2019 Intro to Grants Management
Performance Measures & Reporting

Presented by
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WHAT WE WILL COVER

- Overview
- The outputs
  - Activities
  - Numbers
- The narrative
- Beneficiary report
WHY WE REPORT

- Monitor program progress
- Report program progress
  - Federal – Institute of Museum and Library Services (IMLS)
  - State – Legislature and Legislative Budget Board (LBB)
  - Local – Governing entities, community, patrons
WHAT WE REPORT

❖ Grant-related activities during the reporting period
  ❖ Events
  ❖ programs
  ❖ meetings, etc.
❖ Numbers (outputs)*
❖ Narratives (outcomes +)*

*Measurements and tools provided by TSLAC.
## WHEN WE REPORT

<table>
<thead>
<tr>
<th>Grant Program</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</td>
</tr>
<tr>
<td>• TexTreasures</td>
<td>Q3 – June 7</td>
</tr>
<tr>
<td></td>
<td>Q4 – September 7</td>
</tr>
<tr>
<td>• Texas Reads</td>
<td>P1 – March 7</td>
</tr>
<tr>
<td>• Impact</td>
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REPORTING RESOURCES

- GMS (grants.tsl.texas.gov)
- Performance reporting guidance (reference and grant specific)
- Surveys
- Attendance records
- Calendars
- Publicity/promotions
THE OUTPUTS

Activities
Numbers
ACTIVITIES

- Patron events and services (planning, implementation, results)
- Project meetings/planning sessions
- Staff training
- Acquisitions
- Successes (info purposes only)
- Challenges and delays (info purposes only)
- Corrective actions (info purposes only)
NUMBERS — WHEN TO COUNT

At each
- Event
- Program
- Milestone
- Activity
NUMBERS — WHAT TO COUNT

Output measures (customized for each subrecipient)

a) # materials provided
b) # sessions presented
c) # persons provided project-sponsored services
d) # librarians trained or assisted
e) # circulations attributed to program
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
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)

- Books/e-books
- Subscription issues
- DVDs, CDs, other A/V materials
- Kits or devices if circulating (not its components)
- Webpages created
- Images digitized or made accessible
Numbers — What to Count

b) 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
NUMBERS — WHAT TO COUNT

c) 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
- Circulations*
NUMBERS — WHAT TO COUNT

c) Number of circulations attributed to project

- Items purchased with grant funds
- Items circulated to target audience

Examples

- Books, e-books
- E-readers, circulating tablets
d) 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 (instructional) — classroom instruction, webinars, online tutorials, articles, conferences, e-mails (i.e., instructor-led, self-paced, recorded, etc.)

  Documentation = sign-in sheets, electronic logs, registration receipts, attendance logs/certificates, head counts
NUMBERS — HOW TO COUNT

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

❖ Tells your project story
  ▪ Successes and challenges
  ▪ Delays or failures
  ▪ Best practices
  ▪ Anecdotes
  ▪ Outcomes

❖ Assumes TSLAC knows nothing (be complete and concise)
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NARRATIVE QUESTIONS

- Activities
- Survey results
- Project outcomes
- Anecdotes
- Best practices
- Other results (i.e., accomplishments, impacts) not captured in anecdotes/outcomes
Summarize what has taken place during the specified grant period (i.e., What have you done this period?)

- Who
- What
- Where
- When
- For whom
- Why
SURVEYS

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

- Available at TSLAC website
  - www.tsl.texas.gov/agency/forms/grantforms
    - Survey Guidance (handout)
    - Survey — Library Acquisitions and Content
    - Survey Tool – Planning and Evaluation
    - Survey — Library Planning and Evaluation
    - Survey Tool – Instructional Program Info
    - Survey — Instructional Program for Library Staff
    - Survey — Instructional Program for Public
SURVEY RESULTS

- Collect throughout program activities
  - At conclusion of program/event, series or set of services, project

- Report in last report ONLY

- Give total number of survey responses by program

- Calculate and report number and percentage of responses (agree/disagree, etc.) for each question
SURVEY SCALE

- Strongly Agree
- Agree
- Neither Disagree or Agree
- Disagree
- Strongly Disagree
SURVEY QUESTIONS

Survey — Instructional Program for Public

1. I learned something by participating in this library activity.
2. I feel more confident about using what I just learned.
3. I intend to apply what I just learned.
4. I am more aware of resources and services provided by the library.
5. I am more likely to use other library resources and services.
6. (OPTIONAL) What did you like most about this library program?
7. (OPTIONAL) What could the library do to better assist you in learning more?
Survey — Instructional Program for Library Staff

1. I learned something by participating in this library activity.
2. I feel more confident about using what I just learned.
3. I intend to apply what I just learned.
4. Applying what I learned will help improve library services to the public.
5. (OPTIONAL) What did you like most about this library program?
6. (OPTIONAL) Would you like to provide any other comments or suggestions about the program?
Survey — Questionnaire for Library Staff about Content (acquisition and creation activities only)

1. I am satisfied that the resource is meeting library needs.
2. Applying the resource will help improve library services to the public.
3. (OPTIONAL) Would you like to provide any other comments or suggestions about the program?
Survey Questions

Survey — Questionnaire for Library Staff about Planning and Evaluation

1. I believe the planning or evaluation addresses library needs.
2. I am satisfied with the extent to which the plan or evaluation addresses library needs.
3. I believe the informational from the plan or evaluation will be applied to address library needs.
4. (OPTIONAL) Would you like to provide any other comments or suggestions about the planning or evaluation activity?
PROJECT OUTCOMES

Measure achievements, benefits, changes for patrons/community; how attendees have been impacted or changed as result of project

- Skills
- Knowledge
- Behavior or attitude
- Status or life condition
PROJECT OUTCOMES

Measured (survey-based)

- Beyond TSLAC/IMLS survey questions
- Pre- and post-data most effective indicator
- NOT satisfaction
ANECDOTAL INFORMATION

- Patron stories
- Collection highlights
- Comments
BEST PRACTICES

- Recommended programs
- Words of wisdom (what worked, what did not, what you wish you had known)
- Simple to complex (procedures to equipment)
- Model program to be replicated
OTHER RESULTS

Not already covered

- Accomplishments
- Impacts
- Unexpected findings or results
OUTCOME-BASED EVALUATION

IMLS resources

▪ Outcomes Logic Model Template
  ▪ www.tsl.texas.gov/agency/forms/grantforms.html
▪ Outcome-based Evaluation
  ▪ www.imls.gov/applicants/outcome_based_evaluations
▪ OBE Basics
  ▪ www.imls.gov/applicants/outcome_based_evaluations/basics
▪ OBE Purposes
  ▪ www.imls.gov/applicants/outcome_based_evaluations/purposes
▪ OBE Webography
  ▪ www.imls.gov/applicants/outcome_based_evaluations/webography
▪ OBE Presentations
  ▪ www.imls.gov/applicants/outcome_based_evaluations/presentations
FINAL REPORT

- Due 9/7
- Who benefitted from program
  - Targeted (families, immigrants/refugees, low income, unemployed, people w/disabilities, library staff, limited literacy) or general population
  - Urban, suburban, or rural
  - Age groups
  - Ethnic or minority populations
  - Other groups not listed
SUBMITTING REPORTS

- In GMS (https://grants.tsl.texas.gov)
- Upcoming webinar
  Grant Performance Reporting in GMS
  Wednesday, November 14, 2018, 1:30-2:30 p.m.
CONTACT ME

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