Site Visits: News and Updates for 2018-2022

Michele Farrell

Overview of visit

- Purpose
- How to prepare beforehand
- What to do during the visit
- What happens after the visit

MATCHING (please provide documentation)		
60. What are the SLAA's sources of funding for match? What are the SLAA Budget categories?	☐ Donations ☐ Corporations ☐ Foundations ☐ Local Sources ☐ State Funds	
61. Does the SLAA require matching funds from subrecipients? (not required)	☐Yes ☐No	
62. What is your process for assuring that non-federal cost-sharing expenditures are appropriate and allowable?		
63. If applicable, how are the values of in-kind match contributions determined? (not required)		
MAINTENANCE OF EFFORT (please provide documentation)		
64. What SLAA budget categories are used to make up your Maintenance of Effort?		
AUDIT		
65. Have there been any audit findings or questioned costs related to the LSTA program in the last five years?	☐Yes ☐No	
66. If yes, briefly describe the findings and corrective actions taken.		
67. In general, does the SLAA routinely provide IMLS with the relevant sections of audits with any findings or questioned costs?	☐Yes ☐No ☐N/A	

Purpose

- To provide technical assistance and monitor
- See the funded projects in action
- Identify best practices and projects to highlight at IMLS
- Promote IMLS opportunities

IMLS Program Officer Preparation

- Notifies state that we are coming
- Sends letters to chief and coordinator including checklist
- Reviews SPR report, Five-Year Plan, Five-Year Evaluation

LSTA Coordinator Preparation

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

Site Visit

- Usually lasts three days – tour SLAA
- Meet key personnel
- Meet with chief
- Program Officer reviews checklist with staff
- Visit subrecipients

Checklist includes:

- Overview of basic statistics reflecting libraries in that state
- The SLAA's legal authority and compliance
- How the grant program is administered by the SLAA
- Financial administration information related to the program

Administrative Procedures

- Does the SLAA have written policies and procedures for the grant program?
- Who handles the grant records?
- If you have an Advisory Council, what is their role?
- Completeness of grant files

Financial Considerations

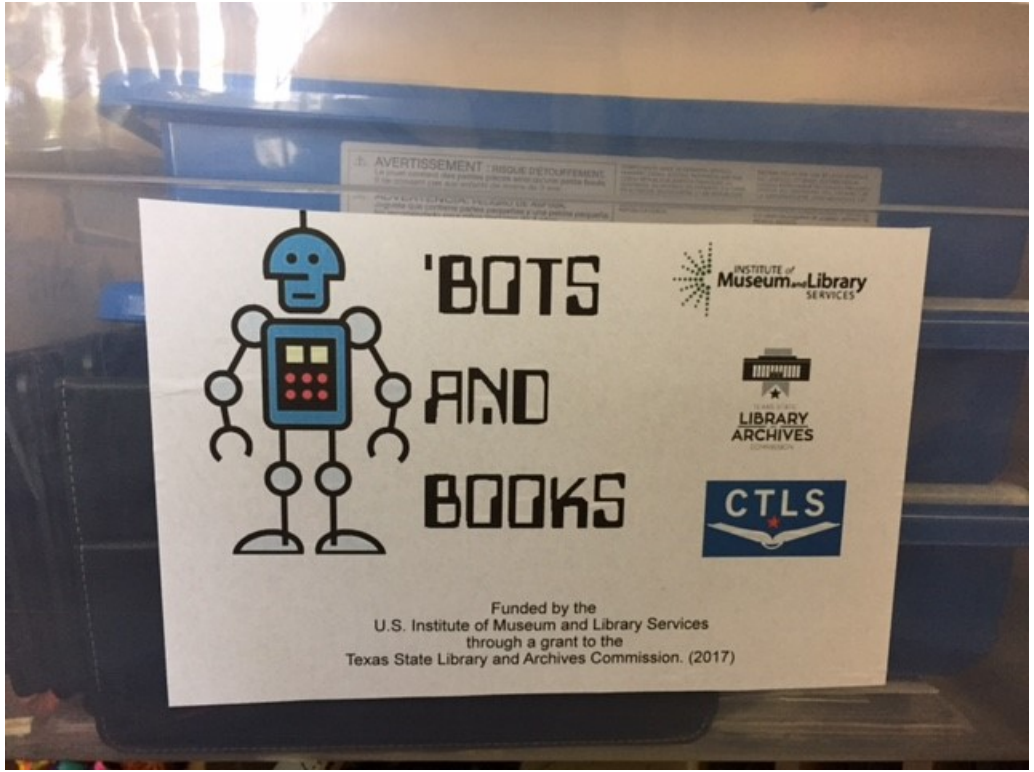
- How to track the 4% administration, match, and Maintenance of Effort (MOE)
- Audits
- Statewide cost allocation plan (SWCAP)

What IMLS will need:

- Itinerary with people we will visit with their title and location
- Subrecipients, title, location and information on their grant including amount and activity
- A copy of the SLAA organizational chart
- Match and Maintenance of Effort documentation

What IMLS will need:

- Sample policies
- Public relations examples
- Written guidance to subrecipients



Subrecipient visits

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

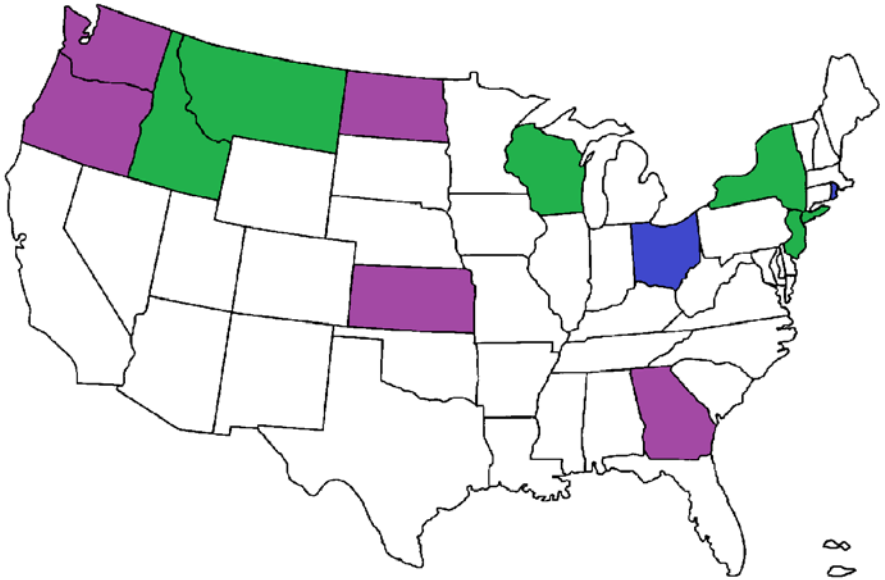
After the visit:

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

If needed:

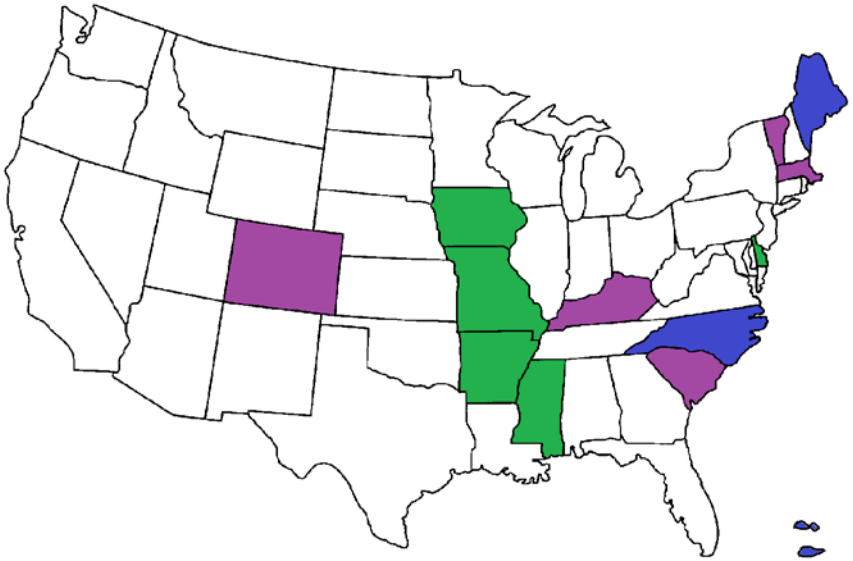
- SLAA sends additional information to IMLS
- IMLS might be in contact again regarding an outstanding project to highlight

Site Visits for 2018



- Dennis: ID, MT, NJ, NY, WI
- Michele: GA, KS, ND, OR, WA
- Madison: OH, RI, Pacific Workshop

Site Visits for 2019



- Dennis: AR, DE, IA, MO, MS
- Michele: CO, KY, MA, SC, VT
- Madison: ME, NC, PR, USVI

General Updates

- All states visited in 4 years
- Planning for no site visits in 2022 when Five-Year Evaluation/Plan are due
- Minor updates to the checklist
  - No longer tracking drawdown signatories
  - Interested in tracking Quarterly Grant Accrual Reports

Questions?