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IMLS

FY201 NATIVE-AMERICAN LIBRARY SERVICES BASIC GRANTEE WEBINAR

1 OF 2

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>> Hi, everybody. We are going to get started in a few minutes. Can you let me know in the chat box if the audio is coming through okay?

>> Hi, everyone. This is Aly at IMLS. Thank you for joining us today. We will get started in a second. A few notes. If you are having any trouble with the audio, using your computer speakers, it might be a little clearer if you dial in, the information is on the screen now. I'll leave it up for a second. We are also recording this webinar. You can go back to it later. I will circulate the link after we have it. If you want to save the files right now you can do this on windows, click file save. If you have any questions, you can type them in the chat box. We will address them, if you have questions in the middle of the presentation, I will hold them until the end.

I'm going to hand off to Sandy Toro.

>> SANDRA TORO: Hi. Welcome, everyone, to managing your FY2016 IMLS grant information session. We are delighted you could join us today. Congratulations once again on receiving one of this year's IMLS grants. We are going to talk about today what will be relevant to Native-American library services grants. Most of the principles will apply to other IMLS grants as well, including the Native-American library services enhancement grant. We will hold another webinar specific to the enhancement grants at a later date. The phones have been muted. Please use the chat box to let us know if you are having any difficulties and we will do everything we can to help. We will be recording the webinar and posting it on our website for

general access.

>> Recording started.

>> SANDRA TORO: To give you a overview, we will talk about your responsibilities and obligations as a grantee, understanding your award packet, finding information on the IMLS website, reporting and performance measurements, advice for managing your grant, and then we will leave it up to you if you have any questions that we can answer.

There are five basic responsibilities of a IMLS grantee. The first of these is to carry out the project activities that you described in submitting your proposal. In short, this is why you are being provided with funding. There is an assumption that you understood the activities in the order you described according to the work plan you laid out, from the funds that you requested and that you proposed as a cost share if any (muffled audio) and key personnel. The second responsibility is adhere to the award terms and conditions. Let's spend a few minutes on these by focusing on the ones that are most likely to be development in your project. Please note that there are others, and we will talk in a minute about where to find the complete set of references, but for now, we will limit ourselves to three that you most assuredly need to keep in mind. Many of you, probably most project directors find themselves change some aspect of their work plan or the budget over the course of the project. We understand that proposals are like best guesses, and we expect that situations will arise that necessitate a shift of some kind. If you need to extend your project [inaudible] methodology, substitute key personnel, make a new hire with project funds, or even reallocate budget funds on either the IMLS side or if you have an enhancement grant in terms of cost share, you are obligated to request approval from us first. You need to make your requests in writing to the program officer who is me and do it in advance rather than after the fact. When you apply for the grant and when you accepted it, you are to follow specific government wide requirements for implementing federal grants. There is also in the guidelines for the grant program to which you applied that are listed in the general terms and conditions document which resides on our website. They include but are not limited to complying with nondiscrimination laws, not doing business with any organization or person that has been debarred or suspended by any federal department or agency, providing a drug-free workplace, not providing human trafficking and not conducting political lobbying within your project. In sum, the three most important terms and conditions you should keep foremost in your mind are know that you need to request approval in advance for certain types of changes in your project, know that you need to follow a

series of federal laws, and know that you need to acknowledge IMLS support. The further responsibility you have as a IMLS grantee is that you must submit both financial and narrative performance reports according to the schedule that came with your award (background noise).

First, you must let us know if there are any significant and relevant programmatic administrative or financial problems that arise during the course of your project. That can be a phone call or E-mail. To let you know, we have many open awards, so there are 226, so sometimes it takes time to get something processed, but the best way to check in is to give me a phone call. First you must maintain documentation, which is subject to audit, of all activities and all expenditures affecting your award. You should do this in accordance with your institution's accepted business practices. You do not need to send us unless and until [inaudible]

The E-mail you received about your award contained several important documents, including the official award notification. Let's take a moment to look at your official award notification for grants and cooperative agreements. This is a two-page, 8-1/2 by 11 document that defines the basis of the relationship between your institution and IMLS. Starting on the left side, you will see your authorizing's official's name, this is the person who will be signing your reports, change requests and your requests for payment.

Below that, this is where you will find your award number, which starts with NG. This is the number we use to track everything about your grant. We ask that you put it in the subject line of your E-mails to us, as well as on the reports that you submit. Below that, you will see your award period start and end dates, start and end dates. We hold you to those. You can't start your work before the first date and you can't extend beyond the second one. You can refer to the terms and conditions for more information or contact me. Sometimes people request an extension, but you are not legally allowed to have two phases at the same time.

Listed below that is your reporting schedule. You want to make sure that the deadlines don't sneak up on you. Not submitting a report on time can mean that your organization can't draw down funds or receive future grants. They are due in pairs, performance and financial.

(audio is muffled).

You have only one performance report and one financial report to submit. This is where you see the project director's name, the person who will direct and oversee your grant activities. To meet that you will see the total award amount, using the IMLS funds that have committed to a project.

On page 2 of the award notification, you will find the basic award information. This pulls up a legal basis for your award and some of it is by reference. IMLS assumes that you will read this carefully, including the documents referenced. The good news about everything referenced is available on-line now, although it is not exactly light reading. It is important. Below that you will find the name, phone number and E-mail address of your program officer, and below that, information about your finance contact here at IMLS. If you can't put your hand on these two pages right now, you should work on finding them. They are very important. If you can't find them, get in touch with one of us at your earliest convenience and we will work on getting you copies.

The IMLS website is another important source of information about your grant. When you go to our home page at WWW.IMLS.gov, you will see at the top a tab marked grants with a sub heading called manage your award. This section of our website is all for you.

When you click on that tab you will come to this page. Most of the time you want to view administration. A important item here is the general terms and conditions for IMLS discretionary awards. You will find three .pdfs, the first is general terms and conditions, the other two are general terms and conditions for awards made after March 1 and the other two are general terms and conditions for awards made previously. Make sure you refer to the correct terms and conditions.

Because yours is a FY2016 grant, you should refer to the general terms and conditions for IMLS discretionary grant and cooperative agreement awards for awards made after March 1, 2016. These terms and conditions are in effect for the duration of your award.

The final piece of information I want to bring to your attention today is the Code of Federal Regulations. If you have questions about whether a particular expense is allowable or unallowable for your project this is the best and most thorough resource to consult. Previously, it varied according to the type of the organization but that is no longer the case. If you have any questions, call us. The chances are excellent that you will be able to find what you need by going to this Office of Management and Budget circular.

Now I'll pass it to Giuliana Bullard from our Office of Communications and Government Affairs.

>> GIULIANA BULLARD: Thank you, Sandy. The Office of Communication and Government Affairs is eager to work with our grantees to share the good news of your awards. We have on our website a grantee communications kit to walk you through the process of publicizing your grant. You get to the kit from the

manage your grant page on our website. The kit includes IMLS logos and guidance on how to use them, tips to share your announcement and requirements for accrediting IMLS. I noted before all grantees are required to acknowledge IMLS funding. The language you need for that is there in the kit. We have updated the kit to provide a comprehensive suite of tools for grantees. The updates include sample social media messages, these are messages that you can use on your Facebook, Instagram and Twitter and you can feel free to customize them to fit your institution and your award. A social media badge, and if you use social media, you know that posts with any kinds of visuals receive way more attention, so from the grantee communications kit you can download a badge or logo that you can use with social media posts about your award. And a template press release and event announcement. Our tips for sharing your news link provides helpful information about how to notify press about your award. We now have a new template press release and event announcement on the site to further guide you as you draft materials to send to the media. Finally, we have an IMLS director quote, this is one of the most frequent requests we receive, and now we have got one that you can use, straight from the website. We encourage you to browse through the site, see what is available, and feel free to contact your program officer if you need assistance or you can reach me at Gbullard@IMLS.gov or the communications E-mail, IMLSnews@IMLS.gov.

>> Our next slide, we have got the awarded grants Web Page which features blurbs about each of the grants. Grants on this page, you are found on the search box on the home page. It can take short descriptions of your project with basic information about it.

Now I'm going to pass the mic to Kim Miller in our grants administration office.

>> KIM MILLER: Welcome, everybody. Congratulations on your award. I'm going to talk about requesting payments from IMLS. The form that you will use for an advance or reimbursement is the standard form 270. On this form you can request both advance or reimbursement or both. If you are just submitting for an advance, we would like you to use section 12. Otherwise, use section 11.

Both are acceptable, and in both cases you can send the completed signed form via E-mail to grantsadmin@IMLS.gov. That's grantsadmin @ IMLS.gov.

You will need to put the grant number in the subject line. And any questions about payments, you can contact myself, Kim Miller, at IMLS.gov or grantsadmin@IMLS.gov.

Thank you. And now I'm going to hand it over to Madison Bolls who will speak about reporting.

>> MADISON BOLLS: Hello, everyone. Welcome. My name is Madison. I'm going to be talking about reporting forms.

If you go a bit further down the administration page, you will find your reporting schedule, excuse me, you will find your reporting forms on the administration page. We have already noted that your reporting schedule came to you when you received your award notification. When it comes time to create these reports, you will want to visit this page for the forms, instructions and guidance for submitting both the performance and the financial report.

Please remember the following reporting essentials. Put your grant number on all reports, and in the subject line of all E-mails you send to us.

Include the abstracts from your original proposal. All reports must use the IMLS cover sheet available on our website at the administration page. And the cover sheet must be signed by your authorized certifying official. All reports components must be submitted together and you will need both your DUNS and EIN numbers.

Your reporting schedule was included in the original award notification.

In submitting reports, reports including the cover sheet and attachments must be E-mailed to IMLSreporting@IMLS.gov.

Please remember to include your grant number in the subject line.

Here we have a screen shot of the first part of the basic grant reporting form. This is a two-page financial and performance report, that you will fill out and submit for all basic grants.

In part A, describe what the grant funds were used to report library information services including equipment purchases. The activities described should follow the categories identified in the spending plan approved when the grant was awarded. Please identify any significant differences between your approved spending plan and your actual expenditures of the grant funds, was there a change of personnel? Did you modify your budget or get a no cost extension? State that here. In part B, you will need to fill it out if you received the education assessment option along with your basic award. In part B, how the grant funds were used to support the following activities should be summarized. Attendance at continuing education courses and/or training workshops on or off site, attendances at conferences related to library services, and hiring of any sort of consultant for on site professional library assessment.

The activities described should follow the categories identified in the spending plan approved when the grant was

awarded. Please identify any significant differences between your approved spending plan and your actual expenditures of the grant funds.

If a grantee has a delinquent report, no reimbursements will be processed. And no new grants will be made to organizations with any delinquent report. If the report continues to be delinquent, an organization may become ineligible on all future awards. So make sure you submit all of your reports on time.

You may ask yourself what is the use of reporting? It provides us transparency and accountability in the use of federal funds. It meets the informational needs of elected officials and other stakeholders. It supports grant program evaluation that enables grantees to improve their performance and that offers lessons learned and best practices.

Reporting allows analysis and research by IMLS and others and supporting research across a range of grants. Finally it informs other grantees or potential applicants of possible activities on the grant.

Now I turn it back to Sandy Toro. Thank you very much.

>> SANDRA TORO: I'll add that, we will be having a future webinar about performance measures, which is something that is new for grants starting in FY2016.

There is an archived webinar on our website, but be on the lookout for more information about that coming up.

So the final question today is our list of suggestions for approaching the management of your grant. These suggestions are based on our collective experience over the years, and we share them here because we believe they will make managing your project go more smoothly and give you a maximum amount of time to spend on your project.

First, read everything that came to you as part of your official award notification. If you have an important role on a project and you don't have these papers, talk to your project director or your authorizing official to request copies.

Know your award number. NG, dash, something, something, 16, dot, something something something dot 16. That is the unique identifier which we gave to you and we will always ask for it when you call. Know your report due dates. Remember that it takes a little time to prepare the report, so allow yourself a few days to do that.

Know your budget. And if you have an enhancement grant, know your cost share. Know this as an actual dollar figure.

If you encounter any difficulties of any kind, please do get in touch with us right away. When it comes to accounting for your budget, it's not something you want to put off until you are filing your final report, and you realize that you have

money that you haven't spent yet.

So download and read the general terms and conditions document on the IMLS website. You will be doing yourself a favor to become familiar enough with this document now so that you know how and when to use it in the future. Have contact information available so you can contact us easily. Jot down the E-mails you need for submitting materials to IMLS. Remember for performance and financial reports, IMLS reporting and IMLS.gov and for the SF270 to request money that is grantsadmin @ IMLS.gov.

A suggestion has to do with getting money transferred to you, there are several specific things you can do to make sure this goes smoothly. The first keep SAM.gov registration up to date and active, it will require at some point -- it will expire at some point in the next twelve months. If you don't renew it, we won't be able to transfer money to you. SAM.gov is integral to transferring payments, and has replaced the need too complete HCH1. Make sure your information is correct. Make sure the reports are in on time. We can't process your request for payment and you may not be eligible to get additional awards if they are not on time.

Make sure the signer of the SF270 request for advance or reimbursement is the project director or administrative official in the IMLS grants database or designated by the project director or administrative official, via an E-mail to us.

A E-mail is correct in .pdf format to grants admin at IMLS.gov and include the award number in the subject line. That is always helpful.

Our final set of suggestions relate to making it easy for us to receive, review and credit you for submitting your reports. Using the required forms, helps ensure that all the various officers at IMLS can extract what they need easily. Submitting on time keeps you from getting delinquency notices. If there are too many of those your institution could be barred from receiving not just IMLS funds but potentially all federal funds. Be succinct, writing well and answering the questions we ask you to address is the smart thing to do. Sending them electronically is quicker and makes it easier to track. Write your award number in the subject line of your E-mails to us in any report. That is the NG number.

Finally, as your program officer I'd be your primary IMLS point of contact. I may touch base without throughout the course of the project to request more information about a report or make sure things are going smoothly. You may also hear from Aly or Madison or Kim. We are always eager to hear about project's successes and developments. We like to share this information on social media blog and other channels. Don't

hesitate to come to us with questions, that you can't answer with the terms and conditions or the costing support, we are always happy to help.

In closing our presentation today, we want to make sure you have our names, E-mails addresses, and direct phone numbers.

I often also give out my phone number, if you need to get in touch with me. I telework on Fridays, if you need to reach me on a Friday send me a E-mail.

Both the program officers and program specialists in general are happy to field questions or help with whatever you might need. Again, don't hesitate to call us with questions or concerns, or simply to confirm what you believe you already know.

So thank you for your time today. We congratulate you once again. We wish you the absolute best of everything in your project and we look forward to working with you.

Now it's your turn to ask questions about everything we said today, or anything that may have popped up since you were notified of your award. Feel free to post your questions into the chat box. And we will do our best to answer them.

>> Recording stopped.

>> We will give you a few minutes to get your questions posted. There is one question, [inaudible] upper left corner, click file save, save as .pdf, if you want to save the slides. We will be posting the slides along with our recording to our website. It will take us a day or two to get that on-line. But once we do, I will send it out to all of our grantees.

>> At the end of July, you should have received it. If you haven't, the organization [inaudible] you can E-mail us and we can get it to you or [inaudible] on our website in a few days. We will also have a second webinar. It will be the same webinar repeated on Thursday. You can find the time and link to that on our website as well. (pause).

>> If you have trouble understanding the SF270, feel free to give Kim or I a call or send us a E-mail. My address is mbolls@IMLS.gov and Kim is kmiller@IMLS.gov. We can help you out.

>> Also, we would like to let everybody know that Sandy, Aly and myself, Madison, will all be in Phoenix at the beginning of October. We will all be doing presentations throughout the conference, and we will be in different meetings throughout the conference. We would love to meet all of you that are there.

>> All right. We don't have any more questions. So feel free to send us an E-mail or give us a call, and if you would like to join us again on Thursday, you are welcome to do that for the next webinar. I see a question.

[inaudible]

Yes, that is possible. If you have specific questions about a person you want to work with, send us an E-mail. We will also be having another webinar for our enhancement grantees that will be coming up in October. We will have that information out soon. If there are no more questions, thank you again.

(end of webinar at 2:33 p.m. CST)

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