
</tr>
<tr>
<td>• Texas Reads</td>
<td></td>
</tr>
<tr>
<td>• Impact</td>
<td>P1 = March 7</td>
</tr>
<tr>
<td></td>
<td>P2 = September 7</td>
</tr>
</tbody>
</table>
RESOURCES

- Performance reporting guidance (released 11/6/18)
- Custom performance measures
- Survey guidance
- Supporting documentation (counts, etc.)
- Grant Management System (GMS) access

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 # of 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 — WHEN TO REPORT

<table>
<thead>
<tr>
<th>Grant</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Special Projects</td>
<td>Q2 – March 7</td>
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<tr>
<td>Library Cooperation</td>
<td>Q4 – September 7</td>
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<tr>
<td>Impact</td>
<td></td>
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</tbody>
</table>

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

- 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

- 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
SUBMITTING THE REPORT

REPORTING IN GMS

- grants.tsl.texas.gov
- All reports submitted in GMS
- Portal role = Create/update reports
REPORTING IN GMS

From Home Page in GMS, select “Performance Reports.”

GMS — PERFORMANCE REPORTS

Select grant title from drop-down list.
GMS – PERFORMANCE REPORTS

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

Form auto-fills grayed out boxes.
GMS – PERFORMANCE MEASURES

Due each reporting period.

GMS – PERFORMANCE MEASURES

Due each reporting period.

GMS – SUBMITTING REPORTS

Due each reporting period.
GMS – EDITING

- Number of library staff trained or assisted:
  - [ ] Name
  - [ ] Department
  - [ ] How many trainings took place and what were the training objectives?
  - [ ] Additional comments

- Number of library staff trained or assisted:
  - [ ] Name
  - [ ] Department
  - [ ] How many trainings took place and what were the training objectives?
  - [ ] Additional comments

GMS – SUBMITTING RETURNED REPORTS

Performance Report

- [ ] Title: GMS
- [ ] Type: Narrative
- [ ] Date: 11/14/2018

Report:

- [ ] Status: Completed
- [ ] Date: 11/14/2018
- [ ] Due: Not due

GMS – NARRATIVE REPORTS

Narrative Project Report

- [ ] Name: [ ] Department
- [ ] Description:
- [ ] Project goals:
- [ ] Project outcomes:
- [ ] Impact of project:
- [ ] Additional comments:

Due for Q3/Q4 or P3 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
- 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'ts
- 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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