

NIST MEP Information Reporting Guidelines

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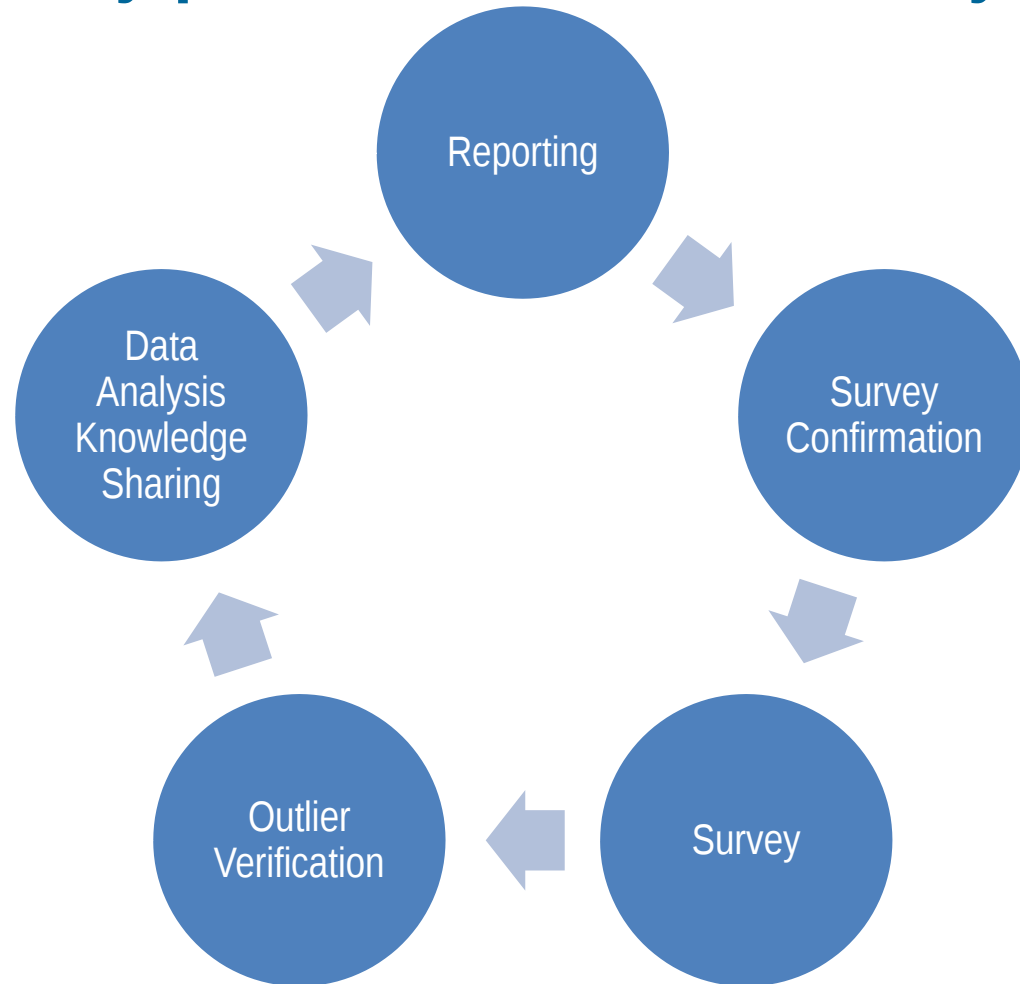


Why is Reporting Necessary?

- Used for CAR performance management, annual/panel reviews and reporting the program's performance to Congress
- Generate standard sets of reports
- Cooperative Agreement Requirement



NIST MEP Reporting, Survey Confirmation and Survey process is a continual cycle.



Reporting Schedule

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
<i>Period:</i>	<i>January 1 – March 31</i>	<i>April 1 – June 30</i>	<i>July 1 – September 30</i>	<i>October 1 – December 31</i>
Deadline:	April 30	July 31	October 31	January 31

But you can report any time!



2018 Calendar Cycle

Reporting
Survey
Survey Confirmation

2018

JANUARY						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

FEBRUARY						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

MARCH						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

APRIL						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

MAY						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

JUNE						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

JULY						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

AUGUST						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

SEPTEMBER						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

OCTOBER						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

NOVEMBER						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

DECEMBER						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					



Reporting Elements and their Minimal Required Reporting Frequency

Quarterly

- Information
- Locations
- Staff (but...)
- Contacts
- Progress Data
- Partners
- Board of Directors
- State Funding Partners
- Success Story

Semi Annually

- Progress Plan/Technical Report*
- As Needed
 - Operating Outcomes*
 - Clients
 - Projects and Events (but....)
 - Budget Actuals*
- Elements not applicable to all
 - Salesforce Configuration
 - Regional Offices

* MEP and Center Partnership Model

** (but...) if you do not submit bad things can happen



Funding Programs

- Center Operations
- MFG USA Embedding
- Rolling Competitive Award Program (RCAP)
- Manufacturing Disaster Assistance Program (MDAP)
- Each award has its own requirements
 - Center Operations typically has the most extensive requirements

NOTE: Not our intention to cover Other Funding Program reporting in this session but if you have any questions see us after the session.



Reporting Elements by Award Type

Reporting Element	Center Operations	Embedding	RCAP	MDAP
Board of Directors	Shared Across All Awards			
CAR Information	Shared Across All Awards			
Clients	Yes	Yes *	Yes *	Yes *
Contacts	Yes	Yes	Yes	Yes
Locations	Shared Across All Awards			
Partners	Shared Across All Awards			
Progress Plan	Yes	Yes	Yes	Yes
Projects	Yes	Yes *	Yes *	Yes *
State Funding Partners	Shared Across All Awards			
Staff	Yes	Yes	Yes	Yes
Sub-Recipient	Yes	No	No	No
Success Stories	Yes	No	No	No



Reporting Dashboard

Dashboard CIP Reports Search Communities ROAR Links D&B Administration/Tools Self Service

Advantage Kentucky Alliance (238)
 Reporting Dashboard

Reporting Period 2016-4

Reporting Dashboard

Reporting Element	Status	Started	Submitted	Finalized	Cleaned
Advantage Kentucky Alliance					
CAR Information	●	By Scott Broughton on 1/11/2017 10:59:29 AM	By Scott Broughton on 1/11/2017 10:59:29 AM	By Scott Broughton on 1/11/2017 10:59:29 AM	
Locallons	●	By Scott Broughton on 1/11/2017 10:58:19 AM	By Scott Broughton on 1/11/2017 10:58:19 AM	By Scott Broughton on 1/11/2017 10:58:19 AM	
Clients	●	By Kristi Gray on 1/26/2017 1:10:33 PM	By Kristi Gray on 1/26/2017 1:10:33 PM	By Nico Thomas on 1/26/2017 3:52:44 PM	
Board of Directors	●	By Scott Broughton on 1/11/2017 10:58:54 AM	By Scott Broughton on 1/11/2017 10:58:54 AM	By Scott Broughton on 1/11/2017 10:58:54 AM	
MEP System-Center Operations					
Staff	●	By Scott Broughton on 1/11/2017 10:58:31 AM	By Scott Broughton on 1/11/2017 10:58:31 AM	By Scott Broughton on 1/11/2017 10:58:31 AM	
Contacts	●	By Scott Broughton on 1/11/2017 10:58:43 AM	By Scott Broughton on 1/11/2017 10:58:43 AM	By Scott Broughton on 1/11/2017 10:58:43 AM	
Projects and Events	● 11	By Kristi Gray on 1/27/2017 10:14:04 AM	By Kristi Gray on 1/27/2017 10:14:04 AM	By Nico Thomas on 1/27/2017 10:39:37 AM	
Progress Plan (next expected 2016-4)	●	By Sophie McAdams on 1/26/2017 12:33:24 PM	By Scott Broughton on 1/30/2017 11:32:26 PM	By Melissa Ayala on 1/31/2017 9:40:23 AM	
Progress Data	●	By Scott Broughton on 1/30/2017 8:49:00 PM	By Scott Broughton on 1/30/2017 8:49:00 PM	By Scott Broughton on 1/30/2017 8:49:00 PM	
Partners	●	By Scott Broughton on 1/11/2017 10:59:14 AM	By Scott Broughton on 1/11/2017 10:59:14 AM	By Scott Broughton on 1/11/2017 10:59:14 AM	
State Funding Partners	●	By Scott Broughton on 1/11/2017 10:59:51 AM	By Scott Broughton on 1/11/2017 10:59:51 AM	By Scott Broughton on 1/11/2017 10:59:51 AM	
Success Stories	● 1	By Kristi Gray on 1/24/2017 1:12:13 PM	By Scott Broughton on 1/30/2017 8:39:41 PM	By Zara Brunner on 2/8/2017 10:18:30 AM	
Operating Outcomes (update as needed)	●	By Scott Broughton on 10/28/2016 4:28:48 PM			

Key

● = Started |
 ● = Passed |
 ● = Passed with Warnings |
 ● = Passed with Errors |
 ● = Passed Pending MEP Review |
 ● = Failed |
 ● = Cleaned |
 = No Submission



Reporting Elements – Information

Purpose:

- Intended to provide NIST MEP with general CAR contact information such as address, telephone number, fax number, and email address
- MEP will use this information in communications with stakeholders and for publishing CAR information in marketing materials and web sites
- Feeds MEP Public Site – Center Near You , MEP Quick List, State One Pager

How to Report:

- Click CIP, hover over Information, Submit Quarterly Reports, review data on the various tabs, click Actions Submit for Reporting
 - Highly recommend that you update this information as soon as something changes, no need to wait for a reporting period.
 - Center's cannot change CAR Name or Organization Type



Reporting Elements – Information

Related Reports: Either data used or clickable from page

- CAR Information
- CAR List
- BIR Report (clickable from Information)
- One Pager (clickable from One Pager)
- CBP, Rural, Congressional Districts (Export from tab)
- CBP Information
- MEP Quick List
- Users



Reporting Elements – Information

Did you know:

- Information – you can view your D&B BIR if already created by your FPO
- One Pager – view the one pager, the SS that is part, based on this you can contact Communications to make changes
- Staff – edit other user account records. New center name so all new email addresses, center moved
- Counties – CBP data and rural export
- Dun & Bradstreet – your center record is there, we use this information for renewal packages. Have you ever looked at this record?



Reporting Elements - Locations

Purpose:

- Locations are physical addresses where CAR, sub-recipient, or partner staff are based or deliver services
- The locations are intended to provide NIST MEP with general contact information such as address and phone information
- MEP uses this information to communicate our national coverage area with our various stakeholders

How to Report:

- Click CIP, hover over Locations, Submit Quarterly Reports, review field offices, CAR regional offices, and partners as service delivery locations, click Actions Submit for Reporting

NOTE: We need centers to look at Locations closely, remove duplicates. Some centers have a location as a field office, CRO, and partner. These locations are being double and triple counted.



Reporting Elements - Locations

Related Reports: Either data used or clickable from page

- CAR Information
- CAR Locations

Did you Know:

- In order to update Partners as Service Delivery Location, you must do so from the Partners page
- Adding or marking records inactive can be done either from the List or Submit Quarterly Reporting Forms



Reporting Elements - Staff

Purpose:

- The staff element provides the CAR a mechanism for reporting on its active workforce
- The staff listing is a compilation of registered CAR staff users

How to report:

- Click CIP, hover over Staff, Submit Quarterly Reports, review data, click Actions Submit for Reporting
 - Verify that the Staff list is current and complete and that all staff are assigned to the appropriate funding agreements
 - To the right on the Staff grid, columns of checkboxes are visible for each Funding Agreement, click the checkbox for each Funding Agreement a staff member is working
 - To remove a staff member, click the archive checkbox to the right on the Staff grid



Reporting Elements - Staff

Related Reports: Either data used or clickable from page

- CAR Contacts
- CAR Information
- Clients and Projects
- Clients/Projects/Impacts
- MEP Quick List
- Users



Reporting Elements - Staff

Did you know:

- Anyone devoted to the CAR, either as an employee or sub-recipient providing part of a partner's cash or in-kind contributions, as delineated in the CARs current Operating Plan, is considered part of the CARs staff and should be reported
- Each CAR staff member is responsible for maintaining his or her own record
- CAR Staff members are automatically associated to a center when they register for access to the MEP MEIS but they are not automatically assigned to a funding program and will not appear in the Staff Listing until a funding program is assigned
- Staff cannot be associated with a project unless they are tied to the appropriate funding agreement



Adding Funding Program for Staff (Continued)

Dashboard CIP Reports Search Communities ROAR Links D&B Administration/Tools Reviews Self Service Action(s)

Tennessee Manufacturing Extension Partnership (197)
Staff Submission

Submissions
Submitted On 1/5/2017 8:43:11 PM By Misty, DePriest
Finished On 1/5/2017 8:43:11 PM By Misty, DePriest

CAR Staff

Apply Filter

Center Name	Relationship	Allocated	Unallocated	Archived	Total	Allocated	Unallocated	Archived
Tennessee Manufacturing Extension Partnership	Primary	21	3	0	24	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Archiving or removing a staff member from a funding agreement will automatically remove that staff member from the associated Contact type.

User...	Last Na...	First Na...	Organization Name	Email	Archive	MEP Sys...	Embedding TNMEP in NNMI Institute Pilot Project
Tennessee Manufacturing Extension Partnership							
9697	Aslinger	George	Tennessee Manufacturing Extension Partnership	gaslinge@tennessee.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8990	Codega	Michael	Tennessee Manufacturing Extension Partnership	michael.codega@tennessee.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10322	Cooper	Kevin	Tennessee Manufacturing Extension Partnership	kevin.cooper@tennessee.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3875	DePriest	Misty	Tennessee Manufacturing Extension Partnership	Misty.DePriest@tennessee.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5555	Duru	Sherri	Tennessee Manufacturing Extension Partnership	sherri.duru@tennessee.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5649	Eddy	Wendy	Tennessee Manufacturing Extension Partnership	wendy.eddy@tennessee.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9455	Foote	Adam	Tennessee Manufacturing Extension Partnership	adam.foote@tennessee.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			Tennessee Manufacturing Extension Partnership	keith.groves@tennessee.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

meisuat.nist.gov/dashboard

Click checkbox to associate staff with funding agreement

Click checkbox to archive staff



Reporting Elements - Contacts

Purpose:

- Contacts are CAR officials with specific duties for which there is the opportunity to correspond as a group
- Contacts are used to communicate with the correct CAR staff through mailing lists and working groups

How to report:

- Click CIP, hover over Contacts, Submit Quarterly Reports, review different contact types, edit/add contacts, click Actions Submit for Reporting



Adding Contacts

North Carolina Manufacturing Extension Partnership (171)
Contacts

Program Name: MEP System - Center Operations

Contact Type Name
Car Review Contact
Director
Director Notification
Operations Manager
Manager
M
Re

Click edit icon to add contact to contact type



Adding Contacts (Continued)

Can search users through MEIS or select from a list. Must use "Add" button

Can change contact type using dropdown

North Carolina Manufacturing Extension Partnership (171)
 Edit Contact Type

Program Name: MEP System
 Contact Type: Reporting Contact

Add Members

By Name: Add

From List:

Available

- Adams, Stefanie (10162)
- Aitkin, Doug (9793)
- Allen, Ken (8864)
- Anderson, George (9794)
- Andrews, Rosa (9804)
- Bagett, Kam
- Barber, Billy
- Baxter, Fiona
- Beamon, Jeff
- Bedoian, Sha
- Beichner, Jer

Selected

Add

Navigation: >> > < <<

Existing Members

Select All Deselect All Remove Selected

	User ID	Last Name	First Name	Phone	Email
<input type="checkbox"/>	5108	Hoeg	KeAnne	(919)-513-4538	keanne_hoeg@ncsu.edu
<input type="checkbox"/>	5494	Mintz	Phillip	(336)-202-8256	phil_mintz@ncsu.edu
<input type="checkbox"/>	10055	Thorpe	Heather	(919)-513-2117	hbthorpe@ncsu.edu
<input type="checkbox"/>	9753	Vann	Doug	(919)-515-0057	dbvann@ncsu.edu

Select All Deselect All Remove Selected

History

Last Updated On 5/2/2011 9:49:31 AM Updated By MEP, HelpDesk

Created On 5/2/2011 9:49:31 AM By MEP, HelpDesk



Reporting Elements - Contacts

- The 8 different contact types are:
 - CAR Review Contact - Used as a communication channel for panel reviews
 - Director - One and only one due to marketing needs. Feeds MEP Public Site – Center Near You and MEP Quick List
 - Director Notification – Allows a center to designate users to receive the same notifications as center directors without feeding the MEP Public Site or MEP Quick List
 - Financial/Operations Manager – Used to support CFO communications and leveraged by grants and FPOs to get updated information and documents out - like new guidelines or terms and conditions
 - Marketing Manager – Provides a focused list of marketing managers and is used to support marketing manager communications
 - MEP Scouts – Used for the Supplier Scouting group on the MEP Connect site
 - Reporting Contact – Used to send out communications in regards to the opening and closing of reporting cycles. Also used to communicate any updates to the reporting requirements, structure, guidelines, etc.
 - Survey Contact - Used to send out communications in regards to survey confirmations and outlier duties



Reporting Elements - Contacts

Related Reports: Either data used or clickable from page

- CAR Contacts
- CAR Information
- CAR List
- MEP Quick List



Reporting Elements - Contacts

Did you know:

- MEP list server- available to be used by anyone with MEIS account, messages are monitored - if you wanted to send an email to center directors, or marketing managers, you can
- Changes made to contacts will be immediate and automatically transferred to the appropriate MEP mailing lists that correspond to those positions



Reporting Elements – Progress Data

Purpose:

- This reporting element is intended to collect quantifiable data for the award
- This information is used to respond to stakeholders and may be used for review, marketing, or research purposes

How to report :

- Click CIP, hover over Progress Data, Submit Quarterly Reports, enter FTE and CME counts, click Actions Submit for Reporting
 - An FTE is full-time equivalent
 - CME is client manufacturing establishment



Reporting Elements – Progress Data

Related Reports: Either data used or clickable from page

- Cohort Comparison

Did you know:

- The CME count found in this section is used in many different NIST MEP publications
- Official source of all FTE counts



Reporting Elements – Board of Directors

Purpose:

- The information contained in the Board of Directors section is intended to provide NIST MEP with general information about the Board and Board members
- NIST MEP will use this information in the day-to-day role as a consultant to the CAR
- Used in Annual and Panel Reviews

• How to report

- Click CIP, hover over Board of Directors, Submit Quarterly Reports, review Board and Board Members, click Actions Add to add new Board, click Actions Submit for Reporting
 - Centers are responsible for updating both the Board and Board Member record
 - Remove Board by marking it inactive
 - Remove Board Member by selecting the X under the Remove from Board column
 - Can also mark inactive in the Member profile



Reporting Elements – Board of Directors

Related Reports: Either data used or clickable from page

- Board of Directors
- CAR Information

Did you know:

- The Board Chair contact information is frequently used for communications from the Director and other working groups, so it is important to keep this information up to date
 - This is done by checking Chairperson in the Board Member record
 - Also important to keep the Tenure and Small manufacturer background information up to date in the Board Member record
- Boards have Board Member records that need to be maintained
- Centers are able to create MEIS accounts for Board Members
 - Access levels are determined by the center



Reporting Elements – Board of Directors

Did you know:

- A CAR may have two types of Boards – a fiduciary board and/or an advisory board
 - A fiduciary board exists for all freestanding non-profit organizations
 - A fiduciary board will have a charter document and/or bylaws describing the duties and terms of the board members
 - An advisory board is usually a less formal body, and can be affiliated with any type of organization
 - The roles and responsibilities of advisory boards may be similar to fiduciary boards, or they may be more focused on areas such as client needs



Creating a User Account for Board Members

OK
Dashboard CIP Reports Search Communities Links D&B Administration/Tools Self Service

North Carolina Manufacturing Extension Partnership (171)
Board of Directors Member

General Information	
Small Manufacturer	<input type="checkbox"/>
Chairperson	<input type="checkbox"/>
Tenure	2017
Organization Name	<input type="text"/>
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Search	
Name	<input type="text"/>
User Information	
Salutation *	--- SELECT ONE ---
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Title *	<input type="text"/>
Address 1 *	<input type="text"/>
Address 2	<input type="text"/>
City *	<input type="text"/>
State *	--- SELECT ONE ---
ZIP *	<input type="text"/> - <input type="text"/>
Time Zone *	--- SELECT ONE ---
Email *	<input type="text"/>
Phone *	<input type="text"/>
Fax	<input type="text"/>
Create MEIS Login Account	<input type="checkbox"/> By clicking on the "Create MEIS Login Account" link an account will automatically be created and an email with login information will be sent to this person.
History	

Click checkbox to create MEIS account for Board Member



Reporting Elements - Clients

Purpose:

- NIST MEP uses client records for the purpose of conducting an in-house project impact survey measuring the realized impacts (sales, investment, employment, customer satisfaction, etc.) of our services to our clients
- Client information may also be used for other purposes such as market and industry research

How to report:

- Click CIP, hover over Clients, Submit Quarterly Reports, either hit Actions Add New to manually add a client or click Select Files to upload CIF XML , click Actions Submit for Reporting, or Click Actions Submit from Salesforce
 - A unique client ID is assigned to each client. The CIF is the Client Information File. The file is found on MEIS
 - If uploading via CIF then file must be in XML
 - For Center Operations, the client must have a manufacturing (31-33) or R&D NAICS Code (541711 or 541712) and a valid DUNS Number (unless included in NIST MEP Definition of Manufacturing – DOM)
 - MEP uses Dun and Bradstreet for NAICS Code verification



Reporting Elements - Clients

Workflow:

- There will be a workflow if clients are submitted as a batch submission (CIF) or from Salesforce as opposed to manually entered. The Salesforce utility will be described in detail later.
- First, the CIF must be converted to XML
 - XML is an open standard for describing data and is an ideal solution for transferring structured data from server-to-client, server-to-server or application-to-application on any platform
 - NIST MEP provided CIF Template has an easy add-in to convert to XML
- Ensure that you have the proper Reporting Period selected and then upload CIF XML
- Click Action(s) - Submit for Validation. Any errors with the file are displayed. When a file is submitted for validation, the file is checked to ensure validity and consistency. Field level validation ensures that the data entered in all record fields are correct. However, this type of validation does not validate against client records already existing in the MEIS database. This is achieved through validation at the database level
- If the file fails with errors, the XML file will need to be corrected and re-uploaded using the same process. Repeat this process until the file passes with no errors. You will then need to submit for reporting
- Click Action(s) - Submit to System. The information in the file is submitted to the MEIS database
- You are redirected to the CAR Dashboard. If you have successfully submitted Client information – the Status Icon will be half green/half yellow indicating the submission is “Passed Pending MEP Review”

Key

 = Started |
  = Passed |
  = Passed with Warnings |
  = Passed with Errors |
  = Passed Pending MEP Review |
  = Failed |
  = Cleaned |
  = No Submission



NIST MEP Expanded NAICS Codes (Definition of Manufacturing)

- 423510 - Metal Service Centers and Other Metal Merchant Wholesalers
- 488991 - Packing and Crating
- 541330 - Engineering Services
- 541380 - Testing Laboratories
- 561910 - Packaging and Labeling Services
- 811310 - Commercial and Industrial Machinery & Equipment (except Automotive & Electronic) Repair & maintenance



Reporting Elements - Clients

Related Reports: Either data used or clickable from page

- CAR Overview
- CAR Performance Metrics
- CAR Performance Review
- CAR Survey Results
- Clients and Projects
- Clients/Projects/Impacts
- Cohort Comparison
- Impact Analysis
- IMPACT Metrics
- IMPACT Metrics Detail
- IMPACT Metrics Summary
- Industry Profile
- Success Story Details
- Survey Confirmation
- Survey Continuity
- Survey Outliers
- Survey Results
- Survey Summary



Reporting Elements - Clients

Did you know:

- The CIF excel templates can be downloaded from the MEIS website on your Center Dashboard in MEP Documents
 - In order to use the template provided macros must be enabled in your Excel application.
- Instructions for using the CIF template are included in the Excel file on the Help worksheet
- The clients (or CIF) must be uploaded before the projects or Project Information File (PIF) can be uploaded



Reporting Elements - Clients

Did you know:

- The client file has two tabs – one contains the information that the CAR has provided about the client and the other contains information that is pulled from the D&B database
 - A ! beside any field, means that the data that you entered differs from D&Bs data
 - You can hover over the ! and right click to accept the data if you believe it to be accurate.
- MEIS has a D&B portal which helps with obtaining DUNS Numbers and NAICS Codes and conducting research on potential clients



Reporting Elements – Projects and Events

Purpose:

- Project/Event information is collected for the purpose of conducting an in-house project impact survey measuring the realized impacts (sales, investment, employment, customer satisfaction, etc.) of services to our clients
- Surveys are conducted six months after the completion of the project for new clients. The survey period could vary for repeat clients
- All projects and events reported to NIST MEP will be surveyed

How to report:

- Click CIP, hover over Projects and Events, Submit Quarterly Reports, either hit Actions Add New to manually add a project or click Select Files to upload PIF XML , click Actions Submit for Reporting, or click Actions Submit from Salesforce
 - Clients must be in the system before submitting projects
 - Each individual project/event reported on the PIF must be assigned a unique project/event identifier. This unique id will identify each interaction
 - Each Project/Event will be directly associated to one of the Funding Agreement Ids
 - Projects are reported with a single Client ID and Events have multiple Client IDs per record











Reporting Elements – Projects and Events

Workflow:

- There will be a workflow if projects are submitted as a batch submission (PIF) or submitted from Salesforce as opposed to manually entered. The Salesforce utility will be described in detail later.
- First, the PIF must be converted to XML
 - XML is an open standard for describing data and is an ideal solution for transferring structured data from server-to-client, server-to-server or application-to-application on any platform
 - NIST MEP provided PIF has easy add-in to convert to XML
- Ensure that you have the proper Reporting Period selected and then upload PIF XML
- Click Action(s) - Submit for Validation. Any errors with the file are displayed. When a file is submitted for validation, the file is checked to ensure validity and consistency. Field level validation ensures that the data entered in all record fields are correct. However, this type of validation does not validate against client records already existing in the MEIS database. This is achieved through validation at the database level
- If the file fails with errors, the XML file will need to be corrected and re-uploaded using the same process. Repeat this process until the file passes with no errors. You will then need to submit for reporting
- Click Action(s) - Submit to System. The information in the file is submitted to the MEIS database
- You are redirected to the CAR Dashboard. If you have successfully submitted Client information – the Status Icon will be half green/half yellow indicating the submission is “Passed Pending MEP Review”

A MEP staff member then has to review and finalize the submission to achieve the “Passed” icon

Key
 = Started |  = Passed |  = Passed with Warnings |  = Passed with Errors |  = Passed Pending MEP Review |  = Failed |  = Cleaned |  = No Submission



Reporting Elements – Projects and Events

Related Reports: Either data used or clickable from page

- CAR Overview
- CAR Performance Metrics
- CAR Performance Review
- CAR Survey Results
- Clients and Projects
- Clients/Projects/Impacts
- Cohort Comparison
- Impact Analysis
- IMPACT Metrics
- IMPACT Metrics Detail
- IMPACT Metrics Summary
- Industry Profile
- Success Story Details
- Survey Confirmation
- Survey Continuity
- Survey Outliers
- Survey Results
- Survey Summary



Reporting Elements – Projects and Events

Did you know:

- Instructions for using the PIF template are included in the Excel file on the Help worksheet
- Common errors include:
 - Date format
 - Cutting and pasting into project description – strange characters
 - Textpad can be a useful tool to avoid this. Download TextPad at www.textpad.com
 - Total Project Value field only accepts whole values – no decimals
 - Staff name in CAR Key Staff MUST be their MEIS User ID number
 - Incorrect email format
 - Using incorrect Funding Agreement Number
 - Substance code – number ONLY – Do Not Include Label
- PIF files may be tested for validation as many times as needed by clicking Submit for Validation, but in order for the submission to be finalized the file MUST be submitted as final by clicking Submit to System



CIF and PIF Reporting Suggestions

- Surveys are triggered off of the project completion date, not the reporting period
- If you report a project, it will be surveyed
- Minimizing the burden on clients – before reporting the project, try to decide if you can determine impact for the activity. If you cannot, then do not expect clients to be able to either;
- Use Project EIS field to your advantage



Reporting Elements - Partners

Purpose:

- The Partner submission provides the CAR a readily available mechanism for reporting on its formal and informal relationships with other organizations
- The importance of knowing a CAR's Partners is to show the extent of a CAR's reach beyond its own resources
- This information is used to show that MEP CARs are working with partner organizations to deliver the best possible services and products to its clients through formal and informal agreements
- CARs are expected to have a formal performance management process for its partners.
- Used in Annual and Panel Reviews



Reporting Elements - Partners

How to report:

- Click CIP, hover over Partners, Submit Quarterly Reports, review Partners, click Actions Add to add new partner, click Actions Submit for Reporting
 - **Partners** – Defined as an organization that contributes or aligns resources (human and/or monetary) through a long-term formal or informal agreement. They could provide cash or in-kind contributions to meet cost share, deliver services, provide office space and equipment, and/or provide staff time
 - **Sub-recipient** – explicitly identified in a CARs Cooperative Agreement and maintained by FPOs in CIP, Funding Programs, Awards, Period of Performance. SRAs are displayed but Centers cannot update this information.
 - **Third-party Contributors** – there is a formal agreement
 - **Other Partners** – no formal agreement – CAR wants to list the Partner as a resource



Reporting Elements - Partners

Related Reports: Either data used or clickable from page

- CAR Information
- Partners

Did you know:

- Remove a Partner by marking the organization inactive
- Adding/removing records can be done either from the List or Submit Quarterly Reporting options
- Centers **MUST** designate Partners as Key Partners (up to five). Key Partners typically have a formal agreement and provide services such as delivery, marketing, developing products, etc.

NOTE: Please review this list and **ONLY** include Partners that add value. More is not always better, we need quality as this is a common data pull.



Reporting Elements – State Funding Partner

Purpose:

- Intended to provide the CAR a readily available mechanism for reporting on its relationships with State and Local Government Officials
- State Funding Partners are the primary funding decision officials for the program within the state or local government for the CAR

How to report:

- Click CIP, hover over State Funding Partner, Submit Quarterly Reports, review State Funding Partners, click Actions Add to add new State Funding Partner, click Actions Submit for Reporting
 - All State Funding Partners must relate back to a Partner organization that is reported in the Partners element
 - Remove State Funding Partners by marking them inactive



Reporting Elements – State Funding Partner

Related Reports: Either data used or clickable from page

- CAR Information
- State Funding Partners

Did you know:

- Centers are able to create MEIS accounts for State Funding Partners
 - Access levels are determined by the center
 - Instructions similar to Board Member account creation

Question: Why is this element not used by centers often? Is it misunderstood or there just are not that many State Government Organizations/People that your center partners with?



NIST MEP Partnership Model



Changes from Previous to Current...

NIST Partnership Model	Previous	Current
Years Covered	'89 - '15	'15 - '25
Guaranteed Number of Competitions after 10 Years	0	1
Number of Times Decision to Renew Designation (Year 5)	10	1
Number of Panel Reviews	5	2
Number of Major Ops Plan Renewals (3, 4 Years)	10	3
Number of Progress Plan/Technical /Budget Reports (SF 425s)	40	20

Note: All other reporting elements will continue to be submitted as based on the reporting schedule as defined in Reporting Part 1



NIST MEP Partnership Model: Modular Approach

Propose

- Proposal/Statement of Work (FFO Response)
- Award (CD-450s, SACs, Regulations)

Operationalize

- Operating Outcome Statements
- Detailed, Multi-year Budgets

Monitor

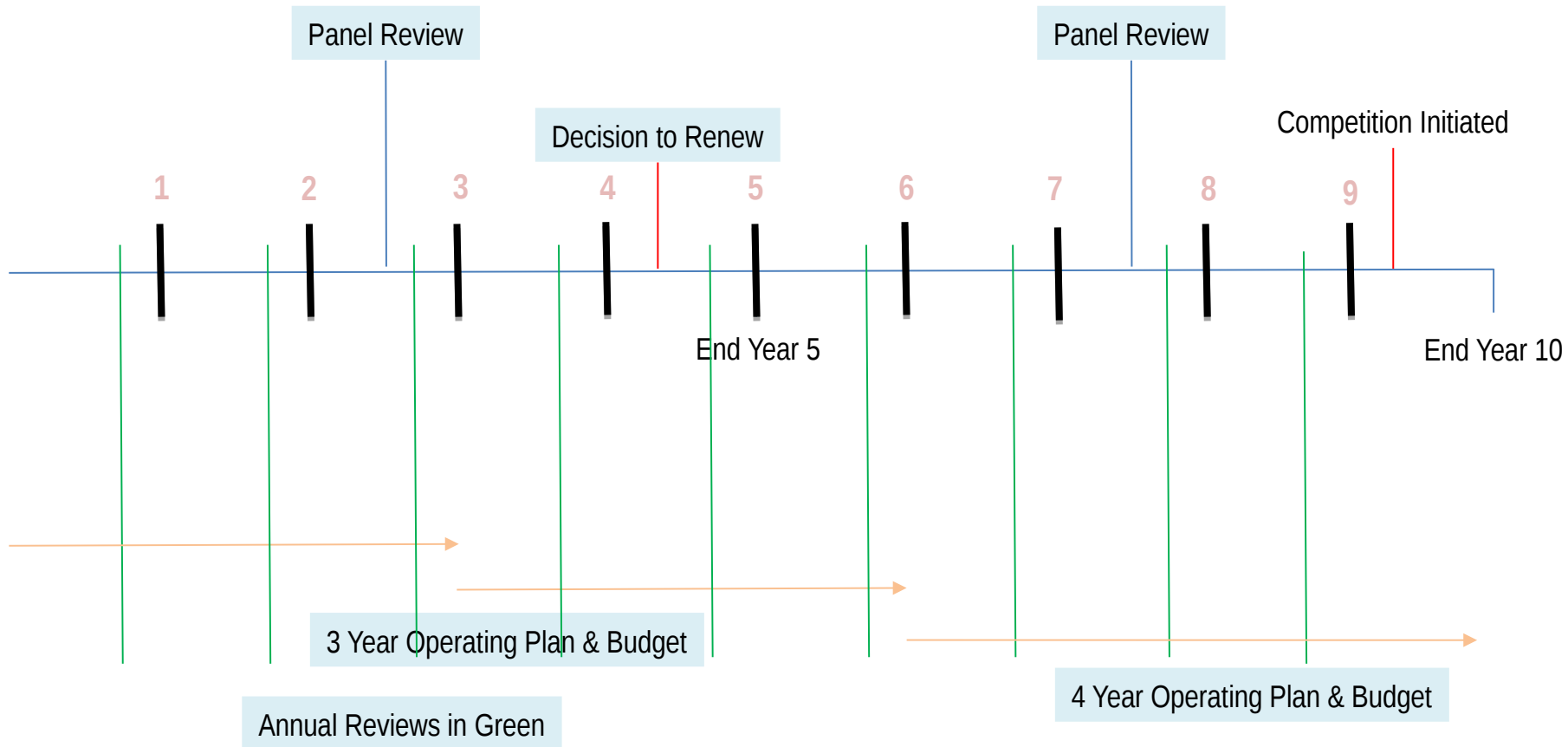
- Reporting (Progress Plans, SF-425s)
- Annual/Panel Reviews

Adjust

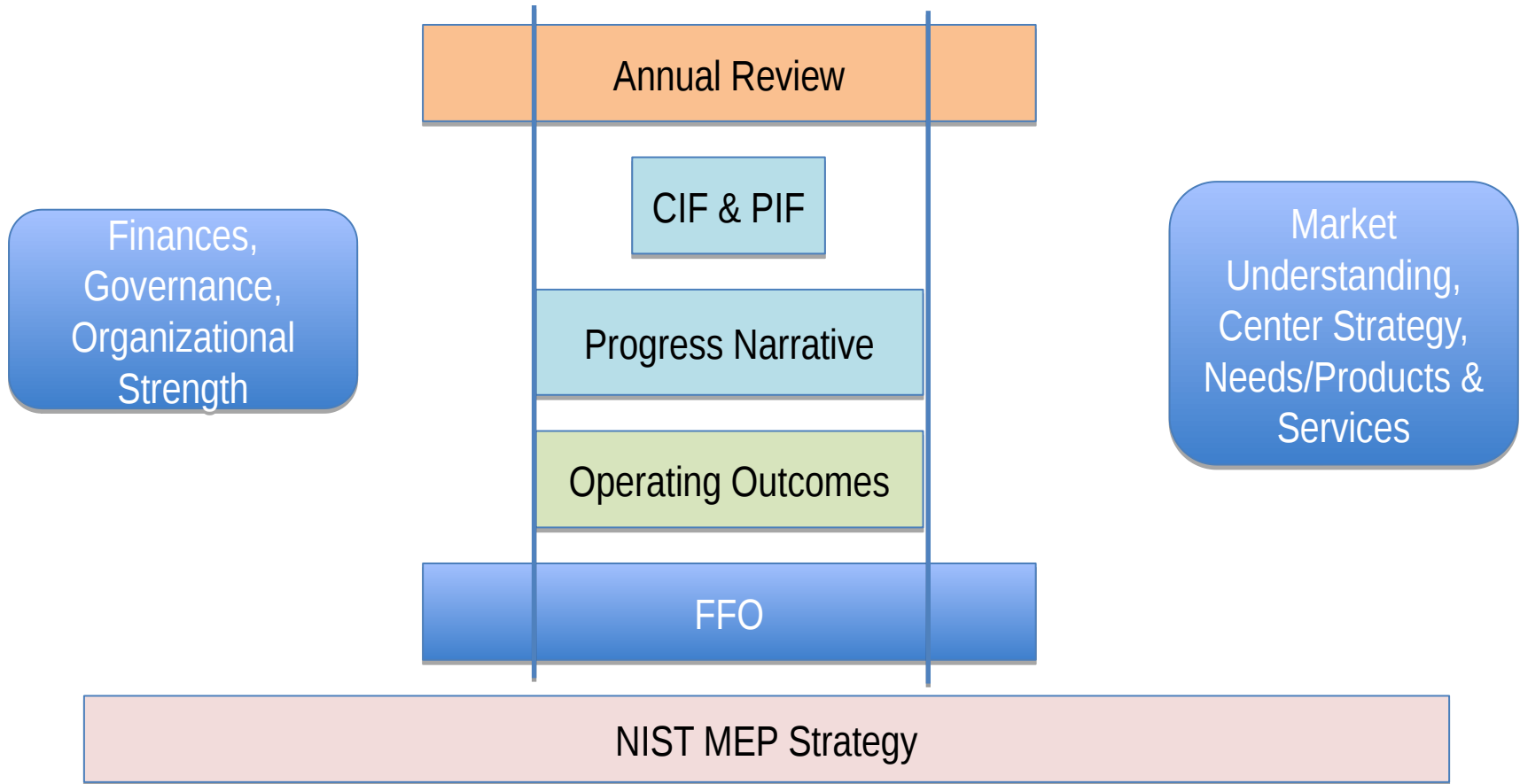
- Revisions to Proposal/Statement of Work, Operating Outcome Statements, Budgets
- Amendments (CD-451s)



NIST MEP Partnership Model Timeline



“Idealized” Future



Annual Review Process

On-Site Review
(Approximately the same time each year)

- Review/Validate FFO/Proposal/Statement of Work
- Review/Validate Operating Outcome Progress
- Review/Validate 5 year budget, Current Year/Next Year Budgets

Outcome 1

No changes
Annual Forms Submitted
Process Following Year Funding

Outcome 2

Some changes
Revise Documents and Resubmit
Annual Forms Submitted
Process Following Year Funding



Alignment of Operating Outcomes

Element	Strategic Plan	FFO	Operating Guidance	Progress Plan Narrative	Definitions
Work with Small, Rural, Start-up Companies	Element #1	a.i.(1) & (2)	Numeric (I)	Open Field & Count	MRPEG, D&B
Transformational Clients	Element #1	a.iii.(1)	Numeric (I)	Open Field & Count	NIST Guidance
Balance of Top Line & Bottom Line Growth	Element #1	a.iii.(2)	Numeric (I)	Open Field & Count	MRPEG, Center
Making New Technologies Available	Element #1 – MEP AB	a.i.(2) & a.iii.(2)	Milestone (F)	Open Field	Center
Center Key Initiatives	Element #3	a.ii	Milestone (F)	Open Field	Center
Board Development	Element #2 – MEP AB	b.i	Milestone (F)	Open Field	Center
Performance Measures/Levels	Element #4	a.iii.(4)	Numeric (O)	Open Field	Center



Client Goals - Very Small, Rural, Start-up and SMEs Served – All D&B Based

- Definitions provided in Operating Outcome documents
 - Very Small = <20 employees
 - Rural = Using USDA Rural Continuum Code
 - Start-up = established within last 5 years
 - Other SME's not captured in one of the specific groupings above
 - Total unique clients
- Within the Progress Plan narratives, describe the overall program progress describing center strategy for serving these clients. NIST MEP does not want just a list of company names.
- Data in table is calculated based on what was submitted in your Projects.
- Without a project, a client alone does not count towards these goals.

- **NOTE:** Client goals are based on what the current D&B record in MEIS states. Records are updated automatically is the last time a client is older than 5 years. As soon as a client is tracked to goal occur

These are not mutually exclusive categories, in other words a client might count in several of these at one time



Client Goals – What is a transformational client?

- Definition used by NIST MEP
 - *“In Client record Centers select “Yes” or “No” to indicate if a client is considered to be in an ongoing transformative relationship with the center... **Yes:** Indicates the center has established a long-term, coaching relationship with the client and is helping the client transform.”*
- Your center decides which Clients/Projects fit this definition
- Within the Progress Plan narratives describe your center’s overall program progress describing the center’s strategy for serving transformational clients. This is to be detailed description as to how your center is transforming clients. This **MUST** not be just a list of company names
- Data in table is calculated based on what was submitted in your Projects.

NOTE: *A client **MUST** be marked as transformational before you submit a project. As soon as a project is Finalized by NIST MEP the tracking of progress to goal occurs.*



Engagement Goals - Top Line/Bottom Line Growth

- The Progress Plan includes two separate narrative sections related to engagement goals. The determination of a project falling under Top Line or Bottom Line Growth is aligned with the NIST MEP substance codes. Centers determine which projects fit where in the mix.

Top Line Growth	Bottom Line Growth
25 – Growth Service Product Suite	23 – Lean Product Suite
27 – Strategic Management Suite	24 – Quality Product Suite
28 – Technology Services Suite	26 – Sustainability Suite
29 – Financial Analysis Suite	31 – Engineering Srvs/Plant Layout Suite
30 – Sales/Bus Dev Suite	32 – Information Technology Suite
	33 – Workforce Development

- Progress Narrative, overall program progress, not just a list of services
- Data in table is calculated based on what was submitted in your Projects.
- Percentage of all projects submitted in the quarter/time period



MEP Partnership Model – Three interrelated components as far as Reporting.

- **Operating Outcome Statements**
 - Proposal/Statement of Work (SOW)
 - Narratives (3000 character limit - not a dissertation!)
 - Goals (Client and Engagement)
- **Progress Plan (aka Technical Report)**
 - Narrative response to Operating Outcome Statement (3000 character limit)
 - SF425
 - Other Resources
- **Budget Actuals**
 - Revenue and expenses based on an as of date
 - Reporting Set (construct in MEIS to allow NIST MEP to evaluate center performance based on the likely 10 year period between competitions 3-2, 3-2)



Operating Outcome Statements

Purpose:

- Creation of mutually agreed upon strategy and goals between NIST MEP (RM) and the Center
- Streamline documentation for CAR Response to Federal Funding Opportunity (FFO), renewals, annual reviews, panel reviews, best practices, performance measurement.

Workflow:

- Initially your Federal Program Officer enters the information at the time your award is finalized into MEIS
- Center either on their own or due to a conversation with your RM determines that an update to the existing Operating Outcomes is needed.
- Upon submittal RM and FPO are notified that a modification has occurred.
- RM reviews the changes
 - CLEAN – deletes the submission due to unnecessary submission
 - RESET– RM sends the Operating Outcome back to Center for changes. Notification includes reason for RESET.
 - FINISH –RM approves the changes. A notification goes out to the Center, RM, FPO and sometimes Grants



Operating Outcomes are to be updated as needed.

- most likely prior to an annual/panel review.

How to report:

- Click CIP Operating Outcomes, Submit Updates, edit the information, click Actions Submit
 - Update the Proposal/SOW (previous versions are maintained)
 - Update the Narrative – only enter information for the sections you wish to change. If you enter “No Changes” then the words “No Changes” are going to overwrite what is currently stored in MEIS
 - Modify the Client or Engagement Goals – adjust the estimated goals as needed and circumstances change
 - Reviewed by your Regional Manager and will either be accepted or reset (sent back for additional clarification). Once approved a notification is made to the FPO and Grants acknowledging that the RM has accepted the changes.



Operating Outcomes (Continued)

Related Reports:

- To be determined – are they necessary? What would be useful?

Gotchas:

- Newish process and neither NIST MEP or Centers have it formalized yet.

Did you know...

- Visible within your Progress Plan
- Center is also responsible for information in the Operating Outcomes. Click on this element, read it, make sure the information entered is accurate.. If not you, make sure your Center Director and/or others on your management team know about this section.
- Operating Outcomes mirror the narratives that you will respond to in your semi-annual Progress Plan.
- Operating Outcomes will be used in your Annual/Panel reviews.



Operating Outcome Statements (Continued)

MEIS - MEP Enterprise Information System (v18.5.0)

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New Jersey Manufacturing Extension Program (180)
Operating Outcomes Edit

Recipient Information

Name: New Jersey Manufacturing Extension Program
Reporting Set: 70NANB15H314

Proposals/SOWs

Background Information Document History

File Name
15H314 NJ Proposal_No Budget.pdf
15H314 NJ 3-Year Outcome Statement.pdf

Operating Outcomes

CAR Client Activity Levels by Type of Company

Client activity levels with a focus on very small, rural, start-up, small and mid-sized manufacturers

(1) Very Small Manufacturers (establishments with fewer than 20 employees): This category accounts for more than half of the manufacturers in New Jersey. It has also historically been one of the most difficult groups to serve via project work. Our main sources of serving this market have been through our workshops, our Made in NJ Program, Experience Manufacturing Program, and our no-cost assessments. In 2016 we have introduced a new position, Small Business Specialist (now replaced by Director of Open Enrollment who will focus on certification programs and training programs for the smaller manufacturers in addition to an Apprenticeship program for all manufacturers) plus all Account Managers serve this market as we introduce new services that enable them to do so, i.e. Open Enrollment. This position will be dedicated to serving manufacturers with 30 employees or less. This role will be vital to increasing our market penetration within this category.

(2) Rural Manufacturers - Not Applicable for NJ, there are no counties in NJ with a rurality index of 4 or higher.

(3) Start-up/Emerging Manufacturers (an establishment that has been in operation for five years or less): This category of manufacturers, while served when the opportunity arises, has not been an intentional target as of yet. There are no immediate plans to focus on this particular segment (nor avoid it) but NJMEP understands how important emerging manufacturers are to our state and our economy and as such will revisit our target efforts annually to assess whether or not we can be doing more to serve this category. Our current activities with this group includes working with the NJ

Client activity with transformational clients

Our goal over the course of the next 3 years is to develop a larger percentage of clients where enterprise wide solutions (transformational services) are occurring regularly, 10% each of the next three years, ideally driven through client understanding and commitment to Top Line Growth through programs such as Destination Innovation other services that fall within our ProAction Program.



Operating Outcomes (Continued)

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New Jersey Manufacturing Extension Program (180)
Operating Outcomes Edit

Client Goals	Goal	Very Small Establishments (< 20 employees)	Rural Establishments (Use USDA Definition)	Start-up Establishments	Transformational Clients (NIST MEP Defined)	Other Manufacturers	Total unique manufacturers
Over 3 years	Jan 2015 - Dec 2017	<input type="text" value="220"/>	<input type="text" value="0"/>	<input type="text" value="50"/>	<input type="text" value="100"/>	<input type="text" value="1,070"/>	<input type="text" value="1,440"/>
Over 3 years	Jan 2018 - Dec 2020	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Over 4 years	Jan 2021 - Dec 2023	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Client Goals

100%



Reporting Elements – Progress Plan/Technical Report (Semi-annually)

Purpose:

- Technical Report – cooperative agreement **requirement** including the SF425
- Narrative for NIST MEP staff outside of your RM/FPO to be familiar with your Center activities
- Feeds Annual/Panel Reviews

Workflow:

- Once submitted, an email is sent to your FPO, RM and Grants Specialist to notify them that the report is ready for review.
- FPO and/or RM has initial review and will either:
 - **FINISH** – accept submission, no longer editable by the center (email is sent to Center, FPO, RM and Grants)
 - **RESET** – Center is able to edit again to make revisions, an email is sent to all parties indicating the submission has been **RESET**, process begins again
 - **CLEAN** – Submission is deleted, an email is sent to all parties



Reporting Elements – Progress Plan/Technical Report (Semi-annually)

How to Report:

- Click CIP, Progress Plan, Submit Quarterly Reports, enter information (oh if only it were that easy), Click Actions Submit for Reporting
 - Enter your narrative response for each major section. If there is nothing new to report for the period, let your RM and FPO know that you did not just skip the section. (3000 characters)
 - Attach your SF 425
 - Make sure you check all of the acknowledgements (official of CAR, change budget with Grants, change OO with NIST MEP), otherwise MEIS will not allow you to submit.
 - If there is additional information to be included, attach document(s) in Related Documents.
- Most complex and time consuming reporting element.



Reporting Elements – Progress Plan/Technical Report (Semi-annually)

Workflow (Continued) :

- Grants has a secondary review which may/may not be going on simultaneously
Typically look at SF425 and will **RESET** if the form submitted is not correct/reasonable
- When Finished, the entire package including PDFs of the narrative, SF425 and supplemental documents are sent to Grants, RM, FPO and Center.

Related Reports:

- Progress Plan – from the Progress Plan List – Click Actions, Print
- MEIS Dashboard – CAR Documents Widget – link to most recent report

Gotchas:

- Budgets total after Budget Actuals are entered by the Center



Reporting Elements – Progress Plan/Technical Report (Semi-annually)

Did you know:

- You can read your Proposal/Statement of Work from within your Progress Plan.
- Click to view/hide Operating Outcome Statements
- Click to view/hide Previous Progress Plan narratives
- Click to see your Budget Table
- Click to view/hide Client and Engagement Goals
- Click on the Year/Qtr links to see clients identified by name that meet each goal
- You can attach additional documents to provide more information to NIST MEP about the project (Schedules, Gantt Charts, Graphs, Images, Narratives)



Progress Plan – Semi-annual response to Operating Outcomes

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Dashboard CIP Reports Search Communities CORE Links D&B Administration/Tools Self Service Action(s)

New Jersey Manufacturing Extension Program (180)

Progress Plan

5H314 - Center Operations

Finished On 8/4/2016 10:53:20 AM By Snow

Recipient Information

Recipient: New Jersey MEP

Funding Agreement Number: 70NANB15H314

Reporting Period: 2016-2

Operating Outcomes

CAR Client Activity Levels by Type of Company
 Client activity levels with a focus on very small, rural, start-up, small and mid-sized manufacturers

Show/Hide Operating Outcomes Statement

Narrative Response

NJMEEP hired a Small Business Specialist whose primary role is to serve manufacturers with 30 employees or less. His primary responsibilities entail assessing their needs, making recommendations to NJMEEP management on service offerings to bring in and determining what this particular market is willing to invest in their organizations and on what. Outside of this new role NJMEEP continues to serve this group through our fee based services when applicable and to those with limited budgets, some of our no out of pocket programs such as: Made in NJ program, Public workshops, Assessments, and our Experience Manufacturing

100%

View OO statement and if available previous PP submission.

Narrative Response



Progress Plan – Semi-annual response to Operating Outcomes (Continued)

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New Jersey Manufacturing Extension Program (180) Progress Plan

Client activity with transformational clients [Show/Hide Table](#)

[Show/Hide Operating Outcomes Statement](#)
[Show/Hide Previous Report Submission](#)

All NJMEP engagements (exclusive of the Open Enrollment Program), without exception effective Jan 2018, will begin with the NJMEP assessment. A lot of time and effort has been put into developing this assessment which should lead to a multi-year plan thereby establishing all client relationships as transformational, at least that will be the assumption made by the NJMEP AM when engaging with the manufacturer.

Client Goals x

Period: 2016-1

Client ID	Name	Is Goal Client Small	Is Goal Client Rural	Is Goal Client Startup	Is Goal Client Transformational
83483	Aall American Fasteners	Yes			
83469	Betar Inc	Yes			
83491	Brewster Washers	Yes			
53050	Church & Dwight Co. Inc	Yes			
80009	F & A Machine Co. Inc	Yes			
83468	General Devices	Yes		Yes	
83489	H & B Petroleum Company	Yes			
83476	Hamilton Embroidery Co Inc.	Yes			
70070	Jarchem Industries Inc	Yes			
83486	Kent International Corporation	Yes			
83487	M F Supply Inc.	Yes			
7716	Meto Lift Inc.	Yes		Yes	
79125	Novel Ingredient Services LLC				
83474	Rich Art Color Co. Inc.				
83485	Wide Band Systems Inc.	Yes			
83473	XPet LLC				

Over 3 years (2016-1 - 2018-4)

Goal	Very Small Establishments (< 20 employees)	Rural Establishments (Use USDA Definition)	Es
2016-1	15	0	
2016-2	16	0	
2016-3	16	0	
2016-4	19	0	
2017-1	17	0	
2017-2	19	0	
2017-3	10	0	
2017-4	13	0	
2018-1	13	0	
2018-2			
2018-3			
2018-4			
Total Values	05	0	14

[Link to client details](#)

[Client Goals - details](#)



Progress Plan – Semi-annual response to Operating Outcomes (Continued)

Use checkboxes to display Estimated Budgets and Variance for one of more awards

Display of POP Actuals and POP Budget

Budget Table

Center enters actuals for reporting period

MEIS - MEP Enterprise Information System (v18.5.0)

Dashboard CIP Reports Search Communities ROAR Links D&B Admin

New Jersey Manufacturing Extension Program (180)
Progress Plan

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Narratives and Attachments Budget

Show budgets

Show actuals

Show variances

Funding Agreement Number

70NANB15H314

70NANB15H014

70NANB10H025

Bolded column is the relevant Period Of Performance

	2016-01-01 to 2016-12-31 70NANB15H314		2017-01-01 to 2017-12-31 70NANB15H314		70NANB15H314					
	Actual	Budget	Actual	Budget	Actual	Budget	As		As	
	As Of: 2016-12-31		As Of: 2017-12-31		As Of: 2018-04-30					
	2,588,968.00	2,588,968.00	2,744,485.17	2,814,432.00	895,020.00	2,814,432.00	0.00	2,814,432.00	0.00	2,814,432
NIST MEP Supplemental Funds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Unexpended Federal Funds (From prior operating year) to be used ABOVE base	0.00	0.00	225,464.00	225,464.00	69,947.00	0.00	0.00	0.00	0.00	0
Unexpended Federal Funds (From prior operating year) to be used TOWARD base	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Applicant Contribution Cash	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
State/Local Funds										
State/Local Cash			0.00	0.00	89,890.00	0.00	0.00	0.00	0.00	0
State/Local In-Kind			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Unexpended Program Income (From prior operating			75,454.00	89,769.00	0.00	575,000.00	0.00	157,776.00	0.00	192,961
Program Income	2,664,422.00	2,678,737.00	3,501,327.00	3,525,000.00	1,013,576.00	3,500,000.00	0.00	4,260,000.00	0.00	5,650,000

https://meis.nist.gov/CIP/ProgressPlan/Edit/563#



Budget Actuals

Purpose:

- Communication of detailed Revenue and Expenses during the reported time period.

Workflow:

- Centers enter Budget Actuals as frequently as needed for activities happening such as a Panel Review where current financials are important to be stated
- Notifications are sent to Centers, Federal Program Officer and Regional Manager. Please note Mailbox icon at top right of MEIS dashboard, if notifications are pending there will be a count shown in red if:
 - Budget Actuals are >180 days old
 - Budget Actuals have been recently changed
 - Budget Actual As of Date does not equal end date of the Period of Performance and it is greater than 30 days after the end of the Period of Performance
 - Budget Actuals As of Date does not equal end date of the Award and is greater than 90 days after the end of the Award



Budget Actuals are to be updated when and as often as needed. Though most likely when submitting a Progress Plan and prior to an annual/panel review.

How to report:

- Click CIP Budget Actuals, click on appropriate Reporting Set, enter the information for As of Date, Revenues and Expenses, automatically saved on entry

Related Reports:

- To be determined – are they necessary? What would be useful?

Gotchas:

- Newish process and neither NIST MEP or Centers have it formalized yet.

Did you know...

- Visible within CIP, Progress Plan
- Visible within CIP, Funding Program, Budget Tab
- . Used within your Center Profile and Performance Report (CPPR)



Budget Actuals

MEIS - MEP Enterprise Information System (v18.5.0) Welcome Davis_Missy | Help | Send Feedback | Sign Out

Dashboard CIP Reports Search Communities ROAR Links D&B Administration/Tools Reviews Self Service

New Jersey Manufacturing Extension Program (180)
Budget Actuals [View Audit History](#)

Program Name	2016-01-01 to 2016-12-31 70NANB15H314		2017-01-01 to 2017-12-31 70NANB15H314		2018-01-01 to 2018-12-31 70NANB15H314		2019-01-01 to 2019-12-31* 70NANB15H314		2020-01-01 to 2020-12-31* 70NANB15H314		Total Actual	Total Budget
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget		
	As Of: 2016-12-31		As Of: 2017-12-31		As Of: 2018-04-30		As Of: N/A		As Of: N/A			
Revenue (Federal and Non-Federal Cost Share)												
NIST MEP Funds	2,588,968.00	2,588,968.00	2,744,485.17	2,814,432.00	895,020.00	2,814,432.00	0.00	2,814,432.00	0.00	2,814,432.00	6,228,473.17	13,846,696.00
NIST MEP Supplemental Funds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unexpended Federal Funds (From prior operating year) to be used ABOVE base	0.00	0.00	225,464.00	225,464.00	69,947.00	0.00	0.00	0.00	0.00	0.00	295,411.00	225,464.00
Unexpended Federal Funds (From prior operating year) to be used TOWARD base	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Applicant Contribution Cash	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
State/Local Funds												
State/Local Cash	0.00	0.00	0.00	0.00	89,890.00	0.00	0.00	0.00	0.00	0.00	89,890.00	0.00
State/Local In-Kind	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unexpended Program Income (From prior operating year)	0.00	0.00	75,454.00	89,769.00	0.00	575,000.00	0.00	157,776.00	0.00	192,961.00	75,454.00	1,015,506.00
Program Income	2,664,422.00	2,678,737.00	3,501,327.00	3,525,000.00	1,013,576.00	3,500,000.00	0.00	4,260,000.00	0.00	5,650,000.00	7,179,325.00	19,613,737.00
Total Other												
Total Other Cash	0.00	0.00	0.00	127.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	127.00
Total Other In-Kind	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Revenue (Federal and Non-Federal Cost Share)	5,253,390.00	5,267,705.00	6,546,730.17	6,654,792.00	2,068,433.00	6,889,432.00	0.00	7,232,208.00	0.00	8,657,393.00	13,868,553.17	34,701,530.00
Expenses (Federal and Non-Federal Cost Share)												
Direct Costs												
Personnel	2,043,785.53	2,043,786.00	1,987,881.00	2,224,500.00	777,840.00	2,411,000.00	0.00	2,335,500.00	0.00	2,563,500.00	4,809,506.53	11,578,286.00

Centers can only view data in Funding Programs. It is a great place to look at budget, reporting sets, and quarterly allocations for IMPACT Metrics

Purpose:

- Centers need to be familiar with the information in this module as it affects your ability to report and how your center's performance is measured
 - General Information about the award
 - Contacts – who is who at NIST MEP and Grants on your Cooperative Agreement
 - Federal Quarterly Allocation – Used in metric calculations.
 - Total Cash Quarterly Allocation – Displayed on The CARD.
 - Budget – read only view of all budget information
 - Reporting Set – construct necessary for reporting and to look at center performance over 10 year period prior to competition

How to report:

- Not a direct submission by Centers though Budget Table Actuals are updated by Progress Plan submission

Related Reports: TBD



Funding Programs – General Information – Funding Agreement (Awards)

MEIS - MEP Enterprise Information System (v18.5.0) Welcome Davis_Missy | Help | Send Feedback | Sign Out

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New Jersey Manufacturing Extension Program (180)

Funding Program

General Information Contacts Federal Quarterly Allocation Total Cash Quarterly Allocation Budget Reporting Set

General Information

Program Name * MEP System

Agreement Type * Cooperative Agreement

Funding Source * Center Operations

First Reporting Quarter * 2016-2

Reporting Frequency * Semi-Annually

Funding Agreements

Add New

Funding Agreement Number	Recipient	Start Date	End Date	Valid Through
70NANB15H314	New Jersey MEP	01/01/2016	12/31/2020	12/31/2018
70NANB15H014	New Jersey Manufacturing Extension Program	01/01/2015	12/31/2015	12/31/2015
70NANB10H025	New Jersey	01/01/2010	12/31/2014	12/31/2014

History

Last Updated On 11/27/2017 01:17:53 PM By: Snowden, Hope

Created On 09/26/2012 07:48:13 AM By: MEP, HelpDesk

Click view/edit icon to see award information

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Funding Programs – General Information – Funding Agreement (Awards)

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New Jersey Manufacturing Extension Program (180)

Funding Program

General Information | Contacts | Federal Quarterly Allocation | Total Cash Quarterly Allocation | Budget | Reporting Set

General Information

Program Name *

Agreement Type *

Funding Source *

First Reporting Quarter *

Reporting Frequency *

Funding Agreements

[Add New](#)

Funding Agreement Number	Recipient	Start Date	End Date	Valid Through
70NANB15H314	New Jersey MEP	01/01/2016	12/31/2020	12/31/2018
70NANB15H014	New Jersey Manufacturing Extension Program	01/01/2015	12/31/2015	12/31/2015
70NANB10H025	New Jersey	01/01/2010	12/31/2014	12/31/2014

History

Last Updated On 11/27/2017 01:17:53 PM By: Snowden, Hope

Created On 09/26/2012 07:48:13 AM By: MEP, HelpDesk

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Funding Programs – General Information - Period of Performance

MEIS - MEP Enterprise Information System (v18.5.0)

Dashboard CIP Reports Search Communities ROAR Links D&B Administration/Tools Reviews Self Service

TMAC (159)
Period Of Performance

Program Name: MEP System

Funding Agreement: MEP System

Start Date: July 2017

End Date: June 2018

Sub-Recipients

Start Date	End Date	Name	City	Total NIST Funds	Cost Share	Regional Office	Status	Delete
07/01/2017	06/30/2018	Bay Area Houston Economic Partnership (Gulf Coast/SE)	Houston	\$160,226.00	\$185,089.00	No		X
07/01/2017	06/30/2018	BeehiveFund Gulf Coast Region		\$338,767.00	\$391,334.00	No		X
07/01/2017	06/30/2018	Southwest Research Institute (TMAC South Central)	San Antonio	\$990,450.00	\$1,144,141.00	No		X
07/01/2017	06/30/2018	Texas A&M Engineering Extension Service (TMAC - East Central)	College Station	\$866,500.00	\$1,000,957.00	No		X
07/01/2017	06/30/2018	Texas Tech University (TMAC-West Texas)	Lubbock	\$330,336.00	\$381,595.00	No		X
07/01/2017	06/30/2018	University of Texas - Rio Grande Valley (TMAC-South Texas)	Edinburg	\$342,131.00	\$395,220.00	No		X
07/01/2017	06/30/2018	University of Texas El Paso (TMAC-Paso del Norte)	El Paso	\$207,229.00	\$239,385.00	No		X

Supplemental Funding:

Approved Funding Level: \$6,955,834.00

History

Last Updated On 12/01/2017 11:33:56 AM By: Leon, Jennifer

Created On 09/06/2017 09:36:42 AM By Solomon, Gloria

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Funding Programs – Contacts

TMAC (159) Funding Program

General Information | **Contacts** | Federal Quarterly Allocation | Total Cash Quarterly Allocation | Budget | Reporting Set

Add Members

Contact Type * Administrative Officer

By Name Add

By User Type

CAR MEP Other

Available Selected Add

Existing Members

Contact Type Name	Last Name	First Name	Organization Name	Phone	Email
<input type="checkbox"/> Survey Admin	Blum	Megean	MEP	(301)-975-3160	megean.blum@nist.gov
<input type="checkbox"/> Reporting Admin	Davis	Missy	MEP	(301)-975-5039	melissa.davis@nist.gov
<input type="checkbox"/> FPO	Dejesus	Nadine	MEP	(301)-975-8322	nadine.dejesus@nist.gov
<input type="checkbox"/> RM	Thompson	Gary	MEP	(240)-483-2955	gary.thompson@nist.gov
<input type="checkbox"/> SuccessStory Admin	Vickery	Ben	MEP	(301)-975-2954	ben.vickery@nist.gov
<input type="checkbox"/> Grants Specialist	White	Anita	NIST Grants and Agreements Management Division	(301)-975-0589	anita.white@nist.gov

History

Last Updated On 11/15/2017 04:32:12 PM By: Coffman, Kim
 Created On 09/26/2012 07:48:13 AM By: MEP, HelpDesk

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Funding Programs – Federal Quarterly Allocation

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TMAC (169)
Funding Program

General Information | Contacts | **Federal Quarterly Allocation** | Total Cash Quarterly Allocation | Budget | Reporting Set

Year	Q1	Q2	Q3	Q4
2018	\$1,741,458.51	\$1,741,458.51	\$0.00	\$0.00
2017	\$1,757,862.99	\$1,757,862.99	\$1,741,458.47	\$1,741,458.51
2016	\$1,675,220.25	\$1,675,220.25	\$1,757,863.03	\$1,757,862.99
2015	\$1,408,851.60	\$1,408,851.60	\$1,675,220.25	\$1,675,220.25
2014	\$1,431,967.75	\$1,431,967.75	\$1,431,967.75	\$1,431,967.75
2013	\$1,294,467.75	\$1,294,467.75	\$1,277,801.12	\$1,244,467.74
2012	\$1,431,967.74	\$1,431,967.74	\$1,386,134.41	\$1,294,467.75
2011	\$1,431,967.75	\$1,431,967.75	\$1,431,967.85	\$1,431,967.74
2010	\$1,431,967.70	\$1,431,967.70	\$1,431,967.72	\$1,431,967.75
2009	\$1,431,968.00	\$1,431,968.00	\$1,431,967.70	\$1,431,967.70
2008	\$1,431,967.75	\$1,431,967.75	\$1,431,968.00	\$1,431,968.00
2007	\$1,431,967.75	\$1,431,967.75	\$1,431,967.75	\$1,431,967.75
2006	\$1,286,217.75	\$1,286,217.75	\$1,286,217.75	\$1,431,967.75
2005	\$1,431,967.75	\$1,431,967.75	\$1,431,967.75	\$1,286,217.75
2004	\$1,431,967.75	\$1,431,967.75	\$1,431,967.75	\$1,431,967.75
2003	\$1,065,450.75	\$1,031,041.50	\$962,233.00	\$1,431,967.75
2002	\$1,183,834.17	\$1,065,450.75	\$1,065,450.75	\$1,065,450.75
2001	\$1,405,328.42	\$1,420,601.00	\$1,420,601.00	\$1,420,601.00
2000	\$1,295,601.00	\$1,295,601.00	\$1,295,601.00	\$1,420,601.00
1999	\$1,279,723.25	\$1,279,723.25	\$1,279,723.25	\$1,295,601.00

History
Last Updated On 11/15/2017 04:32:12 PM By: Coffman, Kim
Created On 09/26/2012 07:48:13 AM By: MEP, HelpDesk

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Funding Programs – Total Cash Quarterly Allocation

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TMAC (159)
Funding Program

Year	Q1	Q2	Q3	Q4
2018	\$3,036,776.25	\$3,036,776.25	\$0.00	\$0.00
2017	\$3,043,176.24	\$3,043,176.24	\$3,036,776.25	\$3,036,776.25
2016	\$2,800,378.50	\$2,800,378.50	\$3,043,176.28	\$3,043,176.24
2015	\$1,408,851.60	\$1,408,851.60	\$2,800,378.50	\$2,800,378.50
2014	\$1,244,467.74	\$1,244,467.74	\$1,299,262.36	\$1,408,851.60
2013	\$1,294,467.75	\$1,294,467.75	\$1,277,801.12	\$1,244,467.74
2012	\$1,431,967.74	\$1,431,967.74	\$1,386,134.41	\$1,294,467.75
2011	\$1,431,967.74	\$1,431,967.74	\$1,431,967.78	\$1,431,967.74
2010	\$0.00	\$0.00	\$477,322.62	\$1,431,967.74
2009	\$0.00	\$0.00	\$0.00	\$0.00
2008	\$0.00	\$0.00	\$0.00	\$0.00
2007	\$0.00	\$0.00	\$0.00	\$0.00
2006	\$0.00	\$0.00	\$0.00	\$0.00
2005	\$0.00	\$0.00	\$0.00	\$0.00
2004	\$0.00	\$0.00	\$0.00	\$0.00
2003	\$0.00	\$0.00	\$0.00	\$0.00
2002	\$0.00	\$0.00	\$0.00	\$0.00
2001	\$0.00	\$0.00	\$0.00	\$0.00
2000	\$0.00	\$0.00	\$0.00	\$0.00
1999	\$0.00	\$0.00	\$0.00	\$0.00

History
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Funding Programs – Budget

MEIS - MEP Enterprise Information System (v18.5.0)

Dashboard CIP Reports Search Communities ROAR Links D&B Administration/Tools Reviews Self Service

TMAC (159)
Funding Program

General Information Contacts Federal Quarterly Allocation Total Cash Quarterly Allocation **Budget** Reporting Set

Show actuals
Show variances
Funding Agreement Number 70NANB15H047
70NANB10H304

	Jul 2015-Jun 2016 70NANB15H047	Jul 2016-Jun 2017 70NANB15H047	Jul 2017-Jun 2018 70NANB15H047	Jul 2018-Jun 2019* 70NANB15H047	Jul 2019-Jun 2020* 70NANB15H047	Total Budget
	Budget	Budget	Budget	Budget	Budget	
Revenue (Federal and Non-Federal Cost Share)						
NIST MEP Funds	6,700,881.00	6,700,881.00	6,700,881.00	6,700,881.00	6,700,881.00	33,504,405.00
NIST MEP Supplemental Funds	0.00	0.00	0.00	0.00	0.00	0.00
Unexpended Federal Funds (From prior operating year) to be used ABOVE base	0.00	330,571.00	264,953.00	0.00	0.00	595,524.00
Unexpended Federal Funds (From prior operating year) to be used TOWARD base	0.00	0.00	0.00	0.00	0.00	0.00
Applicant Contribution Cash	783,711.00	1,104,169.00	1,136,705.00	1,136,705.00	1,136,705.00	5,297,995.00
State/Local Funds						
State/Local Cash	0.00	0.00	0.00	0.00	0.00	0.00
State/Local In-Kind	564,752.00	0.00	0.00	0.00	0.00	564,752.00
Unexpended Program Income (From prior operating year)	0.00	242,358.00	310,000.00	0.00	0.00	552,358.00
Program Income	2,695,130.00	3,539,042.00	3,811,695.00	3,811,695.00	3,811,695.00	17,669,257.00
Total Other						
Total Other Cash	1,805,503.00	1,602,211.00	1,369,576.00	1,116,815.00	1,116,815.00	7,010,920.00
Total Other In-Kind	929,235.00	901,062.00	635,667.00	635,667.00	635,667.00	3,737,298.00
Total Revenue (Federal and Non-Federal Cost Share)	13,479,212.00	14,420,294.00	14,229,477.00	13,401,763.00	13,401,763.00	68,932,509.00
Expenses (Federal and Non-Federal Cost Share)						
Direct Costs						
Personnel	2,918,172.00	3,089,283.00	3,220,675.00	3,220,674.00	3,220,674.00	15,669,478.00
Fringe Benefits	702,207.00	668,089.00	708,548.00	708,548.00	708,548.00	3,495,940.00
Travel	97,157.00	144,102.00	163,838.00	163,838.00	163,838.00	732,773.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00
Supplies	260,469.00	100,809.00	65,200.00	65,200.00	65,200.00	556,878.00
Total Contractual Costs	137,774.00	14,500.00	59,500.00	59,500.00	59,500.00	330,774.00
Total Other Costs	7,098,594.00	7,694,887.00	7,488,563.00	6,958,657.00	6,958,657.00	36,199,358.00
Indirect Costs	1,691,911.00	2,086,281.00	2,225,345.00	2,225,345.00	2,225,345.00	10,454,227.00
Total Expenses (Federal and Non-Federal Cost Share)	12,906,284.00	13,797,951.00	13,931,669.00	13,401,762.00	13,401,762.00	67,439,428.00
Revenue Less Expenses	572,928.00	622,343.00	297,808.00	1.00	1.00	1,493,081.00



Funding Programs – Reporting Set

The screenshot shows a web browser window with the URL <https://meis.nist.gov/CIP/FundingAgreementGroup/E04/36>. The page title is "MEIS - MEP Enterprise Information System (v18.5.0)". The user is logged in as "Welcome Davis_Missy". The navigation menu includes "Dashboard", "CIP", "Reports", "Search", "Communities", "ROAR", "Links", "D&B", "Administration/Tools", "Reviews", and "Self Service". The main content area is titled "TMAC (159) Funding Program" and has several tabs: "General Information", "Contacts", "Federal Quarterly Allocation", "Total Cash Quarterly Allocation", "Budget", and "Reporting Set". A red arrow points to the "Reporting Set" tab.

Under the "Reporting Set" tab, there are two dropdown menus: "Goal Reporting Frequency" (set to 3,2,3,2) and "CAR Key Date Schedule" (set to Selected). Below these is a table of funding agreements:

Funding Agreement Number	Start Date	End Date
<input checked="" type="checkbox"/> 70NANB1SH047	2015-3	2020-2
<input type="checkbox"/> 70NANB1OH304	2010-3	2015-2

At the bottom of the page, there is a "History" section with the following text:

Last Updated On 11/15/2017 04:32:12 PM By: Coffman, Kim
Created On 09/26/2012 07:48:13 AM By: MEP, HelpDesk

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Reporting Elements – Success Story

Purpose:

- Success Stories reflect the variety and depth of impacts that companies realize and are one of the most effective tools to communicate the value of MEP services
- Success Stories are used to share experiences, and to communicate the value of MEP's services to stakeholders and potential clients, and are often used as part of presentations for the budgeting process to demonstrate the effectiveness of the system and how it operates
- NIST and MEP create promotional materials using Success Stories that best describe the value and quality of their services to potential clients
- Posted on NIST MEP Public Website (last 3 years)

How to report:

- Click CIP, hover over Success Stories, Submit Quarterly Reports, review Success Stories, click Actions Add to add new Success Story, click Actions Submit for Reporting
 - At least one Success Story is required every quarter
 - Success Stories will be based on projects or events that were completed with small manufacturing establishments
 - The project cannot be over 3 years old
 - The primary NAICS codes of the SMEs must be between 31 and 33, or one of NIST MEP's R&D or DOM NAICS



Reporting Elements – Success Story

Workflow:

- Each time the CAR submits a Success Story a NIST MEP staff person will review the material. A story may be accepted or rejected. A story is accepted if it meets all of the requirements and if it is well written. A story will be rejected if it is missing required information, or if it is not well written. At least one quantified impact is required.
- If the story is rejected, the CAR staff person that submitted the story, the Marketing Contact and the CAR Director will be notified by e-mail and given the reason(s) for rejection. The CAR will then edit the story online from the CAR Information Page and submit it again. If the story is accepted, the CAR staff person assigned the CAR Reporting Role will be notified of the acceptance by e-mail.
- There will be two separate versions of a Success Story. One will be submitted to the CAR Information Page, which will serve as a record that the CAR met its reporting requirements. The second copy will become the working copy that will be edited by NIST MEP for Success Story publication. After a story has been edited, the two copies will not match. CARs will not be allowed to directly edit a story from the CAR Information Page after it has been accepted
- NIST MEP will review and edit the story if necessary. The story will be showcased after acceptance and made available in MEIS (<https://meis.nist.gov>) and on the MEP Public Site (<http://nist.gov/mep>)



Reporting Elements – Success Story

Related Reports: Either data used or clickable from page

- Clients/Projects/Impacts
- Success Story Details
- One Pager (MEIS Dashboard or Documents/Communications)
- MEP Public Site
- Success Story – Marketing
- Success Story - Original

Did you know:

- The project must be accepted by NIST MEP and in MEIS as “finished” before it is available to be written about in a Success Story.
- Before submitting a Success Story for public use, the CAR must obtain the client’s written approval to release the information contained in the story
- NIST MEP encourages CARs to create the narrative portions of the Success Story report using a word processing program and then cut and paste the information into the online form. You would not want to compose long narratives on the web and then have a network problem cause you to lose the information.
- All formatting is stripped when submitted so no need to make it “pretty”.
- If corrections are needed after the Success Story has been submitted to NIST MEP, contact the NIST MEP Success Story Administrator



State Fact Sheet aka One Pager

- State One Pager includes description, recent impacts, recent Success Story
- To access
 - MEIS Dashboard – CAR Documents click on Fact Sheet (most current version)
 - CAR Information – Click on CIP, click on Information, click on One Pager tab, click view most current version.
 - Click CIP, Click Documents/Communications, filter the Document Type to “Fact Sheet (Public Site Document)”. While more complicated way to get to One Pagers, this is where you can find historical documents.
- This document is often times used with stakeholders and potential clients who would like a brief overview of how impactful your center is on the State



Accessing State Fact Sheet (The Hard Way)

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Dashboard CIP Reports Search Communities CORE Links D&B Administration/Tools Self Service Action(s) ▼

New Jersey Manufacturing Extension Program (180)
CAR Document

Title	Document Type	Created On	Last Updated On	Reporting Period
NewJerseyManufacturingExtensionProgram_180_2016-1_sCOREcard.pdf	sCOREcard		2016	2016-1
NewJerseyManufacturingExtensionProgram_180_2015-4_MEPInternal_sCOREcard.pdf	sCOREcard		2016	2015-4
One Page Fact Sheet (Autogenerated)	Fact Sheet (Public Site Document)		2016	2015-3
NewJerseyManufacturingExtensionProgram_180_2015-3_sCOREcard.pdf	sCOREcard		2016	2015-3
NewJerseyManufacturingExtensionProgram_180_2015-2_MEPInternal_sCOREcard.pdf	sCOREcard		2015	2015-2
NewJerseyManufacturingExtensionProgram_180_2015-1_sCOREcard.pdf	sCOREcard		2015	2015-1
NewJerseyManufacturingExtensionProgram_180_2014-4_sCOREcard.pdf	sCOREcard		2015	2014-4
One Page Fact Sheet (Autogenerated)	Fact Sheet (Public Site Document)		2016	2012-3
One Page Fact Sheet (Autogenerated)	Fact Sheet (Public Site Document)		2016	2013-3
One Page Fact Sheet (Autogenerated)	Fact Sheet (Public Site Document)		2016	2014-3
NewJerseyManufacturingExtensionProgram_180_2014-3_sCOREcard.pdf	sCOREcard		2015	2014-3
NewJerseyManufacturingExtensionProgram_180_2014-2_sCOREcard.pdf	sCOREcard		2016	2014-2
NewJerseyManufacturingExtensionProgram_180_2014-1_sCOREcard.pdf	sCOREcard	06/27/2014	07/02/2014	2014-1
NewJerseyManufacturingExtensionProgram_180_2013-4_sCOREcard.pdf	sCOREcard	04/03/2014	04/04/2014	2013-4
NewJerseyManufacturingExtensionProgram_180_2013-3_sCOREcard.pdf	sCOREcard	01/06/2014	02/04/2014	2013-3
NewJerseyManufacturingExtensionProgram_180_2013-2_sCOREcard.pdf	sCOREcard	09/30/2013	10/23/2013	2013-2
NewJerseyManufacturingExtensionProgram_180_2013-1_sCOREcard.pdf	sCOREcard	07/03/2013	07/03/2013	2013-1
NewJerseyManufacturingExtensionProgram_180_2012-4_sCOREcard.pdf	sCOREcard	04/01/2013	05/09/2013	2012-4
NewJerseyManufacturingExtensionProgram_180_2012-3_sCOREcard.pdf	sCOREcard	12/27/2012	01/07/2013	2012-3
NewJerseyManufacturingExtensionProgram_180_2012-2_sCOREcard.pdf	sCOREcard	09/13/2012	10/04/2012	2012-2
2012-1 sCOREcard	sCOREcard	06/27/2012	07/02/2012	2012-1
2011-4 sCOREcard	sCOREcard	04/08/2012	04/08/2012	2011-4
2011-3 sCOREcard	sCOREcard	02/03/2012	02/03/2012	2011-3
Operating plan for period of performance from 01/01/2015 to 12/31/2015	Operating Plan	02/04/2015	02/04/2015	
Operating plan for period of performance from 01/01/2014 to 12/31/2014	Operating Plan	02/12/2014	02/12/2014	
Operating plan for period of performance from 01/01/2013 to 12/31/2013	Operating Plan	05/01/2013	05/01/2013	

- Operating Plan
- Panel Review
- Review
- Strategic Plan
- Other
- Historic Operating Plan
- Communication
- CARReview
- DnB Company File
- Fact Sheet (Public Site Document)

Filter Clear



State Fact Sheet Example

NEW JERSEY
Making an Impact on U.S. Manufacturing



New Jersey Manufacturing Extension Program

New Jersey Manufacturing Extension Program, Inc. (NJMEP) is a not-for-profit company that works with New Jersey's small to mid-sized manufacturers to help them become more efficient, profitable and globally competitive. NJMEP's cost saving strategies and growth initiatives such as lean manufacturing and business process improvements have helped hundreds of companies save an average of 20% of the time, effort, or costs associated with their business and manufacturing processes. NJMEP's training processes and methodologies are designed to specifically meet the needs of manufacturers and provides companies with training and tools to continuously improve productivity, grow, and compete both locally and globally.

Backed by National Institute of Standards and Technology (NIST), NJMEP has access to a vast number of both public and private resources and certified trainers with 20+ years of experience in business and industry. NJMEP staff experts play an important role in assessing needs and determining a course of action. Located throughout the state, the experts have worked their entire career in manufacturing, and several have owned their own businesses. Their job is to identify opportunities to improve business, or to assist you in implementing solutions you've already identified.



MEP • MANUFACTURING EXTENSION PARTNERSHIP

CONTACT US



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(973)998-9801



www.njmeep.org

ECONOMIC IMPACT

MEP Center impacts are based on clients surveyed in FY2015



\$238 Million
Total Increased/Retained Sales



3,979
Total Increased/Retained Jobs



\$73.3 Million
New Client Investments



\$27.7 Million
Cost Savings



WWW.NIST.GOV/MEP.1-800-MEP-4MFG

SUCCESS STORY
OPEX CORP
New Jersey Manufacturing Extension Program

"The opportunity to participate in NJMEP's customized training program provided OPEX with in-depth and diverse modules to address specific training needs for a broad spectrum of the organization. The Lean training allowed us to identify inefficiencies in our current manufacturing processes that resulted in saved time and money in producing our equipment. OPEX is able to work more effectively in a team setting as a result of the training." John Kretzu, Manager of Production

INCREASED SALES AND COST SAVINGS ACHIEVED AS A RESULT OF WORKFORCE TRAINING

ABOUT. OPEX Corporation, headquartered in Moorestown, New Jersey, provides performance enhancing workflow solutions and cost-effective results for financial services, healthcare, government, non-profit, utility, service bureau, insurance, retail, telecommunications, and university/educational marketplaces. The company employees approximately 350 people.

THE CHALLENGE. OPEX recognized the urgency of implementing further Lean efficiencies on the OPEX assembly floor largely as a result of the increasing number and complexity of new OPEX product offerings. Production needed to become more versatile and react quicker. OPEX management chose to partner with NJMEP, a NIST MEP affiliate, to provide training in Lean concepts to the production staff, engineering group and select supervisors. Meanwhile, in the Mechanical Engineering department, they had recently purchased a new software package to allow them to design parts faster and more accurately.

MEP'S ROLE. NJMEP's Lean training was conducted in three steps: an overview of Lean concepts and benefits; an in-house Lean 101 workshop detailing Lean concepts and demonstrating them in a simulated setting; and a comprehensive Lean manufacturing training program that consisted of seven courses ranging from Lean Tools and Techniques to Team Building and Business Communications-Writing Basics for the Workforce. NJMEP also assisted OPEX in securing a SkillsJersey grant from the New Jersey Department of Labor and Workforce Development for the comprehensive Lean manufacturing training. NJMEP also coordinated training for the new engineering design software tool with a certified training resource, which allowed the entire Design Engineering team to ramp up quickly on the new software program, and with minimal disruption to ongoing projects. As a result of the Lean implementation, OPEX realized improved efficiencies on the production floor that allows them to react quickly to order demand. Following the training, single-piece flow was implemented into the assembly cells, production employees were cross-trained, Takt times were established for each assembly cell, standardized workstations were created within the cells and an organizational plan was instituted to maintain the improvements.



RESULTS



\$2,000,000 indirect increase in sales



40 new jobs



\$150,000 cost savings



\$43,200 toward the cost of training

WWW.NIST.GOV/MEP.1-800-MEP-4MFG

U.S. DEPARTMENT OF COMMERCE, NATIONAL INSTITUTE OF STANDARDS AND TECHNOLOGY, MANUFACTURING EXTENSION PARTNERSHIP



Non reporting element- Documents & Communications

- The Documents & Communications section of MEIS is a repository of information directly relating to your center
- Documents found in this section include:
 - The CARD
 - D&B Company File
 - Operating Plan
 - State Fact Sheets
 - Review documents



Survey Confirmation



Survey Confirmation Schedule

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Period	January 1 - March 31	April 1 - June 30	July 1 - September 30	October 1 - December 31
Start Date	March 1	June 1	September 1	December 1
End Date	March 31	June 30	September 30	December 31



Take Advantage of the Many MEIS Reports Survey Confirmation – 2 Reports

The screenshot displays a web application interface for selecting and running reports. On the left, a 'Select Report:' dropdown menu is open, listing various report types. The option 'Survey Confirmation (All Clients & Projects)' is highlighted. To the right of the dropdown is a blue 'Run Report' button. Below the button, the 'Report Description' section contains the text: 'Provide confirmation records(All Clients in one tab and All Projects in another tab when export to Excel)'. The 'Report Methodology' section is currently empty.

Report Description	Provide confirmation records(All Clients in one tab and All Projects in another tab when export to Excel)
Report Methodology	



Survey Confirmation

- Clients and Project data is submitted well before the survey occurs.
- CARs are given one month immediately prior to the survey to review client contact information and make changes.
- Opportunity to update information needed to conduct the survey and ensure that the materials sent to the client appear as professional as possible.
- Most CARS involve their field staff in the review process since it is the field staff that are most aware of changes.
- All client records with valid manufacturing MEP DOM NAICS Codes will be sent to survey regardless of whether the CAR has completed the confirmation process.



Survey Confirmation Suggestions

- Use this one-month period as a time to reconnect with clients. Go over project(s) up for survey to discuss expected impacts and investigate current needs and look for new opportunities with the customer.
- Use this period to initiate a D&B Investigation for any clients that do not have an acceptable NAICS Code. They are marked with a **red** exclamation point !
- Let clients know that you are trying to minimize the burden on them. Provide clients with third-party survey vendor name, survey schedule, and describe the process in detail to set expectations.
- Emphasize taking the web-based survey and that it should not take more than 15 minutes of their time if the field agent has already had a project close-out/feedback session where it was determined the success of the project.



During Survey Confirmation, centers can update client contact information and manage the number of times a project is surveyed (EIS)

As client/project records are reviewed, the client moves from Pending Review to either Reviewed, Excluded or EIS set to # times surveyed.

The screenshot shows the MEIS web application interface. At the top, there is a navigation bar with 'MEIS' on the left and 'Welcome ctest | Help | Send Feedback | Sign Out' on the right. Below this is a secondary navigation bar with 'D&B', 'Administration/Tools', and 'Self Service' options. The main content area features a 'Funding Source' dropdown menu and a status filter section with radio buttons for 'Pending Review', 'Reviewed', 'Excluded', and 'EIS set to # times surveyed'. The 'Reviewed' option is currently selected. To the right of the filter, it shows 'Pending Review (0)' and 'Total Client (41)'. Below the filter is a section titled 'Select Clients in Survey' with a warning icon and the text 'Hover over exclamation icon to view the information necessary for the client to be in survey.' The main part of the interface is a table with the following columns: Client Id, Client Name, CAR Client ID, Updated On, and Updated By. The table lists several clients, including Akcros Chemicals Inc., Aurora Multimedia Corporation, Avida Inc., Belden Brick Sales & Service Inc., Breeze-Eastern, BTECH Inc, Cementex Products Inc, Cooper Power Systems LLC, and CTC International.

Client Id	Client Name	CAR Client ID	Updated On	Updated By
42504	Akcros Chemicals Inc.	So2801742	3/6/2017 4:36:21 PM	Kia Lewis
81952	Aurora Multimedia Corporation	So3670458	3/27/2017 1:56:39 PM	Kia Lewis
84651	Avida Inc.	NO3801961	3/27/2017 10:36:57 AM	Kia Lewis
84660	Belden Brick Sales & Service Inc.	No3271009	3/27/2017 10:37:42 AM	Kia Lewis
84657	Breeze-Eastern(Div. of Trans Technolgy Corporation)	No3771000	3/21/2017 10:46:57 AM	Kia Lewis
81957	BTECH Inc	No3870190	3/6/2017 4:41:55 PM	Kia Lewis
4847	Cementex Products Inc	NJ3400164	3/27/2017 1:57:01 PM	Kia Lewis
84656	Cooper Power Systems LLC	So3670927	3/27/2017 1:57:16 PM	Kia Lewis
81953	CTC International	No3570720	3/21/2017 10:38:54 AM	Kia Lewis



Outlier Verification



Survey Data Import Process – In Short

- After survey closes, third-party contractor exports data from their system
- Data are imported into MEIS.
- Center Regional Office Aware



Reporting Elements – Outlier Verification

Purpose:

- Sometimes clients report significant impacts that NIST MEP requires be validated by the Center by communicating with the client to make sure what was reported is accurate.
- Outliers are flagged and confirmed by Centers by indicating the method for communication with the client and a short paragraph describing the work and why the large impact was realized as a result.
 - >5M Total\$
 - >250 Jobs

How to report:

- Click CIP, hover over Survey, Survey Outliers
 - Click on the View edit icon for the appropriate impact verification record.
 - Click the radio button to indicate the Verification Type
 - Click the radio button to indicate the Verification Status
 - Make any changes necessary to the quantified amounts.
 - Enter the narrative justification (minimum 500 characters)
- Click Save Outlier



Reporting Elements – Outlier Verification

Workflow:

- Centers are notified via email when Outliers need to be verified including a date when verifications MUST be entered into MEIS>
- Centers edit the Outlier records in MEIS. When complete, the record is saved and an email is generated and sent to the NIST MEP Survey Administrator, Center Survey Contact, Center Director and NIST MEP Manager for Program Evaluation.
- The NIST MEP Survey Administrator reviews the information provided and adjusts the impacts if necessary.
- Once all Outliers have been reviewed and adjusted, the IMPACT Metrics reports are run and distributed to Centers.



Outlier Verification

List of Outliers to be reviewed.

CAR ID	Client Id	Client Name	Outlier Status	Outlier Type	Verification Status	Respondent Name
160	35844	Air Master Awning	Finished, not updated	<ul style="list-style-type: none"> Business Impact Amount Job Impact Amount 	Verified, no modification	Grisell Vazquez
160	79047	Challenger Brass & Cooper	Finished, not updated	<ul style="list-style-type: none"> Business Impact Amount 	Verified, no modification	Abimael Padilla
160	77507	Congar International	Finished, not updated	<ul style="list-style-type: none"> Business Impact Amount Job Impact Amount 	Verified, no modification	Julio Acevedo
160	58268	Med Tech PR/ Vention Medical	Finished, not updated	<ul style="list-style-type: none"> Business Impact Amount 	Verified, no modification	Irving Mendez
160	37544	St. Jude Medical Puerto Rico, Inc	Finished, not updated	<ul style="list-style-type: none"> Business Impact Amount Job Impact Amount 		

IMPACT based on \$ or Jobs

For assistance using MEP's Enterprise Information System (MEIS), please contact [webmaster](#) or call the MEP HelpLine 301-975-4773.
 NIST is an agency of the U.S. Commerce Department
 For information on other federal programs, see USA.gov
[Privacy Policy](#) / [Security Notice](#) / [Accessibility Statement](#) / [Disclaimer](#) / [FOIA](#) / [Contact Us](#) / [Information Quality](#)

Outlier Verification

Radio buttons to indicate Verification Type and Status.

Modify downward an impacts that were overstated.

Business Impact Amount			
Impacts	Verify Impacts	Original Impact	
Increased Sales	<input type="text" value="2806050"/>	2,806,050	
Retained Sales	<input type="text" value="4700000"/>	4,700,000	
Cost Savings	<input type="text" value="613500"/>	613,500	
Increase Investment	<input type="text" value="453750"/>	453,750	
Increase Investment	<input type="text" value="285975"/>	285,975	
Increase Investment	<input type="text" value="99600"/>	99,600	
Increase Investment	<input type="text" value="57195"/>	57,195	
Avoid and/or Save	<input type="text" value="127800"/>	127,800	
Increase Investment in New Products and Processes	<input type="text" value="154000"/>	154,000	
Total	9,297,870	9,297,870	

Job Impact Amount			
Impacts	Verify Impacts	Original Impact	
Created Jobs	<input type="text" value="95"/>	95	
Retained Jobs	<input type="text" value="181"/>	181	
Total	276	276	

Outlier Verification

MEIS - MEP Enterprise Information System (v18.5.2) Welcome kcoffman | Help | Send Feedback | Sign Out

Dashboard CIP Reports Search Communities ROAR Links D&B Administration/Tools Reviews Self Service Action(s)

Puerto Rico Manufacturing Extension Inc (160)
CAR Client Surveys

Avoid and/or Save on Investment		127800	127,800
Increase Investment in New Products and Processes		154000	154,000
Total		9,297,870	9,297,870

Job Impact Amount	Impacts	Verify Impacts	Original Impact
	Created Jobs	95	95
	Retained Jobs	181	181
	Total	276	276

Outlier Type		
Rule Function	Name	Failed Rule
SUM	Business Impact Amount	< 100 or >=5,000,000.00
SUM	Job Impact Amount	> 25

Impact Justification / Comments

Impact Justification	Production line reconfiguration due to process improvements. PRIMEX facilitated the learning as well as working with employees for increased productivity. New opportunities related to Hurricane Maria
Outlier Comment	

History

Updated On 3/8/2018 4:13:28 PM Updated By Blum, Megean
Created On 02/26/2018 07:08:25 PM By Blum, Megean

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Short paragraph describing the project(s) and how the impact was realized.

Post-Survey Data Analysis - Knowledge Sharing



Post-Survey Data Analysis - Knowledge Sharing

- After all survey outliers have been verified, the data are ready to be analyzed
- Centers' survey results are made available
- Analysis



Post-Survey Data Analysis Suggestions

- Take advantage of the survey results reports in MEIS.
- Review the data you receive from the survey.
- Analyze the impacts, your response rate, Net Promoter Score™, clients comments, answers to challenges question, etc.
- The more you can learn from your clients the more efficiently you can respond to their needs.



Panel Reviews



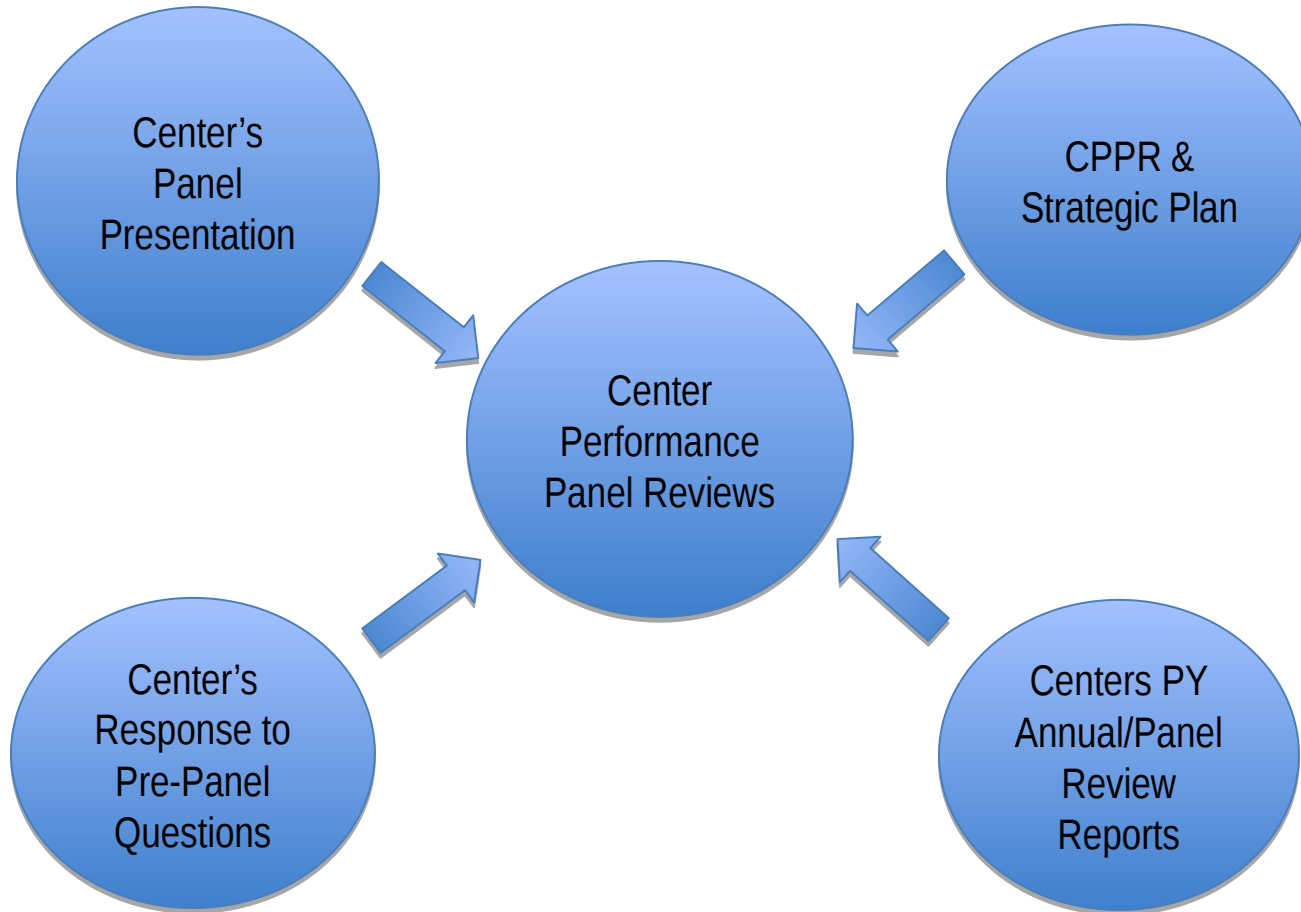
Purpose of the Performance Panel Reviews

The intent of the Performance Panel Reviews:

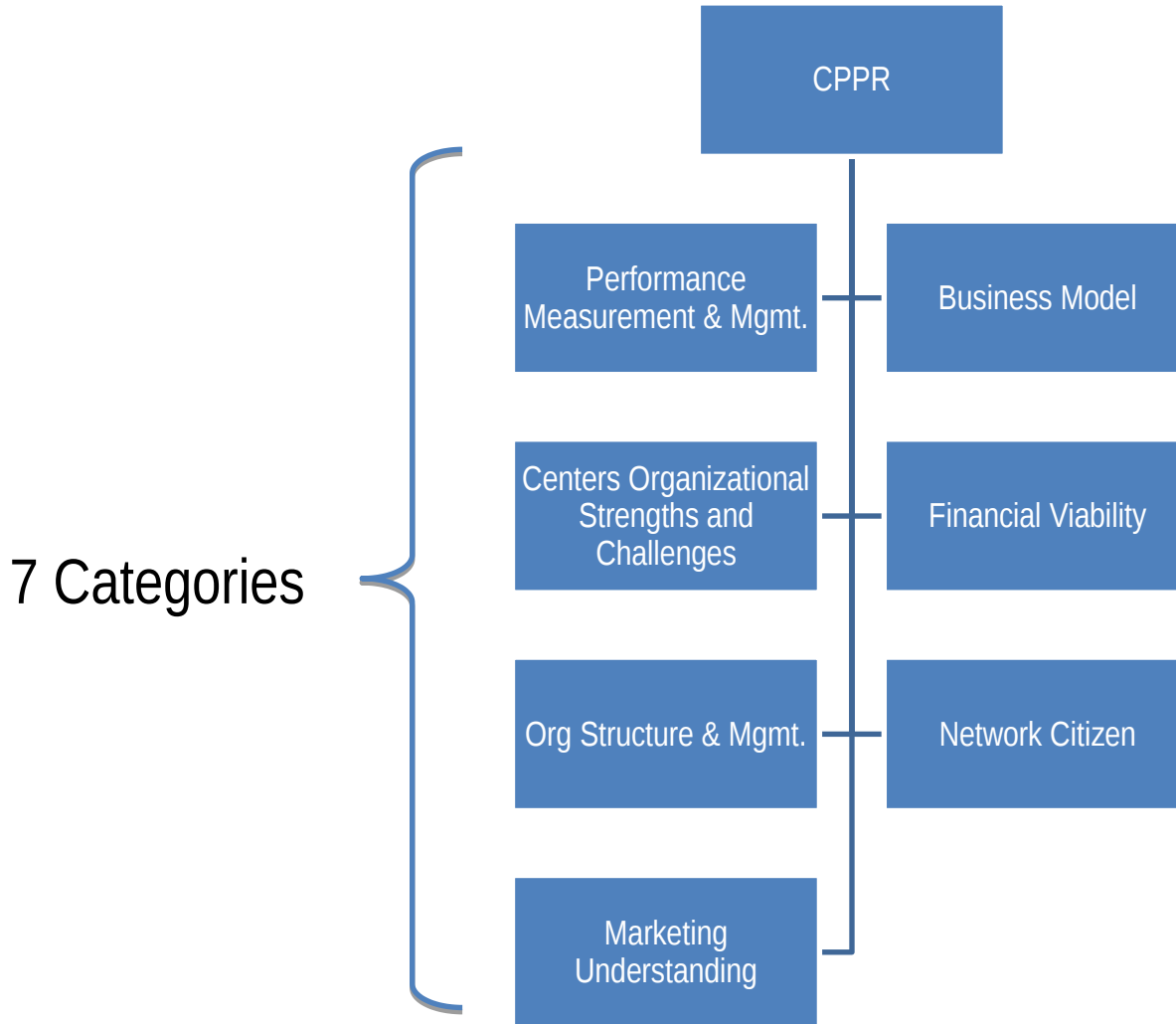
- Satisfy Statutory Requirement (American Innovation & Competitiveness Act);
- Assess their overall performance as it relates to market penetration, economic impact, and financial sustainability to improve the productivity and performance of the U.S. manufacturing;
- Focusing on trends and patterns to diagnose the causes for strong and weak performances;
- Include evaluation of a Center's own Performance Management System effectiveness and use, including self-assessment;
- Provide feedback on Center strengths and opportunities for performance improvement, including deficiency areas, if any, as defined in the Performance Policy;
- Promotes the sharing of information across the National Network; and
- Identify common Center performance gaps so the program can leverage internal and/or external resources to assist the National Network in improving performance.



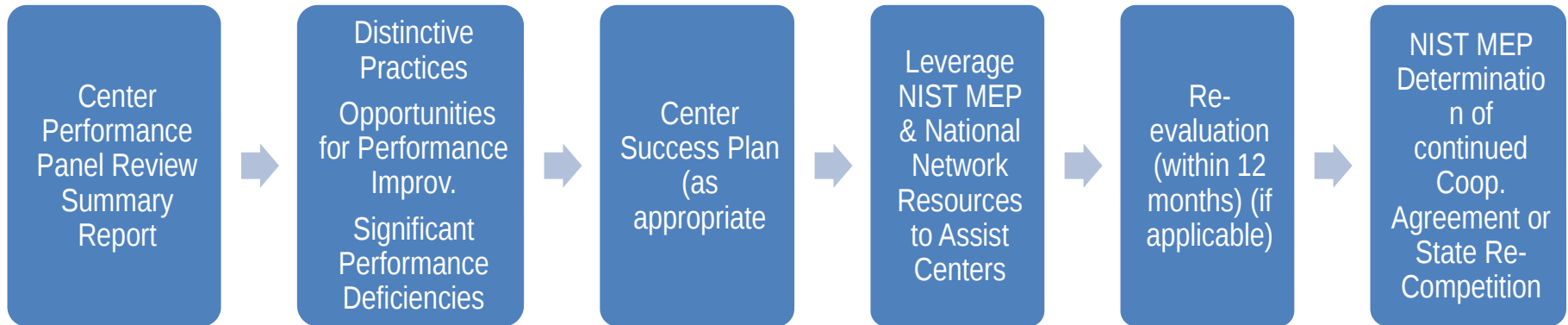
Center Performance Panel Review Inputs



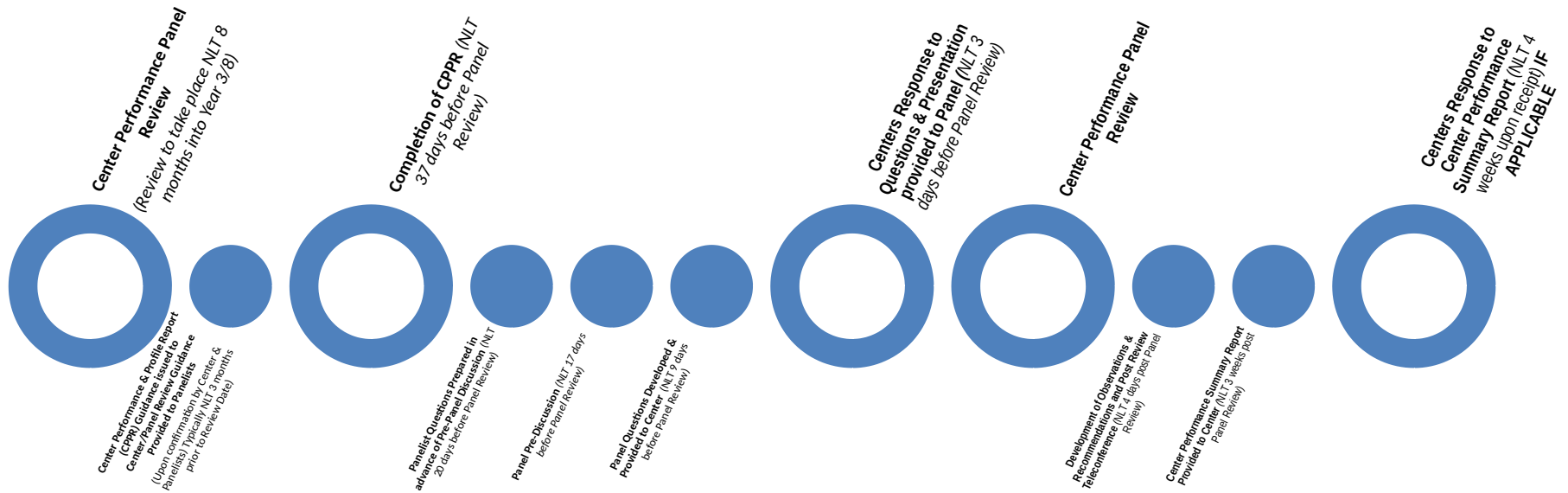
Center Performance & Profile Report



Center Performance Panel Review – Output



Center Performance Panel Review Process



Note: The larger circles identify the key milestones for the Center undergoing the review. The smaller circles identify the activities of the panel members and NIST MEP representatives.



MEIS – Review Module


Review Details			
CAR Name	Indiana MEP - Purdue Manufacturing Extension Partnership (177)	Regional Manager (RM)	Phillip Wadsworth
Review Type	3rd Year Panel Review	Federal Program Officer (FPO)	Melissa Ayala
Review Date	Tuesday, February 27, 2018	Current Milestone	
Panel Chair	David Stieren	Status	Completed
Panel Members	Keith Phillips (ATN); Chuck Spangler (SCMEP); John J. Tice IV (IMI)		


Reference Documents	Draft Review Documents	Final Review Documents																						
<table border="1"> <thead> <tr> <th>File Name</th> </tr> </thead> <tbody> <tr> <td>MEP Performance and Evaluation Management System Policy </td> </tr> <tr> <td>Performance Panel Review Background and Process Overview </td> </tr> <tr> <td>Performance Panel Review Overview Presentation 11/1/17 </td> </tr> <tr> <td>MEP Center Performance Panel Review Overview Webinar Recording 11-1-17 </td> </tr> <tr> <td>Round 1 Panelist Training Webinar Presentation </td> </tr> <tr> <td>Round 1 Panelist Training Webinar Recording </td> </tr> <tr> <td>Round 2 Panel Reviews - CPPR and Navigating the Review Module in MEIS Presentation 2-28-18 </td> </tr> </tbody> </table>	File Name	MEP Performance and Evaluation Management System Policy	Performance Panel Review Background and Process Overview	Performance Panel Review Overview Presentation 11/1/17	MEP Center Performance Panel Review Overview Webinar Recording 11-1-17	Round 1 Panelist Training Webinar Presentation	Round 1 Panelist Training Webinar Recording	Round 2 Panel Reviews - CPPR and Navigating the Review Module in MEIS Presentation 2-28-18	<table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr> <td>No records to display.</td> </tr> </tbody> </table>	Name	No records to display.	<table border="1"> <thead> <tr> <th>Milestone Name</th> <th>File Name</th> </tr> </thead> <tbody> <tr> <td>Completion of CPPR and Upload Strategic Plan</td> <td>Purdue MEP Manufacturing Service Strategy 2018-2020.pdf </td> </tr> <tr> <td>Completion of CPPR and Upload Strategic Plan</td> <td>CARReview_CenterPerformanceandProfileReport.pdf </td> </tr> <tr> <td>Final Pre-Panel Questions - Publish and Sent to Center</td> <td>CARReview_PrePanelQuestions.pdf </td> </tr> <tr> <td>Center Response to Pre-Panel Questions and Upload Presentation</td> <td>IN MEP CPPR 2018 Panel PPT 022618 FNL.pptx </td> </tr> <tr> <td>Center Response to Pre-Panel Questions and Upload Presentation</td> <td>CARReview_PrePanelQuestions_CARResponse.pdf </td> </tr> </tbody> </table>	Milestone Name	File Name	Completion of CPPR and Upload Strategic Plan	Purdue MEP Manufacturing Service Strategy 2018-2020.pdf	Completion of CPPR and Upload Strategic Plan	CARReview_CenterPerformanceandProfileReport.pdf	Final Pre-Panel Questions - Publish and Sent to Center	CARReview_PrePanelQuestions.pdf	Center Response to Pre-Panel Questions and Upload Presentation	IN MEP CPPR 2018 Panel PPT 022618 FNL.pptx	Center Response to Pre-Panel Questions and Upload Presentation	CARReview_PrePanelQuestions_CARResponse.pdf
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All Documents are clickable links

MEIS – Review Module


Previous Review Reports

File Name
Year 1 Annual Review Report - 3/9/2016 
Year 2 Annual Review Report - 3/29/2017 

to Center [FINAL Purdue MEP 3rd Year Panel Summary Report 3-20-18.pdf](#) 

Note: All Scheduled meetings are based on Eastern Standard Time

Milestone Due Dates

	Milestone	Action(s)	Due Date	Start Time (EST)	End Time (EST)	Review Status	Event
1	Panel Review & CPPR Prep Guidance to Center	Admin	Wednesday, November 15, 2017			Completed	
2	CPPR Submission Due Date Reminder	Center	Friday, January 12, 2018			Completed	
3	Completion of CPPR and Upload Strategic Plan	Center	Friday, January 19, 2018			Completed	
4	Panelist Evaluation Report Reminder	Panel	Monday, February 5, 2018			Completed	
5	Pre-Panel Discussion	Panel	Wednesday, February 14, 2018	01:00 PM	03:00 PM	Completed	
6	Draft Pre-Panel Questions for Review by Panel	Chair	Friday, February 16, 2018			Completed	
7	Reminder to Panel Chair to finalize pre-panel questions	Admin	Tuesday, February 20, 2018			Completed	
8	Final Pre-Panel Questions - Publish and Sent to Center	Chair	Tuesday, February 20, 2018			Completed	
9	Center Response to Pre-Panel Questions and Upload Presentation	Center	Monday, February 26, 2018			Completed	

Add events to your calendar by clicking the calendar icon in the "Event" column.

Thank You

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