

FINAL REPORTING REFRESHER FOR LSTA PROJECTS

Guidelines and
Best Practices

WHY ARE FINAL REPORTS SO IMPORTANT?

We are here to assist you in completing your final reports.

It is important that final reports are submitted correctly.

- Final reports document the funded project, and the State Library retains these records.
- Final report data is used to complete the annual State Program Report, a report required by the Institute of Museum and Library Services (IMLS) that demonstrates how Library Services and Technology Act (LSTA) funds were administered.
- Errors on reports must be revised before the State Library can approve. Accuracy is critical.

PROJECT AND ACTIVITY ABSTRACTS

General Guidance

- Briefly describe the activity.
 - What you did, with whom, and what was the intended result?
- Always use the past tense.
- Must adhere to the 90-160 word limit.
- Write for a general audience by avoiding jargon, acronyms, and abbreviations.
- High level results **MUST** be included.

PROJECT AND ACTIVITY ABSTRACTS

Common Mistakes

- Grant vs. Project
 - Using the word **project** instead of **grant** is preferred. The activities funded by the grant make up the project and the project is what is being reported.
- Focusing on the purchases made to support the project, rather than the project itself.
 - E.g., for a Makerspace project, the abstract should not lead with a statement about the equipment that was purchased, it should lead with a statement about establishing the Makerspace and the Makerspace programs the library presented.

PROJECT AND ACTIVITY ABSTRACTS

Example Abstract

ABC Express provided early literacy programming to low-income families with children on preschool waiting lists. The project focused on areas such as digital literacy and socialization, to help with reading readiness, emergent literacy, and basic technology skills. Spanish-speaking librarians led weekly discussions with parents and guardians around the topic of early literacy skills. Through these sessions, caregivers learned about concepts and practiced simple activities that they could apply in the home environment. Meanwhile, the children participated in hands-on reading readiness activities that incorporated computers and handheld devices.

PROJECT ABSTRACT

Example of Abstract in Need of Revisions

This project brought together diverse groups of people to collaborate on STEAM learning. Together, they had the opportunity to connect and learn about science, technology and engineering. Through these endeavors the participants learned the value of science and technology in everyday life regardless of age or background.

LANGUAGE – PROJECT ABSTRACT

Abstract Edited to Accurately Reflect Project

The library presented a series of STEAM programs that provided science and engineering instruction for children, teens, and adults, and brought people of diverse backgrounds together to create community through STEAM learning. Local engineering instructor, XXX, from XXX College, provided instruction for the workshops, introduced participants to different engineering and technology concepts and offered career guidance in those fields. Following the workshops, twelve participants created posters that demonstrated how science and technology benefit everyday life. The posters were displayed in the library gallery. The program was a success, and participants expressed the desire to participate in future programs.

DETAILED FINANCIAL REPORT

(a) Salaries/Wages/Benefits					
Position Title	FTE	LSTA Funds	Cash Match	In-Kind	Description
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
Total Salaries/Wages/Benefits		\$0	\$0	\$0	

(b) Consultant Fees					
Name(s) of consultant(s) or consulting firm(s) and expertise		LSTA Funds	Cash Match	In-Kind	Description
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
Total Consultant Fees		\$0	\$0	\$0	

(c) Travel					
Travel expenditures		LSTA Funds	Cash Match	In-Kind	Description
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
		\$0	\$0	\$0	
Total Travel		\$0	\$0	\$0	

BUDGET NARRATIVES

- **Salaries:** Full-time equivalents (FTE) are required in the Salaries section of the budget.
 - Have you included FTEs in Salaries? Are they accurate?
- **Consultants:** include name(s) (or firm name), area of expertise and actions/contributions to the project.
- **Travel:** include number of travelers, the types of travel expenditures, and purpose of travel.
- **Supplies and Equipment:** include types and quantities of supplies/materials and equipment.
- **Services:** include name(s) of any contractors.
- **Note:** giveaway items are **never** allowable.

PROJECT OUTCOMES

First question: List any important outcomes or findings not previously reported

- Not previously reported: Should not include content (outcomes, outputs, budget information, anything else) that is included elsewhere in the report.
- Important: Any content included here must be important.
- State only the outcomes/findings, not the analysis (this comes next).
- Section should not include information about key project activities that should have been submitted as an activity report.

PROJECT OUTCOMES

Second question: Briefly describe the importance of these outcomes and findings for future planning

- Only include content that relates to the outcomes or findings listed in the previous question.
- Should not begin writing about a different outcome or finding. If that outcome or finding is important and not otherwise in the report, it should be described in the previous outcomes question.

PROJECT OUTCOMES

Third question: Explain one or two of the most significant lessons learned for others wanting to adopt any facets of this program

- This section does not need to connect to the two previous sections. It can encompass the full experience of implementing the project.
- What might people in other libraries or states want or need to know to successfully replicate the project or facets of the project?

ACTIVITY REPORTS

When to Report an Activity

- There must be an activity description for all significant project activities, not just something that costs over 10 percent.
 - Any activity that accounts for at least 10 percent of the resources contributed to the project **MUST** be reported.
 - This does not mean important activities don't need activity reports if they used less than 10 percent of the resources contributed to the project.
- This is especially true if (a) the report as a whole does not make sense without the specific activity report, and/or (b) the activity is described in the main project abstract.

ACTIVITY REPORTS

Types and Modes



Activity Types (4) and their Modes

- **Instruction** (Program, Consultation, Other, etc.)
- **Content** (Acquisition, Creation, Lending, etc.)
- **Planning & Evaluation** (Prospective, Retrospective)
- **Procurement** (no mode applicable) – NOTE: only available with Institutional Capacity intent

ACTIVITY REPORTS

General Guidance

- Activity abstracts should be between 90 and 160 words
- Activity titles cannot be the same as the project title
- No more than 10 activities (most projects have 2-5)
- Activities with the same category, type, and mode can be combined

ACTIVITY REPORTS

General Guidance Continued

- Project activities should not be reported in the outcomes section including the section for findings not previously reported.
- Activity reports must accurately reflect the activity. Cannot describe a program as a presentation simply to avoid collecting outcomes.

ACTIVITY REPORTS

Outcomes Surveys

Activity Outcomes

When To Survey Participants in a Grants to States Project

		Beneficiary	
		Library Workforce	General Public
Activity	Instruction	Yes if mode is Program	Yes if mode is Program
	Content	Yes if mode is Acquisition or Creation	No
	Planning & Evaluation	Yes	No
	Procurement	No	No

Outcomes survey questions can be found on the [Manage Your Current Grant page](#).

ACTIVITY REPORTS

Quantity Information

Quantity information includes: number of programs, number of sessions in a program, number of attendees, number of consultations, number of items circulated etc.

- Quantity information must align with the content included in other sections of the report, including the activity abstract and the budget.
- If the narrative said a library presented two programs, each comprising five sessions, the quantity information must reflect this.

ACTIVITY REPORTS

Quantity Example: Instruction/Consultation

Instruction/Consultation

Average number of consultation/reference transactions per month

- The total number of all consultations/reference transactions divided by the number of months over which they occurred.
- This means we need to know how many months any consultation activity occurred for. We cannot assume a 12-month project period so this information must be included in the narrative.

PARTNERS, BENEFICIARIES, AND LOCALE

Must be complete and completed correctly

- These sections of the reports are often submitted with incorrect or missing information.
- Information must align with the narrative.

Partners

- Not beneficiaries
- Partners contribute to the project and have a formal agreement with the grantee.
- Boxes denoting the area(s) in which partner(s) operate and the partner(s) legal type must be checked and correct.

PARTNERS, BENEFICIARIES, AND LOCALE CONTINUED

Locale

- If a program takes place in a number of library branches or other locations, those branches and locations must be listed in the report.
- Check for alignment with the project narratives.
- If a project takes place in three county library branches, we cannot just report the main address of the county library system.
- If the program took place in more than 10 branches, location information can be submitted as an attachment.

TIMELINE

- Submission of reports
- Review Period
- Potential Revisions
- Acknowledgment of Revisions Complete
- Reports sent out Through DocuSign

REMINDERS AND RESOURCES

- The Institute of Museum and Library Services State Program Reporting Requirements set the guidelines we are required to follow. To remain compliant with LSTA funding rules and regulations, we must ensure that these guidelines are being followed.
- We are available to assist with any reporting questions or issues!
- Reach us at:
 - LSTAGrants@library.ca.gov
- Resources including reporting instructions, Grant Guide, and links to submission portals:
 - [Manage Your Current Grant - California State Library](#)
- Sample Detailed Financial Report:
 - <https://www.library.ca.gov/wp-content/uploads/2023/07/Sample-LSTA-Detailed-Financial-Report.xlsx>