



TEXAS STATE LIBRARY  
AND  
ARCHIVES COMMISSION

## Reporting for 2018 Rebuilding Texas Libraries Grants

Presented by  
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## What we'll cover

- Performance Report
  - Performance measures
  - The narrative
  - Submitting report in GMS (Grant Management System)
- FINAL Report



## PERFORMANCE MEASURES



## The numbers – What to count

- Output measures
  - a) # materials purchased
  - 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

- 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/newsletter issues
  - DVDs, CDs, other A/V materials



## The numbers – What to count

- b) 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)
  - Hardware or software usage
- b) Number of circulations attributed to project
- Items purchased with grant funds circulated to target audience



## 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 help improve library services (*non-unique count*)
  - Training – classroom instruction, webinars, online tutorials (instructional)
    - Documentation = sign-in sheets, electronic logs, registration/attendance logs, head counts



## The numbers – Other info

- 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



## The numbers – How to count

- Explanation of method and justification of measurement

*(How did you come up with the numbers reported? What?)*

Examples:

- # 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



## The 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 supported)



## The numbers – How we count

- Documentation
  - Date
  - Event name
  - Location
  - Description
  - Audience
  - Count
  - Name, title of person responsible for count
  - Sign off (initials, date)
- Record information
  - Record data after each event using data sheet or spreadsheet



## THE NARRATIVE



## The narrative

- Due February 15, 2018
- Tells your project story
  - Activities
  - Successes
  - Challenges
  - Delays or failures
  - Corrective actions
  - Best practices
  - Anecdotes
- Assumes we know nothing (be complete and concise)



## The narrative

- Project activities
  - List of activities, events, or milestones (detailed summary)
  - Who, what, when, where & why
- 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?
- Anecdotal information
  - Stories or comments received from program participants, staff, or others related to the programming.



## The FINAL Report

- Beneficiaries
  - Check boxes
  - 6 questions
    - Targeted or general population
    - Urban, suburban, or rural
    - Targeted age groups
    - Ethnic or minority populations
    - Groups not captured
    - Continuation - “Not applicable”



## GMS input process

1. Add new record.
2. Save.
3. Input information.
4. Save.
5. Check “submit” box.
6. Save.



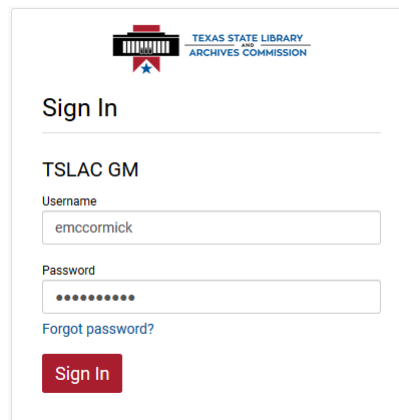



## SUBMITTING THE REPORT



## Reporting in GMS

<https://grants.tsl.texas.gov>

A screenshot of a web form titled "Sign In" for "TSLAC GM". The form includes a "Username" field with the value "emccormick" and a "Password" field with masked characters. There is a "Forgot password?" link and a red "Sign In" button.

  
Sign In

TSLAC GM

Username

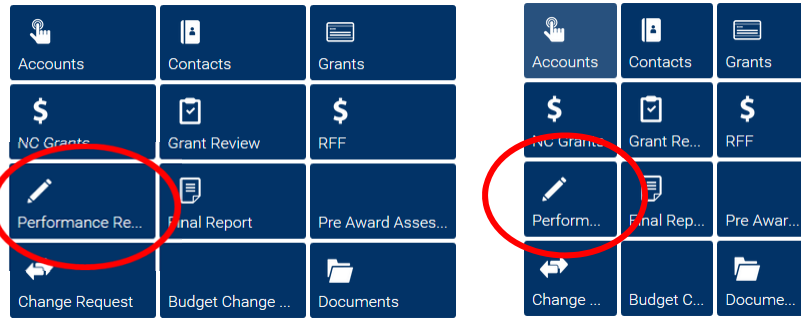
Password

[Forgot password?](#)

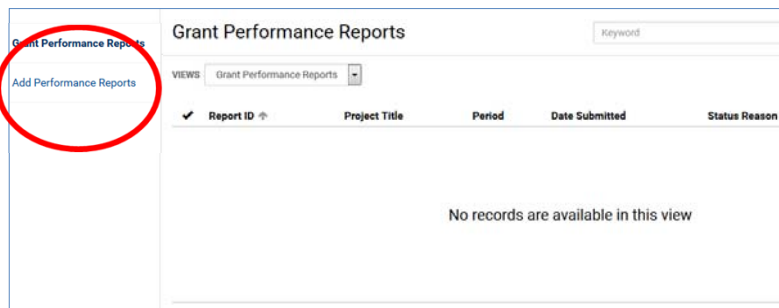


# Reporting in GMS

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



# GMS – Performance reports





## GMS – Performance Reports

The screenshot shows a web form titled "Performance Report" with a "Grant Performance Reports" header. A red circle highlights the "Project Title \*" dropdown menu. Other fields include "Grant Number", "Grant Program", "Sub Recipient \*", and "Period \*", all of which are currently grayed out. A "Save" button is located at the bottom left of the form.

Select grant title from drop-down list.



## GMS – Performance Reports

The screenshot shows the "Performance Report" form with all fields auto-filled and grayed out. The "Project Title \*" dropdown contains the text "Too many dogs, not enough cats". The "Grant Number" field is empty. The "Grant Program" dropdown contains "Library Cooperation". The "Sub Recipient \*" dropdown contains "Texas Lutheran University". The "Period \*" dropdown is empty. A "Save" button is located at the bottom left of the form.

Form auto-fills grayed out boxes.



## GMS – Performance Reports

**Performance Report**

Project Title \*  
Too many dogs, not enough cats

Grant Number  
[Empty field]

Grant Program  
Library Cooperation

Sub Recipient \*  
Texas Lutheran University

Period \*  
2017 Q1  
2017 Q2  
2017 Q3  
2017 Q4

Select reporting period "2018 P1" from drop-down list and **SAVE**.



## GMS – Performance Reports

Record created successfully.

**Performance Report**

Project Title \*  
Too many dogs, not enough cats

Report ID  
100008

Grant Number  
479-17001

Grant Program  
Library Cooperation

Sub Recipient \*  
Texas Lutheran University

Period \*  
2017 Q1

Submit Report

Date Submitted  
[Empty field]



# GMS – Performance Reports

| Grant Performance Reports |                                |         |                |               |                           |
|---------------------------|--------------------------------|---------|----------------|---------------|---------------------------|
| VIEWES                    |                                |         |                |               | Grant Performance Reports |
| Report ID                 | Project Title                  | Period  | Date Submitted | Status Reason | Created On                |
| 100008                    | Too many dogs, not enough cats | 2017 Q1 |                | New           | 11/16/2016 10:57 AM       |



# GMS – Performance Measures

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

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

2 Number of persons provided library project-sponsored services

Persons Served:  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

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



## GMS – Performance Measures

|   |  |
|---|--|
| <b>1 Number of books and other library materials purchased with grant funds</b> |  |
| <b>Materials</b><br>25  | <b>Explanation</b><br>5 Apps purchased for 2 iPads = 10; 15 e-books purchased counts taken from invoices                   |
| <b>2 Number of persons provided library project-sponsored services</b>          |  |
| <b>Persons Served</b><br>25   | <b>Explanation</b><br>iPads circulated 10 times; e-books circulated 15 times total counts taken from circulation system    |
| <b>3 Number of library staff trained or assisted</b>                            |  |
| <b>Librarians Trained</b><br>6  | <b>Explanation</b><br>library staff members trained on iPad and e-book downloads in 2 sessions. counts from sign-in sheets |



## GMS – Submitting Reports

**Performance Report**

Project Title \* Too many dogs, not enough cats Report ID 100008

Grant Number 479-17001

Grant Program Library Cooperation

Sub Recipient \* Texas Lutheran University

Period \* 2017 Q1

Submit Report



## GMS – Submitted Reports

**Record updated successfully.**

**Performance Report**

Project Title :  
Too many dogs, not enough cats

Grant Number:  
479-17001

Grant Program:  
Library Cooperation

Sub Recipient :  
Texas Lutheran University

Period :  
2017 Q1

Submit Report

Date Submitted:  
11/16/2016 11:46 AM

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


Materials: 25  
Explanation: 5 Apps purchased for 2 iPads = 10; 15 e-books purchased counts taken from invoices

2 Number of persons provided library project-sponsored services

Persons Served: 25  
Explanation: iPads circulated 10 times; e-books circulated 15 times total counts taken from circulation system

3 Number of library staff trained or assisted

Librarians Trained: 6  
Explanation: library staff members trained on iPad and e-book downloads in 2 sessions. counts from sign-in sheets



## GMS – Performance Reports

**Grant Performance Reports**

Views: Grant Performance Reports


| Report ID | Project Title                  | Period  | Date Submitted | Status Reason | Created On          |
|-----------|--------------------------------|---------|----------------|---------------|---------------------|
| 100008    | Too many dogs, not enough cats | 2017 Q1 | 11/16/2016     | Submitted     | 11/16/2016 10:57 AM |

**Grant Performance Reports**

Views: Grant Performance Reports


| Report ID | Project Title                  | Period  | Date Submitted | Status Reason | Created On          |
|-----------|--------------------------------|---------|----------------|---------------|---------------------|
| 100008    | Too many dogs, not enough cats | 2017 Q1 | 11/16/2016     | Returned      | 11/16/2016 10:57 AM |



## GMS – Returned Reports

**Performance Report**

|                        |   |                  |                                     |
|------------------------|---|------------------|-------------------------------------|
| <b>Project Title *</b> | <input type="text" value="Too many dogs, not enough cats"/> | <b>Report ID</b> | <input type="text" value="100008"/> |
| <b>Grant Number</b>    | <input type="text" value="479-17001"/>                      |                  |                                     |
| <b>Grant Program</b>   | <input type="text" value="Library Cooperation"/>            |                  |                                     |
| <b>Sub Recipient *</b> | <input type="text" value="Texas Lutheran University"/>      |                  |                                     |
| <b>Period *</b>        | <input type="text" value="2017 Q1"/>                        |                  |                                     |
|                        | <input type="checkbox"/> Submit Report                      |                  |                                     |
| <b>Date Submitted</b>  | <input type="text" value="11/16/2016 11:46 AM"/>            |                  |                                     |



## GMS – Editing

**3 Number of library staff trained or assisted**

|                           |   |   |
|---------------------------|---|---|
| <b>Librarians Trained</b> | <input type="text" value="6"/> <b>X</b> | <b>Explanation</b>  |
|                           |   | <input type="text" value="library staff members trained on iPad and e-book downloads in 2 sessions. counts from sign-in sheets"/> |

**3 Number of library staff trained or assisted**

|                           |                                |   |
|---------------------------|--------------------------------|---|
| <b>Librarians Trained</b> | <input type="text" value="7"/> | <b>Explanation</b>  |
|                           |                                | <input type="text" value="library staff members trained on iPad and e-book downloads in 2 sessions. 3 in one session; 4 in another. counts from sign-in sheets"/> |





## GMS – Submitting Reports

Record updated successfully.

**Performance Report**

Project Title : Too many dogs, not enough cats Report ID: 100008

Grant Number: 479-17001

Grant Program: Library Cooperation

Sub Recipient : Texas Lutheran University

Period : 2017 Q1

Submit Report

Date Submitted: 11/16/2016 12:03 PM



## GMS – Status

| Grant Performance Reports                  |                                |         |                |               |                     |  |
|--|--------------------------------|---------|----------------|---------------|---------------------|--|
| Report ID                                  | Project Title                  | Period  | Date Submitted | Status Reason | Created On          |  |
| <input checked="" type="checkbox"/> 100008 | Too many dogs, not enough cats | 2017 Q1 | 11/16/2016     | Submitted     | 11/16/2016 10:57 AM |  |

| Grant Performance Reports                  |                                |         |                |               |                     |  |
|--|--------------------------------|---------|----------------|---------------|---------------------|--|
| Report ID                                  | Project Title                  | Period  | Date Submitted | Status Reason | Created On          |  |
| <input checked="" type="checkbox"/> 100008 | Too many dogs, not enough cats | 2017 Q1 | 11/16/2016     | Returned      | 11/16/2016 10:57 AM |  |



## 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., outputs).



## Contact me

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