

TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION

TSLAC Grant Management Series: Performance Reporting

November 18, 2020

Presented By
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What we'll cover

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

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Housekeeping

- Review training webinars as needed
TSLAC (www.tsl.texas.gov) | Services for Libraries | Professional Development | Archived Webinars
 - Next Steps (8/5/20)
 - Communications (8/12/20)
 - Contract Overview (8/17/20)
 - Financial Management and Reporting (9/2/20)
 - Performance Measures (9/9/20)
 - Grants Q&A (10/14/20)
 - Performance Reporting (11/18/20)

MANDATORY by December 1, 2020

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Housekeeping

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

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Performance Measures Review

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The outputs - When we report

Grant	Due
<ul style="list-style-type: none">• Special Projects• Library Cooperation• TexTreasures• ILS Cooperative• LTA	Q1 - December 7 Q2 - March 7 Q3 - June 7 Q4 - September 7
<ul style="list-style-type: none">• Texas Reads	P1 - March 7 P2 - September 7
<ul style="list-style-type: none">• CARES 1	P1 - December 7 P2 - March 7 P3 - September 7

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Resources

- Performance reporting guidance and custom performance measures (released 11/16/20)
- Survey guidance
- Supporting documentation (counts, etc.)
- Grant Management System (GMS) access
- Webinar - *TSLAC Grant Management Series: Performance Measures (9/9/20)*
<https://www.tsl.texas.gov/ld/workshops/webinars/archivedannexfy2021.html>

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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

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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

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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
- Kits
- Newsletters
- Web pages created
- Images/pages digitized and/or made accessible

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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

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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

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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

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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

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Documentation

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

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Documentation

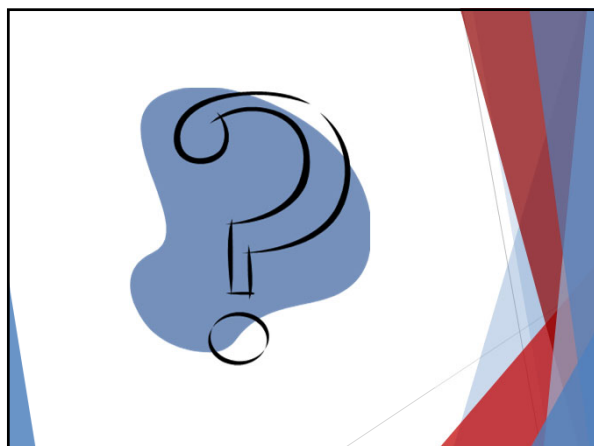
- Number of sessions presented
 - Session title
 - Session length in minutes
 - Number of sessions in program
 - Number in attendance per session
 - Number of times program/presentation administered

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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

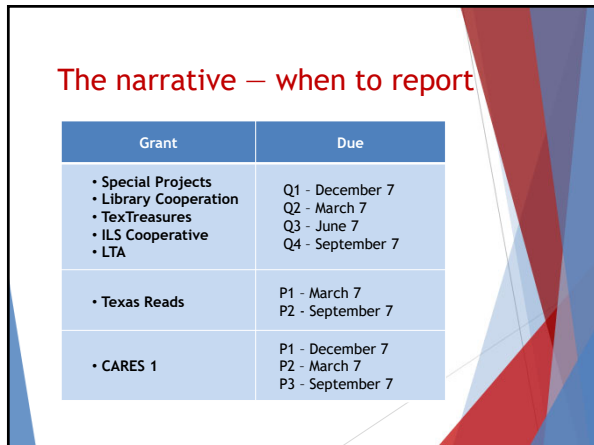
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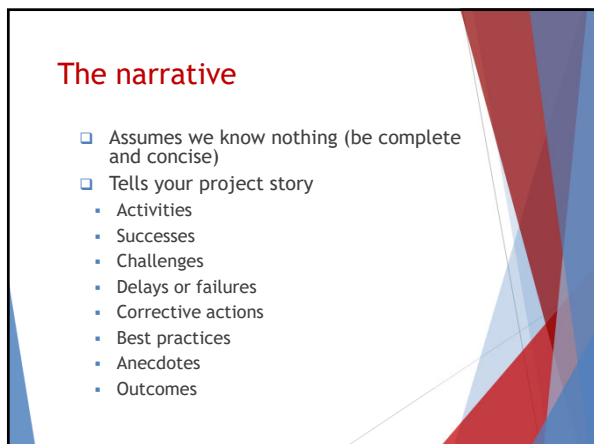
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The narrative

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

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Activity/event tracking

- TSLAC Grant Survey Tool – Instructional Program Information
- Complete page 1 for each activity

Please provide the following information about this instructional program.

Class/Session Title _____
 Program/Series Title* _____
 Date offered _____

1. Session Length in Minutes	
2. Number of Sessions or Classes in Program/Series	
3. Average Number in Attendance per Session (total/W classes)	
4. Number of Times Program/Series Administered in grant year	
5. Survey administered (Y/N; if yes, complete the tally sheet)	

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The narrative

- Survey results
 - MANDATORY
 - Include in final performance report ONLY (due 9/7)
- 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

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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

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Surveys (mandatory)

- Available at TSLAC website
www.tsl.texas.gov/ldn/grants/forms-tools
- Based on program/activity type
 - Instructional (public or staff)
 - Planning and evaluation (staff)
 - Content (staff)
- Type specified in individual guidance

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Surveys (mandatory)

- Surveys (MANDATORY)
www.tsl.texas.gov/ldn/grants/forms-tools
 - 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

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Survey Results (public/staff)

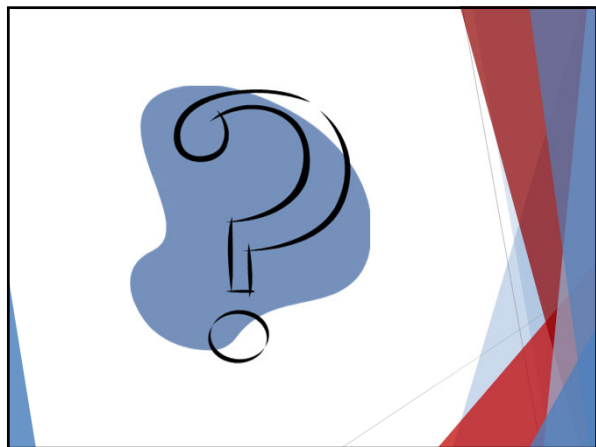
1. Administer survey at conclusion of each program/event, series or set of services, grant project
2. Tally responses for each question after each event using the "Survey Response Tally Sheet" in the relevant Survey Tool

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Survey Results Reporting

- Report in final performance report **ONLY (due 9/7)**
- Give total number of survey responses by type of program
- Calculate and report number and percentage of responses (agree/disagree, etc.) for each question from all surveys
- Include any noteworthy comments or anecdotes

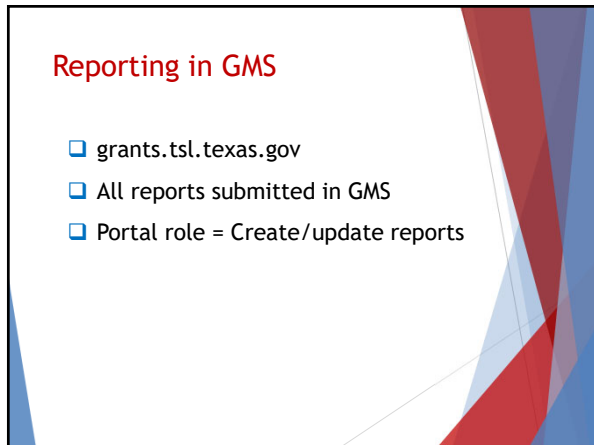
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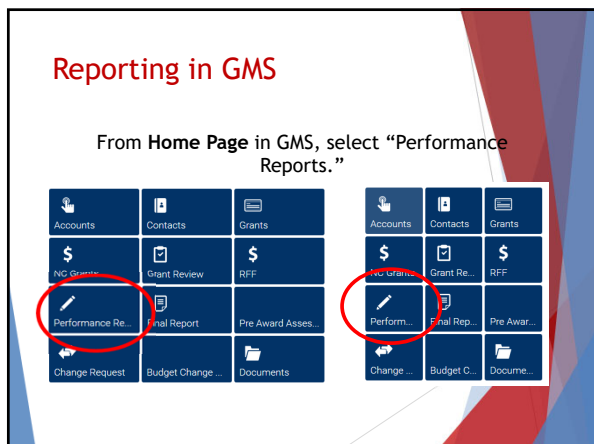
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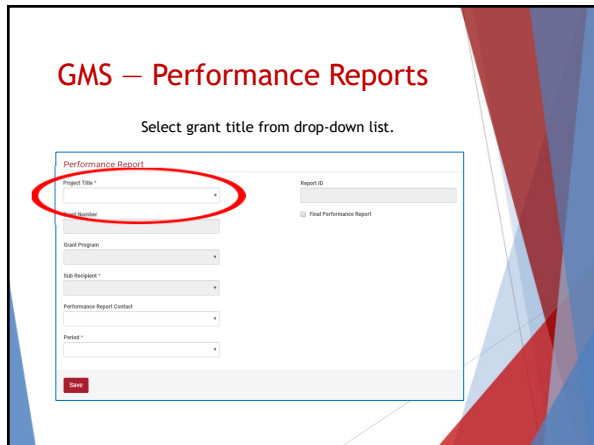
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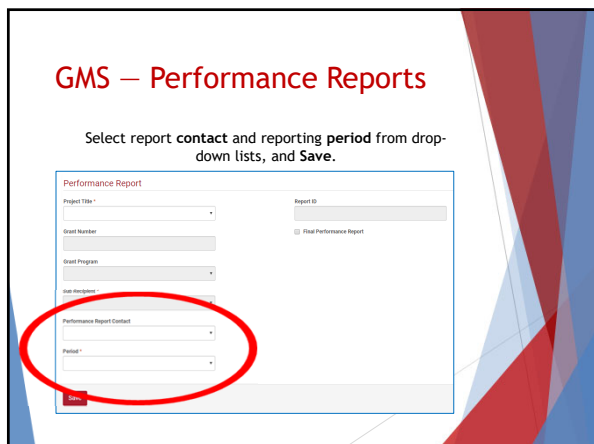
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GMS – Performance Reports

Record created successfully

Performance Report

Project Title: TXR-18007 - sammie learns to fly by reading

Grant Number: TXR-18007

Grant Program: Texas Reads 2019

Sub Recipient: Texas State Library & Archives Commission

Performance Report Contact: Cassandra Candiani

Period: 2019 P1

Submit Report

Submit Date

Report ID: 100548

Final Performance Report

Form auto-fills grayed out boxes.

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GMS – Performance Measures

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

Materials: #s

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

2 Number of persons provided library project-sponsored services

Persons: #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

Libraries: #s

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

Due each reporting period.

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GMS – Performance Reports

Grant Performance Reports

Views: All Grant Performance Reports

Report ID	Project Title	Period	Submit Date	Status Reason	Created On
100213	478-18TST - Aint no stopping us now	2018 Q1	1/5/2018	Submitted	1/5/2018 9:11 AM
100225	478-18TST - Aint no stopping us now	2018 Q1		New	1/26/2018 12:36 PM
100460	478-18TST - Aint no stopping us now	2018 Q4		New	6/27/2018 2:04 PM
100484	TXR-18007 - Sammie loves the sun	2018 Q2		New	8/31/2018 4:14 PM
100558	TXR-18007 - Sammie loves the sun	2019 Q1		New	10/8/2018 10:55 AM
100548	TXR-18007 - sammie learns to fly by reading	2019 P1		New	11/13/2018 11:23 AM

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GMS – Performance Measures

1 Number of books and other library materials purchased with grant funds	
Answer: <input type="text" value="25"/>	Explanation: 5 Apps purchased for 2 (Pops) - 10 15-e books purchased counts taken from invoices
2 Number of persons provided library project-sponsored services	
Answer: <input type="text" value="25"/>	Explanation: Pops included 10 times, ebooks included 15 times total counts taken from circulation system
3 Number of library staff trained or assisted	
Answer: <input type="text" value="8"/>	Explanation: Library staff members trained on iPad and a book downloaded in 2 sessions counts from sign-in sheet

Due each reporting period.

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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?

Answer 1

7,500 character limit

Question 2
 Survey results (if applicable, include in your final report ONLY) – Summarize the results of surveys administered during your programming activities (i.e., needs/s).

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GMS – Submitting Reports

Performance Report

Project Title *
 TXR-1900T - sammie learns to fly by reading

Grant Number
 TXR-1900T

Grant Program
 Texas Reads 2019

Sub Recipient *
 Texas State Library & Archives Commission

Performance Report Contact
 Cassandra Carrozzini

Period *
 2019 P1

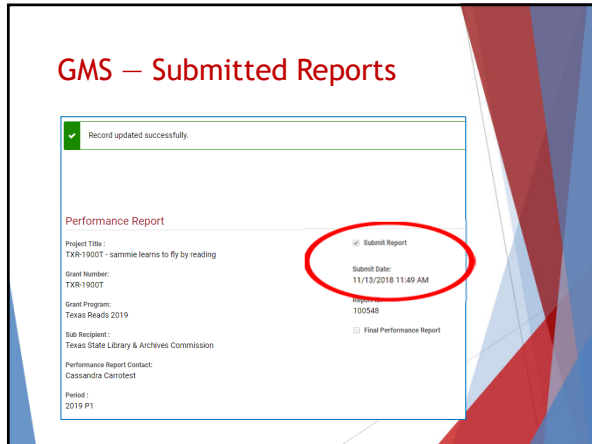
Report ID
 100548

Submit Report

Final Performance Report

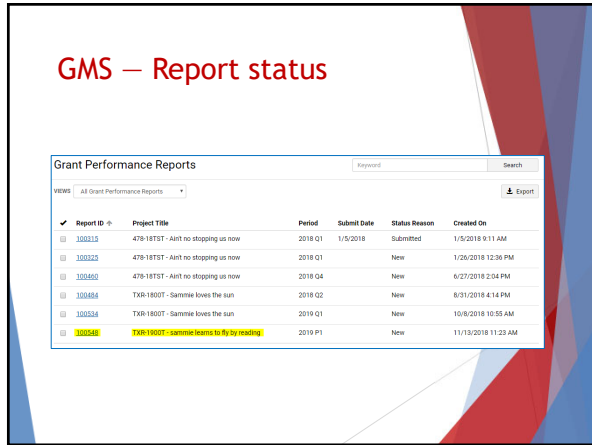
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GMS – Submitted Reports



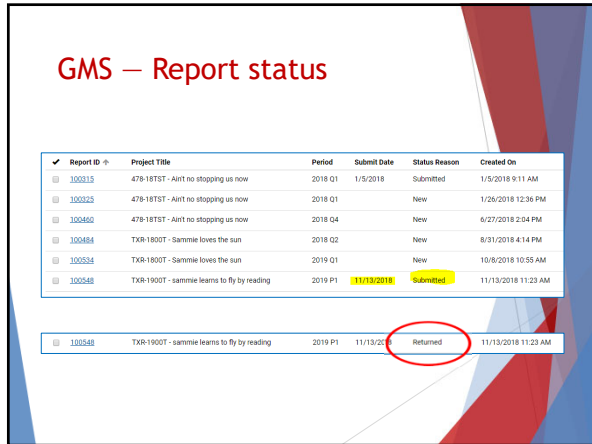
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GMS – Report status

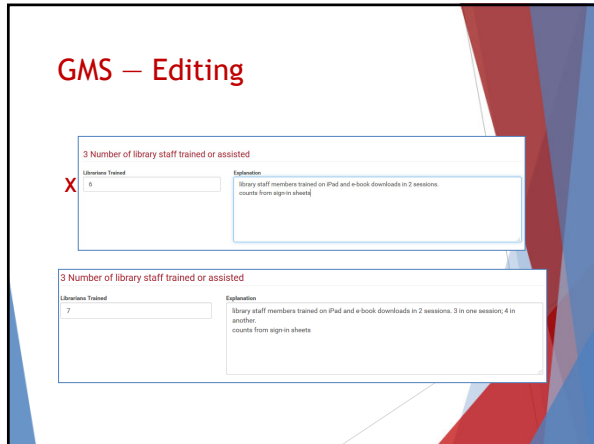


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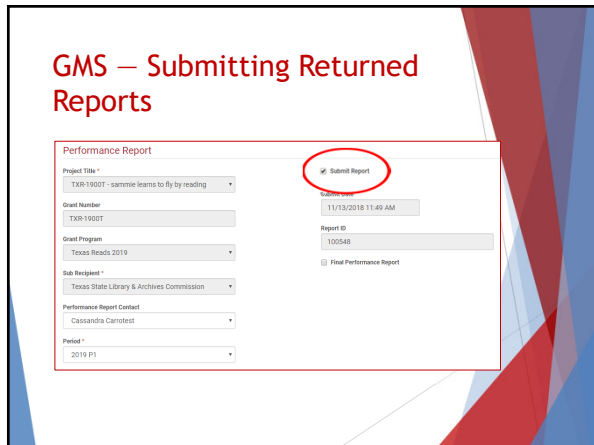
GMS – Report status



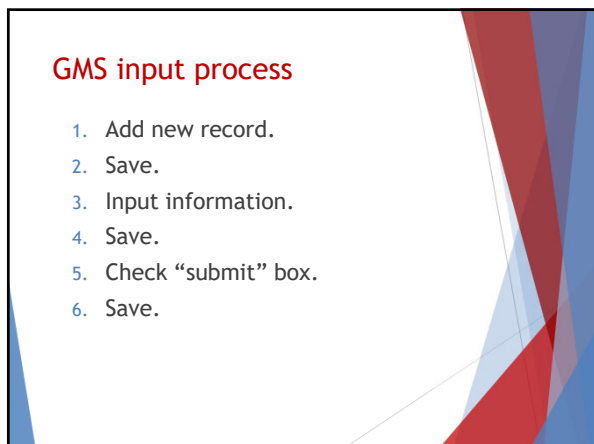
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The process

- 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

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PET PEEVES (Do's & don't's)

Do's	Don't's
<ul style="list-style-type: none">□ 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.	<ul style="list-style-type: none">□ 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.

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Contact

Bethany Wilson
Grants Administrator
bwilson@tsl.texas.gov
or
grants@tsl.texas.gov



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