



Revisiting Site Visits

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Site visit: purpose

- Provide technical assistance and monitoring support
- Identify best practices and projects to highlight at IMLS
- Promote IMLS opportunities
- *See funded projects in action

*in-person only

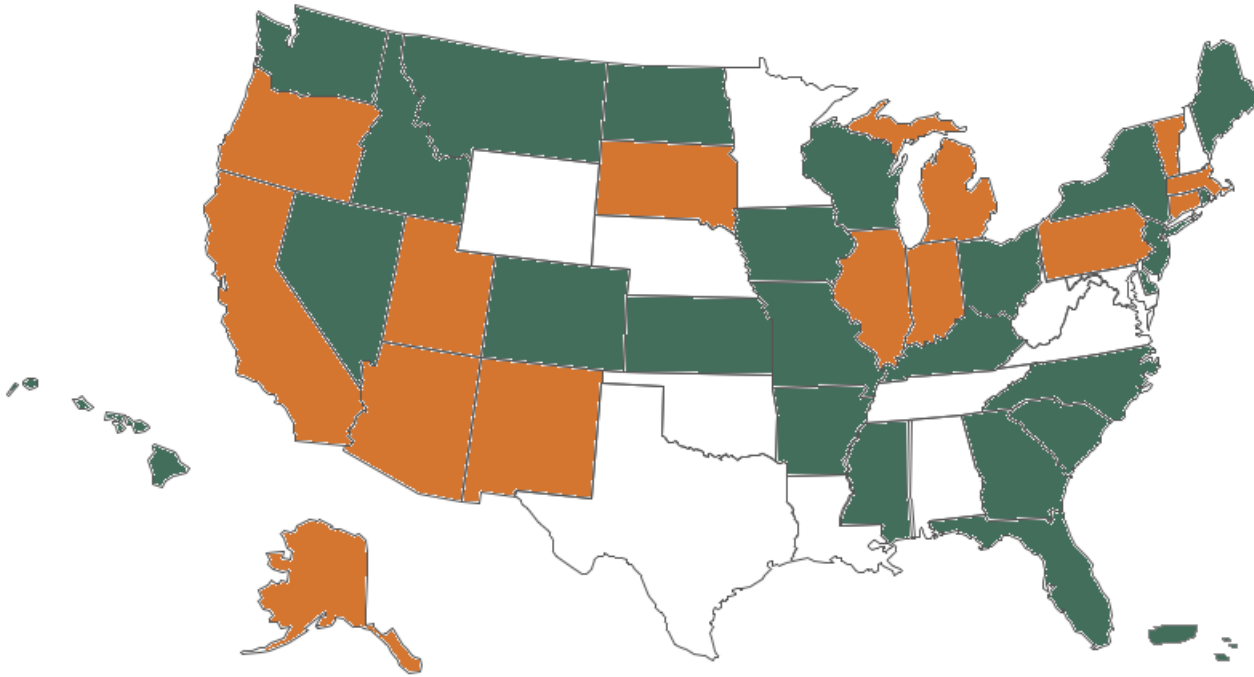




Site visit: frequency

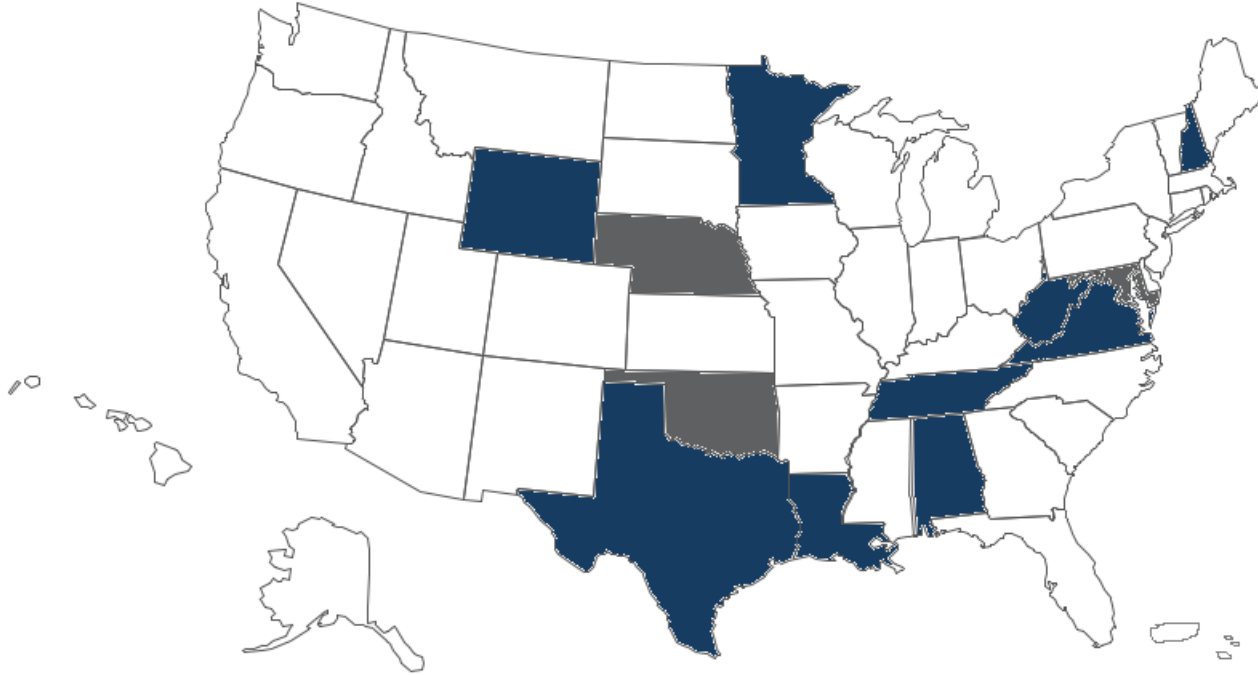
- IMLS schedules a visit to every state within each five-year cycle
- IMLS strives to visit all states within the first four years of the cycle
- This means no site visits are anticipated for the year Five-Year Evaluations/Plans are due

Site visits so far: 2023-2025



- In-person: AR, CO, DE, FL, GA, HI, IA, KS, KY, ME, MS, MO, MT, NV, NJ, NY, NC, ND, OH, PR, RI, SC, WA, WI, VI
- Virtual: AK, AZ, CA, CT, IL, IN, MA, MI, NM, OR, PA, SD, UT, VT

Anticipated site visits for 2026



Cindy: AL, LA, MN,
NH, TN, TX, VA, WV,
WY

Teri: DC, MD, NE,
OK

Recalibrating and resetting

- Site visits will finish up as mostly virtual in this cycle
- Two-time virtual states* CAN request IMLS visits in 2026-27
- We hope to revive 2-3 day visits for 2028-2032
- Today's focus: continue to share institutional knowledge and adapt together

*AK, AZ, CA, CT, IL, IN, LA, MI, NE, NM, OK, PA, SD, TX, UT, WY



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Refresher on mechanics

- Site Visits - what to expect and how to prepare
- SPR-based Site Visit Checklist
- Table discussion

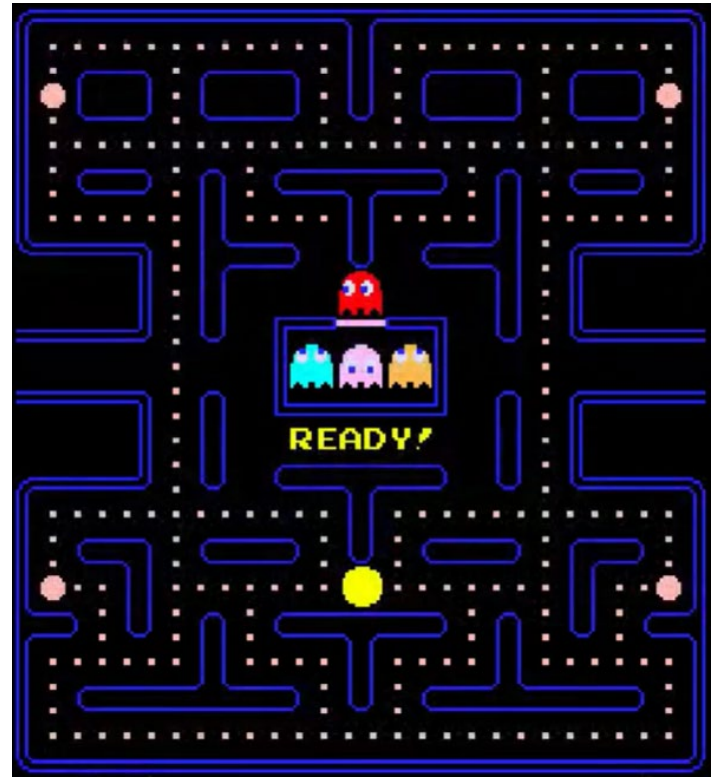


[This photo](#) by [Dan Butler](#) is in the [public domain](#).



IMLS Program Officer preparation

- Notifies state that IMLS is coming
- Sends letters to chief and LSTA coordinator referencing checklist
- Reviews SPR report, Five-Year Plan, Five-Year Evaluation, other material

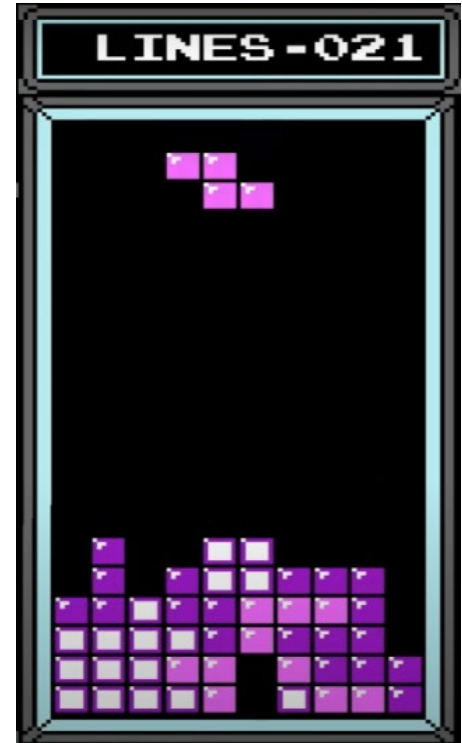


Screenshot for educational/non-commercial use.

LSTA Coordinator preparation

- Organizes when IMLS program officer meets with SLAA staff
- Fills in the Site Visit Checklist
- *Selects and sets up field sites, contacting those grantees
- *Prepares full itinerary of the visit

*in-person only



Screenshot for educational/non-commercial use.



Site visit

- Meet key personnel, including Chief Officer
- Program Officer reviews checklist with staff
- *Usually lasts 2-3 days – visit SLAA and others
- *Visit beneficiaries of funds

*in-person only



Screenshot for educational/non-commercial use.

What IMLS will need – pt. 1

- A copy of the SLAA organizational chart
- Match and Maintenance of Effort documentation
- Sample policies
- Examples of IMLS acknowledgement
- Written guidance to subrecipients, if applicable
- Other materials detailed in the Site Visit Checklist



Screenshot for educational/non-commercial use.



Subrecipient/beneficiary visits*

- *Visits to any type of beneficiary:
- *Public, tribal, talking book, academic, or school library

*in-person only



Screenshot for educational/non-commercial use.



After the visit:

- IMLS will send the SLAA a letter with recommendations
- SLAA should send the Program Officer a response to this letter

If needed:

- SLAA sends additional information to IMLS
- IMLS might be in contact again regarding an outstanding project to highlight



Screenshot for educational/non-commercial use.



SPR-based site visit checklist: new to 2023-2027 cycle

- State Program Report (SPR)-based form that can be filled out and saved iteratively
- Documentation materials uploaded within the checklist
- Can be saved as PDF to reference outside the system
- [Reference copy of all questions](#) available in the G2S Manual on the IMLS website

Home
Projects
User Reports
Account Management
Manage Subrecipients
Subaward Info
State Goals
State Info
Subrecipient Access
User Info
Site Visit Checklist
Help
SPR Data Export



Checklist format

- **Last Modified Date:** the SPR tracks the latest time the checklist was saved
- **Print:** The checklist can be printed to PDF as needed and for local record-keeping
- The checklist is divided into **five categories** and includes about 100 questions: click on the headers to expand each section

Last Modified Date:

Grants to States Site Visit Checklist

Date(s) of Site Visit:

Program Officer:



Additional materials

- Requested materials are incorporated at the end of each section
- There is an option to either upload documents or provide URLs to files
- NOTE: if providing URLs to internal/private file share systems (i.e., Google Drive/OneDrive), be sure to grant access to your Program Officer

General Information: Additional Materials

Please upload and/or link to:

- Names and titles of all SLAA staff affiliated with the LSTA Grants to States program.
- Current SLAA organization chart.
- Current job description for LSTA coordinator showing LSTA as well as other duties.

Attach File (file limit: 40MB)

No file chosen

Enter URL



Discussion Prompts

- Intended to generate open-ended discussion about your state and SLAA
- Provides more transparency for the things IMLS wants to discuss
- No formal responses are recorded in these sections

General Information: Discussion Prompts (to be discussed during the site visit)

- *How are libraries organized in the state (county, parish, region, districts, systems, etc.)?*
- *What level of engagement does the SLAA have with non-public libraries? What kinds of libraries can the SLAA legally work with?*
- *Tell us more about the SLAA's staffing levels, responsibilities, and position within the state's government structure.*



Five categories of the checklist

- **General Information:** overview of basic statistics reflecting libraries in the state and SLAA personnel
- **Legal Authority and Compliance with Federal Law:** context and documentation for the SLAA's legal authority and compliance
- **Administrative Activity:** how the grant program is administered by the SLAA, including written procedures, recordkeeping, etc.
- **Financial Activity:** 4%, Match, MOE, audit, and procurement/equipment information related to the program
- **Wrap Up:** uploads for logistical aspects of the visit and fields for any additional context

Aspirational checklist updates

- Quarterly grant accruals (no longer required/tracked)
- Equipment threshold went from \$5,000 to \$10,000
- Tracking subawards over \$30,000 moved to SAM.gov



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Frequent findings/concerns

- Overall capacity to carry out the program (vacancies, etc.)
- Internal procedures written down, including for complaints
- Communication with financial counterparts and clarity on 4%, Match, MOE
- Managing risk: spending down funds, delayed procurement, monitoring subrecipients

BE PREPARED TO BE CHALLENGED.

Activity: sorting ourselves

“Player 1” (Organizers)

- You had a significant hand in organizing one or more site visits, even if they were virtual

“Player 2” (Observers)

- You participated in one or more site visits, but weren't deep in the details

“Player 3” (First-Timers)

- You are new to the site visit process

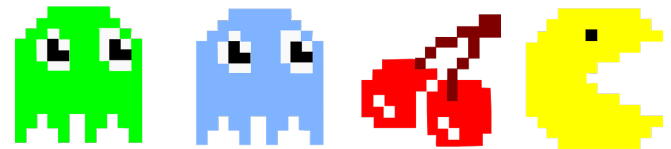




Table discussion: 15 min

All: briefly introduce yourselves to each other

Organizers (Player 1):

- What was the most time-consuming and/or stressful part of your site visit experience?
- Is there anything you would have done differently during your site visit?
- What were the highlights or benefits of your visit?

Observers (Player 2):

- What did you learn from the site visit process?

First-Timers (Player 3):

- What are your concerns/questions about the site visit process?

Insights and Wrap up