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FY2018
NATIVE AMERICAN LIBRARY SERVICES BASIC GRANTS PERFORMANCE MEASURES
WEBINAR

JANUARY 25, 2018

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>> SANDY TORO: Good afternoon. I'm Sandy Toro, and I'm a senior program officer in the Office of Library Services at IMLS. I'm joined today by Stephen Mayeaux who is a program specialist and today we're going to share information about IMLS performance measures and how they can fit into your basic library plan. The next deadline is in April and we want you to be aware of what you need to know in advance.

So we'll give you introduction of the performance measures and context and point you to evaluation resources that we have in our website and we'll talk about what successful plans can look like. I'll refer you to a blog post that first introduced the topic of performance measures and we'll talk about the democrat stateable results which is term -- a demonstrable result, we'll look at the point evaluation plan and talk about performance measures statements and information that you need for the final report at the end of the award period. We'll talk in general about how to think about an evaluation plan overall and then again look at what's available on our website in terms of resources.

Finally, we'll open the chat up to questions although

you're free to ask any question as we go along, and I am happy to try to answer them.

To get started, it is helpful to think about performance measures within the overall context of evaluation. Before we dive into what the IMLS performance measures are and how you need to make use of them I want to point out that on our website you will find a page devoted to research and evaluation. In the evaluation resources section there are a number of web links you can click on that will help you think about which kind of evaluation approach you might want to take for your project.

The reason I bring this up, it is that performance measures which has to do with gathering information, data that addresses how well the project meets any goals presented in the library plan falls within the area of evaluation.

For example, an evaluation resources, if you scroll down, you will find a section on project planning tools for museum and library services. This section has links to other sites that look at evaluations and the inspiring learning framework, there is a framework for broadening the impact of outreach efforts and other links and sites.

There is one section on common evaluation methods and terms from the Harvard family research project and in this case we have pulled out key terms and brief descriptions that might be helpful for you to get an overall view of different approaches to gathering the information that you need to help you figure out if you're meeting your goals.

For example, if you're including educational workshops for families in the library plan how will you know what the family members are taking away from their experiences during the workshop? You ask them questions as to -- will you take notes about the observations in terms of how the parents, children are working together during the workshop? It is up to you. It is important to keep in mind that at IMLS we don't require any one particular kind of evaluation or that you hire an external, outside evaluator. We leave it up to you to figure out what you need. In most cases, if you have a plan, that will help you to address the performance measures that we do require you to have.

Again, it is helpful to think about performance measures within that bigger context of evaluation and there are lots of resources on our websites.

So back in 2016, in that fiscal year IMLS was first required to report back to the Office of Management and Budget the results of projects that we funded. Because we fund so many different kinds of libraries and museum to do a variety of types of research and programs this was a huge challenge for us. We need a way to show results across all of the programs for both libraries and museum so an internal team at IMLS came up with a

basic performance measures requirement that could be used by all awardees regardless of type of institution, program type, so a blog first introduced this general performance measures to applicants in the Fall of 2015. I have the link here on the bottom of the slide.

As you can read in the post, all projects funded by IMLS are now required to measure performance. This is new for Basic Grants, we tried to put it off as long as we could and it still is required and as I mentioned earlier by measuring performance we mean gathering information or data that addresses how well the project meets any goals that are presented in your application for funding.

We're going to see some slides and I'll walk you through what it looks like for you as the applicant.

This is the IMLS program and information sheet or PIS. The PI, it is linked to every notice of funding opportunity including the one for the Basic Grants. This is one of the required documents that you need to have a complete basic grant application so make sure that you use the correct version of the PIS. On this sheet you have to select an agency level goal and a performance goal. You need to look at the bottom of the sheet to get the correct one.

This is important to submit with the application. If not, it would be rejected. You can resubmit but it is better to use the correct form from the beginning.

This is question 4 from that program information sheet. It will ask you to select one of three IMLS agency level goals so the learning, community, content and collections. Then you select at least one of the performance goals. For learning, you have train and develop museum and library professionals, support communities of practice, develop and provide inclusive and accessible learning opportunities.

For community you have strengthen museum and libraries as essential partners in addressing the needs of their communities.

For content and collections we have broaden access and expand use of the nation's content and collections and improve management of the nation's content and collections, and improve preservation, conservation and care of the nation's content and collections.

So you take one goal on the PIS and this goal needs to be addressed in the library plan.

Check your plan to make sure you've dressed a performance goal and you may be asked to revise your plan if we see a performance goal has not been addressed.

As you work through the plan, make sure that you reflect and really think about which goal you want to pick. Even though sometimes people are ambitious and pick multiple goals you only

really need to pick one.

So projects that have to do with learning or community, we provide a link to specific performance measure statements and information on our website. If you click on the link you'll be given basic information that refers you back to the statement that you picked on your program information sheet. You're told that you will be required to provide specific information that relates to that statement by the program information sheet in your final report and you're given some samples in terms of what you can say to help address that goal that you picked. For example, for train and development for library and professionals, you can ask your staff who participated in a workshop did your understanding increase as a result of the training and they can strongly agree, neither agree or disagree and they can disagree or they can strongly disagree.

The data to collect would be how many people participated in the training, how many responses you got and how many people responded per question and how many people refused to respond or didn't respond. That's one example for training and developing museum and library professionals.

If you pick development for providing inclusive and development community opportunities you could ask maybe participants in a workshop did your understanding increase as a result of participating in the workshop. Again, they can agree, disagree, strongly disagree and you would get the same data, how many people participated, how many responses you got, how many people didn't respond.

If you pick the community goal that talks about strengthening museum and libraries as essential partners in addressing needs of the communities you can ask your staff is my organization better prepared to provide a program or service that addresses community needs. Again, they can agree or disagree and you collect the same data, how many people responded, how many people didn't respond. That's what gives you a sense of the kinds of examples we have in our website to help you figure out who to ask, what kind of questions to ask and what kind of data you will need to include that you have been addressing the performance goal statement.

The next time you'll be officially required to address that goal is when you submit your final report. You address the performance measure statement and program information sheet in your library plan and then in your final report.

This is the page on our website where you can find the final report requirements for Basic Grants. Sometimes it is helpful to see what you'll be required to do at the end to help you put together the application in the beginning.

You can see here in orange it says Native American Library

Services Basic Grants, and underneath is the link to the form. At this time we do not expect this form to change. It is the same form if you applied last year that you had to fill out as your Basic Grant.

On the form, there are areas where you describe what you did during the award period and how much money you spent. So this is divided between your regular project activities and the education or assessment activities that cannot go over \$3,000. You'll put that on the second page of the form.

When you work on the final report you can follow the guidance that's available for final performance reports for other grants to help you describe which activities were proposed, which activities were completed and if there were it changes what did the changes look like. Currently we don't have this guidance for Basic Grants, so that's why I'm directing you to the instructions for help. They're accessible through the same link on Slide 8 which is repeated here.

This is the first page.

On the second page you will see specific instructions about performance goals.

Again, you're directed to the performance goals statements and for learning and community projects you will be instructed to again record the number of participants, the number of responses, how many people didn't answer and you should have one line of information for each performance measure statement. You're going to see some other guidance about how to capture the results, how to capture lessons learned and what your next steps are in terms of the project beyond the end date of the award.

Foreclosing learning and community projects you want to refer to the plan that you're submitting with the application and record the performance measure statements, for example here in the first column, and in the survey respondent column you can specify for whom the survey results -- from whom the survey results were obtained, was it program or project participants, other staff, community partners, then for each performance measure statement you record the number of participants, the responses, et cetera. You can have one line of information measure statement.

We're not asking for had that much information but you have to include all the parts.

Taking a step back again, in general, thinking about performance measures in terms of it a broader evaluation plan and how do you know what to include in the evaluation plan.

You should include specific and sufficient resources dedicated to evaluation activities in your library plan, in your budget and refer to these throughout the duration of the award. Keep in mind that you're going to need time to fill out this

report and account for who attended, gathering their responses to the questions.

So relevant costs can include payments for consultants, your own staff, staff time for developing a questionnaire or survey, staff time for collecting the information and analyzing the data that you're going to put in the final report so include the costs of the evaluation and the reporting and sharing the results in your project budget and keep in mind that evaluation strait gees often use multiple techniques, not just to measure and analyze things like outputs and outcomes, which are short-term and long-term impacts, but also to help you to share information about your project design and how you progress with your project.

When you think about a plan, remember to link back to the IMLS goals from the program information sheet, the goal statements that you will find on our website further explained, and the results that you intend to measure in terms of the project that you're proposing.

I recognize that's a lot of information and we're going to open it up to questions now. I will say that we're happy to look at drafts of library plans and give you feedback if you would like to get any feedback from us before you submit your application for the Basic Grant.

If you have any questions at all, feel free to type them into the chat box.

We have one question from Ann. She says so for the performance goals, they're Basic Grant usually covers things that would be in multiple categories. Is it okay to just pick one and go with the parts of the grant that apply to that goal? Yes. Yes, pick one even though you have some things that may fall outside of that range and only answer the questions that you need to.

Again, when these performance measures and the statements were developed, they were trying to find the base that anybody who gets a grant could answer. We're trying to keep it simple although it could seem overwhelming. That's a great question.

We see a few people typing. We'll wait a few more minutes.

We'll put up our contact information so that you can know how to get in touch with us if you have questions about your library plan and your performance measures.

Another question, if we picked the performance relating to education and training, is it okay if the staff participating is only a few people. There would only be a few responses to the survey. Yes. If it is only three people, then that's your number of respondents and if one person refuses to answer then you put in the responses from the two people who were willing to answer.

We're not seeing any other questions pop-up. I would mention that on our news and events page you will see a link to the webinar we had over the past couple of weeks, we had a general basic webinar which explains how to apply and changes and updates, that -- the biggest change I'll mention right now, it is the top is \$10,000 rather than 5 or 6 and education and assessment activities you can now use up to \$3,000 instead of \$1,000. There is also a new budget form. We had a webinar focused on the budget form and that's on that webpage. We expect that you may have questions about the new budget form and about performance measures. If you can't think of them right now. Feel free to email us or give us a call and we'll try to talk you through what you need to know.

Thank you very much for joining us. We'll hang out for a couple more minutes to see if anyone has any additional questions.

Thank you.

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