



Site Visits: News and Updates for 2023-2027

Dennis Nangle, Madison Bolls, and Cindy Boyden, Senior Program Officers



Overview

- Site Visits - what to expect and how to prepare
- During the visit
- After the visit
- Discussion
- New Site Visit Checklist - how it works and what's new



Purpose

- Provide technical assistance and monitoring support
- See funded projects in action
- Identify best practices and projects to highlight at IMLS
- Promote IMLS opportunities





IMLS Program Officer preparation

- Notifies state that IMLS is coming
- Sends letters to chief and coordinator referencing checklist
- Reviews SPR report, Five-Year Plan, Five-Year Evaluation, other material



LSTA Coordinator preparation

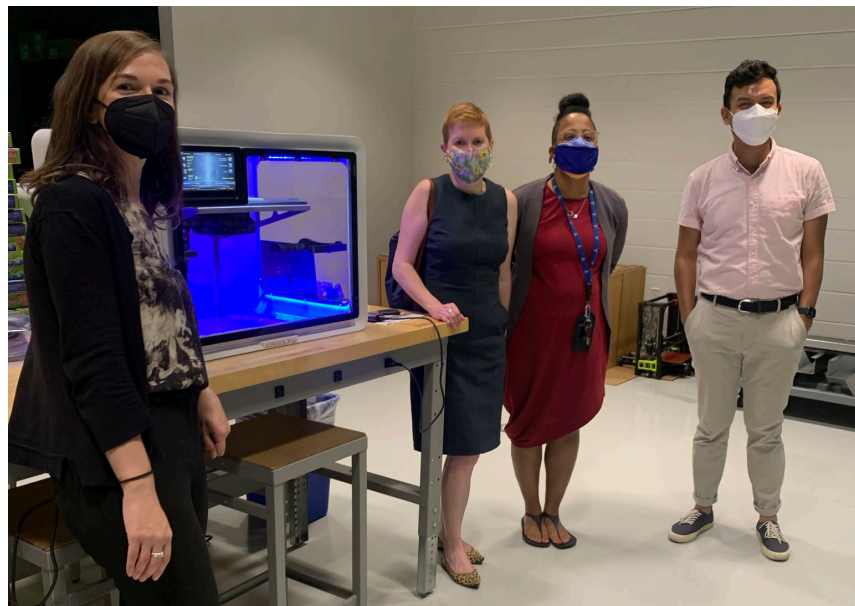
- Organizes when IMLS program officer meets with SLAA staff
- Selects and sets up field sites, contacting those grantees
- Prepares full itinerary of the visit
- Fills in the Site Visit Checklist





Site Visit

- Usually lasts 2-3 days – visit SLAA and others
- Meet key personnel
- Meet with chief
- Program Officer reviews checklist with staff
- Visit beneficiaries of funds



What IMLS will need – pt. 1

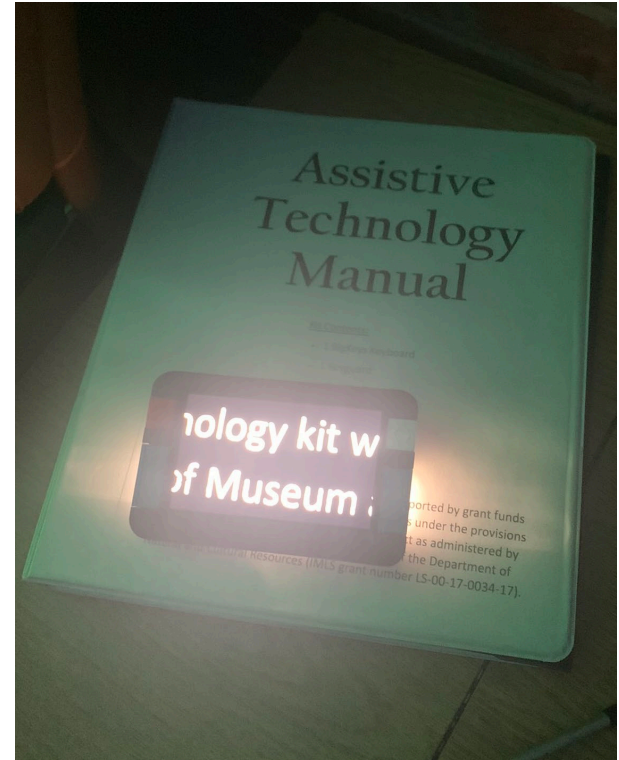
- Itinerary with people we will visit with their title and location
- If subrecipients: title, location and information on their grant including amount and activity
- A copy of the SLAA organizational chart
- Match and Maintenance of Effort documentation





What IMLS will need – pt. 2

- Sample policies
- Public relations examples
- Written guidance to subrecipients, if applicable
- Other materials detailed in the Site Visit Checklist



Subrecipient/beneficiary visits

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





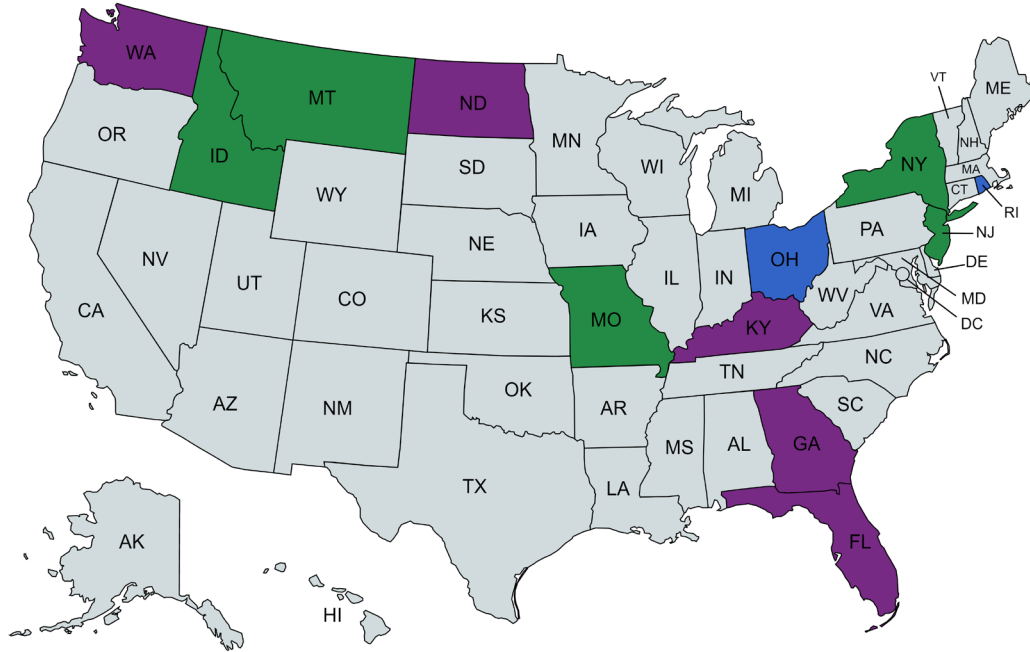
After the visit:

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

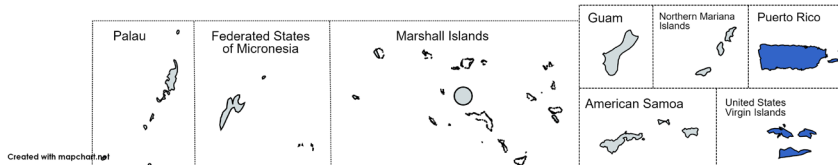
If needed:

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

Site Visits for 2023

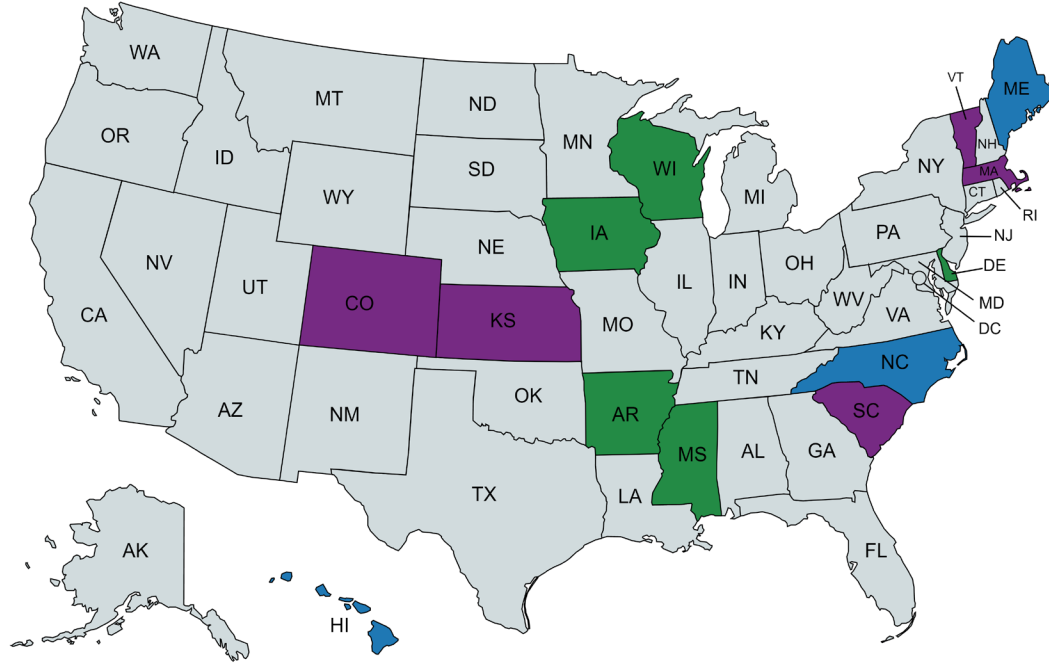


- Dennis: ID, NY, MO, MT, NJ
- Cindy: GA, FL, KY, ND, WA
- Madison: PR, RI, OH, USVI

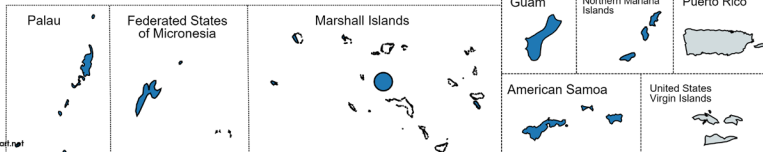


Credited with mapchart.net

Anticipated Site Visits for 2024



- Dennis: AR, WI, MS, DE, IA
- Cindy: CO, KS, SC, VT, MA
- Madison: Pacific Workshop, HI, NC, ME





Site Visit Share-Out

Veterans:

- What do you wish you would have done differently during your site visit?
- What were the highlights of your visit?
- What was your experience completing the checklist? Any unanticipated delays to watch out for?

First-Timers:

- What are your concerns/questions about the site visit process?

Everyone:

- Is there anything IMLS should know about the site visit preparation process?



New Checklist with 2023-2027 cycle

- Now lives in the SPR
- No longer a fillable PDF, but can be saved as PDF for record-keeping
- Questions have been updated and the entire checklist is web-based
- All requested documentation materials can be uploaded within the checklist, rather than emailing attachments
- [Reference copy of all questions](#) available in the G2S Manual on the IMLS website

Home
Projects
User Reports
Account Management
Manage Subrecipients
Subaward Info
State Goals
State Info
Subrecipient Access
User Info
Site Visit Checklist
Help
SPR Data Export



New Checklist format

- Last Modified Date: the SPR will keep track of the last time the checklist was saved
- Print: The checklist can be printed in case an “analog” version is needed, and/or can be printed to PDF for local record-keeping
- The checklist is divided into five categories: click on the headers to expand each section

Print Save

Last Modified Date:

Grants to States Site Visit Checklist

Date(s) of Site Visit:

Program Officer:

General Information

Legal Authority and Compliance with Federal Law

Administrative Activity

Financial Activity

Wrap Up

Save



New approach to additional materials

- Requested materials are no longer listed altogether at the end of the checklist; they now are at the end of each section
- There is an option to either upload documents or provide URLs to files
- NOTE: if providing URLs to internal/private file share systems (i.e., Google Drive/OneDrive), be sure to grant access to your Program Officer

General Information: Additional Materials

Please upload and/or link to:

- Names and titles of all SLAA staff affiliated with the LSTA Grants to States program.
- Current SLAA organization chart.
- Current job description for LSTA coordinator showing LSTA as well as other duties.

Attach File (file limit: 40MB)

No file chosen

Enter URL



New feature: Discussion Prompts

- Intended to generate open-ended discussion about your state and SLAA
- Provides more transparency for the things IMLS wants to discuss
- No formal responses are recorded in these sections

General Information: Discussion Prompts (to be discussed during the site visit)

- *How are libraries organized in the state (county, parish, region, districts, systems, etc.)?*
- *What level of engagement does the SLAA have with non-public libraries? What kinds of libraries can the SLAA legally work with?*
- *Tell us more about the SLAA's staffing levels, responsibilities, and position within the state's government structure.*



Checklist contents

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

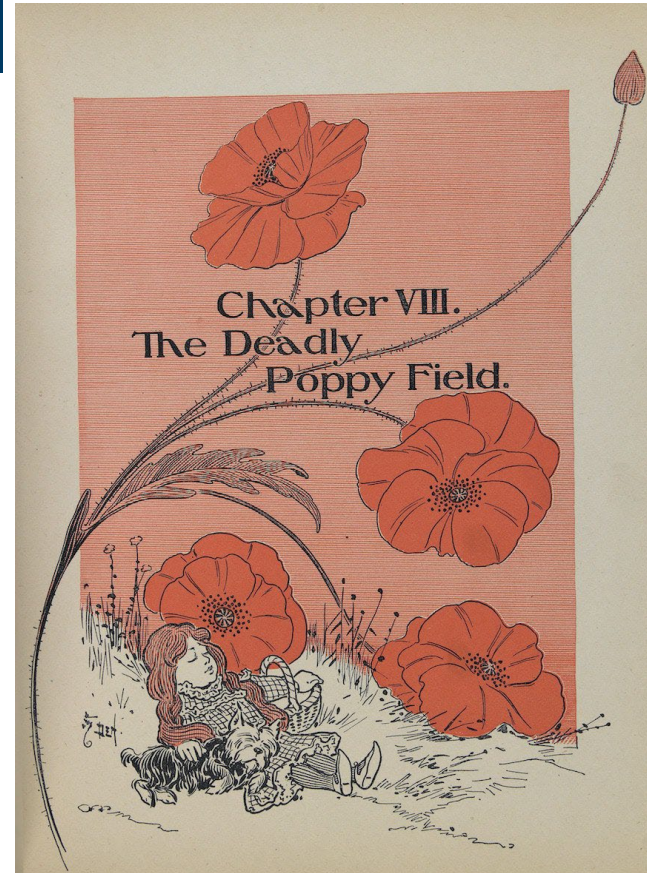


General Information

- Provides a general overview of your state library
- Gives a top-level orientation to structures and systems of libraries throughout the state

Legal Authority and Compliance with Federal Law

- Opportunity for deeper perspectives on legal matters pertaining to the SLAA
- Grounding for the legal authority in your state
- Discussion surrounding how federal law interacts with state laws/policies





Administrative Activity

- 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 Activity

- How the 4% administration, match, and Maintenance of Effort (MOE) are tracked
- Statewide cost allocation plan (SWCAP), if any
- Audits
- Procurement/equipment





Wrap Up

- Optional fields for any additional context or comments not covered by other sections of the checklist
- Section for uploading logistical elements of the visit (agenda/itineraries) as well as files for projects that will be visited



General Updates

- All states should be visited within 4 years
- No site visits will be scheduled in 2027 when Five-Year Evaluations/Plans are due

Questions?