

IMLS Grants to States

# Site Visit Webinar

Tuesday, April 15, 2014  
2:00 pm Eastern Time



# Overview

- Purpose of visit
- Pre-visit
- Site visit
- Post-visit
- Questions



# Staff Intro

Michele Farrell

Omaha Public Library, NE





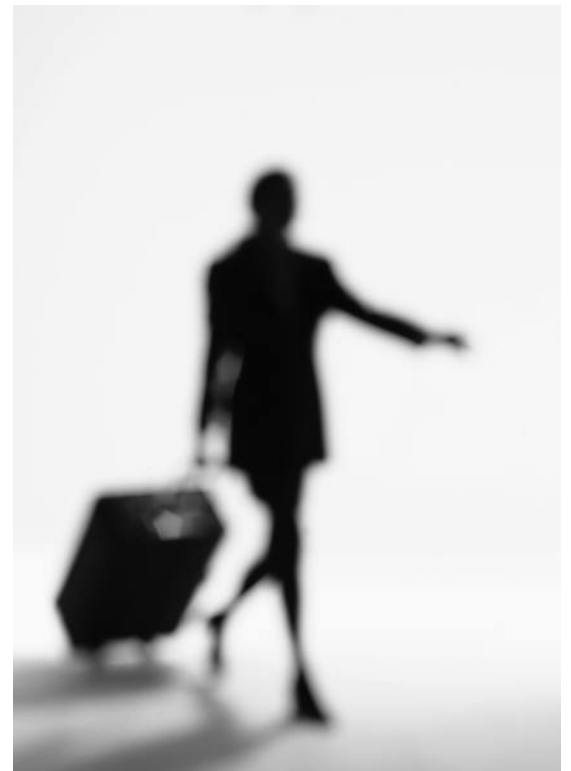
# Purpose of visit

- Monitoring/technical assistance
- Visit LSTA-funded projects
- Identify best practices



# Site visit

- Generally 2-3 days
- Meetings with key personnel
- Discussing checklist items
- Field visits





# Pre-visit responsibilities

## IMLS

- initiates contact
- sends preparatory materials (letter, checklist)
- checks records on file

## LSTA Coordinator

- organizes visit logistics, including field visits
- prepares itinerary
- reviews checklist

communicates ← → communicates

# Checklist

- Overview of state's libraries and statistics
- Legal authority and compliance
- Administrative activity
- Financial activity

INSTITUTE of Museum and Library SERVICES	
Grants to States Site Visit Checklist	
<i>Note: all comment fields are expandable</i>	
Review Dates	Program Officer
GENERAL INFORMATION	
1. State Name	
2. State Population	
3. State Population Year	
4. Counties #	
5. Public libraries #	
6. School libraries #	
7. Academic Libraries #	
8. Special Libraries #	
9. Library Districts #	
10. Library Systems #	
11. Library Regions #	
12. SLAA Staff Total FTE #	
13. State Fiscal Year begins	
14. State Fiscal Year ends	

# Staff Intro

James Lonergan



Elaine I. Sprauve Public Library, St. John, VI





# Overview of your state

- What types of libraries and how many
- What does staffing look like
- If you give subgrants, to what types of libraries



# Legal authority and compliance

- Statutory authority
- Assurances and certifications
- Other federal requirements



# Administrative activity

- Written policies and procedures
- Training of staff
- Records retention
- Complaint procedures
- Advisory council
- Completeness of grant files



# Financial activity

- 4% administrative costs
- Statewide cost allocation plan (SWCAP)
- Accounting procedures to track funds
- Match requirement
- Maintenance of Effort (MOE) requirement
- Audits





# Documents for IMLS

- List of people we will visit and their titles
- Names and titles of SLAA personnel - LSTA
- SLAA organizational charts
- Match and MOE documentation
- Sample policies
- Public relations examples
- Project information



# Staff Intro

Timothy Owens

Hearst Free Library, Anaconda, MT



# Visit: SLAA meetings

- State Librarian
- LSTA Coordinator
- Financial Staff
- Library Development Staff
- Tour



# SLAA review

- Project files
- Public relations examples
- Written policies
- LSTA program procedures
- Audit statements





# SLAA review (cont.)

- Match and MOE files
- Record retention guidelines
- Subgrant cycle information
- Written guidance for subgrantees
- Complaint files



# Field visits

- LBPH/Talking Books Library
- Public
- School
- Academic
- Special

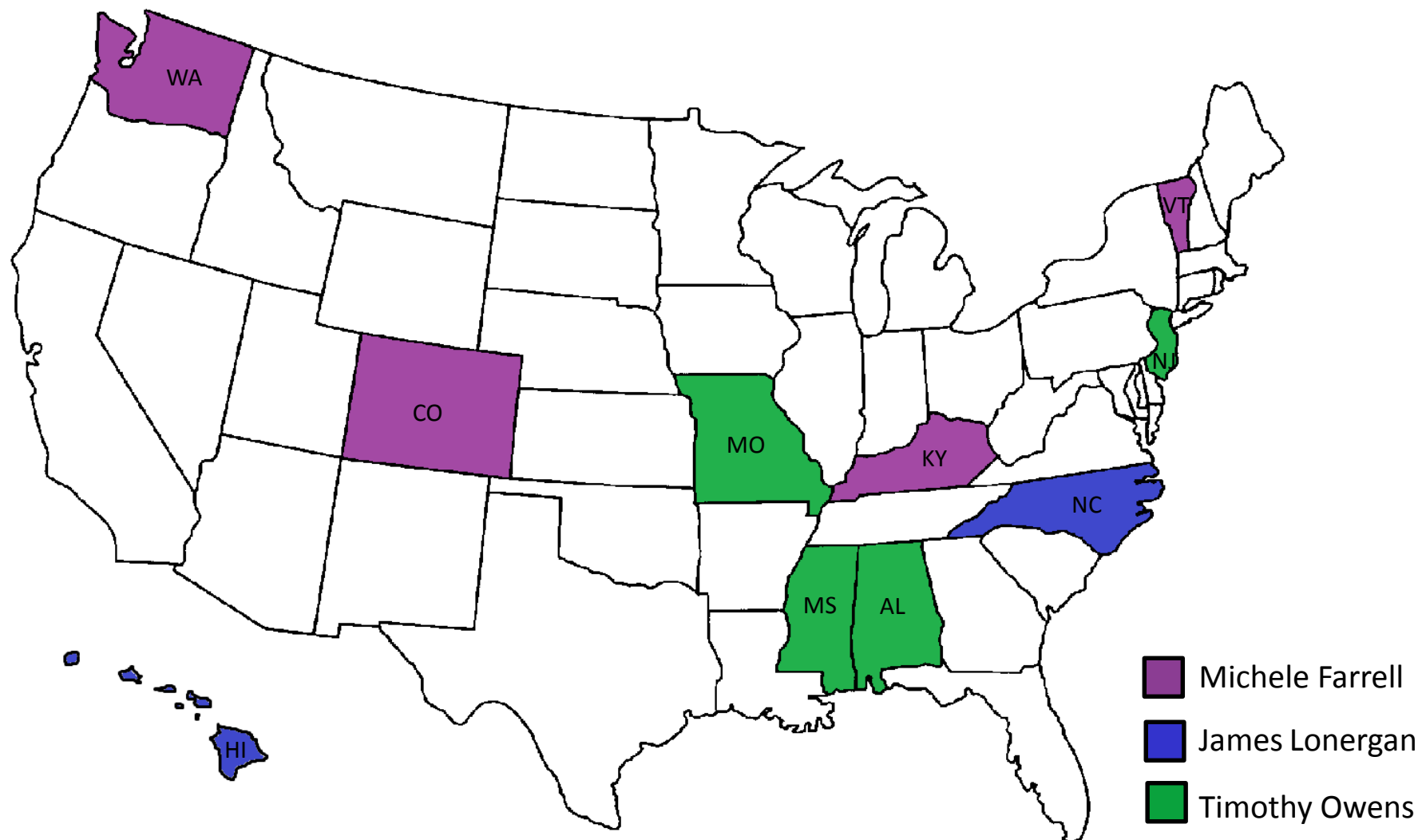


# Post-visit

- Required actions
- Suggested recommendations



# 2014 site visits







# Contacts and resources

- Michele Farrell, Senior Program Officer  
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  - Timothy Owens, Senior Program Officer  
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- Federal Audit Clearinghouse:  
<http://harvester.census.gov/sac/>
  - IMLS Grantee Communications Kit:  
<http://www.imls.gov/recipients/grantee.aspx>