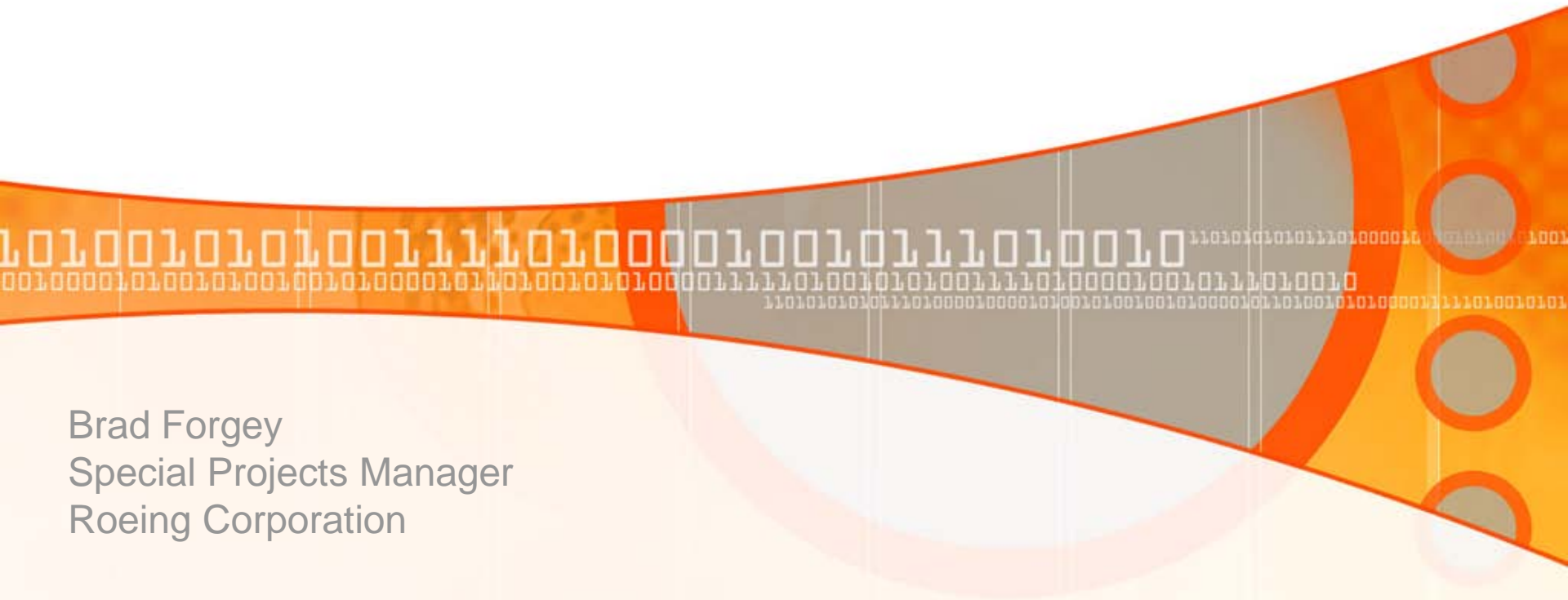


Tracking and Reporting Software

What are the possibilities?




Brad Forgey
Special Projects Manager
Roing Corporation

Why Do I Need It?

- 
- More Data
 - More Requirements

- 
- Performance and Outcomes
 - Accountability

- 
- Higher Expectations
 - Transparency



More Data and Requirements

Program rules require more data collection

“They” always want that one piece of data that you don’t have.

Program requirements will get more complex

When was the last time you remember that the rules got simpler?

Performance, Outcomes, and Accountability

- *Higher expectations of performance for the funding programs*
- *Outcomes are your report card*
- *Accountability is demanded by their constituents so elected officials demand it of you*

Higher Expectations and Transparency

- *The public expects to see real results, therefore, you must be able to demonstrate them*
- *President Obama promises transparency and you will be delivering it.*

So What Can You Do With It?

Tracking and Reporting, Right?

But that sounds so simplistic!

It's not. There is much more to it!

You need to start with a project plan and your business requirements.

1st – Start at the Beginning

The data is in the field so start there

- *Jobs Completed*
 - *Dwelling Information*
- *Funds Expended (Job Costs)*
 - *Funding source, Cost Categories*
 - *Contractor*
 - *Completion Dates*

This is the foundation to build on.



2nd – Expand To What Was Done

Capture the details so you can use them later

- *Measures*
 - *Insulation*
 - *Sealing*
 - *Repairs*
- *Demand Side Management (DSM)*
- *Refrigerators*

You are going to need this



3rd – Ask The Questions

Step back from the job and look at the big picture

- *Who are you serving?*
- *What do we know about the household and dwelling?*
- *What are their needs?*
- *How did we educate them?*

These are questions you are going to be asked so make sure that you are collecting this data.

5th – Make It Transparent

Transparency means visibility into the information you have.

- *Monitor your agencies from your desk*
- *Validate the expenditure of funds*
- *Show progress to those who “need to know”*
- *Be able to run reports on demand or automate the reports to deliver the data automatically*

What Advantages Do You Get?

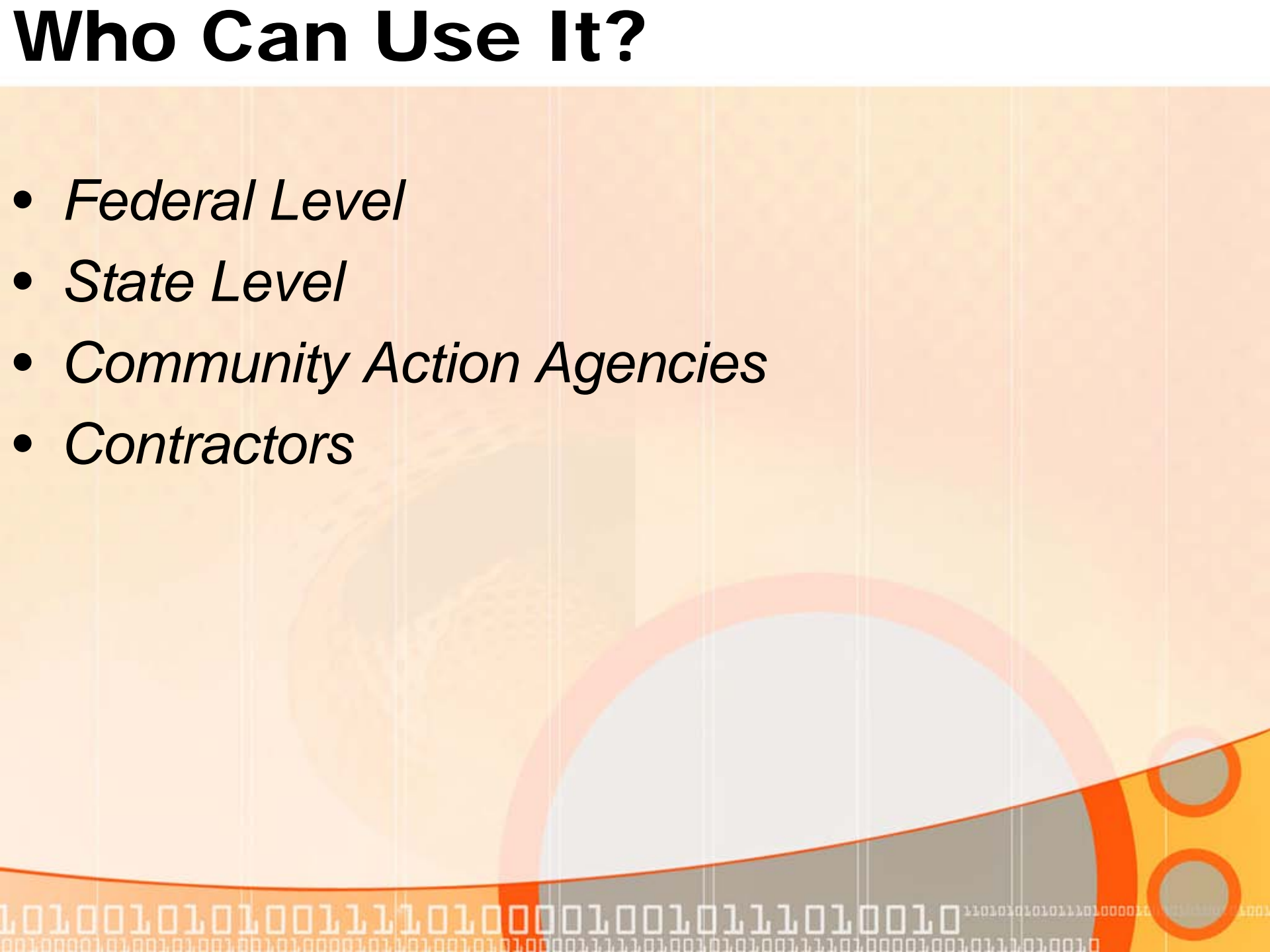
Haven't we covered this already?

You could have done this on paper....right?

Just how many hours do you have in a day?



Who Can Use It?

- *Federal Level*
 - *State Level*
 - *Community Action Agencies*
 - *Contractors*
- 
- The background features a light orange and yellow gradient. A faint globe is visible in the center. A large, light blue semi-circle with a red outline is positioned in the lower half. At the bottom, there is a decorative border with binary code (0s and 1s) and two orange circles on the right side.

State

- *Easier Federal Reporting – On Time!*
- *What Are Your CAA's Doing?*
 - *Desktop Monitoring*
 - *Pre-site Monitoring*
- *Automated Reports*
- *Coordinate With Utility Companies*
- *Planning For Your Next State Plan*

CAA's

- *Jobs + Costs = Claims*
- *Client Education Tracking*
- *Training and Technical Assistance*
- *Manage Your Progress Towards Completions*
- *Understand What Your Costs Are*
- *Be Able To Answer “Those” Questions*

Going Beyond...

- *Waiting Lists*
 - *Direct Integration with Energy Assistance*
 - *Online applications*
- *Inspectors*
 - *Onsite Inspections (Mobile or Off-line)*
 - *Onsite Closeouts (Mobile or Off-line)*
- *Contractors and Crews*
 - *Davis Bacon Reporting*