

Develop routine reports or dashboards to help monitor the collected data

Many Better Buildings Neighborhood Program partners found that program dashboards—regularly updated, easily accessed, summary reports of key metrics—helped them identify problems and monitor program progress toward their goals. Depending on the program’s goals and needs, dashboards included metrics such as energy savings, energy upgrades in progress and completed, customer satisfaction, jobs created, and cost of service delivery.

- Connecticut's [Neighbor to Neighbor Energy Challenge](#) [1] (N2N) customized their Salesforce system to display dashboards of key project data, such as contractor performance and the marketing and outreach activities of staff and volunteers. Contractors and program staff entered all the data into Salesforce. Program administrators reviewed the data on a weekly basis to ensure data quality and resolved any data quality issues with contractors. Program administrators met with outreach and contractor staff to discuss the dashboard findings and any necessary process refinements and course corrections. The program also published monthly dashboards to share data such as number of outreach events, number of leads generated, and number of upgrades completed, with state policymakers and other program partners.
- [Massachusetts Department of Energy Resources](#) [2] (MassDOER) developed a monthly dashboard that tracked the number of homes assessed, the number of home energy upgrades, and signed efficiency energy upgrade contracts. The dashboard included cumulative data and data for the past month. MassDOER used the dashboard to track the gross number of audits and upgrades, and to understand what work was “in the pipeline.” This helped MassDOER determine whether they were on track to meet project goals for assessments and upgrades. MassDOER had confidence in the data because staff reviewed the updated dashboards each month, flagged inconsistencies, and confirmed the numbers with the contractors who supplied the data, making corrections when it was necessary.

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Source URL: <https://rpssc.energy.gov/tips-for-success/develop-routine-reports-or-dashboards-help-monitor-collected-data>
Links

[1] <http://energy.gov/eere/better-buildings-neighborhood-program/connecticut-challenges-towns-reduce-energy-use>

[2] <http://www.mass.gov/eea/grants-and-tech-assistance/guidance-technical-assistance/agencies-and-divisions/doer/>