



# NIST MEP Information Reporting Guidelines

OMB Control No. 0693-0032

A Federal agency may not conduct or sponsor, and a person is not required to respond to, nor shall a person be subject to a penalty for failure to comply with an information collection subject to the requirements of the Paperwork Reduction Act of 1995 unless the information collection has a currently valid OMB Control Number. The approved OMB Control Number for this information collection is 0693-0032. Without this approval, we could not conduct this survey/information collection. Public reporting for this information collection is estimated to be approximately 20 hours for the Quarterly Review, 4 hours for the Semi-Annual Review, 30 hours for the Annual Review and 80 hours for the Panel Review, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the information collection. All responses to this information collection are required to obtain benefits. Send comments regarding this burden estimate or any other aspect of this information collection, including suggestions for reducing this burden to NIST MEP Attn: Melissa Davis, [melissa.davis@nist.gov](mailto:melissa.davis@nist.gov).



# 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 continuous cycle.





## Reporting 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
Deadline	January 31	April 30	July 31	October 31

**BUT... You can report anytime!**



# 2021 Calendar Cycle

Reporting	2021	
Survey	Revised 8/12/2021	
Survey Confirmation		
Outlier Verification		
IMPACT Metrics Available		
Survey Reminder Email		
<b>2021Q1 January - March</b>		
<b>Reporting 2020Q4; Survey 2020Q4; Survey Confirmation 2021Q1</b>		
<i>surveys extended to 2/22 8:00 a.m. due to weather/shortened outlier period</i>		
<b>JANUARY</b>	<b>FEBRUARY</b>	<b>MARCH</b>
S M T W T F S	S M T W T F S	S M T W T F S
	1 2 3 4 5 6	1 2 3 4 5 6
3 4 5 6 7 8 9	7 8 9 10 11 12 13	7 8 9 10 11 12 13
10 11 12 13 14 15 16	14 15 16 17 18 19 20	14 15 16 17 18 19 20
17 18 19 20 21 22 23	21 22 23 24 25 26 27	21 22 23 24 25 26 27
24 25 26 27 28 29 30	28	28 29 30 31
31		
<b>2021Q2 April - June</b>		
<b>Reporting 2021Q1; Survey 2021Q1; Survey Confirmation 2021Q2</b>		
<b>APRIL</b>	<b>MAY</b>	<b>JUNE</b>
S M T W T F S	S M T W T F S	S M T W T F S
		1 2 3 4 5
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26
25 26 27 28 29 30	23 24 25 26 27 28 29	27 28 29 30
	30 31	
<b>2021Q3 July - September</b>		
<b>Reporting 2021Q2; Survey 2021Q2; Survey Confirmation 2021Q3</b>		
<i>Surveys extended to 8/31 due to pandemic</i>		
<b>JULY</b>	<b>AUGUST</b>	<b>SEPTEMBER</b>
S M T W T F S	S M T W T F S	S M T W T F S
	1 2 3 4 5 6 7	1 2 3 4
4 5 6 7 8 9 10	8 9 10 11 12 13 14	5 6 7 8 9 10 11
11 12 13 14 15 16 17	15 16 17 18 19 20 21	12 13 14 15 16 17 18
18 19 20 21 22 23 24	22 23 24 25 26 27 28	19 20 21 22 23 24 25
25 26 27 28 29 30 31	29 30 31	26 27 28 29 30
<b>2021Q4 October - December</b>		
<b>Reporting 2021Q3; Survey 2021Q3; 2021Q4 Survey Confirmation</b>		
<b>OCTOBER</b>	<b>NOVEMBER</b>	<b>DECEMBER</b>
S M T W T F S	S M T W T F S	S M T W T F S
	1 2 3 4 5 6	1 2 3 4
3 4 5 6 7 8 9	7 8 9 10 11 12 13	5 6 7 8 9 10 11
10 11 12 13 14 15 16	14 15 16 17 18 19 20	12 13 14 15 16 17 18
17 18 19 20 21 22 23	21 22 23 24 25 26 27	19 20 21 22 23 24 25
24 25 26 27 28 29 30	28 29 30	26 27 28 29 30 31
31		



# Reporting Elements - Minimal Required Reporting Frequency

## Quarterly and When Changes Occur

- Center Information
- Center Locations
- Center Staff
- Center Contacts
- Center Partners
- Center Board of Directors
- Center State Funding Partners
- **Projects and Events**
  - Title
  - Description
  - Project type and delivery mode
  - Intensity (hours)
  - Center vs. Third party delivery distribution (hours)
  - Total project value

## Semi Annually

- Progress Plan/Technical Report
  - Narrative update on progress under awards
- Budget Actuals

## Quarterly

- Client Success Stories (Min One)
- Progress Data
  - FTE Count
  - Manufacturers Interacted with
- **Third Party Client Survey**
  - New Sales & Retained Sales
  - Jobs Created and Retained
  - New Investment
  - Cost Savings
  - Client Challenges
  - Reasons for engaging with MEP Center

## As Needed

- Operating Outcomes
  - Interactions with very small, rural, start-up manufacturers
- **Clients**
  - Client Name & Location
  - Client Size & Industry
  - Client Contacts (including phone & e-mail)
  - C-Level Engagement
  - Transformational Engagement
  - Participates in DOD



# Funding Programs

- Center Operations (Base Award)
  - Manufacturing USA Institutes - Embedding
  - Rolling Competitive Award Program (RCAP)
  - Manufacturing Disaster Assistance Program (MDAP)
  - Supplemental Competitive Award Program (SCAP)
  - DefenseCyber
  - Coronavirus, Aid, Relief, and Economic Security Act (CARES)
  - Advanced Manufacturing Technical Services (AMTS)
  - Each award has its own requirements
    - Center Operations typically has the most extensive requirements
- NOTE:** Special Funding Program reporting is detailed separately, please see Special Funding Programs in the Table of Contents.



# Reporting Elements by Award Type

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

\* Clients and Projects reported as Center Operations with National Account designation.





# Reporting Dashboard

MEIS - MEP Enterprise Information System (v21.8.1) 29 Help | Welcome Davis\_Missy | Send Feedback | Sign Out

Dashboard CIP - PAMEP Switch CAR Reports Search ROAR Links D&B Administration/Tools Reviews Self Service

### Reporting Dashboard

State Funding Partners	<span style="color: green;">●</span>	By Chris Wilusz on 7/6/2021 7:19:08 AM	By Chris Wilusz on 7/6/2021 7:19:08 AM	By Chris Wilusz on 7/6/2021 7:19:08 AM
<b>MEP System-Center Operations</b>				
Budget Actuals - 70NANB16H214 (next expected 2021-3) - (Closeout - 2021-12-30)	<span style="color: yellow;">●</span>		By Chris Wilusz on 3/31/2021 12:00:00 AM	
Contacts	<span style="color: green;">●</span>	By Chris Wilusz on 7/6/2021 7:22:00 AM	By Chris Wilusz on 7/6/2021 7:22:00 AM	By Chris Wilusz on 7/6/2021 7:22:00 AM
Operating Outcomes - 70NANB16H214 - (update as needed)	<span style="color: green;">●</span>	By Rikki Riegner on 5/28/2020 4:33:45 PM	By Rikki Riegner on 6/1/2020 10:38:35 AM	By Julia Shriner on 6/2/2020 9:29:30 PM
Progress Data	<span style="color: green;">●</span>	By Chris Wilusz on 7/28/2021 8:46:08 AM	By Chris Wilusz on 7/28/2021 8:46:08 AM	By Chris Wilusz on 7/28/2021 8:46:08 AM
Progress Plan (next expected 2021-3) - (Closeout - 2021-12-30)	<span style="color: gray;">○</span>			
Projects and Events (Catalyst Connection)	<span style="color: green;">●</span> 65	By Amber McGoldrick on 7/27/2021 10:50:54 AM	By Amber McGoldrick on 7/27/2021 10:50:54 AM	By Missy Davis on 7/27/2021 11:04:54 AM
Projects and Events (Delaware Valley Industrial Resource Center)	<span style="color: green;">●</span> 55	By Nida Uddin on 7/26/2021 9:53:22 PM	By Nida Uddin on 7/26/2021 9:53:22 PM	By Missy Davis on 7/27/2021 11:05:29 AM
Projects and Events (Innovative Manufacturers Center (IMC))	<span style="color: green;">●</span> 19	By Kim Vanemon on 7/23/2021 12:09:23 PM	By Kim Vanemon on 7/23/2021 12:09:23 PM	By Missy Davis on 7/23/2021 12:20:42 PM
Projects and Events (MANTEC)	<span style="color: green;">●</span> 30	By Scott Sipe on 7/15/2021 2:17:34 PM	By Scott Sipe on 7/15/2021 2:17:34 PM	By Missy Davis on 7/17/2021 5:37:54 PM
Projects and Events (Manufacturers Resource Center)	<span style="color: green;">●</span> 298	By Ronald Williams on 7/26/2021 3:50:46 PM	By Ronald Williams on 7/26/2021 3:50:46 PM	By Missy Davis on 7/27/2021 11:05:59 AM
Projects and Events (Northeastern Pennsylvania Industrial Resource Center)	<span style="color: green;">●</span> 68	By Randy Yash on 7/13/2021 2:05:41 PM	By Randy Yash on 7/13/2021 2:05:41 PM	By Kimberly Coffman on 7/15/2021 9:47:10 AM
Projects and Events (Northwest Pennsylvania Industrial Resource Center)	<span style="color: green;">●</span> 72	By Kimberly Stebick on 7/23/2021 12:41:10 PM	By Kimberly Stebick on 7/23/2021 12:41:10 PM	By Missy Davis on 7/23/2021 2:24:37 PM
Staff	<span style="color: green;">●</span>	By Chris Wilusz on 9/2/2021 8:34:01 AM	By Chris Wilusz on 9/2/2021 8:34:01 AM	By Chris Wilusz on 9/2/2021 8:34:01 AM
Success Stories	<span style="color: green;">●</span> 5	By Amber McGoldrick on 7/20/2021 2:21:48 PM	By Amber McGoldrick on 7/20/2021 2:26:15 PM	By Megean Blum on 7/20/2021 3:00:21 PM
<b>NEAP-Coronavirus Aide Relief and Economic Security (CARES)</b>				
Budget Actuals - 70NANB20H051 (next expected 2021-2)	<span style="color: yellow;">●</span>		By Chris Wilusz on 6/30/2021 12:00:00 AM	
Contacts	<span style="color: green;">●</span>	By Chris Wilusz on 7/6/2021 7:24:14 AM	By Chris Wilusz on 7/6/2021 7:24:14 AM	By Chris Wilusz on 7/6/2021 7:24:14 AM
Progress Plan (next expected 2021-2)	<span style="color: green;">●</span>	By Chris Wilusz on 7/26/2021 10:01:08 AM	By Chris Wilusz on 7/27/2021 9:18:22 AM	By Julia Shriner on 8/4/2021 5:49:32 PM
Staff	<span style="color: green;">●</span>	By Chris Wilusz on 9/2/2021 8:34:02 AM	By Chris Wilusz on 9/2/2021 8:34:02 AM	By Chris Wilusz on 9/2/2021 8:34:02 AM
<b>PA MEP Kata in a Box MEP Collaborative Competitive Award-Rolling Competitive Awards Program - RCAP</b>				
Budget Actuals - 70NANB19H015 (next expected 2021-3)	<span style="color: yellow;">●</span>		By Chris Wilusz on 4/30/2021 12:00:00 AM	
Contacts	<span style="color: gray;">○</span>			
Progress Plan (next expected 2021-3)	<span style="color: gray;">○</span>			
Staff	<span style="color: green;">●</span>	By Chris Wilusz on 9/2/2021 8:34:02 AM	By Chris Wilusz on 9/2/2021 8:34:02 AM	By Chris Wilusz on 9/2/2021 8:34:02 AM

**Key**  
● = Started ● = Passed ● = Passed with Warnings ● = Passed with Errors ● = Passed Pending MEP Review ● = Failed ○ = Cleaned ○ = No Submission

For assistance using MEP's Enterprise Information System (MEIS), please contact [webmaster](#) or call the MEP HelpLine 301-975-4776.



# Reporting Elements – Information

## (Quarterly and When Changes Occur)

### **Purpose:**

- Intended to provide NIST MEP with general CAR contact information such as address, telephone, 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, Center Performance Management and Reviews.
- 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 to submit your changes to NIST MEP.
  - Highly recommend that you update this information as soon as something changes, no need to wait for a reporting month.
  - Center's cannot change CAR Name or Organization Type



## Reporting Elements – Information

(Quarterly and When Changes Occur)

**Related Reports:** Either data used in report or clickable from page

- CAR Information
- CAR List
- BIR Report (clickable from Information Tab)
- One Pager Fact Sheet, Covid-19 Response and Distinctive Practice (clickable from One Pager Tab)
- County Business Pattern Data (Export from Counties Tab)
- CBP Information
- MEP Quick List (Center contact information)



# Reporting Elements – Information

(Quarterly and When Changes Occur)

## Did you know:

- Information Tab – you can view your D&B BIR if already created by your FPO as well as cohort characteristics
- One Pager Tab – each one-pager has the ability to have a Success Story – centers can choose the Success Story that show in the Success Story module
  - Fact Sheet
  - Covid-19 MEP Response
  - Distinctive Practice
- Staff Tab – edit other user account records with the Reporting Role. Useful when - new center email addresses, center moved.
- Counties Tab – CBP data and rural export
- Dun & Bradstreet Tab – your center record is there; we use this information for renewal packages. Have you ever looked at this record?



# CAR Information Resources – Information Tab

MEIS - MEP Enterprise Information System (v19.8.2) Help | Welcome ctest | Send Feedback | Sign Out

Dashboard CIP - PAMEP Switch CAR Reports Search Links D&S Administration/Tools Reviews Self Service OK

**Pennsylvania Manufacturing Extension Partnership (276)**  
CAR Information

General Information One Pager Staff Counties Dun & Bradstreet

**Competitive Award Recipient**

Name *	Pennsylvania Manufacturing Extension Partnership
Short Name *	PAMEP
Description *	<p>PA MEP serves small and medium sized manufacturers in the state by enhancing their productivity and technological performance to create a positive and enduring economic impact in their communities and in Pennsylvania. Small and medium-sized manufacturing companies represent 12% of the total gross state product. According to the U.S. Policy Institute, Pennsylvania ranks 5th in the nation among all the states in manufacturing employment. Manufacturing businesses provide over 578,000 jobs in Pennsylvania, representing approximately one out of every 11 jobs in the state.</p> <p>Displayed on MEP Public Web Site - <a href="http://www.nist.gov/mep">www.nist.gov/mep</a> - Find Your Local Center</p>
State *	Pennsylvania
Organization Type *	Non-Profit
Account Status *	Active
Start Date *	10/01/2016
Review Month *	September
DUNS Number *	079894840
Region	Mid-Atlantic
Cohorts	<ul style="list-style-type: none"> <li>▶ Other MEP Awards</li> <li>▶ Project Mode</li> <li>▶ Project Portfolio</li> <li>▶ Revenue Model</li> <li>▶ Service Delivery Model</li> <li>▶ Size Category</li> <li>▶ Urban/Rural Continuum</li> </ul>
SMEs in Service Area	Manufacturing : 13577 MEP's Definition of Manufacturing: 18166 (CBP Update Year: 2016)
Logos (MAX file size is 100K)	<p>Small Logo (recommended size 32X32 pixels)</p> <p>Large Logo (recommended size 100x100 pixels)</p> <p>Select files... Select files...</p>
Contact Information	<p>Address 1 * One College Avenue</p> <p>Address 2 DIF 32</p>

Friday, August 9, 2019

Edit CAR Description

View Cohort Characteristics

Upload CAR Logos



# One Pager Tab Fact Sheet

The screenshot shows the MEIS One Pager Tab Fact Sheet interface. The browser address bar shows 'meis.nist.gov'. The page title is 'MEIS - MEP Enterprise Information System'. The navigation menu includes 'Dashboard', 'CIP - PAMEP', 'Administration/Tools', 'Reviews', and 'Self Service'. The main content area has tabs for 'General Information', 'One Pager', 'Staff', 'Counties', and 'Dun & Bradstreet'. The 'One Pager' tab is active, displaying the following information:

- Generate:** Yes
- One Pager Title (CAR name used if not populated):** Pennsylvania Manufacturing Extension Partnership (PA MEP)
- CAR Description:** PA MEP serves small and medium sized manufacturers in the state by enhancing their productivity and technological performance to create a positive and enduring economic impact in their communities and in Pennsylvania. Small and medium-sized manufacturing companies represent 12% of the total gross state product. According to the U.S. Policy Institute, Pennsylvania ranks 5th in the nation among all the states in manufacturing employment. Manufacturing businesses provide over 578,000 jobs in Pennsylvania, representing approximately one out of every 11 jobs in the state. Managed by the Pennsylvania Industrial Resource Center Foundation, the PA MEP is a public-private partnership sponsored by NIST MEP. The PA MEP is also supported by the Pennsylvania Department of Community and Economic Development and by the manufacturers who receive essential training and consulting services to increase competitiveness and grow their companies. To serve the regional diversity of the state's manufacturing base, PA MEP manages MEP federal funding and program outcomes for a network of seven Industrial Resource Centers who are regional affiliates strategically focused on meeting the needs of the geographic region. Affiliates include: Catalyst Connection (southwest); DVIRC (southeast); IMC (central); MANTEC (south central); HRC (Lehigh Valley); NEPIRC (northeast); and NWIRC (northwest).
- Logo (only PNG format is supported):** [PA MEP Logo]
- State Image (only PNG format is supported):** [Map of Pennsylvania]
- Success Story Highlighted in One Pager:** [View](#)
- View most recent one pager:** [One Page Fact Sheet \(Autogenerated\).pdf](#)

The 'History' section at the bottom shows:

- Last Updated On 07/29/2019 11:45:27 AM By: Riegner, Rikki
- Created On 10/31/2016 10:29:47 AM By Coffman, Kim

Four callout boxes are present:

- Click on One-Pager Tab:** Points to the 'One Pager' tab in the navigation menu.
- View CAR Description:** Points to the 'CAR Description' field.
- View and Print One Pager:** Points to the 'View' link under 'Success Story Highlighted in One Pager'.
- View Success Story:** Points to the 'View' link under 'View most recent one pager'.



# One Pager Tab COVID-19 MEP Response

**Click on One-Pager Tab**

**Click drop-down menu to choose COVID-19 MEP Response**

**Click check-box to regenerate One Pager**

**Centers can update Logos (496 x 143 Pixels) or Choose to display the Fiscal Year IMPACTS or upload a custom image**

**Centers Can Edit:**

- CAR Description
- Second Narrative Title
- Second Narrative

**Click radio button to include IMPACTS or Image**

General Information | **One-pager** | Staff | Counties | Dun & Bradstreet

One Pager Type: COVID-19 MEP Response

Generate

One (CAR)

Second Narrative Title: COVID-19 Response Details

Center Image (only PNG format is supported)

State Image (only PNG format is supported)

Impacts:  Include Impacts  Include Image

Success Story Highlighted in One Pager: N/A

View most recent one pager: COVID-19 MEP Response.pdf  
Last Generated On 05/20/2020 03:33:53 PM



# CAR Information Resources – Staff Tab

Click on Staff Tab

Click View/Edit icon to open user profile

User ID	Last Name	First Name	Organization Name	Phone	Email
8434	Adams	Jack	Pennsylvania Manufacturing Extension Partnership	(800)-654-8960	jack@nepirc.com
4057	Basla	Mark	Pennsylvania Manufacturing Extension Partnership	(215)-464-8550	mbasla@dvirc.org
4057	Bove	Angie	Pennsylvania Manufacturing Extension Partnership	(610)-628-4623	angie.bove@mrcpa.org
10053	Buck	Karen	Pennsylvania Manufacturing Extension Partnership	(610)-628-4626	Karen.Buck@mrcpa.org
11788		Nora	Pennsylvania Manufacturing Extension Partnership	(717)-843-5054	nora@mantec.org
11499	Campanelli	Terri	Pennsylvania Manufacturing Extension Partnership	(412)-918-4283	tcampbell@catalystconnection.org
4054	Clark		Pennsylvania Manufacturing Extension Partnership	(412)-918-4288	tcclark@catalystconnection.org
2032	Connelly		Pennsylvania Manufacturing Extension Partnership	(412)-918-4273	cconnelly@catalystconnection.org
5776	Connelly		Pennsylvania Manufacturing Extension Partnership	(412)-918-4248	mconnelly@catalystconnection.org
5024	Connelly		Pennsylvania Manufacturing Extension Partnership	(717)-843-5054	Tammy@mantec.org
8892	Cross		Pennsylvania Manufacturing Extension Partnership	(215)-464-8550	rcrossett@dvirc.org
11059	Decker		Pennsylvania Manufacturing Extension Partnership	(570)-704-0028	nick@nepirc.com
7760	Dietz		Pennsylvania Manufacturing Extension Partnership	(412)-918-4227	sdietz@catalystconnection.org
10023	Dopico	Robert	Pennsylvania Manufacturing Extension Partnership	(412)-918-4264	RDOPICO@CATALYSTCONNECTION.ORG
8836	Enoch	Jennifer	Pennsylvania Manufacturing Extension Partnership	(215)-464-8550	jenoch@dvirc.org
4541	Enright	Kathleen	Pennsylvania Manufacturing Extension Partnership	(215)-464-8550	kenright@dvirc.org
194	Esoda	Eric	Pennsylvania Manufacturing Extension Partnership	(570)-819-8966	eric@nepirc.com
1513	Evans	Jayne	Pennsylvania Manufacturing Extension Partnership	(570)-819-8966	jayne@nepirc.com
11554	Farkas	Janelle	Pennsylvania Manufacturing Extension Partnership	(570)-819-8966	janelle@nepirc.com
717	Felise	Pat	Pennsylvania Manufacturing Extension Partnership	(610)-628-4640	pat.felise@mrcpa.org
8403	Frischmann	Erica	Pennsylvania Manufacturing Extension Partnership	(412)-918-4278	efrischmann@catalystconnection.org
10928	Gajer	Lonni	Pennsylvania Manufacturing Extension Partnership	(215)-464-8550	lgajer@dvirc.org
11446	Gibson	Severna	Pennsylvania Manufacturing Extension Partnership	(215)-454-8550	sgibson@dvirc.org
4135	Gilroy	Leo	Pennsylvania Manufacturing Extension Partnership	(570)-704-0031	leo@nepirc.com
1179	Girfalco	Anthony	Pennsylvania Manufacturing Extension Partnership	(215)-464-8550	tgirfalco@DVIRC.org
4849	Giza	Gerv	Pennsylvania Manufacturing Extension Partnership	(570)-704-0019	ogerv@nepirc.com





# CAR Information Resources – Counties Tab

Click on Counties Tab

SME count by size

Export data to Excel

Click on arrows to drill down. Any county with 3 or less establishments will show as blank – click arrow to view.

Rural Continuum description

The screenshot displays a web application interface for the 'Counties' tab. At the top, there is a navigation bar with a 'Counties' tab selected. Below this, there are tabs for 'General Information', 'One Pager', 'Staff', 'Counties', and 'Dun & Bradstreet'. A 'History' dropdown is set to '2019' and a 'Filter' dropdown is set to 'Manufacturing'. An 'Export to Excel' button is visible in the top left of the data table area. The main data table has columns for 'Name', 'FIPS', and six 'Employee Size' categories (1-19, 20-99, 100-249, 250-499, 500+), 'RUCC Code', and 'Rural Continuum'. The table lists counties such as Beaver, Box Elder, Cache, Carbon, Davis, Duchesne, and Grand. A summary row at the bottom shows 'Sum: 0' for each employee size category and a 'Total Sum :0'. A second table below shows 'SMEs in Service Area' for 'Beverage and Tobacco Product Manufacturing' with a count of 3. A 'Rural Continuum description' callout points to the 'Rural Continuum' column. A 'Click on arrows to drill down...' callout points to the expand/collapse arrows in the table. An 'Export data to Excel' callout points to the 'Export to Excel' button. An 'SME count by size' callout points to the employee size columns. The page footer shows '1 - 10 of 21 items'.

Name	FIPS	Employee Size 1 - 19	Employee Size 20 - 99	Employee Size 100 - 249	Employee Size 250 - 499	Employee Size 500 +	RUCC Code	Rural Continuum
▶ Beaver	001						7	Nonmetro - Urban population of 2,500 to 19,999, not adjacent to a metro area
▶ Box Elder	003	23					2	Metro - Counties in metro areas of 250,000 to 1 million population
▶ Cache	005	108	28				3	Metro - Counties in metro areas of fewer than 250,000 population
▶ Carbon	007	6					7	Nonmetro - Urban population of 2,500 to 19,999, not adjacent to a metro area
▶ Davis	011	171	28				2	Metro - Counties in metro areas of 250,000 to 1 million population
▶ Duchesne	013	7					7	Nonmetro - Urban population of 2,500 to 19,999, not adjacent to a metro area
▶ Grand	019						7	Nonmetro - Urban population of 2,500 to 19,999, not adjacent to a metro area
				Sum: 0	Sum: 0	Sum: 0		
<b>Total Sum :0</b>								

Code	Industry	SMEs in Service Area	Employee Size 1 - 19	Employee Size 20 - 99	Employee Size 100 - 249	Employee Size 250 - 499	Employee Size 500 +	
3	Beverage and Tobacco Product Manufacturing	3						
			Sum: 0	Sum: 0	Sum: 0	Sum: 0	Sum: 0	
<b>Total Sum :0</b>								



# CAR Information Resources – Dun & Bradstreet Tab

Click on Dun & Bradstreet Tab

Click to launch D&B investigation

Start Investigation

History	
Last Updated in D&B	6/4/2017
Last Updated in MEIS	3/14/2019

Company Information		General Information	
DUNS Number	079894840	Company Type	Privately owned
Name	PA IRC Network Foundation	Trade Names	
Synopsis	Commercial nonphysical research	Phone Number	(570) 329-3200
Line Of Business	Commercial nonphysical research	Fax Number	
Sales Volume	\$45,207.00	Website	www.pamade.org
Number of Employees	1	Year Founded	2015
Employees Total	1	Ownership Year	2015
Prescreen Score	Low	Legal Status	Corporation (US)
Women Owned	False	FIPS State Code	42
Minority Owned		FIPS County Code	081

Income and Market Information		Duns Hierarchy	
Assets Period	P1Y	Headquarter/Parent Duns Number	
Assets	USD 198241.0000 SingleUnits	Headquarter/Parent Business Name	
Sales Growth%		Domestic Ultimate Duns Number	
NetIncome		Domestic Ultimate Business Name	
NetIncome Growth%		Global Ultimate Duns Number	
Market Value		Global Ultimate Business Name	
Value Date			

NAICS Codes		
NAICS Code	Description	Display Order
541910	Marketing Research and Public Opinion Polling	1



# Reporting Elements – Locations

## (Quarterly and When Changes Occur)

### 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, Center Performance Management and Reviews.

### How to Report:

- Click CIP, hover over Locations, Submit Quarterly Reports, review Sub-recipient Agreements, Field Offices, and partners as service delivery locations,
- Click Actions, Add to add a new location. Complete the form. Click OK to Save.
- Click Actions Submit for Reporting to submit your changes to NIST MEP

**NOTE:** We need centers to look at Locations closely, remove duplicates. Some centers have a location as a field office, SRA, and partner. These locations are being double and triple counted. Only your FPO can add/edit an SRA.



## Reporting Elements – Locations (Quarterly and When Changes Occur)

**Related Reports:** Either data used or clickable from page

- CAR Information
- CAR Locations
- CAR Summary (CAR Locations Map)

### **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 (Quarterly and When Changes Occur)

### Purpose:

- The staff element provides the CAR a mechanism for reporting on its labor resources
- The staff listing is a compilation of registered users associated with the CAR
- Used for Center Performance Management and Reviews.

### 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 add a staff member, staff self-register at <https://meis.nist.gov>. Click Register Here
  - To remove a staff member, click the archive checkbox to the right on the Staff grid



## Reporting Elements – Staff (Quarterly and When Changes Occur)

**Related Reports:** Either data is used in report or clickable from page

- CAR Contacts
- CAR Information
- Clients and Projects
- Clients/Projects/Impacts
- MEP Quick List (Center Director)
- Users
- Survey Confirmation (All Tab)



## Reporting Elements – Staff (Quarterly and When Changes Occur)

### Did you know:

- Anyone associated to the CAR, either as an employee or sub-recipient providing part of a partner’s cash or in-kind is considered part of the CARs staff and should be reported
- Each CAR staff member is responsible for maintaining his or her own record
  - Contact information
  - Skills profile
- 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



# Assign Staff to Funding Program

Dashboard - MEP's Enterprise Information System

meis.nist.gov/dashboard/show

MEIS - MEP Enterprise Information System

Help | Welcome clst | Send Feedback | Sign Out

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | D&B | Administration/Tools | Reviews | Self Service | Action(s)

CAR Dashboard

- Reporting Dashboard
- Information
- Locations
- Staff
- Submit Quarterly Reports
- Contacts
- Clients
- Projects and Events
- Operating Outcomes
- Progress Plan
- Progress Data
- Partners
- Board of Directors
- State Funding Partners
- Success Stories
- Survey
- Management

Extension Partnership

Survey Response (2019-1)

Clients Eligible : 138 Surveyed : 103

New Sales	10			
Retained Sales	10			
Jobs Created	10			
New Investment	10			
Cost Savings	10			
Percent Increase	10			
Survey Response	10			
Net Promoter Score	10			
New Mfg. Client	10			
Federal Funding	10			
Management	10			

Lean Product Suite

\$5,296,449.00

Cost Savings \$15,660,240

Cost Savings \$3,018,505

Cost Savings \$18,396,502

Cost Savings \$22,458,500

Cost Savings \$6,184,500

Cost Savings \$2,904,495

Cost Savings \$1,970,100

83.3 %

Lean Product Suite 442

**CAR STATUS**

Reporting | Survey Confirmation

Pennsylvania Manufacturing Extension Partnership (2019-2)

Rep.Elements/Funding Sources	CAR Submissions	MEP System	Manual
Board of Directors	●	N/A	
CAR Information	●	N/A	
Clients	N/A	N/A	
Locations	●	N/A	
Partners	●	N/A	
State Funding Partners	●	N/A	
Budget Actuals	N/A	○	

**CAR DOCUMENTS**

Fact Sheet (3/14/2019) (2018-3)

IMPACT Metrics (6/17/2019) (2019-1) - Published

Fiscal Year Impacts: FY2018	CAR	National Network
Cost Saving	\$71,386,462	\$1,703,462,991
New Client Investment	\$182,324,768	\$4,034,341,505
Total Increased Retained Sales	\$751,584,565	\$15,971,355,729
Total Increased Retained Jobs	6113	122029

Document/Funding Program

MEP System Embedding MEP in Mfg USA Inst

(7076) (MFR) (642) (14)

(7077) (MFR) (474) (20)

**MEP DOCUMENTS**

CPR Reference

- MEP Panel Review Background and Process
- MEP Performance and Evaluation Management System Policy
- Panel Review Module User Guide for Centers, Panelists and Panel Chairs
- Center Performance & Profile Report (CPPR) - Explanation of the Data
- Module 1 - Panel Review Overview Presentation & Webinar Recording - 10-17-18
- Module 2 - Panel Review & MEIS Guidance for Centers Presentation & Webinar
- Module 3 - Panelist Training Part 1 PowerPoint Presentation 4-12-18
- Module 4 - Panelist Training Part 2 - Demo of MEIS Review Module Webinar Rec

**SEARCH**

Search [ ] Use words separately

- Success Story
- Center Documents
- System Documents

Note: To limit the search, click checkbox next to the area(s) to be searched

**D&B RESEARCH**

Search By : Search Criteria : State : Phone (Area Code) : Location Type :

Company Name

Indicators:

Minority-Owned  Women-Owned  Import  Export  Stand-alone

Employee Size (Establishment):

Min: Max:

Search Reset

DUNS Number Organization Name Location Type Phone Number Address Employee Size Industry Type

https://meis.nist.gov/CIP/Staff/Submit/276

Click CIP, Staff, Submit Quarterly Reports





# Assign Staff to Funding Program / Archive Staff

MEIS - MEP Enterprise Information System (v19.8.2)

Dashboard CIP - PAMEP Switch CAR Reports Search Links D&B Administration/Tools Reviews Self Service

### Pennsylvania Manufacturing Extension Partnership (276) Staff Submission

**Submissions**  
Submitted On 7/2/2019 6:34:57 PM By Rikki, Riegner  
Finished On 7/2/2019 6:34:57 PM By Rikki, Riegner

**CAR Staff**

Apply Filter

Center Name	Relationship	Allocated	Unallocated	Archived
Pennsylvania Manufacturing Extension Partnership	Primary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Innovative Manufacturers Center (IMC)	Other	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Jersey Manufacturing Extension Program	Sub-Recipient With Other Funding Agreement	<input checked="" type="checkbox"/>	<input checked="" 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 ID	Last Name	First Name	Organization Name	Email	Archive	MEP System	Mfg USA-PA IRC Network Foundation	Embedding MEP in Mfg USA institute - ARM	PA MEP Kata in a Box MEP Collaborative Competitive Award
4313	Test	Center	APEG	kimberly.coffman@nist.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11499	Campbell	Terri	Catalyst Connection	tcampbell@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4054	Clark	Timothy	Catalyst Connection	tclark@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2032	Connelly	Cindy	Catalyst Connection	cconnelly@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5776	Connelly	Mara	Catalyst Connection	mconnelly@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7760	Dietz	Scott	Catalyst Connection	sdietz@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10023	Dopico	Robert	Catalyst Connection	RDOPICO@CATALYSTCONNECTION.ORG	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8403	Frischmann	Erica	Catalyst Connection	efrischmann@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8296	Haag	Allison	Catalyst Connection	ahaag@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9705	Holjes	Matthew	Catalyst Connection	mholjes@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10912	Kusenko	Hannah	Catalyst Connection	hkusenko@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8605	MacDonald	Eric	Catalyst Connection	emacdonald@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5828	Mancuso	Anna	Catalyst Connection	amancuso@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11479	McGoldrick	Amber	Catalyst Connection	amgoldrick@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11071	Minner	Matt	Catalyst Connection	mminner@catalystconnection.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click checkbox to associate staff with funding agreement

Click checkbox to archive staff



# Reporting Elements – Contacts

(Quarterly and When Changes Occur)

## Purpose:

- Contacts are CAR officials with specific responsibilities for which there is the opportunity to communicate as a group
- Contacts are used to communicate with the correct CAR staff through mailing lists and working group membership
- Centers report on Contacts as part of Center Performance Management.

## 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

Reporting Period: 2019-2

Submissions  
Submitted On 7/29/2019 12:06:23 PM By Rikki, Riegner  
Finished On 7/29/2019 12:06:23 PM By Rikki, Riegner

Program Name: MEP System (Center Operations)

Contact Type Name
Car Review Contact
D&B Hoovers List Administrator
Director
Director (New)
Financial/Operations Manager
Marketing Manager
MEP Scouts
Reporting Contact
Salesforce Administrator
Survey Contact

Click view/edit icon to add contact to contact type

For assistance using MEP's Enterprise Information System (MEIS), please contact [webmaster](#) or call the MEP HelpLine 301-975-4778.

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# Adding Contacts

MEIS - MEP Enterprise Information System (v19.8.2)

Dashboard CIP - PAMEP Switch CAR Reports Search Links D&B Administration/Tools Reviews Self Service

MEIS - MEP Enterprise Information System (v19.8.2) | Welcome ctest | Send Feedback | Sign Out

**MEIS - MEP Enterprise Information System (v19.8.2)**  
 Pennsylvania Manufacturing Extension Partnership (276)  
 Edit Contact Type

Program Name: MEP System  
 Contact Type: Reporting Contact

**Add Members**

By Name: [Search] Add

From List

**Available**

- Adams, Jack (8434)
- Basla, Mark (4102)
- Bove, Angie (4057)
- Buck, Karen (10053)
- Burgos, Nora (11788)
- Campbell, Terri (11499)
- Clark, Timothy (4054)
- Connolly, Cindy (2032)
- Connolly, Mara (5776)
- Cooke, Tammy (5024)
- Crossett, Robert (8892)

**Selected**

Add

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

Can change contact type using dropdown

User ID	Last Name	First Name	Phone	Email
3058	Riegner	Rikki	(570)-308-3312	rriegner@pamep.org

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

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# Reporting Elements – Contact Types Explained

- CAR Review Contact – notifications about reviews
- D&B Hoovers – Center representative holding D&B license key
- Director - **Only one.** Identified on MEP Public Site and report. **Receives notification of Client Survey Contact changes.**
- Director Notification – Designate users to receive the same notifications as Director (Contact Above)
- Financial/Operations Manager – support CFO communications related to grants **Also receives notification of Client Survey Contact changes.**
- Marketing Manager – supports Marketing/Communications



# Reporting Elements – Contact Types Continued

- MEP Scouts – Center representative for Supplier Scouting process
- Reporting Contact – Used to communicate any updates to the reporting requirements, structure, guidelines, etc.
- Salesforce Administrator – Center representative for Salesforce/MEIS configuration
- Survey Contact - communications about Survey, Survey Confirmation, and Outliers

Note: Special Awards have an identified subset of the Contacts listed above



## Reporting Elements – Contacts (Quarterly and When Changes Occur)

**Related Reports:** Either data is used in report or clickable from page

- CAR Contacts
- CAR Information
- CAR List
- MEP Quick List (Center Director)
- CAR Contacts Detail



## Reporting Elements – Contacts

(Quarterly and When Changes Occur)

### Did you know:

- MEP list server distribution lists - available to be used by anyone with a MEIS account, messages are monitored (see PEER Group for list server email address)
- 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** (Quarterly – One per Quarter)

### **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 Center Performance Management, Reviews, and 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 (Includes Center and SRAs)
  - CME is client manufacturing establishment



## Reporting Elements – Progress Data (Quarterly – One per Quarter)

**Related Reports:** Either data used in report or clickable from page

- CAR Summary (capacity utilization charts)

### **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

## (Quarterly and When Changes Occur)

### **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 for Center Performance Management and Annual and Panel Reviews

### **• How to report**

- Click CIP, hover on 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 (Quarterly and When Changes Occur)

**Related Reports:** Either data used in report or clickable from page

- Board of Directors
- CAR Information

### Did you know:

- The Board Chair contact information is used in the Review Module for Annual and Panel Reviews as well as 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
  - Board Chair is an active participant in a Panel Review
  - Board 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 can create MEIS accounts for Board Members
  - Access levels are determined by the center



## Reporting Elements – Board of Directors (Quarterly and When Changes Occur)

### 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 like fiduciary boards, or they may be more focused on areas such as client needs
- Board Bylaws are a required document upload.



# Creating a User Account for Board Members

Board of Directors Member - ME | meis.nist.gov/CIP/BoardofDirectors/MemberEdit/2719

MEIS - MEP Enterprise Information System (v19.8.2) | Welcome clst | Send Feedback | Sign Out

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | D&B | Administration/Tools | Reviews | Self Service | Action(s) | OK

**Pennsylvania Manufacturing Extension Partnership (276)**  
Board of Directors Member

<b>General Information</b>	
Small Manufacturer	<input type="checkbox"/>
Chairperson	<input type="checkbox"/>
Tenure	2017
Organization Name	Lycoming Engines
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
<b>User Information</b>	
Salutation *	
First Name *	Katie
Last Name *	Bell
Title *	Director of Marketing and Communications
Address 1 *	652 Oliver Street
Address 2	
City *	Williamsport
State *	
ZIP *	17701
Email *	kbell@lycoming.com
Phone *	(570) 327-7001
Fax	
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.
<b>History</b>	
Last Updated On 1/19/2017 1:59:39 PM Updated By Riegner, Rikki	
Created On 1/19/2017 1:59:39 PM By Riegner, Rikki	

Click checkbox to create MEIS account for Board Member

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# Reporting Elements – Partners

## (Quarterly and As Changes Occur)

### Purpose:

- The Partner submission provides the CAR a readily available mechanism for reporting on its formal and informal relationships with other organizations
- Partners 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 documented performance management process for its partners.
- Used in Annual and Panel Reviews (top 5 Key Partners) as well as for Center Performance Management.



## Reporting Elements – Partners (Quarterly and As Changes Occur)

### 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, monetary, office space, incubators, etc.) through a long-term formal or informal agreement.
    - **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

## (Quarterly and As Changes Occur)

**Related Reports:** Either data used in report or clickable from page

- CAR Information
- CAR Summary
- CPPR
- 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) that are listed in the CPPR. Key Partners typically have a formal agreement and provide services such as delivery, marketing, developing products, etc.
- State Funding Partners (SFP) are people associated to Partner organizations. To deactivate a Partner with a State Funding Partner association, you must disassociate the SFP before the Partner can be deactivated.

**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 (Quarterly and As Changes Occur)

### Purpose:

- Intended to provide the CAR a readily available mechanism for reporting on its relationships with State and Local Government Officials that provide funding and are interested in Center Performance.
- State Funding Partners are the primary funding decision officials for the program within the state or local government for the CAR
- Used in Annual and Panel Reviews as well as for Center Performance Management.

### 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 (Quarterly and As Changes Occur)

**Related Reports:** Either data used in report or clickable from page

- CAR Information
- State Funding Partners

### **Did you know:**

- Centers can create MEIS accounts for State Funding Partners
  - Access levels are determined by the center

**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?



## Reporting Elements – Clients (As Needed)

### Purpose:

- NIST MEP uses client records for the purpose of conducting an in-house project impact survey measuring the realized impacts (sales, investment, employment, cost of goods sold, etc.) of our services to our clients
- Client information may also be used for other purposes such as market and industry research
- Used in the calculation of New and Unique Clients Served metrics.
- Used in Center Performance Management and Center Annual and Panel Reviews.

### How to report:

- Click CIP, hover over Clients, click Submit Quarterly Reports. Centers now have four options for submitting client information.
  - Add New (one at a time) click Add New
  - Click Select Files to upload a Client Information File (CIF) XML or CSV file (requires one time setup of field mapping to work)
  - Click Goto Spreadsheet to use the spreadsheet interface
  - Click Validate/Submit from Salesforce using the Salesforce/MEIS Utility (requires one time setup of field mapping to work)
- A unique client ID is assigned to each client. The CIF is the Client Information File Template and is found on MEIS
- 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
  - **Just because the client previously existed in MEIS does not mean you should not update the record in MEIS on a regular basis**



# Reporting Elements – Clients

(As Needed)

Clients Submission - N X +

meis.nist.gov/CIP/Clients/SubmitNew/276

MEIS - MEP Enterprise Information System (v19.9.1) Help | Welcome ctest | Send Feedback | Sign Out

Dashboard CIP - PAMEP Switch CAR Reports Search Links D&B Administration/Tools Reviews Self Service

**Pennsylvania Manufacturing Extension Partnership (276)**  
Clients Submission

**Submissions**  
No submission history for selected reporting period

**Choose method to use to submit / validate data**

Reporting Period: 2019-2

Add New Client

Regional Office: **Catalyst Connection (278)**

Upload a XML file   
Note, a CSV file can be used as well but a column mapping needs to be setup first. Contact support for assistance.

Use a spreadsheet like UI within MEIS

Validate / submit directly from Salesforce   
If your CAR uses Salesforce, you can validate / submit directly from it without having to create a XML / CSV file or manage data in the Spreadsheet UI. Please contact support for more details.

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Type here to search

Show hidden icons

9/13/2019



# Reporting Elements – Clients

## (As Needed)

### Workflow:

- There is a workflow if clients are submitted as a batch submission (CSV or XML), use the Spreadsheet Interface, or from Salesforce as opposed to manually entered.
- Add New (One by One)
  - Center is responsible for ensuring that a duplicate client record (same company two different CAR Client IDs) is NOT being created.
  - MEIS will report an error if a duplicate CAR Client ID is used but will not give an error if the same company name is used with a different CAR Client ID
  - Click OK to save
- Salesforce/MEIS Utility
  - Click Validate from Salesforce. Any errors are displayed.
  - If the utility returns errors, the issues will need to be corrected in your Salesforce System. Repeat this process until the utility passes validation with no errors. You will then need to submit for reporting
  - Click Submit from Salesforce. The information in Salesforce 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 reviews and finalizes the submission to achieve the “Passed” icon



# Reporting Elements – Clients

## (As Needed)

### Workflow:

#### – CSV or XML Upload

- XML Upload

- CIF Template with macro to convert to XML option – **MACRO is no longer supported by NIST MEP**
- But if you are going to use this time, 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 provides a CIF Template with an easy add-in to convert to XML
- Click Select File, choose the proper XML file
- Click 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 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



## Reporting Elements – Clients (As Needed)

- CSV Upload
  - Create CSV file (Microsoft Comma Delimited)
  - Click Select File, choose the proper CSV file
  - Click 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 CSV 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 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





# Reporting Elements – Clients

## (As Needed)

- Spreadsheet Interface
  - Click Goto Spreadsheet
  - Enter data (typing or cut/paste) into the appropriate fields.
  - Simple data errors such as an 11 digit phone number, will result in a pop-up error message displayed. Complex data errors such as an invalid D&B number will be displayed after validation.
  - If adding multiple rows, select the number of rows to add
  - Click Submit for Validation. Any errors in the spreadsheet will be displayed. When the spreadsheet is submitted for validation, the data is checked to ensure validity and consistency.
  - If the spreadsheet fails with errors, the issues will need to be corrected. Repeat this process until the spreadsheet passes validation with no errors. You will then need to submit for reporting
  - Click Submit to System. The information in the spreadsheet 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



## Reporting Elements – Clients (As Needed)

### Explanation of Key

- Blue Circle – Started (In Process but not submitted by Center)
- Green Circle – Passed (data is in MEIS)
- Green/Yellow Circle with Exclamation Point - Passed with Warnings (most likely Non-Manufacturing NAICS)
- Green/Yellow Circle with Asterisk – Passed with Errors (Not used for Clients)
- Green/Yellow Circle – Passed Pending MEP Review (waiting on NIST MEP review)
- Red Circle – Failed (invalid file format)
- Pink Circle – Cleaned (NIST MEP deleted a submission)
- White Circle – No Submission (No activity as of yet)

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(DOM))

- 423510 - Metal Service Centers and Other Metal Merchant Wholesalers
- 488991 - Packing and Crating
- 541330 - Engineering Services
- 541380 - Testing Laboratories
- 54171X – Research and Development
- 561910 - Packaging and Labeling Services
- 811310 - Commercial and Industrial Machinery & Equipment (except Automotive & Electronic) Repair & maintenance



## Reporting Elements – Clients (As Needed)

**Related Reports:** Either data used in report or clickable from page

- **CAR Summary**
- CAR Survey Results
- Client Counts
- Clients and Projects
- Clients/Projects/Impacts
- Cohort Comparison
- Impact Analysis
- IMPACT Metrics
- IMPACT Metrics Detail
- IMPACT Metrics Summary
- Industry Profile
- **New/Repeat Clients**
- Success Story Details
- Success Story Marketing
- Survey Confirmation
- **Survey Continuity (Clients and Projects)**
- **Survey Impact Allocation by Hours**
- Survey Outliers
- Survey Results
- Survey Summary



## Reporting Elements – Clients (As Needed)

### Did you know:

- Common errors on the CIF include:
  - Potential duplicates that require reconciliation prior to FINISH by NIST MEP
    - Typos
    - Change in naming conventions but do not update MEIS and instead create duplicates
  - Clients that do not meet the MEP DOM
  - Typos in D&B number
- The clients (or CIF) must be uploaded before the projects or Project Information File (PIF) can be uploaded



## Reporting Elements – Clients (As Needed)

### 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 mydnb.com 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 researching your clients



## Client Information Collected from Center or Calculated/Designated in MEIS

- Client data based on what is provided by Center
  - CAR Client ID
  - **D&B Number (extremely important for data integrity)**
  - Participates in DOD Supply Chain (regular data request from DOC and DOD)
  - C – Level Engagement (conversations with RM)
  - **Transformation and Coaching (progress towards Operating Outcome Transformational Goal)**
  - Primary Contact Information for MEP Client Survey
  - Secondary Contact Information for MEP Client Survey
- Calculated in MEIS or Designated by NIST MEP
  - MEIS Client ID
  - Client Since (based on completion year/quarter of first project)
  - **Next Expected Survey Year/Quarter**
  - NAICS Impact Driver (first MEP DOM NAICS from D&B, used in Industry reports and charts)
  - **MEP Waived (approved Center request to waive meeting D&B NAICS requirement)**
  - MEP Special Client (SBIR – designated by NIST MEP based on SBIR data resource)
  - Out of Business (verified by NIST MEP after Center indicates company is no longer active)



# Client Information Collected using D&B

- NIST MEP relies on D&B for client background information
  - Address 1 and 2
  - City
  - State
  - County
  - Zip
  - NAICS (determines if project can be submitted for client)
  - **Number of Employees (progress towards Operating Outcomes Very Small Goal)**
  - **FIPS State/County (for rural mapping to USDA RUCC)**
  - **Year Founded (progress towards Operating Outcome Startup Goal)**
  - **Prescreen Score (D&B proprietary algorithm to provide simple indicator of credit worthiness)**
  - **Corporate Hierarchy**





# Reporting Elements – Projects and Events

## (Quarterly and As Changes Occur)

### Purpose:

- Project/Event information is collected for the purpose of conducting an in-house project impact survey measuring the realized impacts (sales, investment, employment, cost of goods sold, 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
- Used in Center Performance Management and Center Annual and Panel Reviews.

### How to report:

- Click CIP, hover over Projects and Events, click Submit Quarterly Reports. Centers now have four options for submitting client information.
  - Add New (one at a time) click Add New
  - Click Select Files to upload a Project Information File (PIF) XML or CSV file (requires one time setup of field mapping to work)
  - Click Goto Spreadsheet to use the spreadsheet interface
  - Click Validate/Submit from Salesforce using the Salesforce/MEIS Utility (requires one time setup of field mapping to work)
  - 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 (Quarterly and As Changes Occur)

Projects/Events Submis: X + v

meis.nist.gov/CIP/ProjectEvent/SubmitNew/276

MEIS - MEP Enterprise Information System (v19.9.1) Help | Welcome ctest | Send Feedback | Sign Out

Dashboard CIP - PAMEP Switch CAR Reports Search Links D&B Administration/Tools Reviews Self Service

**Pennsylvania Manufacturing Extension Partnership (276)**  
Projects/Events Submission

**Submissions**  
Submitted On 7/26/2019 1:01:45 PM By Amber, McGoldrick  
Finished On 7/26/2019 1:02:55 PM By Kim, Coffman

**Choose method to use to submit / validate data**

Reporting Period: 2019-2  
Add New Projects/Events: Add New

Regional Office: Catalyst Connection (278)

Upload a XML file: Select files...  
Note, a CSV file can be used as well but a column mapping needs to be setup first. Contact support for assistance.

Use a spreadsheet like UI within MEIS: Goto Spreadsheet

Validate / submit directly from Salesforce: If your CAR uses Salesforce, you can validate / submit directly from it without having to create a XML / CSV file or manage data in the Spreadsheet UI. Please contact support for more details.

For assistance using MEP's Enterprise Information System (MEIS), please contact [webmaster](#) or call the MEP HelpLine 301-975-4778.  
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](#)

Type here to search

11:29 AM 9/13/2019



## Reporting Elements – Projects and Events (Quarterly and As Changes Occur)

### Workflow:

- There is a workflow if clients are submitted as a batch submission (CSV or XML), use the Spreadsheet Interface, or from Salesforce as opposed to manually entered.
- Add New (One by One)
  - Center is responsible for ensuring that a duplicate Project/Event record (same Project, two different CAR Project Ids on a client) is NOT being created.
  - MEIS will report an error if a duplicate CAR Project ID is used but will not give an error if the same Project/Event Title is used with a different CAR Project ID
  - Click OK to save
- Salesforce/MEIS Utility
  - Click Validate from Salesforce. Any errors are displayed.
  - If the utility returns errors, the issues will need to be corrected in your Salesforce System. Repeat this process until the utility passes validation with no errors. You will then need to submit for reporting
  - Click Submit from Salesforce. The information in Salesforce is submitted to the MEIS database
  - You are redirected to the CAR Dashboard. If you have successfully submitted Project and Event 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



## Reporting Elements – Projects and Events (Quarterly and As Changes Occur)

### Workflow:

#### – CSV or XML Upload

- XML Upload

- PIF Template with macro to convert to XML option WILL BE eliminated in 2019Q4
- But if you are going to use this time, PIF must be converted to XML using the Excel Template
  - » 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 provides a PIF Template with an easy add-in to convert to XML
- Click Select File, choose the proper XML file
- Click 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 Project and Event 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 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 Project and Event 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



## Reporting Elements – Projects and Events (Quarterly and As Changes Occur)

- CSV Upload
  - Create CSV file (Microsoft Comma Delimited)
  - Click Select File, choose the proper CSV file
  - Click 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 Project and Event records already existing in the MEIS database. This is achieved through validation at the database level
  - If the file fails with errors, the CSV 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 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 Project and Event 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



## Reporting Elements – Projects and Events (Quarterly and As Changes Occur)

- Spreadsheet Interface
  - Click Goto Spreadsheet
  - Enter data (typing or cut/paste) into the appropriate fields.
  - Simple data errors such as an inactive National Account, will result in a pop-up error message displayed. Complex data errors such as a duplicate Project will be displayed after validation
  - If adding multiple rows, select the number of rows to add
  - Click Submit for Validation. Any errors in the spreadsheet will be displayed. When the spreadsheet is submitted for validation, the data is checked to ensure validity and consistency.
  - 
  - If the spreadsheet fails with errors, the issues will need to be corrected. Repeat this process until the spreadsheet passes validation with no errors. You will then need to submit for reporting
  - Click Submit to System. The information in the spreadsheet is submitted to the MEIS database
  - You are redirected to the CAR Dashboard. If you have successfully submitted Project and Event 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



## Reporting Elements – Projects and Events (Quarterly and As Changes Occur)

### Explanation of Key

- Blue Circle – Started (In Process but not submitted by Center)
- Green Circle – Passed (data is in MEIS)
- Green/Yellow Circle with Exclamation Point - Passed with Warnings (not likely to appear with Projects and Events)
- Green/Yellow Circle with Asterisk – Passed with Errors (Not Used for Projects/Events)
- Green/Yellow Circle – Passed Pending MEP Review (waiting on NIST MEP review)
- Red Circle – Failed (invalid file format)
- Pink Circle – Cleaned (NIST MEP deleted a submission)
- White Circle – No Submission (No activity as of yet)



# Reporting Elements – Projects and Events

## (Quarterly and As Changes Occur)

**Related Reports:** Either data used in report or clickable from page

- **CAR Summary**
- CAR Survey Results
- Client Counts
- Clients and Projects
- Clients/Projects/Impacts
- Cohort Comparison
- Impact Analysis
- IMPACT Metrics
- IMPACT Metrics Detail
- IMPACT Metrics Summary
- Industry Profile
- **New/Repeat Clients**
- Success Story Details
- Success Story Marketing
- Survey Confirmation
- **Survey Continuity (Clients and Projects)**
- **Survey Impact Allocation by Hours**
- Survey Outliers
- Survey Results
- Survey Summary





## Reporting Elements – Projects and Events (Quarterly and As Changes Occur)

### Did you know:

- Common errors when reporting Projects and Events 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](http://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
- 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



## Projects and Events Information Collected From Center

- Client ID/Name Association
- CAR Project ID
- Funding Agreement Number
- Substance (14 choices)
- Delivery Mode (Project or Event)
- Project Mode (Assessment, Training or Implementation)
- Project Title
- Project Description
- Initiated Date
- Completed Date
- **Estimated Impact Span (EIS)**
- **National Account**
- CAR Key Staff
- **CAR Hours**
- **Third Party Organization**
- **Third Party Hours**
- Total Project Value
- **Project Cost Share (Direct or Facilitated)**



## Projects and Events Information Calculated/Designated by NIST MEP

- MEIS Project ID
- MEP Special Project (Supply Chain Optimization, ExportTech)
- **Reported Date – (Year/Quarter project reported – primarily used for troubleshooting purposes)**
- **Completed Period – (Year/Quarter project completed- determines when client counts as unique and new or repeat and when selected for survey)**
- Total Hours (calculated sum of CAR and Third Party Hours)



# CIF and PIF Reporting Suggestions

- **Surveys are triggered off the project completion date, not the reporting period**
- If you report a project, it will be surveyed
- Minimize 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
- Use Project Cost Share (Direct or Facilitated) to your advantage



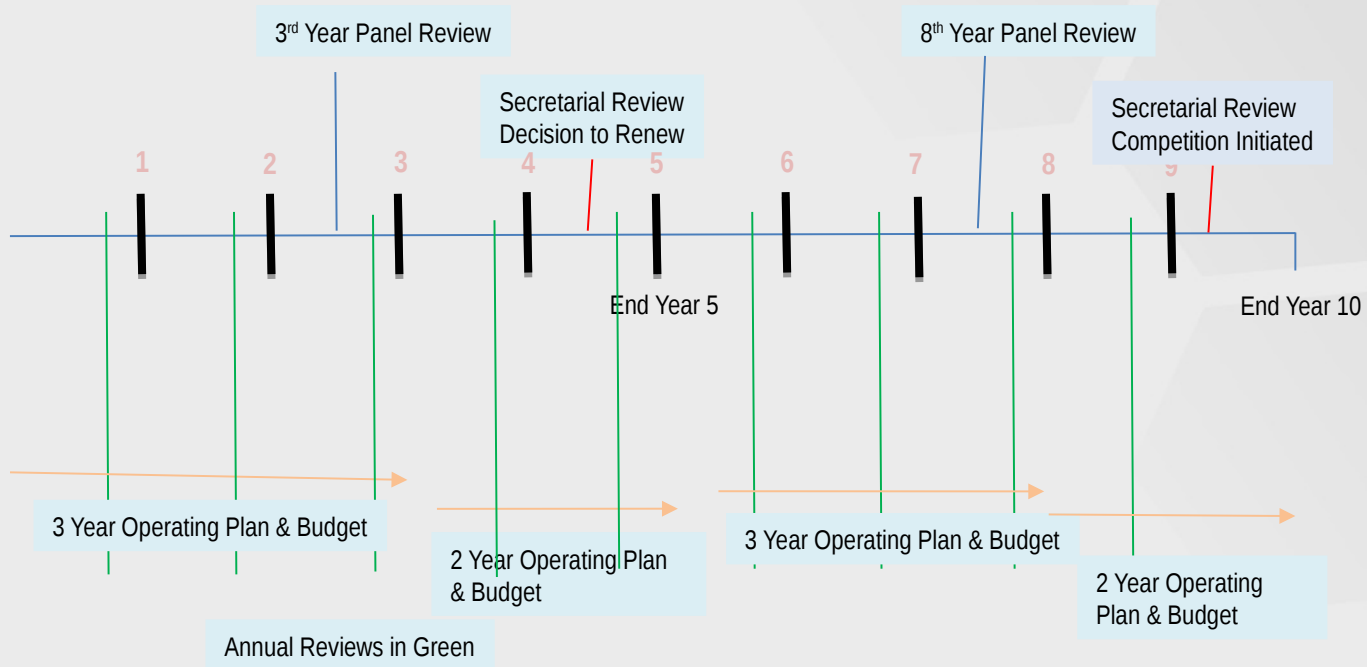
# Operating Outcomes, Progress Plan and Budget Actuals are Intertwined

Feed Performance Metrics and Annual, Panel, and Secretarial Reviews

- **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)



# NIST MEP Partnership Model Timeline





# Operating Outcome Statements (As Needed)

## Purpose:

- Creation of mutually agreed upon strategy and goals between NIST MEP (Resource Manager (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 (FPO) 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 update:

- 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

(As Needed)

## Related Reports:

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

## 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.



# 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 at least every 6 months. 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



# Operating Outcome Statements

MEIS - MEP Enterprise Information System (v19.8.2)

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | D&B | Administration/Tools | Reviews | Self Service | Action(s)

Reporting: 16H214

Submission: No submission history for selected reporting period.

Recipient Information

Name: Pennsylvania Manufacturing Extension Partnership

Proposals/SOWs

Proposals/SOWs History

File Name
16H214 PA Proposal_No Budget.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	Narrative
	<p>The Pennsylvania Manufacturing Extension Partnership (PA MEP) will serve small and medium sized manufacturers (SMEs) in Pennsylvania by enhancing their productivity and technological performance, to create a positive and enduring economic impact on their communities and on Pennsylvania as a whole. The PA MEP will be managed by the PA IRC Network Foundation, Inc. (Foundation) an independent 501(c)(3) corporation.</p> <p>PA MEP will leverage the experience and regional market understanding of Pennsylvania's seven Industrial Resource Centers (IRCs) through individual subrecipient agreements to develop and provide services to Pennsylvania's smaller manufacturing firms and to create impact. The PA MEP will facilitate the sharing of current regional assets and the development and expansion of new services across Pennsylvania through the IRCs and other statewide organizations who serve Pennsylvania's smaller manufacturing firms. The PA MEP and also help SMEs stay abreast of new market and technology trends so that they remain healthy and vibrant companies.</p> <p>The Foundation will serve as the corporate structure for the PA MEP, and the program will be managed by the Center Director will report to an independent Board of Directors and will be supported by a subrecipient Leadership Team and Working Groups, providing valuable sharing of best practices and market insights about SME needs.</p>

Client activity with transformational clients

Transformational Clients - 117



# Operating Outcomes

meis.nist.gov/CIP/OperatingOutcomes/SubmitByReportingSet/72

MEIS - MEP Enterprise Information System (v19.8.2) | Welcome ctest | Send Feedback | Sign Out

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | D&B | Administration/Tools | Reviews | Self Service | Action(s)

**Pennsylvania Manufacturing Extension Partnership (276)**  
Operating Outcomes Edit

Client Goals	Goal Period	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 Oct 2016 - Sep 2019	<input type="text" value="215"/>	<input type="text" value="134"/>	<input type="text" value="39"/>	<input type="text" value="117"/>	<input type="text" value="614"/>	<input type="text" value="1,023"/>
	Over 2 years Oct 2019 - Sep 2021	<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 3 years Oct 2021 - Sep 2024	<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 2 years Oct 2024 - Sep 2026	<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"/>

**Top and Bottom Line Growth**

**Engagement in top line growth**

The PA MEP expects to have 40% of its clients involved on top line growth over the next three years as indicated in TABLE 2 below.

The development of services, staff training, novel tools, or techniques will be developed and deployed through the PA MEP Leadership Group and other working groups in accordance with the PA MEP organizational model.

**Engagement in bottom line growth**

The PA MEP expects to have 60% of its clients involved in bottom line growth over the next three years as indicated in TABLE 2 below.

The development of services, staff training, novel tools, or techniques will be developed and deployed through the PA MEP Leadership Group and other working groups in accordance with the PA MEP organizational model.

Client Goals



# Reporting Elements – Progress Plan (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
- Used in Center Performance Management and Feeds Annual/Panel Reviews

## 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 (Semi-annually)

## 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
  - Grants has a reconciliation 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 (approved by both the FPO and RM), the entire package including PDFs of the narrative, SF425 and supplemental documents are sent to Grants, RM, FPO and Center.

## Related Reports: Either data used in report or clickable from page

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





# Reporting Elements – Progress Plan

## (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 view but not edit 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

MEIS - MEP Enterprise Information System (v19.8.2) | Welcome ctest | Send Feedback | Sign Out

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | D&B | Administration/Tools | Reviews | Self Service | Action(s)

**Pennsylvania Manufacturing Extension Partnership (276)**  
Progress Plan

Narratives and Attachments | Budget

2019-1

70NANB16H214 - Pennsylvania MEP(Center Operations)

PA IRC Network Foundation

Funding Agreement Number: 70NANB16H214

I, Rikki Riegner, an official of this CAR, verify that data reported in this Progress Plan is accurate. \* SF425 attached is accurate.

**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](#)  
The Pennsylvania Manufacturing Extension Partnership (PA MEP) will serve small and medium sized manufacturers (SMEs) in Pennsylvania to create a positive and enduring economic impact on their communities and on Pennsylvania as a whole. The PA MEP will be managed by an independent Board of Directors and will be supported by a subrecipient Leadership Team and Working Groups, providing valuable sharing of best practices and market insights about SME needs. PA MEP is ahead of target to achieve the three-year goals for type of manufacturer. PA MEP has now served 197 very small, 132 rural, and 32 start-ups as of the end of the 7th quarter as well as 858 unique companies. This translates into 92% of goal for very small, 98% of goal for rural, 122% of goal for Start-ups and 84% of goal for unique manufacturers. As a point of reference the PA MEP should 58% of goals at the end of 2018-2 on these Three-Year Plan metrics.

[Show/Hide Previous Report Submission](#)  
PA MEP has exceeded or continues to be ahead of target on goals related to very small, rural, start-up and mid-sized manufacturers. PA MEP has now served 225 very small, 142 rural and 36 start-ups as of the end of the 9th quarter as well as 960 unique manufacturers. PA MEP is 105% of goal for very small establishments and 106% of goal for rural manufacturers. PA MEP is 92% of goal for start-up establishments, 91% of goal for other manufacturers and 94% of goal for total unique manufacturers. With three reporting periods remaining for the three-year plan the PA MEP will likely exceed all goals associated with Client Levels by Type of Company.

**Client activity with transformational clients**

[Show/Hide Operating Outcomes Statement](#)  
[Show/Hide Previous Report Submission](#)  
At the end of the 7th quarter of the three-year goals, the PA MEP is working with 114 Transformational Clients which is 97% of goal. PA MEP will likely exceed this goal by the next reporting period.

[Show/Hide](#)

**Over 3 years (2016-4 - Total Unique)** [Show/Hide](#)

**Over 2 years (2019-4 - Total Unique)** [Show/Hide](#)

**Over 3 years (2021-4 - Total Unique)** [Show/Hide](#)

**Over 2 years (2024-4 - Total Unique)** [Show/Hide](#)

**Narrative Response**

View OO statement and if available previous PP submission.



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

MEIS - MEP Enterprise Information System (v19.8.2)

Dashboard CIP - PAMEP Switch CAR Reports Search Links D&B Administration/Tools Reviews Self Service

Change year/quarter

Pennsylvania Manufacturing Extension Partnership (276) Progress Plan

Show/Hide Table

Client activity with transformational clients

Over 3 years (2016-4 - Total Unique)

Show/Hide Operating Outcomes Statement

The Pennsylvania Manufacturing Extension Partnership (PA MEP) will serve small and mid-sized manufacturing, start-up, small and mid-sized companies to create a positive and enduring economic impact on their communities and on Pennsylvania's smaller manufacturing firms and to develop and provide services to Pennsylvania's smaller manufacturing firms and to services across Pennsylvania through the IRCs and other statewide organizations and technology trends so that they remain healthy and vibrant companies. The Foundation is an independent Board of Directors and will be supported by a subrecipient Lead Agency.

Show/Hide Previous Report Submission

PA MEP is ahead of target to achieve the three-year goals for type of manufacturing companies. This translates into 92% of goal for very small, 98% of goal for rural, and 91% of goal for other manufacturers and 94% of goal for total unique establishments associated with Client Levels by Type of Company.

Show/Hide Operating Outcomes Statement

Show/Hide Previous Report Submission

At the end of the 7th quarter of the three-year goals, the PA MEP is working with the following clients:

Year	Very Small Establishments (< 20 employees)	Rural Establishments (Use USDA Definition)	Start-up Establishments	Transformational Clients (MEP Define)
Goal	Goal:215	Goal:134	Goal:39	Goal:117
2016-4	45	27	8	
2017-1	52	24	7	
2017-2	44	42	8	
2017-3	27	23	6	
2017-4	48	21	6	
2018-1	49	36	3	
2018-2	54	43	9	
2018-3	36	17	7	
2018-4	48	14	6	21
2019-1	46	19	6	23
2019-2	48	38	3	17
2019-3	2	2	0	0

Client Goals

Period 2019-2

Client ID	Name	Is Goal Client Small	Is Goal Client Rural	Is Goal Client Startup	Is Goal Client Transformational
8080	Accu-Chek Machining Inc	Yes	Yes		
31756	Actco Tool & Manufacturing Co		Yes		
19436	Advantage Precision Plastics Inc.		Yes		
93467	Alpha Sintered Metals dba APG MIM	Yes			
93299	American Gas Lamp Works	Yes			
33507	APG - Wilcox (Formerly PCC)				
30260	Azek Company	Yes			
77164	B. R. D. Noise & Vibration Control, Inc.	Yes			

Client Goals - details

Link to client details



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

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

Budget Table

Display of POP Actuals and POP Budget

Center enters actuals for reporting period

A	AL		AM		AO		AP		AR	
	Actual (as of)	Budget	Actual (as of)	Budget	Actual (as of)	Budget	Actual (as of)	Budget	Actual (as of)	Budget
2016-10-01 - 2017-09-30										
2017-09-30			2018-09-29		2019-03-31				2019-10-01 - 2020-09-30	
Revenue (Federal and Non-Federal Cost Share)										
NIST MEP Funds	\$5,248,830.35	\$5,248,830.00	\$5,265,981.77	\$5,280,576.00	\$2,741,295.39	\$5,280,576.00		\$5,280,576.00		\$5,280,576.00
NIST MEP Supplemental Funds				\$0.00		\$479,740.00				
Unexpended Federal Funds (From prior operating year) to be used ABOVE base				\$31,746.00						
Unexpended Federal Funds (From prior operating year) to be used TOWARD base										
Applicant Contribution Cash										
State/Local Funds										
State/Local Cash		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
State/Local In-Kind										
State/Local Funds sub-total		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
Unexpended Program Income (From prior operating year)										
Program Income				\$0.00		\$0.00		\$0.00		\$0.00
Total Other										
Total Other Cash	\$8,303,837.70	\$8,303,837.00	\$6,056,851.00	\$5,312,322.00	\$3,244,370.00	\$5,760,316.00		\$5,280,576.00		\$5,280,576.00
Total Other In-Kind										
Total Other sub-total				\$6,056,851.00		\$5,312,322.00		\$3,244,370.00		\$5,760,316.00
Revenue (Federal and Non-Federal Cost Share) sub-total				\$11,322,832.77		\$10,624,644.00		\$5,985,665.39		\$11,520,632.00
Expenses (Federal and Non-Federal Cost Share)										
Direct Costs										
Personnel		\$118,254.55		\$118,255.00		\$127,790.67		\$127,300.00		\$69,995.18
								\$135,968.00		\$135,968.00



# Budget Actuals

## (Semi-annually and Prior to Panel Review)

### Purpose:

- Communication of detailed Revenue and Expenses during the reported time period.
- Used in Center Performance Management and Center Annual and Panel Reviews.

### 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, Management, 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?

## **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 (v19.8.2) | Welcome ctest | Send Feedback | Sign Out

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | D&B | Administration/Tools | Reviews | Self Service

**70NANB16H214** Past Projects

View Audit History

1	A	AL	AM	AO	AP	AR	AS	AU	AV
		2016-10-01 - 2017-09-30	2017-10-01 - 2018-09-30	2018-10-01 - 2019-09-30	2019-10-01 - 2020-09-30				
2		Actual (as of)	Budget	Actual (as of)	Budget	Actual (as of)	Budget	Actual (as of)	Budget
3		2017-09-30		2018-09-29		2019-03-31			
5	Revenue (Federal and Non-Federal Cost Share)								
6	NIST MEP Funds	\$5,248,830.35	\$5,248,830.00	\$5,265,981.77	\$5,280,576.00	\$2,741,295.39	\$5,280,576.00		\$5,280,576.00
7	NIST MEP Supplemental Funds				\$0.00		\$479,740.00		
8	Unexpended Federal Funds (From prior operating year) to be used ABOVE base				\$31,746.00				
9	Unexpended Federal Funds (From prior operating year) to be used TOWARD base								
10	Applicant Contribution Cash								
11	State/Local Funds								
12	State/Local Cash		\$0.00		\$0.00		\$0.00		
13	State/Local In-Kind								
14	State/Local Funds sub-total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15	Unexpended Program Income (From prior operating year)								
16	Program Income		\$0.00		\$0.00		\$0.00		
17	Total Other								
18	Total Other Cash	\$6,303,872.00	\$5,280,576.00	\$6,056,851.00	\$5,312,322.00	\$3,244,370.00	\$5,760,316.00		\$5,760,316.00
19	Total Other In-Kind								
20	Total Other sub-total	\$6,303,872.00	\$5,280,576.00	\$6,056,851.00	\$5,312,322.00	\$3,244,370.00	\$5,760,316.00	\$0.00	\$5,760,316.00
21	Revenue (Federal and Non-Federal Cost Share) sub-total	\$11,552,702.35	\$10,529,406.00	\$11,322,832.77	\$10,624,644.00	\$5,985,665.39	\$11,520,632.00	\$0.00	\$11,520,632.00
22									
23	Expenses (Federal and Non-Federal Cost Share)								
24	Direct Costs								



# Budget Actuals Key - Explained

- Centers have asked that there be a visual on their Reporting Dashboard.
- The following key applies:
  - Green – Budget Actuals was submitted  $\geq 1 \leq 90$  days
  - Passed with Warnings – Budget Actuals was submitted between  $>90 \leq 180$  days
  - Red – Last Budget Actuals was submitted  $> 180$  days
  - Clear/White – No submission

## Key

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





# Reporting Elements – Success Story

(Quarterly)

## Purpose:

- Success Stories reflect the variety and depth of impacts companies realize and are one of the most effective tools to communicate the value of MEP services
- Success Stories share experiences and 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 5 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 should 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 meet the MEP DOM.



# Reporting Elements – Success Story

(Quarterly)

## 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 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 two quantified impacts are 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 edited by NIST MEP for publication. After a story has been edited the two copies will not match. CARs will not be allowed to directly edit a story after it has been accepted
- NIST MEP will review and, if necessary, edit the story. The story will be showcased after completion and made available in MEIS (<https://meis.nist.gov>) and on the MEP Public Site (<http://nist.gov/mep>)



# Reporting Elements – Success Story

(Quarterly)

**Related Reports:** Either data used or clickable from page

- Clients/Projects/Impacts
- Success Story Details
- One Pager (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”. Bullets etc. cannot be supported.
- If corrections are needed after the Success Story has been submitted to NIST MEP, contact the NIST MEP Success Story Administrator



## Center Can Choose a Success Story for your One Pager

- The Center One Page fact sheet provides a brief overview of the Center plus highlights a Success Story
- To choose which story is highlighted in the Success Story, the user must go to MEIS  CIP  Click Success Stories
- From the Success Story list page click the radio button of the story you are interested in
- Click *Success Story Highlighted in One Pager*  Actions  Save



## Success Stories: A Few More Things to Remember

- Clients cannot be the subject of repeated success stories within a two-year span.
- Stories will be edited to fit to one marketing page.
- Success stories must follow the guidelines in the next slide and include information for each element. Each section is represented in MEIS.



# Success Story Required Elements

- Company Description: The description should be a concise, substantive description of the company including name, city/state, number of employees, branches/other facilities, key products and markets, and indicate if it's family/woman-owned, etc.
- Situation: Provide a brief explanation of the company's challenge, whether high-level decision makers were involved, and why the company needed your assistance.
- Solution: Briefly describe how you helped resolve the company's challenge, including services provided and an overview of the process used to implement them, whether you brought in other resources, etc. Summarize actions taken.
- Results: This section should feature 2-5 high-level impacts, with the most significant impact reported first. At least two should be a quantifiable increase in sales, jobs, or investment, or commercialization of new products and/or expansion into new markets. Centers can include data on cost savings or other changes in company performance metrics. Qualitative results could include such results as: the introduction of new technology, entering new markets, launching a new product, improving safety, etc.
- Testimonial: Provide a short testimonial about the client's experience working with your center and/or the impacts they have achieved as a result. A C-suite executive provides the most credibility.



# Funding Programs



# **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





# Funding Programs – General Information – Funding Agreement (Awards)

MEIS - MEP Enterprise Information System (v21.8.1) 29 | Welcome Davis\_Missy | Send Feedback | Sign Out

Dashboard CIP PAMEP Switch CAR Reports Search ROAR Links D&B Administration/Tools Reviews Self Service OK

**Pennsylvania Manufacturing Extension Partnership (276)**  
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 for Progress Plan Submission \*

Reporting Frequency \*

Funding Agreements

Funding Agreement Number	Recipient	Start Date	End Date	Valid Through
70NANB16H214	PA IRC Network Foundation	10/01/2016	09/30/2021	09/30/2021
Past Projects	Past Projects	07/01/2006	09/30/2016	01/01/0001

**History**

Last Updated On 12/23/2020 10:05:54 AM By: Shriner, Julia  
Created On 10/31/2016 10:35:31 AM By Coffman, Kimberly

Click view/edit icon to see funding agreement award information

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# Funding Programs – General Information – Funding Agreement (Awards)

**MEIS - MEP Enterprise Information System (v21.8.1)**

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | ROAR | Links | D&B | Administration/Tools | Rev

### Pensylvania Manufacturing Extension Partnership (276) Funding Agreement

**Funding Agreement Number \*** 70NANB16H214

**Award Name \*** Pennsylvania MEP

**Recipient \*** PA IRC Network Foundation

**Start Date \*** October 2016

**End Date \*** September 2021

**POP Award Amount** \$5,851,784

**Total Award Amount \*** \$5,851,784

**Period Of Performance**

	Start Date	End Date	POP Amount	Federal Funding Opportunity Eligible Amount	Delete
	10/01/2020	09/30/2021	\$5,851,784.00	\$5,851,784.00	
	10/01/2019	09/30/2020	\$0.00	\$0.00	
	10/01/2018	09/30/2019	\$0.00	\$0.00	
	10/01/2017	09/30/2018	\$0.00	\$0.00	
	10/01/2016	09/30/2017	\$0.00	\$0.00	

**Proposals/SOWs**

**Upload \***

	File Name	Name	Summary of Key Changes	Create Date	Delete
	16H214 PA Proposal_No Budget.pdf			03/24/2017	

**Intellectual Property Plan**

**Upload**

**Intellectual Property Plan History**

	File Name	Name	Summary of Key Changes	Create Date	Delete
No records to display.					

**National Account**

Add National Account Available Selected

**Annotations:**

- Period of Performances – click view/edit icon to drill down (points to the first row in the POP table)
- Link to Proposal (points to the first row in the Proposals/SOWs table)



# Funding Programs – General Information - Period of Performance

MEIS - MEP Enterprise Information System (v21.8.1) | Welcome Davis\_Missy | Send Feedback | Sign Out

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | ROAR | Links | D&B | Administration/Tools | Reviews | Self Service | OK

### Pennsylvania Manufacturing Extension Partnership (276) Period Of Performance

**Program Name:** MEP System  
**Funding Agreement:** Pennsylvania MEP  
**Start Date:** October 2020  
**End Date:** September 2021  
**POP Amount:** \$5,851,784  
**Federal Funding Opportunity Eligible Amount:** \$5,851,784

**Sub-Recipients**

	Start Date	End Date	Name	City	Total NIST Funds	Cost Share	Supplemental Funds	Regional Office	Status	Delete
	10/01/2020	09/30/2021	Catalyst Connection	Pittsburgh	\$1,141,385.00	\$525,037.00	\$0.00	Yes	Active	
	10/01/2020	09/30/2021	Delaware Valley Industrial Resource Center	Philadelphia	\$1,404,765.00	\$646,192.00	\$0.00	Yes	Active	
	10/01/2020	09/30/2021	Innovative Manufacturers Center (IMC)	Williamsport	\$391,950.00	\$182,150.00	\$0.00	Yes	Active	
	10/01/2020	09/30/2021	MANTEC	York	\$765,987.00	\$352,354.00	\$0.00	Yes	Active	
	10/01/2020	09/30/2021	Manufacturers Resource Center	Allentown	\$614,613.00	\$282,722.00	\$0.00	Yes	Active	
	10/01/2020	09/30/2021	Northeastern Pennsylvania Industrial Resource Center	Hanover Township	\$526,771.00	\$252,893.00	\$0.00	Yes	Active	
	10/01/2020	09/30/2021	Northwest Pennsylvania Industrial Resource Center	Erie	\$772,301.00	\$379,612.00	\$0.00	Yes	Active	

**Supplemental Funding:**   
**Approved Funding Level:** \$5,961,252.00

**History**  
 Last Updated On 12/23/2020 09:14:52 AM By: Shriner, Julia  
 Created On 05/14/2020 09:38:11 AM By Shriner, Julia

Listing of sub-recipients for this funding agreement

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# Funding Programs – Contacts

MEIS - MEP Enterprise Information System (v19.8.7)

Dashboard CIP - PAMEP Switch CAR Reports Search Links D&B Administration/Tools Reviews Self Service

**Pennsylvania Manufacturing Extension Partnership (276)**  
Funding Program

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

**Existing Members**

Contact Type Name	Last Name	First Name	Organization Name	Phone	Email
SuccessStory Admin	Blum	Megean	MEP	(301)-975-3160	<a href="mailto:megean.blum@nist.gov">megean.blum@nist.gov</a>
Reporting Admin	Davis	Missy	MEP	(301)-975-5039	<a href="mailto:melissa.davis@nist.gov">melissa.davis@nist.gov</a>
Survey Admin	Davis	Missy	MEP	(301)-975-5039	<a href="mailto:melissa.davis@nist.gov">melissa.davis@nist.gov</a>
FPO	Shriner	Julia	MEP	(301)-975-5021	<a href="mailto:Julia.Shriner@nist.gov">Julia.Shriner@nist.gov</a>
RM	Williams	Thomas	MEP	(301)-975-3983	<a href="mailto:thomas.williams@nist.gov">thomas.williams@nist.gov</a>
Grants Specialist	Williams	Shanell	NIST Grants and Agreements Management Division	(301)-975-6342	<a href="mailto:shanell.williams@nist.gov">shanell.williams@nist.gov</a>

**History**  
Last Updated On 07/01/2019 03:07:17 PM By: Coffman, Kim  
Created On 10/31/2016 10:35:31 AM By Coffman, Kim

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# Funding Programs – Federal Quarterly Allocation

meis.nist.gov/CIP/FundingAgreementGroup/edit/158

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Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | D&B | Administration/Tools | Reviews | Self Service

**Pennsylvania Manufacturing Extension Partnership (276)**  
Funding Program

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

Year	Q1	Q2	Q3	Q4
2020	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00	\$0.00
2019	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00
2018	\$1,328,080.50	\$1,328,080.50	\$1,328,080.50	\$1,320,144.00
2017	\$1,312,207.50	\$1,312,207.50	\$1,312,207.50	\$1,328,080.50
2016	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00
2015	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00
2014	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00
2013	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00
2012	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00	\$1,320,144.00

**History**  
Last Updated On 07/01/2019 03:07:17 PM By: Coffman, Kim  
Created On 10/31/2016 10:35:31 AM By Coffman, Kim

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# Funding Programs – Total Cash Quarterly Allocation

meis.nist.gov/CIP/FundingAgreementGroup/Edit/158

MEIS - MEP Enterprise Information System (v19.8.2) | Welcome ctest | Send Feedback | Sign Out

Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | &B | Administration/Tools | Reviews | Self Service

**Pennsylvania Manufacturing Extension Partnership (276)**  
Funding Program

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

Year	Q1	Q2	Q3	Q4
2020	\$2,640,288.00	\$2,640,288.00	\$2,640,288.00	\$0.00
2019	\$2,760,222.99	\$2,760,222.99	\$2,760,222.99	\$2,640,288.00
2018	\$2,656,161.00	\$2,656,161.00	\$2,656,161.00	\$2,760,223.03
2017	\$2,632,351.50	\$2,632,351.50	\$2,632,351.50	\$2,656,161.00
2016	\$0.00	\$0.00	\$0.00	\$2,632,351.50
2015	\$0.00	\$0.00	\$0.00	\$0.00
2014	\$0.00	\$0.00	\$0.00	\$0.00
2013	\$0.00	\$0.00	\$0.00	\$0.00
2012	\$0.00	\$0.00	\$0.00	\$0.00

**History**  
Last Updated On 07/01/2019 03:07:17 PM By: Coffman, Kim  
Created On 10/31/2016 10:35:31 AM By Coffman, Kim

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# Funding Programs – Budget

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Dashboard | CIP - PAMEP | Switch CAR | Reports | Search | Links | D&B | Administration Tools | Reviews | Self Service

**70NANB16H214** Past Projects

View Audit History

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

Show Budget  Actual  Variance

	A	AL	AM	AO	AP	AR	AS	AU
		2016-10-01 - 2017-09-30		2017-10-01 - 2018-09-30		2018-10-01 - 2019-09-30		2019-10-01 - 2020
		Actual (as of)	Budget	Actual (as of)	Budget	Actual (as of)	Budget	Actual (as of)
		2017-09-30		2018-09-29		2019-03-31		
5 Revenue (Federal and Non-Federal Cost Share)								
6 NIST MEP Funds		\$5,248,830.35	\$5,248,830.00	\$5,265,981.77	\$5,280,576.00	\$2,741,295.39	\$5,280,576.00	
7 NIST MEP Supplemental Funds					\$0.00		\$479,740.00	
8 Unexpended Federal Funds (From prior operating year) to be used ABOVE base					\$31,746.00			
9 Unexpended Federal Funds (From prior operating year) to be used TOWARD base								
10 Applicant Contribution Cash								
11 State/Local Funds								
12 State/Local Cash			\$0.00		\$0.00		\$0.00	
13 State/Local In-Kind								
14 State/Local Funds sub-total		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15 Unexpended Program Income (From prior operating year)								
16 Program Income			\$0.00		\$0.00		\$0.00	
17 Total Other								
18 Total Other Cash		\$6,303,872.00	\$5,280,576.00	\$6,056,851.00	\$5,312,322.00	\$3,244,370.00	\$5,760,316.00	
19 Total Other In-Kind								
20 Total Other sub-total		\$6,303,872.00	\$5,280,576.00	\$6,056,851.00	\$5,312,322.00	\$3,244,370.00	\$5,760,316.00	\$0.00
21 Revenue (Federal and Non-Federal Cost Share) sub-total		\$11,552,702.35	\$10,529,406.00	\$11,322,832.77	\$10,624,644.00	\$5,985,665.39	\$11,520,632.00	\$0.00
22								
23								



# Funding Programs – Reporting Set

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Dashboard CIP - PAMEP Switch CAR Reports Search Links D&B Administration/Tools Reviews Self Service

## Pennsylvania Manufacturing Extension Partnership (276) Funding Program

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

**Defined Reporting Sets**

Funding Agreements	Start Date	End Date
70NANB16H214	10/01/2016	09/30/2021

**History**  
Last Updated On 07/01/2019 03:07:17 PM By: Coffman, Kim  
Created On 10/31/2016 10:35:31 AM By Coffman, Kim

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# 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:
  - IMPACT Metrics – Published Versions
  - Old D&B Company Files
  - Operating Plan
  - State Fact Sheets
  - Review Documents



# Special Projects



# Special Award Programs (RCAPs, MDAPs, DefenseCyber, CARES, MFG USA Embedding)

meis.nist.gov/CIP/FundingAgreementGroup/Edit/195

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## Pennsylvania Manufacturing Extension Partnership (276)

### Funding Program

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

**General Information**

Program Name \* PA MEP Kata in a Box MEP Collaborative Competitive Award

Agreement Type \* Cooperative Agreement

Funding Source \* Rolling Competitive Awards Program - RCAP

First Reporting Quarter for Progress Plan Submission \* 2019-3

Reporting Frequency \* Semi-Annually

Funding Agreements

Funding Agreement Number	Recipient	Start Date	End Date	Valid Through
70NANB19H015	PA IRC Network Foundation	05/01/2019	04/30/2021	04/30/2021

**History**

Last Updated On 05/24/2019 10:19:24 AM By: Coffman, Kim

Created On 05/01/2019 04:11:51 PM By Lequin, Adelwiza

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## Special Projects – National Account Field

- Projects will be reported on your Center Operations base award.
- Repurpose the National Account field. If you do not already have this field in your CRM – Project entity you will need to create.
- Your National Network Partners will also be able to use these tags to submit projects they deliver. A center working with many Special Project awardees can submit projects for each and every award.



# Special Projects – List of National Account Codes

CARES	“RCAP” – GAMEP – FTA Supplier Forum	"RCAP" - NJMEP - FSMA
“AMTS” – CMTC – Industry 4.0	“RCAP” – GAMEP – Machine Shop	"RCAP" - NJMEP - QSENN
“AMTS” – MMTC – AMTS D3+	“RCAP” – GENEDGE – MedAccred	"RCAP" - NVIE - STAT-P
“AMTS” – PurdueMEP – ISMART	"RCAP" - GENEDGE - MEDMMAP-2	"RCAP" - NYMEP - MFG Readiness
"AMTS" - TMAC - AAMT	"RCAP" - GENEDGE - NN Cyber VA	"RCAP" - OHMEP - Digi Maturity
"AMTS" – NJMEP – SupplyChain	“RCAP” – HTDC – Smart Talent	"RCAP" - OMEP - ITAP
"DefenseCyber"	"RCAP" - MassMEP - Barometrics	"RCAP" - OMEP - ITAP Phase2
"MDAP" – PRIMEX-EARTHQUAKE	"RCAP" - MMEC - FSMA	"RCAP" - PAMEP - Kata in a Box
“MDAP” – TMAC – Hurricane Laura	"RCAP" - MMEP - AddMfg	"RCAP" - PRIMEX - Industry 4.0
"RCAP" - CMTC - NN Cyber CA	"RCAP" - MMTC - Cybersecurity	"RCAP" - SD MEP - Technology Adoption
"RCAP" - CONNSTEP - Mfg Skills for CT	"RCAP" - MMTC - NN Cyber MI	"RCAP" - TNMEP - Adv Tech Team
"RCAP" - FloricaMakes - I4.0 Baldrige	"RCAP" - MO MEP - America Works	"RCAP" - URIRF - ICDM
"RCAP" - FloridaMakes - Aeroflex	"RCAP" - MO MEP - FSMA	"RCAP" - NYMEP - CRIRC
"RCAP" - GAMEP - CMMC Training	"RCAP" - NCMEP - Digital Supply Chain	
"RCAP" - GAMEP - FSMA	"RCAP" - NIE - Trusted Advisors	



# All Special Project required elements will appear on your Reporting Dashboard

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Dashboard CIP - PAMEP Switch CAR Reports Search Links D&B Administration/Tools Reviews Self Service

### Pennsylvania Manufacturing Extension Partnership (276) Reporting Dashboard

Projects and Events (Manufacturers Resource Center)	244	By Kim Coffman on 7/26/2019 4:22:02 PM	By Kim Coffman on 7/26/2019 4:22:02 PM	By Kim Coffman on 7/26/2019 4:23:12 PM
Projects and Events (Northeastern Pennsylvania Industrial Resource Center)		By Randy Yash on 7/25/2019 8:57:50 AM	By Randy Yash on 7/25/2019 8:57:50 AM	By Kim Coffman on 7/26/2019 12:43:12 PM
Projects and Events (Northwest Pennsylvania Industrial Resource Center)		By Kimberly Stebick on 7/25/2019 12:32:54 PM	By Kimberly Stebick on 7/25/2019 12:32:54 PM	By Kim Coffman on 7/25/2019 12:35:25 PM
Staff		By Rikki Riegner on 7/2/2019 6:34:57 PM	By Rikki Riegner on 7/2/2019 6:34:57 PM	By Rikki Riegner on 7/2/2019 6:34:57 PM
Success Stories	6	By Eric Esoda on 7/30/2019 8:39:14 AM	By Eric Esoda on 7/30/2019 8:40:44 AM	By Megean Blum on 7/30/2019 11:12:43 AM
<b>PA MEP Kata in a Box MEP Collaborative Competitive Award-Rolling Competitive Awards Program - RCAP</b>				
Budget Actuals - 70NANB19H015 (next expected 2019-3)				
Contacts				
Progress Plan (next expected 2019-3)				
Staff			By Rikki Riegner on 7/2/2019 6:34:57 PM	By Rikki Riegner on 7/2/2019 6:34:57 PM

**Key**  
● = Started ● = Passed ● = Passed with Warnings ● = Passed with Errors ● = Cleaned ○ = No Submission

First Progress Plan Due Date

Staff and Contacts are funding program specific and must be reported quarterly

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# Immediate quarterly reporting requirements

- **Staff** – assign staff to work on the new awards
  - Click CIP, Staff, Submit Quarterly Reports, check the box for staff/award, click Actions – Submit for Reporting
- **Contacts** – associate staff to be responsible for certain tasks like project management, reporting, survey so that they can be easily contacted via phone or email
  - Click CIP, Contacts, Submit Quarterly Reports, Select the Program Name from the dropdown, click the View/Edit icon for the Contact Type, use the Available/Selected Box to designate staff to the Contact Type, Click Add, click OK to save
    - Project Manager
    - Reporting Contact
    - Survey Contact



# **Special Projects will be reporting on project progress based on the requirements of the award.**

Examples include:

- **Program Status:** (Provide narrative that details the status of your program. Specific details that discuss project specific stages (Define, Design, Develop, Deploy), partnerships developed, coordinations made, challenges and next steps)
- **Status Outcomes:** (includes Results/ Accomplishments, Lessons learned and best practices)

Progress Plans will be reviewed by the NIST MEP Project Manager and FPO and sent to Grants once finalized.





# All parties get to share in the success of these projects.

**Scenario** – GA MEP partners with Oregon MEP to deliver food safety services to a food manufacturer in Oregon. Oregon delivers the services and submits the project for survey, tagging the project with National Account “RCAP” – GAMEP – FSMA.

- Aggregate client and project counts along with impacts rolled up to the “RCAP” – GAMEP – FSMA.
- Oregon MEP is also credited with the client and project counts and impacts related to the RCAP. Reflected in The IMPACT metrics.

**This ONLY works if projects are properly tagged.**



## Who is responsible to ensure Special projects are being tagged?

- **Project Manager at the Lead MEP Center**
- **Reporting Contact at the Lead MEP Center**
  
- **Project Manager at NIST MEP**

**Communication will be key. It is important that the PM for the Lead Center make sure the delivering Center is properly educated (CD, sales, delivery, and reporting staff) in the way to report the project. And that the Lead Center PM follows-up to make sure projects are reported properly. If it is not marked it is not counted.**



# Survey Confirmation Schedule

<b>Quarter</b>	<b>Dates Open</b>
<b>Quarter 1</b>	<b>March 1 – March 31</b>
<b>Quarter 2</b>	<b>June 1 – June 30</b>
<b>Quarter 3</b>	<b>September 1 – September 30</b>
<b>Quarter 4</b>	<b>December 1 – December 31</b>



# Take Advantage of the Many MEIS Reports

## Survey Confirmation – 2 Reports

The screenshot displays a web-based reporting interface. On the left, a vertical menu titled 'Select Report:' lists various report categories. The 'Survey Confirmation (All Clients & Projects)' option is highlighted in blue. Other visible options include 'Impact Concentration', 'Impact Metrics', 'Industry Profiles', 'MEP Initiatives', 'MEP Phone List', 'MEP Quick List', 'Partner Sub Recipients', 'Partners', 'Performance Caucus Mega Report', 'Period Statistics', 'Raw Data For Economic Impact Calculations', 'sCORE Dashboard', 'State Funding Partners', 'State Letters', 'Success Story Details', 'Survey Confirmation (Clients per Tab)', 'Survey Continuity (Chart)', 'Survey Continuity (Clients and Projects)', 'Survey Outliers', 'Survey Results (Individual Client)', 'Survey Results (Quarter)', and 'Survey Results Quantified'. To the right of the menu is a 'Run Report' button. Below the button, the report's details are shown in a table-like format:

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. MEP refreshes the record with current D&B information if >6 months aged at the time Survey Confirmation is opened.



# 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.

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D&B Administration/Tools Self Service

Funding Source Operations

Pending Review
  Reviewed
  Excluded
  EIS set to # times surveyed
 Pending Review (0) Total Client (41)

**Select Clients in Survey**

! Hover over exclamation icon to view the information necessary for the client to be in survey.

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





# Outlier Verification Process

- After survey closes, third-party contractor exports data from their system
- Data are imported into MEIS.
- Outliers flagged and confirmed by centers:
  - >5M Total\$
  - >250 Total Job Impacts





# 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 deadline for verification
- 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

Search Users - MEP's Enterp | Iteration Task Items - NPR It | CarSummaryReport?CarId= | GetDocument?DocumentID | New tab | Survey - MEP's Enterpri

Welcome kcoffman | Help | Send Feedback | Sign Out

Links | D&B | Administration/Tools | Reviews | Self Service

Reporting Period: 2017-4

Funding Source: Center Operations

Survey Outliers

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"> <li>Business Impact Amount</li> <li>Job Impact Amount</li> </ul>	Verified, no modification	Grisell Vazquez
160	79047	Challenger Brass & Cooper	Finished, not updated	<ul style="list-style-type: none"> <li>Business Impact Amount</li> </ul>	Verified, no modification	Abimael Padilla
160	77507	Congar International	Finished, not updated	<ul style="list-style-type: none"> <li>Business Impact Amount</li> <li>Job Impact Amount</li> </ul>	Verified, no modification	Julio Acevedo
160	58268	Med Tech PR/ Vention Medical	Finished, not updated	<ul style="list-style-type: none"> <li>Business Impact Amount</li> </ul>	Verified, no modification	Irving Mendez
160	37544	St. Jude Medical Puerto Rico, Inc	Finished, not updated	<ul style="list-style-type: none"> <li>Business Impact Amount</li> <li>Job Impact Amount</li> </ul>	Verified, no modification	Leticia Chevere

100 items per page | 1 - 5 of 5 items

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Type here to search | 2:35 PM 5/16/2018

List of Outliers to be reviewed.

IMPACT based on \$ or Jobs



# Outlier Verification

Search Users - MEP's Enter | Iteration Task Items - NPR It | CarSummaryReport?CarId= | GetDocument?DocumentID | New tab | CAR Client Surveys - MI

Welcome kcoffman | Help | Send Feedback | Sign Out

Links | D&B | Administration/Tools | Reviews | Self Service | Action(s)

### Survey Outlier for Client : Air Conditioning (35844)

Save Outlier

**Status Information**

Outlier Status \*

Verified By \*

Verification Type \*

- Emailed client
- Telephoned client
- Met with client in-person
- Center project close-out survey
- Unable to contact client

Verification Status \*

- No action taken
- Verified, no modification
- Verified, needs modification
- Cannot be verified

**Verify Impacts**

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 in Plant & Equipment	<input type="text" value="453750"/>	453,750
	Increase Investment in Information Systems	<input type="text" value="285975"/>	285,975
	Increase Investment in Workforce Practices and Emp	<input type="text" value="99600"/>	99,600
	Increase Investment in Other Areas of Business	<input type="text" value="57195"/>	57,195
	Avoid and/or Save on Investment	<input type="text" value="127800"/>	127,800
	Increase Investment in New Products and Processes	<input type="text" value="154000"/>	154,000
	<b>Total</b>	<b>9,297,870</b>	<b>9,297,870</b>
<b>Job Impact Amount</b>	<b>Impacts</b>	<b>Verify Impacts</b>	<b>Original Impact</b>
	Created Jobs	<input type="text" value="95"/>	95
	Retained Jobs	<input type="text" value="181"/>	181
	<b>Total</b>	<b>276</b>	<b>276</b>

Type here to search | 2:44 PM 5/16/2018

Radio buttons to indicate Verification Type and Status.

Modify downward an impacts that were overstated.



# Outlier Verification

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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
<b>Total</b>		<b>9,297,870</b>	<b>9,297,870</b>

<b>Job Impact Amount</b>	Impacts	Verify Impacts	Original Impact
	Created Jobs	95	95
	Retained Jobs	181	181
	<b>Total</b>	<b>276</b>	<b>276</b>

Rule Function	Name	Failed Rule
SUM	Business Impact Amount	< 100 or >=5,000,000.00
SUM	Job Impact Amount	> 250

**Impact Justification / Comments**

<b>Impact Justification</b>	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
<b>Outlier Comment</b>	

**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 is 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™, client 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 (A Data Perspective)



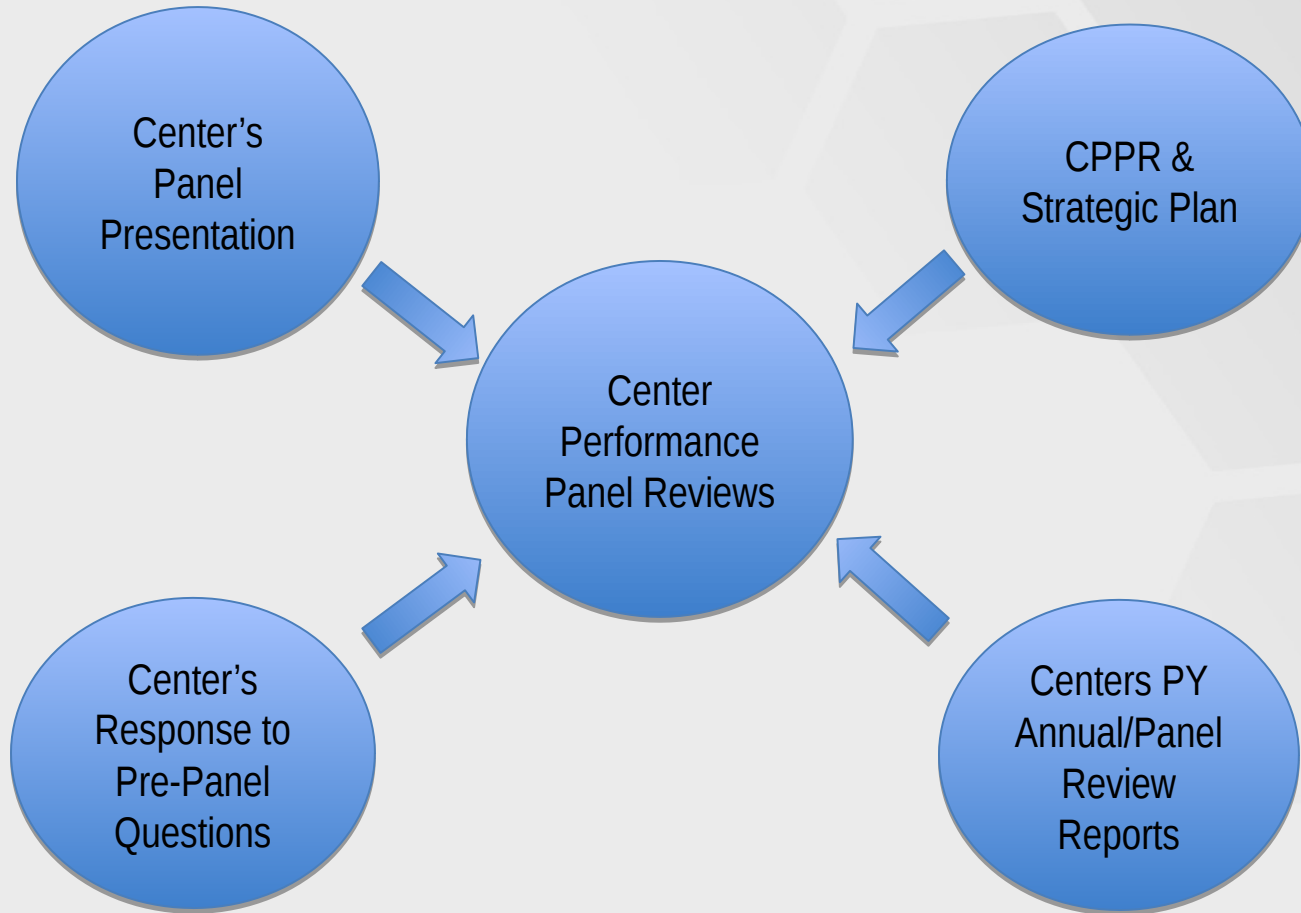
# Purpose of the Performance Panel Reviews

## 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.
- Conducted during the 3<sup>rd</sup> & 8<sup>th</sup> Year of Center Operation

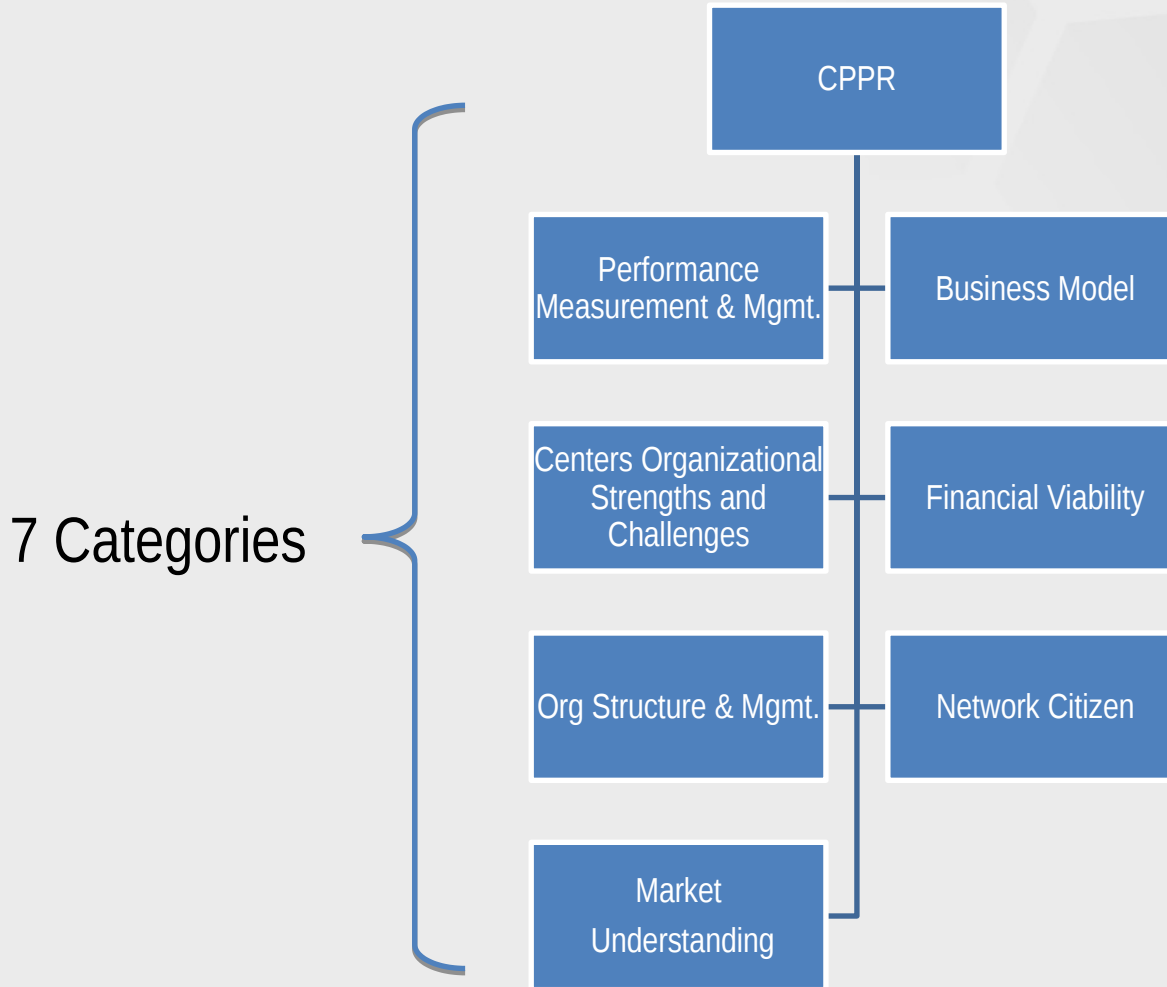


# Center Performance Panel Review Inputs



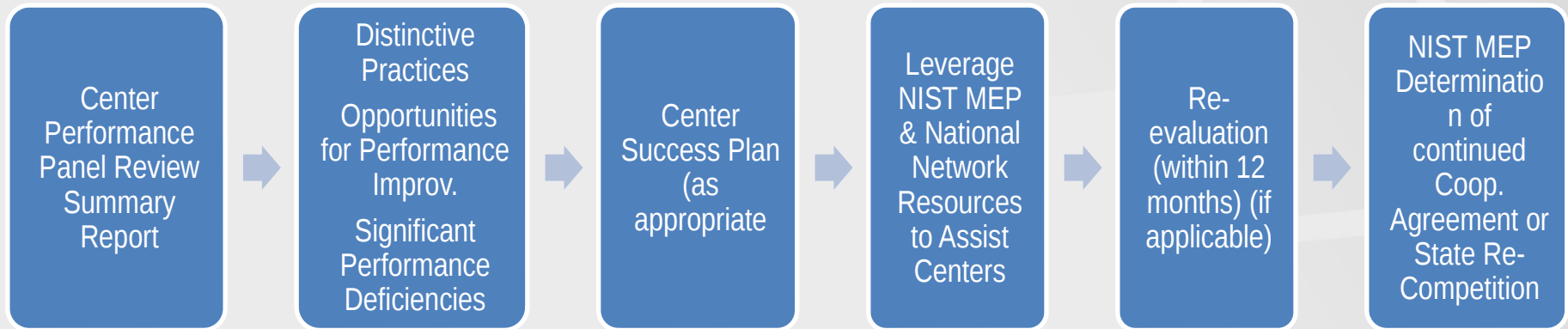


# Center Performance & Profile Report



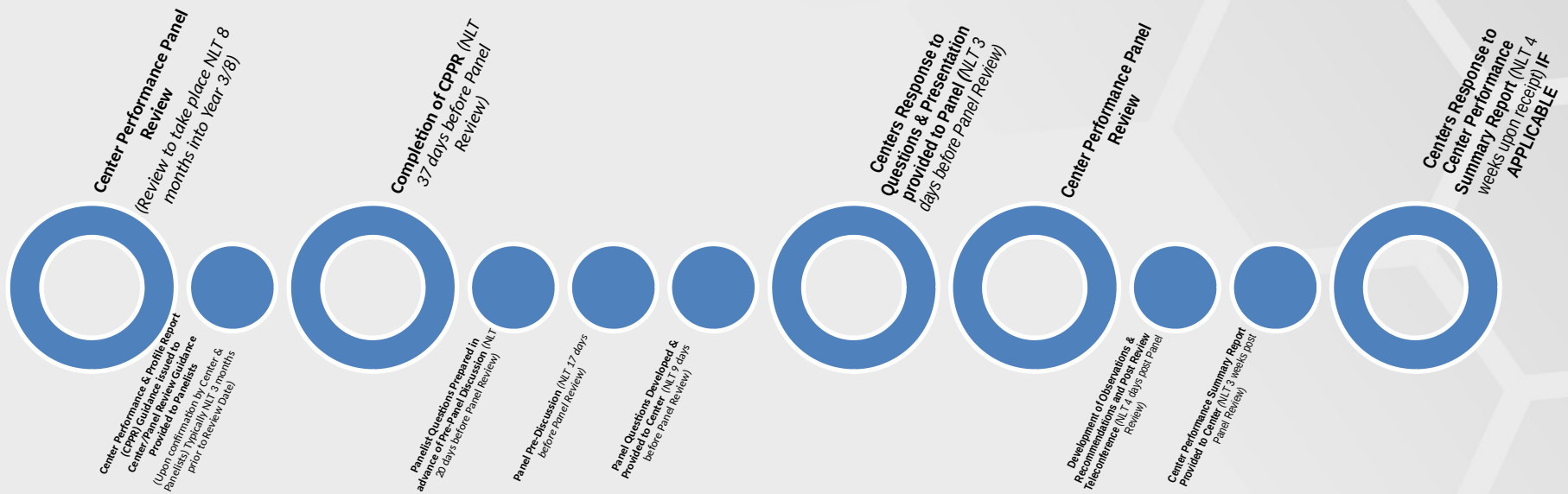


# Center Performance Panel Review – Output





# 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																						
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All Documents are clickable links





# MEIS – Review Module

## Previous Review Reports

to Center

FINAL Purdue MEP 3rd Year Panel Summary Report 3-20-18.pdf

File Name

Year 1 Annual Review Report - 3/9/2016

Year 2 Annual Review Report - 3/29/2017

**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.



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