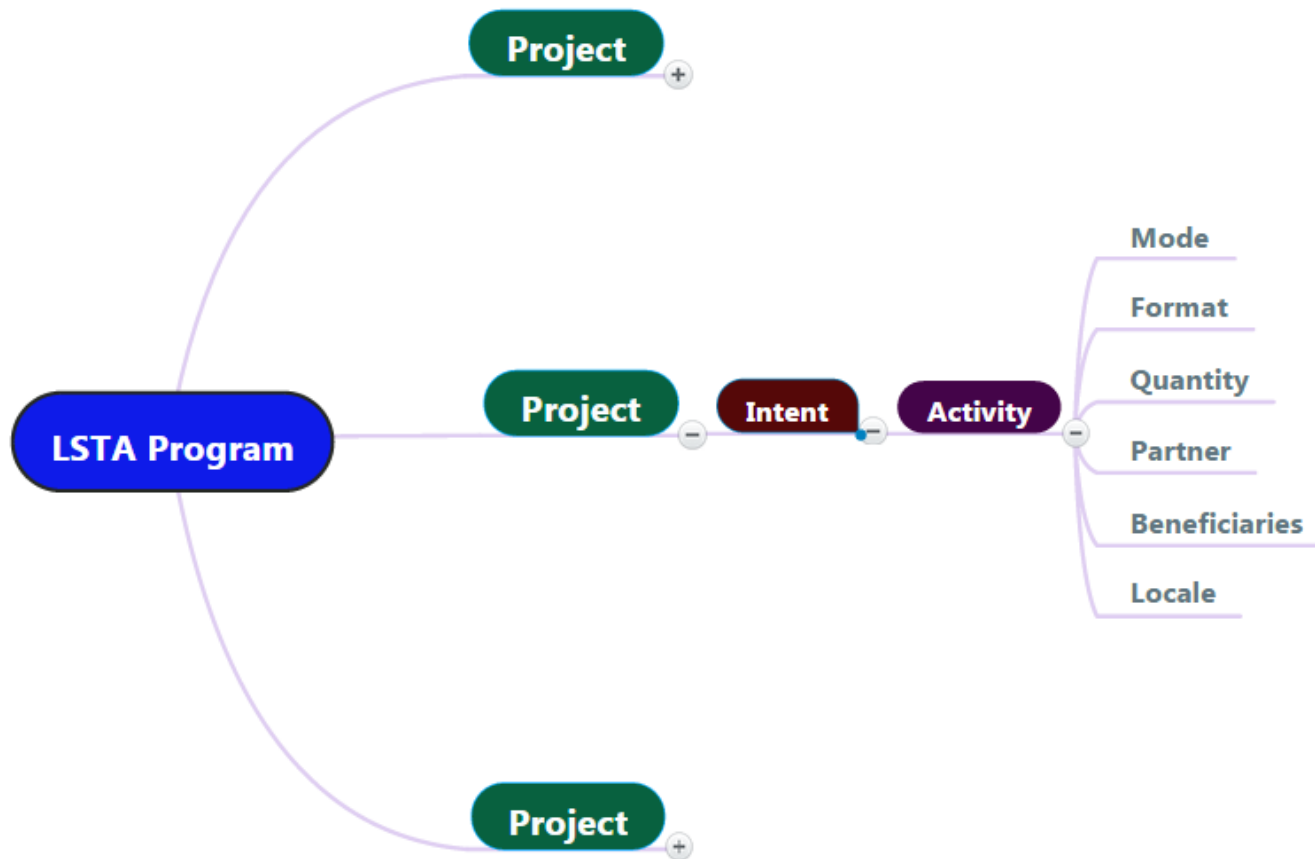


May 18, 2016 – Pacific Workshop

New SPR Framework Overview



New Report Framework





What is a Project?

- Set of discrete and interdependent activities carried out to achieve an intended outcome
- Contains allocable resources, e.g.:
 - dollars spent
 - people responsible for accomplishing tasks
 - venue or service location(s)
 - time spent

Intent: the “why” of a project

Each Project is assigned one Intent

- Intent: an objective or expected result in a project
- Intents correspond to the 6 focal areas (broad impact)
- There are 14 possible intents, which include:

Focal Area	Intent(s)
Lifelong Learning	<ul style="list-style-type: none">• Improve users' formal education• Improve users' general knowledge and skills
Information Access	<ul style="list-style-type: none">• Improve users' ability to discover information resources• Improve users' ability to obtain and/or use information resources

Intent (continued)

Focal Area	Intent(s)
Institutional Capacity	<ul style="list-style-type: none">• Improve the library workforce• Improve the library's physical and technological infrastructure• Improve library operations
Employment & Economic Development	<ul style="list-style-type: none">• Improve users' ability to use resources and apply information for employment support• Improve users' ability to use and apply business resources

Intent (continued)

Focal Area	Intent(s)
Human Services	<ul style="list-style-type: none">• Improve users' ability to apply information that furthers their personal, family, or household finances• Improve users' ability to apply information that furthers their personal or family health & wellness• Improve users' ability to apply information that furthers their parenting and family skills
Civic engagement	<ul style="list-style-type: none">• Improve users' ability to participate in their community• Improve users' ability to participate in community conversations around topics of concern

Intent Check

Lay out the first 14 INTENT cards
from your deck

- Lifelong Learning – 2
- Information Access – 2
- Institutional Capacity – 3
- Employment and Economic Development – 2
- Human Services – 3
- Civic Engagement – 2

select the one that you think matches
each of the following projects

Intent Check – Scenario 1

Upgrade the online catalog for
compatibility with E-books

Intent Check – Scenario 1

Upgrade the online catalog for compatibility with E-books

Answer: Improve the library's physical and technological infrastructure (Institutional Capacity)

Intent Check – Scenario 2

Increase adult users' knowledge of
Internet safety through classes

Intent Check – Scenario 2

Increase adult users' knowledge of Internet safety through classes

Answer: Improve users' general knowledge and skills
(Lifelong Learning)

Intent Check – Scenario 3

Help homebound individuals access
library services

Intent Check – Scenario 3

Help homebound individuals access library services

Answer: Improve users' ability to obtain information resources
(Information Access)

Intent Check – Scenario 4

Engage parents, caregivers and their children through early literacy programs

Intent Check – Scenario 4

Engage parents, caregivers and their children through early literacy programs

Answer: Improve users' ability to apply information that furthers their parenting and family skills
(Human Services)

Intent Check – Scenario 5

Help students maintain progress in school through a summer reading program

Intent Check – Scenario 5

Help students maintain progress in school through a summer reading program

Answer: Improve users' formal education
(Lifelong Learning)

Intent Check – Scenario 6

Increase skills of library
paraprofessionals through training

Intent Check – Scenario 6

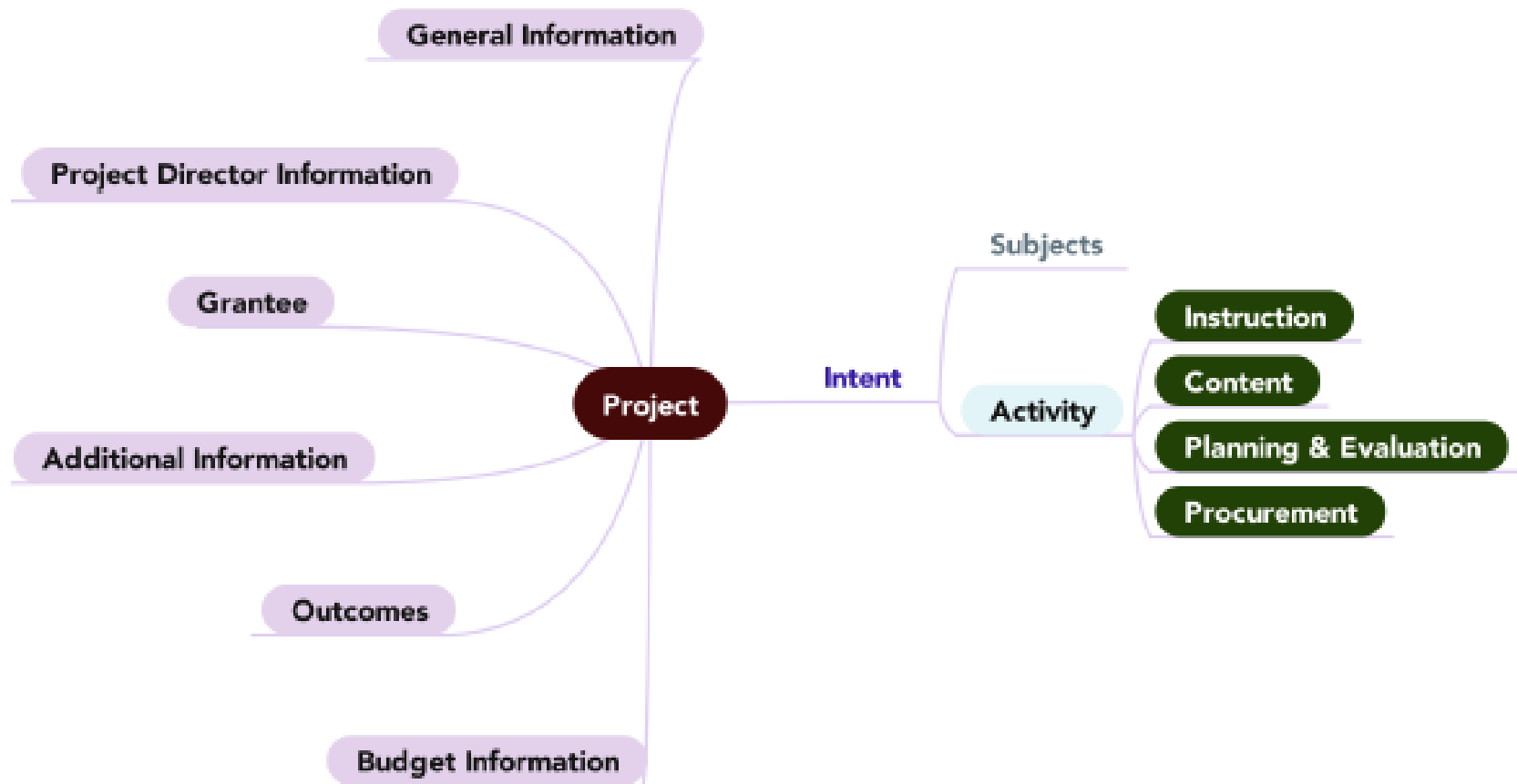
Increase skills of library
paraprofessionals through training

Answer: Improve the library workforce
(Institutional Capacity)

Project/Intent Notes

- Remember that you should only have one intent per project
- This means some large projects may need to be divided into smaller projects
- In the new system, you'll be able to choose up to 2 subjects per intent, such as:
 - Summer reading
 - After-school activities
 - Etc.

New Report Framework





New Report Budgets

Old Report	New Report			
<p>Total LSTA funds for each project</p> <p>No field for match</p>	<ul style="list-style-type: none"> ▪ Salaries/Wages/Benefits ▪ Consultant Fees ▪ Travel ▪ Supplies/Materials ▪ Equipment (<i>\$5,000+ each</i>) ▪ Services ▪ Other Operational Expenses 	LSTA \$	MATCH - State \$	MATCH - Other \$

Budget Check: Scenario 1

- When project funds support:
 - Library staff, and
 - Hardware under \$5,000 per unit
- Which of the following budget lines should be included?
 - Salaries/wages/benefits
 - Consultant Fees
 - Travel
 - Supplies/Materials
 - Equipment (*\$5,000+ each*)
 - Services
 - Other Operational Expenses

Budget Check: Scenario 1

- When project funds support:
 - Library staff, and
 - Hardware under \$5,000 per unit
- Which of the following budget lines should be included?
 - **Salaries/wages/benefits** 
 - Consultant Fees
 - Travel
 - **Supplies/Materials** 
 - Equipment (*\$5,000+ each*)
 - Services
 - Other Operational Expenses

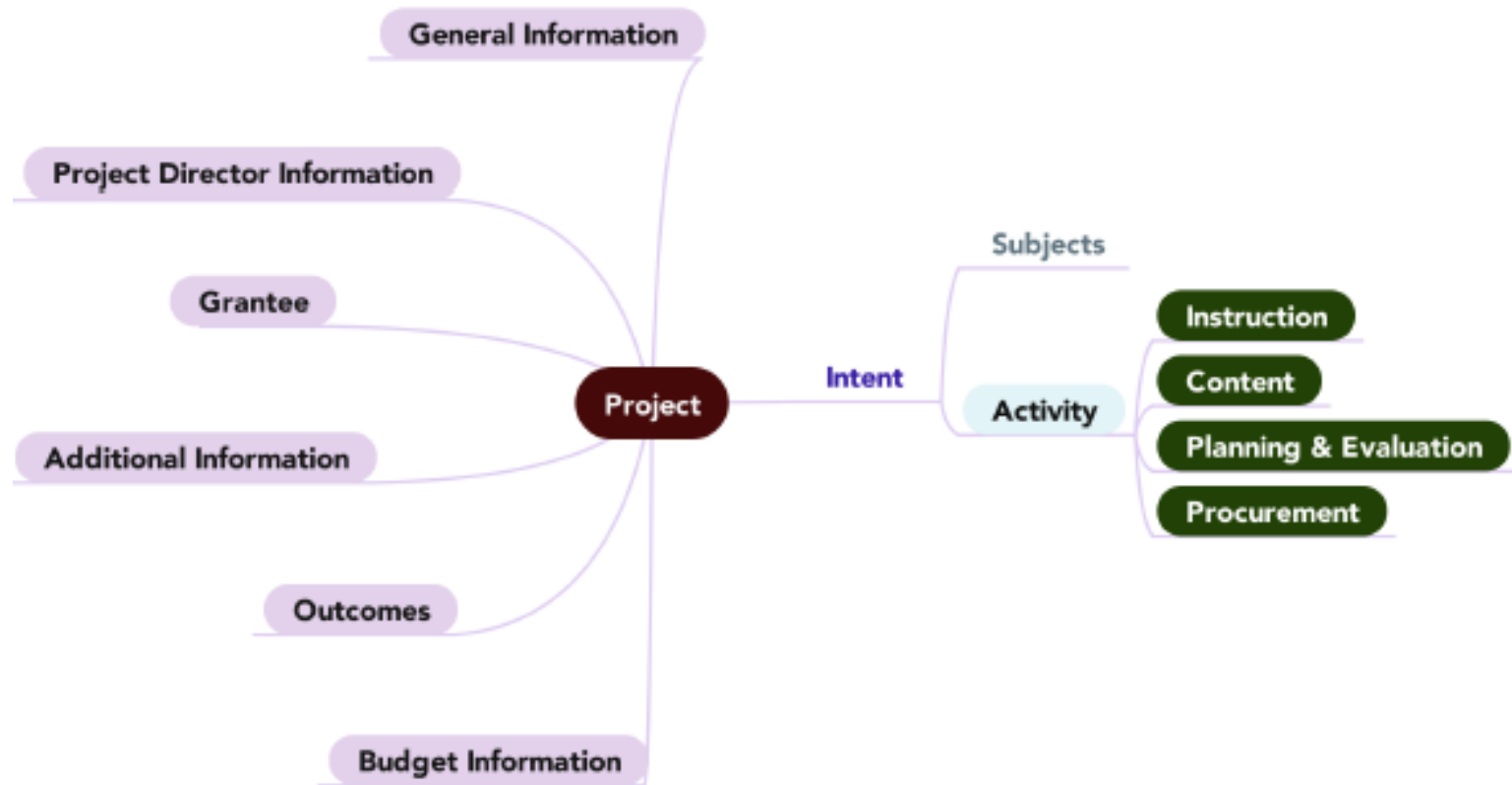
Budget Check: Scenario 2

- When project funds support:
 - A staff training workshop speaker from outside the library
 - Travel for library staff to attend a conference
 - Conference registration fees
- Which of the following budget lines should be included?
 - Salaries/wages/benefits
 - Consultant Fees
 - Travel
 - Supplies/Materials
 - Equipment (*\$5,000+ each*)
 - Services
 - Other Operational Expenses

Budget Check: Scenario 2

- When project funds support:
 - A staff training workshop speaker from outside the library
 - Travel for other library staff to attend a conference
 - Conference registration fees
- Which of the following budget lines should be included?
 - Salaries/wages/benefits
 - **Consultant Fees** ←
 - **Travel** ←
 - Supplies/Materials
 - Equipment (*\$5,000+ each*)
 - **Services** ←
 - Other Operational Expenses

New Report Framework



Activities: the “how” of a project

- Action(s) through which the intent of a project is accomplished
- An activity should account for at least 10% of the project budget
- Activity Types:

Instruction	Involves an interaction for knowledge or skill transfer.
Content	Involves the acquisition, development, or transfer of information.
Planning & Evaluation	Involves design, development, or assessment of operations, services, or resources.
Procurement	Involves purchasing facilities, equipment/supplies, hardware/software, or other materials (not content) that support general library infrastructure.

Activity Modes: Instruction

- A mode is a characteristic of an activity
- There are multiple mode choices per activity:

Instruction

Program	Active user engagement (e.g., class on computer skills)
Presentation	Passive user engagement (e.g., author talk)
Consultation	Informal interaction such as expert advice or reference services

Activity Modes: Content

Content

Acquisition	Purchasing library materials or software/hardware for storing and retrieving information
Creation	Designing or producing new materials, including digitization
Description	Cataloging or otherwise describing materials
Lending	Circulating materials
Preservation	Extending the useful life of materials

Activity Modes (continued)

Planning & Evaluation

Retrospective	Historical assessment of a program or service (e.g., Five-Year Evaluation)
Prospective	Future assessment (e.g., Five-Year Plan)

Procurement

(no mode)	Acquiring or leasing facilities or purchasing supplies, materials, or equipment that support general infrastructure (not content)
-----------	---

Activity Check, Intent Refresher

Keep the INTENT cards out, and lay out
the 10 ACTIVITY cards
from your deck

- Instruction – 3
- Content – 5
- Planning/Evaluation – 1
- Procurement – 1

select the intent and activities that you
think match each of the following
projects/activities

Activity Check – Scenario 1

Increase information access
through a public computer
and internet center

- Activity 1: purchase new server
- Activity 2: purchase databases

Activity Check – Scenario 1

Intent: Improve users' ability to obtain information resources
(Information Access)

- Activity 1 (server): Procurement
- Activity 2 (databases): Content - Acquisition

Activity Check – Scenario 2

Help the public find archival photos by numbering, cataloging, and digitizing them

- Activity 1: number/catalog photos
- Activity 2: digitize photos

Activity Check – Scenario 2

Intent: Improve users' ability
to discover information
(Information Access)

- Activity 1 (catalog): Content - Description
- Activity 2 (digitize): Content - Creation

Activity Check – Scenario 3

Help students with school assignments through an afterschool program

- Activity 1: drop-in tutoring
- Activity 2: Internet search class
- Activity 3: test-taking software

Activity Check – Scenario 3

Intent: Improve users' formal education
(Lifelong Learning)

- Activity 1 (tutor): Instruction - Consultation
- Activity 2 (class): Instruction - Program
- Activity 3 (software): Content - Acquisition

Activity Quantities

- Selected activities will prompt you to fill in number fields that vary by mode:
 - Number of Print Materials Acquired: ____
 - Number of Presentations Administered: ____
 - Number of Items Circulated: ____
 - Etc.
- We'll look at these fields during the demo

Other Activity Areas

- Activities also have areas for:
 - Partners (if they commit resources to projects)
 - Beneficiaries
 - Library Workforce
 - General Population
 - Targeted Population
 - Locale (participating institutions)
 - Statewide?
 - Institution types

Project/Activity Notes

- Every project and every activity will have a separate title
- Every project and every activity will have an abstract of 90-160 words
 - NOTE: this is significantly less text than your prior reports
- Every project has an Outcomes section where additional narrative information might be appropriate

Other Features

- Financial Status Report (FSR) is integrated
 - Match field needs at least \$0.01 entered to successfully certify the report
- Administrative Project (4%) will be new for territories – separates those funds from projects
- Certification is integrated through credentials

Resources

- Framework Cards
- State Program Reporting Requirements (130pp) [includes data dictionary and report templates]
- Other Extranet materials (See New Program Report section)
- Mentor state: Hawaii (Lynn Masumoto)
- Program Officer (Teri DeVoe)