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# Data is Power: Maximizing Data Benefits to Improve WAP Administration



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Energy Office  
Weatherization Assistance Program

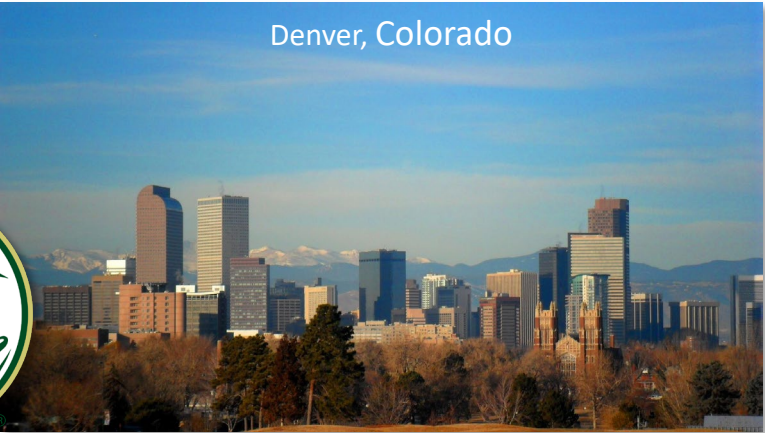
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# Libby Lenox, Data Analyst



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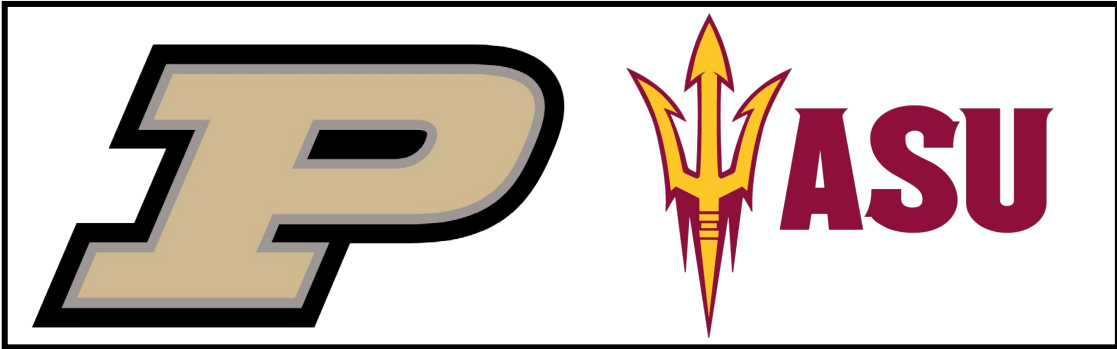
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# Mitch Foresman, Program Associate



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# Roadmap for Today's Agenda



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- 1 Intro & Background to Colorado Weatherization
- 2 Data Systems
- 3 Data Processes
- 4 Data Challenges & Tools to Overcome
- 5 Impacts on WAP
- 6 Final Takeaways



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Purpose: To highlight the data management process and tools implemented by Colorado WAP to enhance program metrics, policy decisions, and quality controls.

## Quick Disclaimer:

While Salesforce is our database, we want to make sure that we can reach a broader audience who might be using other systems.

The focus is towards the data tools and processes that others can potentially transfer/incorporate into their databases to help with the ever-changing nature of the program.

What are your data hopes and dreams for the future?

0 surveys completed

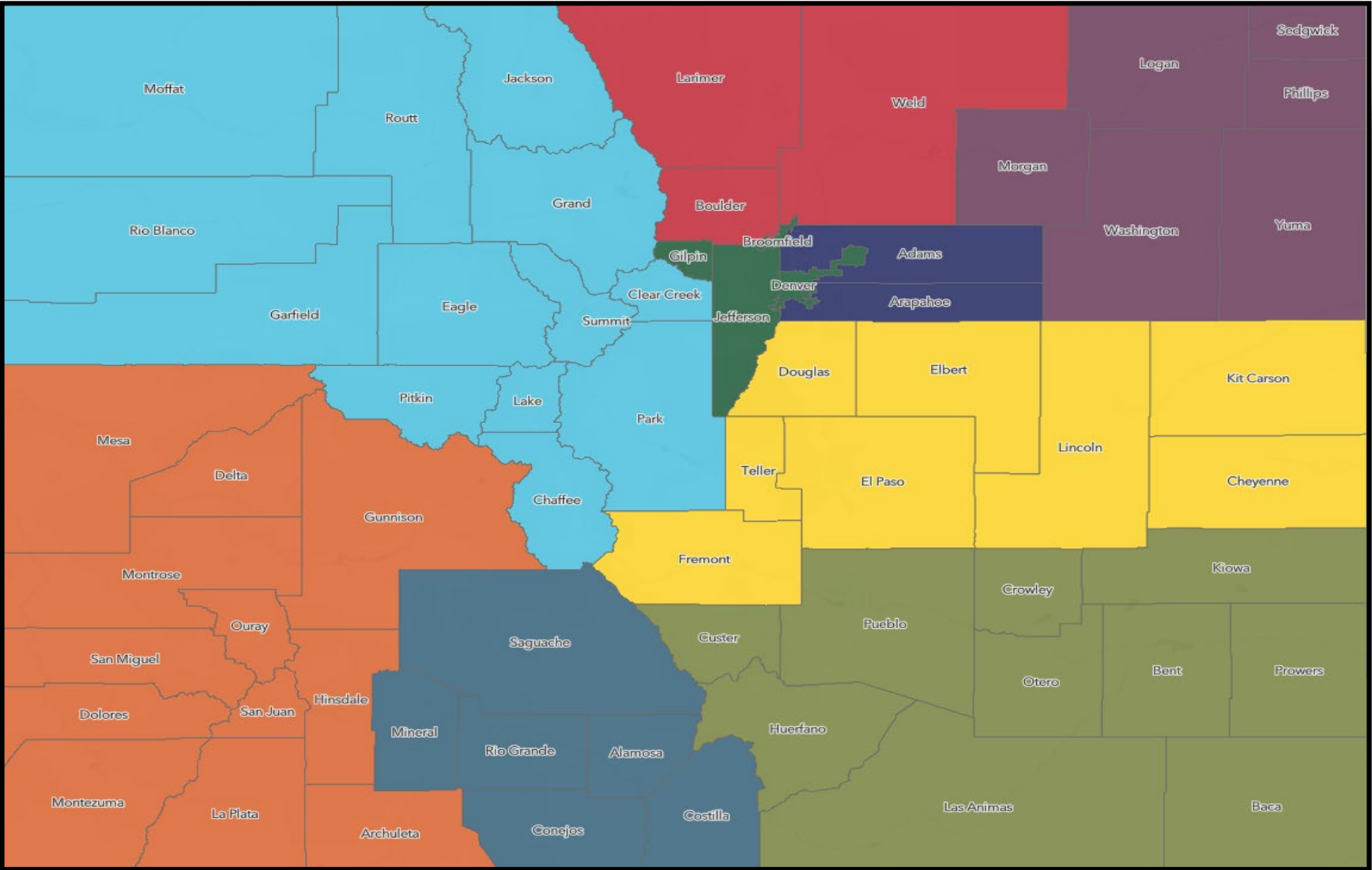
0 surveys underway

## Potential Key Takeaways:

- Understand the importance of incorporating an agile and inclusive data process
- Ideas on how to utilize tools in your databases
- How data visualization can help drive engagement and provide helpful insights
- Tips and tricks on managing and monitoring data more effectively



# Local Weatherization Service Providers



## Colorado Weatherization Assistance Program

- Arapahoe County Weatherization Division
- Energy Resource Center - Colorado Springs
- Energy Resource Center - Denver
- Energy Resource Center - Loveland
- Energy Resource Center - San Luis Valley
- Energy Resource Center - Sterling
- Housing Resources of Western Colorado
- Northwest Colorado Council of Governments
- Pueblo County Department of Housing and Human Services

# Our Data Systems



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What data systems do you currently use? (e.g. data management, client management, etc.)

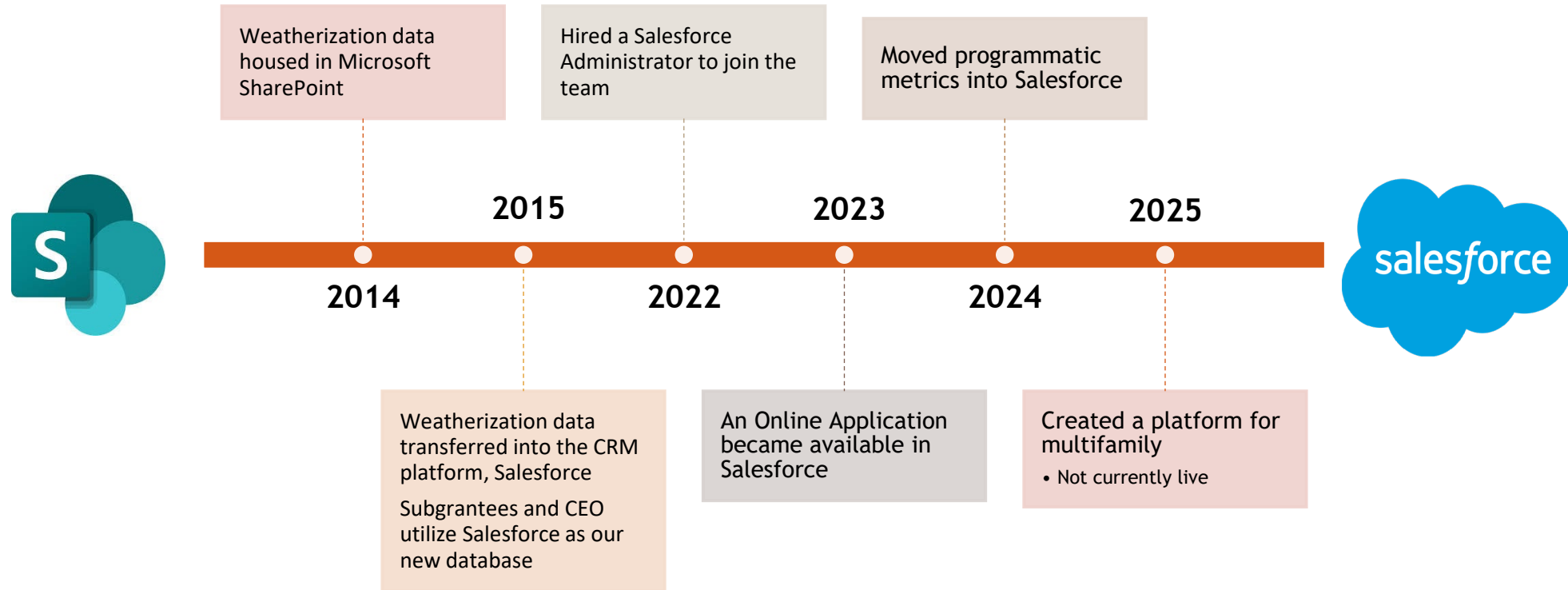
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# Salesforce Developments Timeline



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## Walkthrough Example

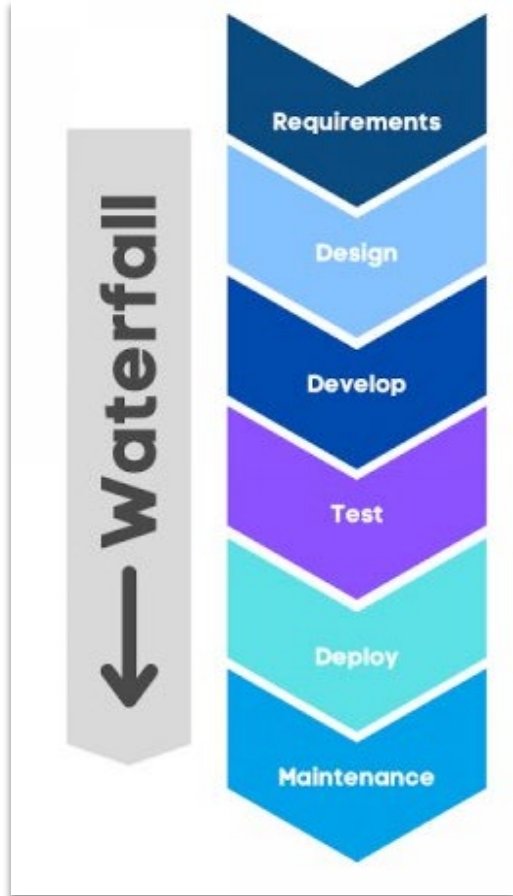
Application Internal

▼ Applicant Information

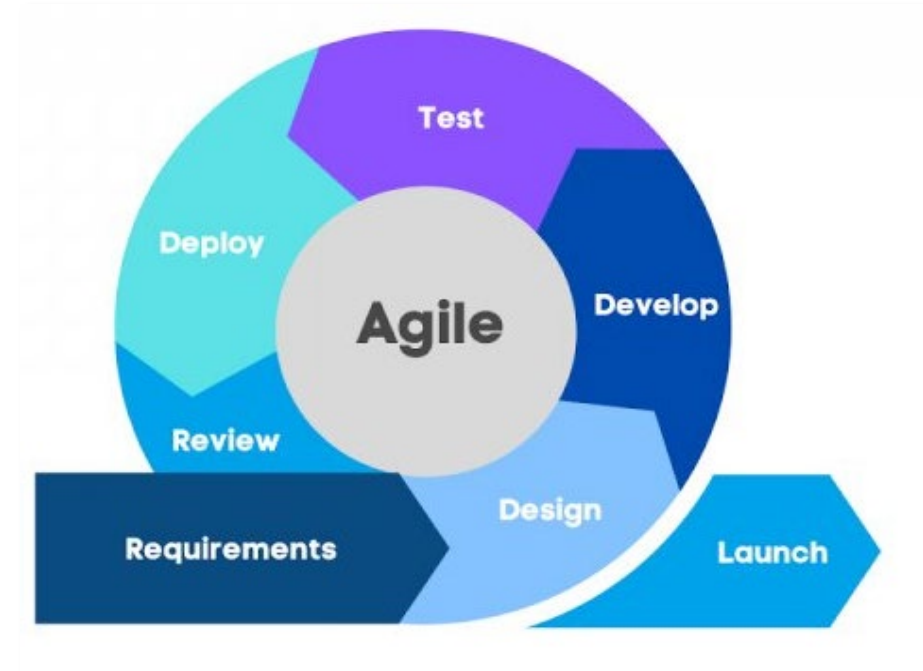
Client Last Name	Salesforce User Guide Example	Client First Name	Not a real job
Unit Address 1	100 Main St	Unit Address 2	
Unit City	Denver	Unit County	Denver
Unit State	CO	Unit Zip Code	
Client Phone Number	000-000-0000	Client Secondary Phone Number	
Client Email Address	test@test.com	Same Address As Unit	<input checked="" type="checkbox"/>
Mailing Address 1	100 Main St	Mailing Address 2	
Mailing City	Denver	Mailing State	CO
Mailing Zip Code		Region	ERC Denver

▼ Utility Information

# Data Processes: Waterfall vs. Agile



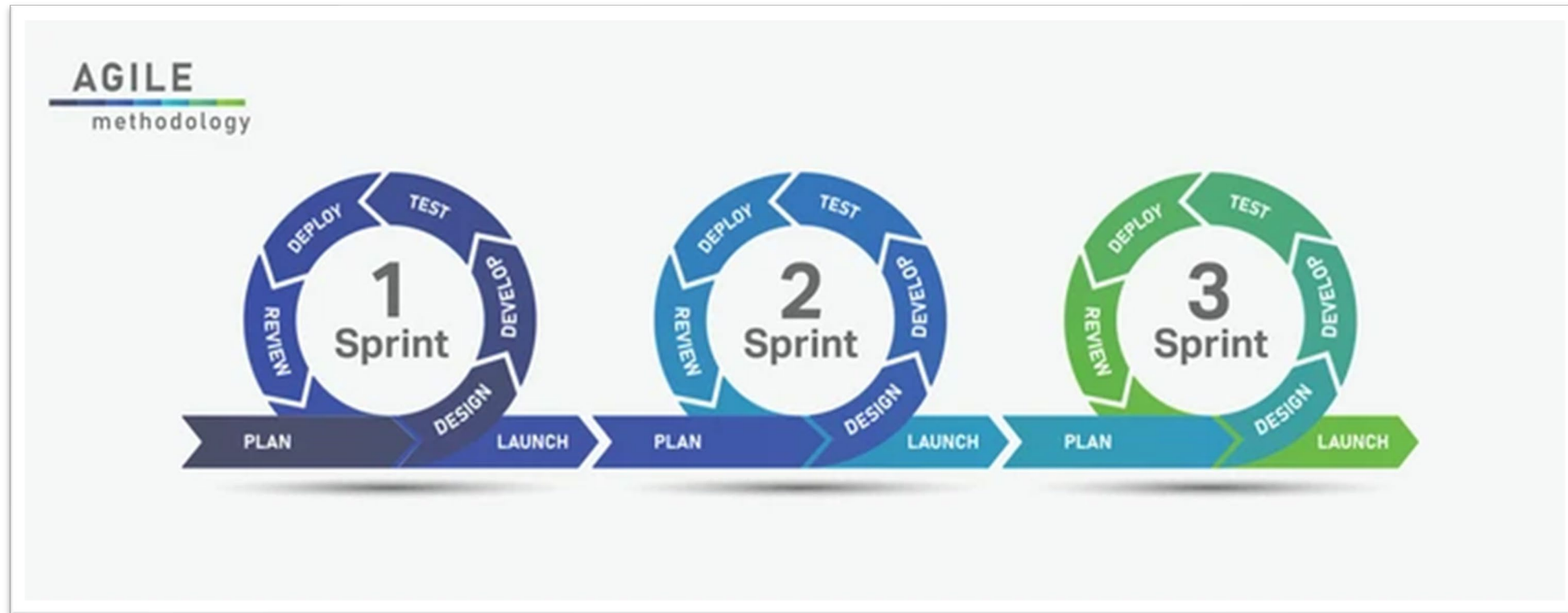
- Linear process
- All planning for implementation is upfront (non-flexible)
- Little or no collaboration
- Higher risk
- When to use: Project is straightforward and not complex
  - Example: Addition of required fields



- User stories & customer based
- Collaboration with key stakeholders
- Allows for flexibility & change
- Small wins along the way
- Lower risk
- When to use: Project requirements are unclear or there is expected change
  - Example: Online Application



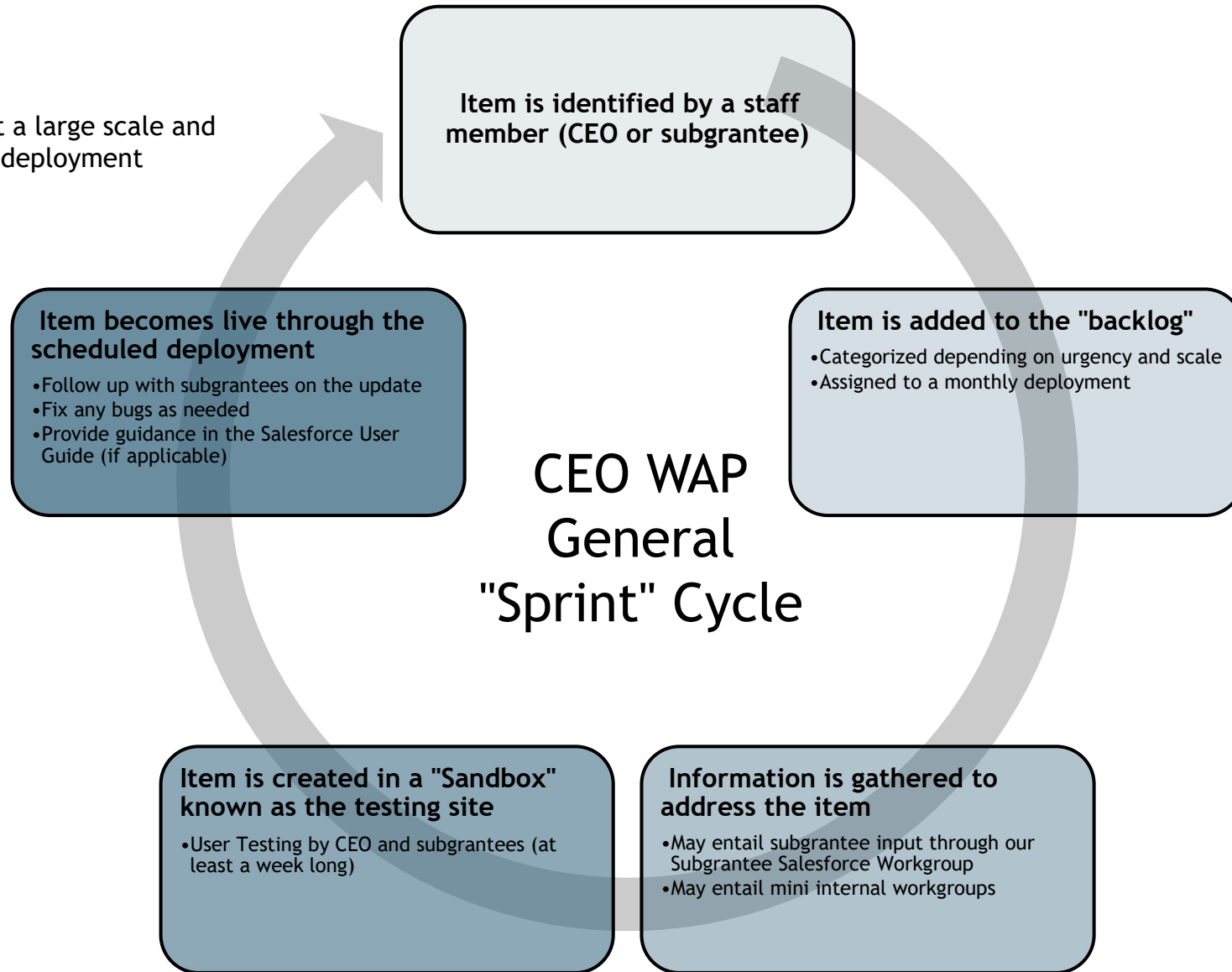
## Progress, not Perfection



**Agile:** An iterative and incremental approach to product management and software development

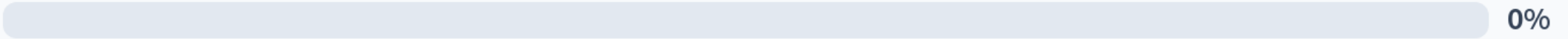
**Sprints:** The team reflects on the work implemented and makes adjustments as needed

Repeat if the change was at a large scale and required multiple steps for deployment



## What is your current relationship with your data / data system?

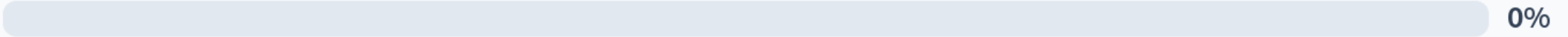
Nonexistent



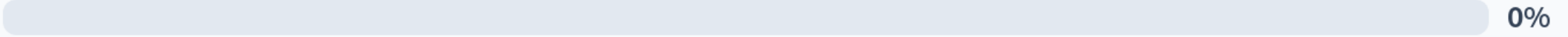
Continuous



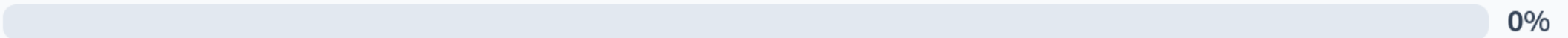
Steady



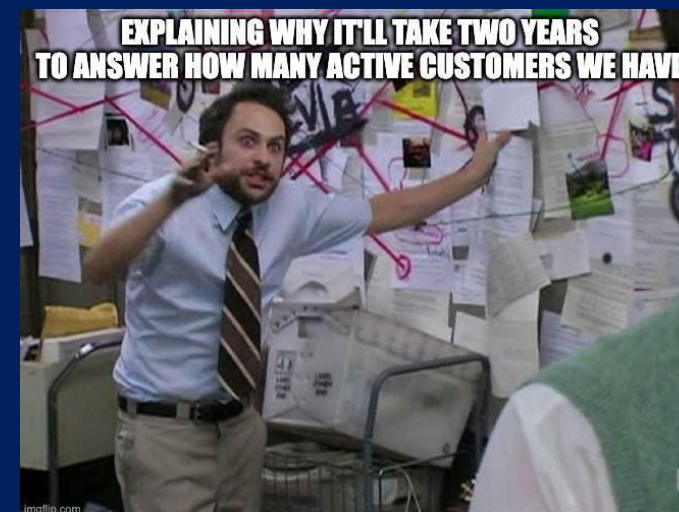
Slowly improving



Solid









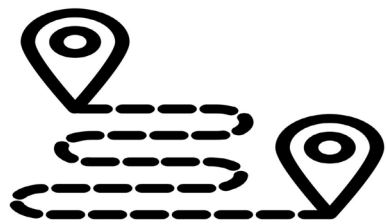
# Data Challenge #1:

**Data Integrity:** The trustworthiness of the information and being free from unmonitored change.

**Scenario:** Pulling reports and getting different numbers each time. Why is this the case and which is the right answer?



- History Job Tracking
- History Measure Tracking



- Weekly Notifications Report

Job History (3+)

Date:1/17/2025 2:33 PM

Field:Job Status

User:Libby Lenox

Original Value:Closed

New Value:WRF Deferral

Date:1/15/2025 2:36 PM

Field:Job Status

User:Libby Lenox

Original Value:Audit Completed

New Value:Closed

Date:12/20/2024 10:29 AM

Field:Job Status

User:Libby Lenox

Original Value:Closed

New Value:Audit Completed

View All

Measure History (3)

Date:8/28/2024 3:07 PM

Field:Funding Source

User:Libby Lenox

Original Value:DOE Formula

New Value:HB-1105

Date:8/28/2024 3:06 PM

Field:Funding Source

User:Libby Lenox

Original Value:DOE Formula

New Value:DOE Formula

Date:6/4/2024 2:38 PM

Field:Created.

User:Libby Lenox

Original Value:

New Value:

View All

Region	Job: Application Number	Job Number	Job: Owner Name	Edited By	Field / Event	Old Value	New Value	Edit Date	Closed Date	$f_x$ Days After Close
					Number of household residents	-	1	12/12/2024 12:05 PM	11/1/2024	41.00
					Job Status	Work in Progress	Closed	12/12/2024 12:11 PM	11/1/2024	41.00
					Closed Date	-	11/1/2024	12/12/2024 12:11 PM	11/1/2024	41.00
					Estimated Total Energy Savings (MMBtu)	-	67.6	12/12/2024 12:11 PM	11/1/2024	41.00
					Number of Indigenous American residents	-	0	12/12/2024 1:37 PM	11/1/2024	41.00



## • Data Entry Policy

Effective Date: July 1, 2024

- Subgrantee Responsibilities
- Job Status Definitions
- Criteria for closing a job
- Verifications



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## CEO-WAP-701 Data Entry & Reporting

*"In order to assign a job as closed, by selecting a "Closed" job status and entering a "Closed Date," the job must meet the following criteria:"*



*"After closed jobs have been quality controlled through the desk audit, the data should not be changed unless it's imperative to the accuracy of the job."*

- *"Discovery of any discrepancies in closed jobs data may require CEO to follow up and provide additional requests/guidance if needed."*

Do you lock access to editing jobs after the job has been closed? If so, at what time?

Do not lock access

Soon (up to two weeks) after the job has closed

After a month of the job closed

After the DOE QPR reporting (quarterly)

Other (please explain)



## Data Challenge #2:

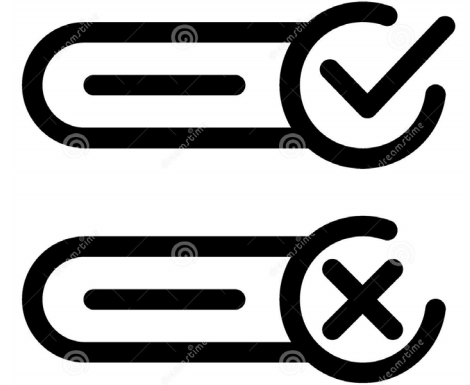
**Data Quality:** Having accurate, complete, and consistent data to serve its intended purpose.

**Scenario:** Data entry errors such as typos, incomplete, or incorrect information.



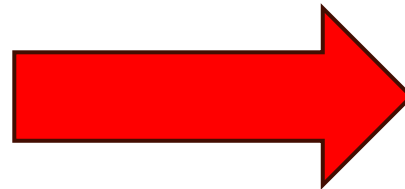


- Validation Rules:
  - Examples
    - DOE and BIL cannot be used on the same job
    - LIHEAP auto-qualification requires entry of a Household Number
    - Certain fields must be entered before you can "Close" the job



## Visual Example: LIHEAP auto-qualification requires entry of a Household Number

Job Number	<input type="text" value="Salesforce Guide Example (NOT REAL JOB)"/>
Application Number	J-094945
Weatherization Application Status	<input type="text" value="Approved"/>
Job Status <i>i</i>	<input type="text" value="Closed"/>
Deferral Reason (if applicable) <i>i</i>	<input type="text" value="--None--"/>
Target Date	<input type="text"/>



Qualification Information	
Client Qualification	<input type="text" value="Low-Income Energy Assistance Program (LEA..."/>
HHN	<input type="text"/>
When Job status changes to "Closed" and Client Qualification is "LEAP", "HHN" is required	

















## Guides are your friend

- Created a guide on how to use our database
  - Living document
    - Updates are made as the database evolves
  - Useful for both subgrantee and grantees
    - Can be utilized for trainings and referencing
- Includes a glossary of definitions
  - Helps to standardize data inputs and understandings  
= more consistent data



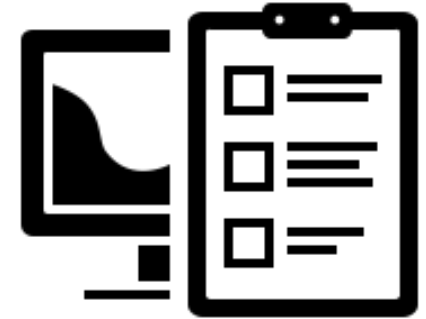


## Salesforce User Guide Example

	All Building Weatherization Fields (BWR) & Definitions	
	Additional Salesforce Resources	
	Call Back Go Backs How-To Guide	
	Measures How-To Guide	
	Online Application Guide	
	Paper Application How-To Guide	
	Salesforce BWR Guide	
	Subgrantee Desk Audit Guide.xlsx	

## What is a Desk Audit?

- A monthly data quality check for the subgrantees
- Double checking specific data fields and verifying correct information based on certain criteria
- Helps identify areas of need if there is a trend in errors in specific data fields
- Ensures policy compliance



## Desk Audit Live Demo

	Field Name	Validation Criteria
<a href="#">Jobs - Desk Audit - Jobs All Regions</a> (edit the closed date for the desk audit month, Export to an Excel file, Save in Desk Audit folder)		
Job Detail	Number of jobs	Check that number of jobs completed last month still matches
	Job Number	Check for blanks
	Weatherization Application Status	Check that is "Approved"
	Job Status	Check that this is "Closed"
	Funding Sources	Check for Blanks. Check that DOE BIL is NOT braided with DOE Formula. Check to see if HB-1105 is in an IOU territory: Xcel, Black Hills, Atmos, CNG.
	Additional Funding Sources (Manual)	Check that DOE BIL is NOT braided with DOE Formula. Check to see if HB-1105 is in an IOU territory: Xcel, Black Hills, Atmos, CNG. (Work with agencies to check on if there were any rollover funding sources from before the change)
	Audit Funding Source	Check for blanks. Check that DOE BIL is NOT braided with DOE Formula. Check to see if HB-1105 is in an IOU territory: Xcel, Black Hills, Atmos, CNG.
	Inspection Funding source	Check for blanks. Check that DOE BIL is NOT braided with DOE Formula. Check to see if HB-1105 is in an IOU territory: Xcel, Black Hills, Atmos, CNG.
	Contribution Total	Make sure that if any measures are paid for by WAP *and* a non-WAP funding source (this would be in a comment/description), those contributed \$\$ are also added to the "Contributions" in the Job Costs section. The Net Total Costs should have those contributions subtracted from the Gross Total Cost. (Go through each job's contributions. Check that the Measures with contributions are not fully paid for) If they are mark the in the Measures section)
	Transfer Month	Check for blanks Check that it's the right desk audit month
	Closed Date	Check that it's within transfer month
	Program Year	Make sure it is the correct Program Year
	Region	Check for blanks





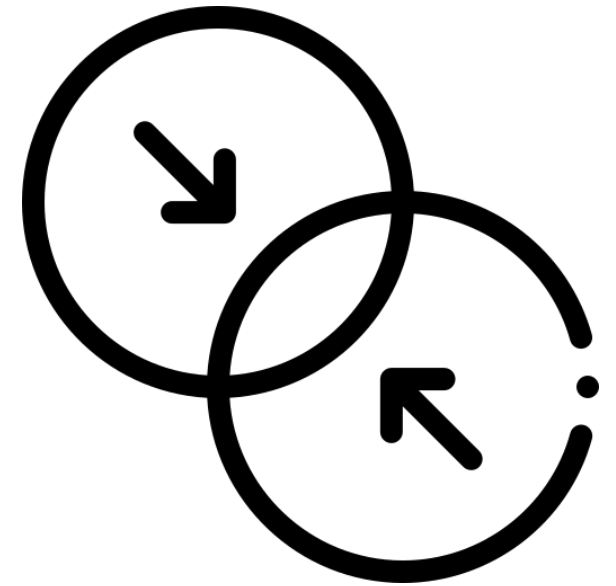
## Data Challenge #3:

**Data Storytelling:** Taking data and transforming it into simple and easy to digest information, in order to extract insights and have informed decisions.

**Scenario:** Taking extra time to piece together monthly metrics via a large spreadsheet without visuals.

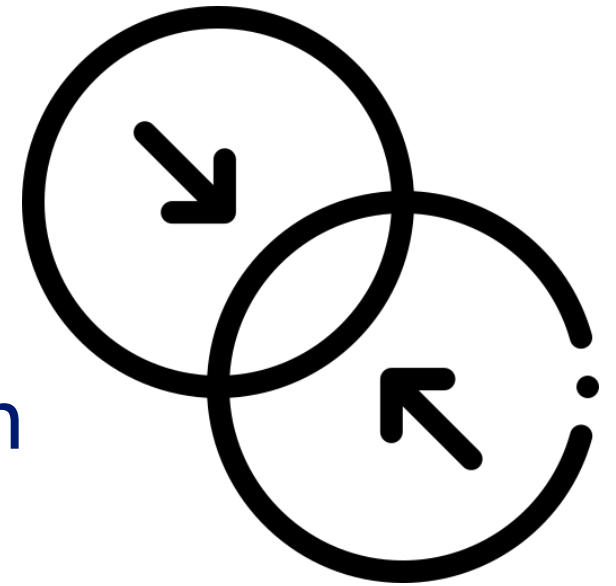
## Our Metrics Journey

- Old metrics document combined both fiscal and programmatic data
  - One large spreadsheet
  - Difficult to read
  - Information was harder to digest at a quick glance



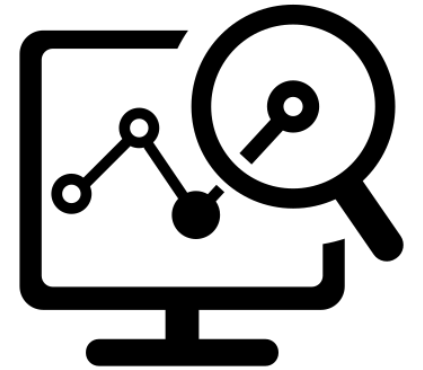
## Our Metrics Journey

- New metrics document only includes fiscal data
  - Easier to comprehend
  - Highlights the most important information
- [Metrics Demo](#)



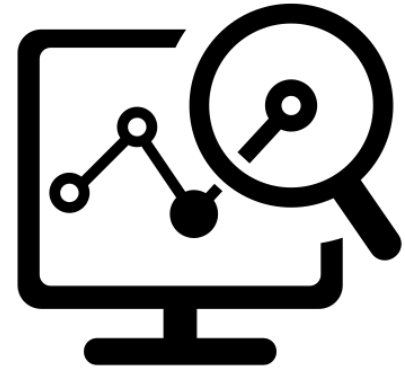
## Dashboards!

- Dashboards play a vital role in data visualization
- Helps users see data in a different way
  - Easier to understand at a quick glance
- Utilize tools such as Salesforce and Google Sheets





- Utilize Dashboards for:
  - Programmatic Data
  - Fiscal Data
- Subgrantees have access to the dashboards
- Review and discuss dashboards in monthly agency check-ins
  - Helps identify any inconsistencies with our data and subgrantee data



## Dashboard Demos:

- Agency Programmatic Dashboard
- Agency Fiscal Dashboard



## Agency Check-ins:

- Conduct monthly agency check-ins
  - After data collection and corrections
    - Dashboard and metrics overview
  - Open discussion



## Agency Check-ins:

- Allows us to highlight what data we have compared to our agencies
- Any discrepancies can be discussed and taken back for further investigation





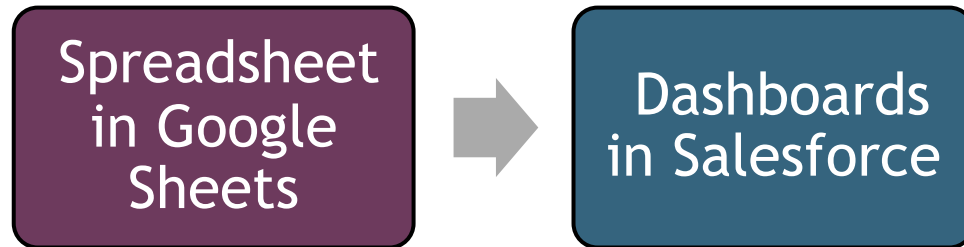


## Data Challenge #4:

**Data Integration:** Combing data types and formats into a centralized location.

**Scenario:** Having data housed in multiple places, creating data silos and repetitive tasks.

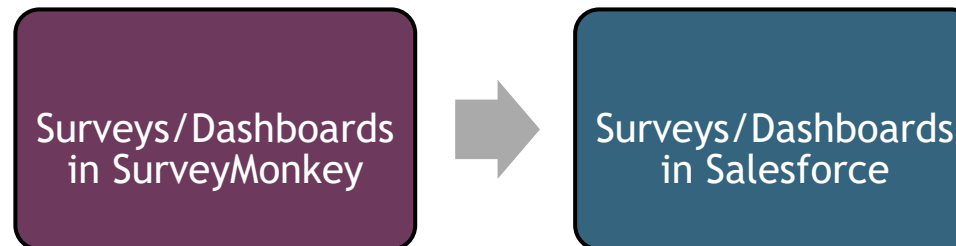
## Production Metrics



## Online Application

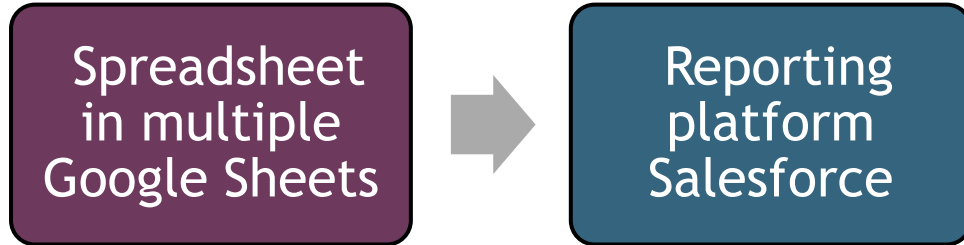


## Client Satisfaction Surveys

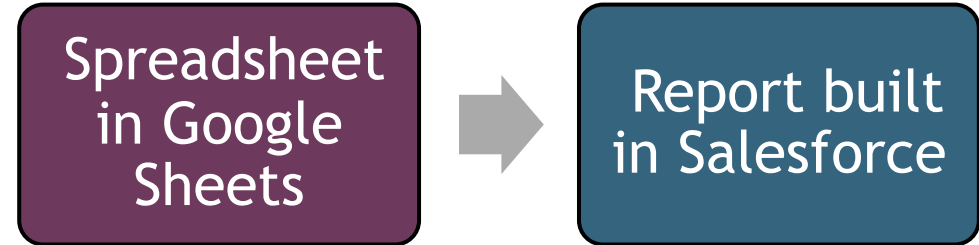


# Transfers to Salesforce: Coming Soon

## Multifamily Reporting



## Administrative Monitoring Checklist



- Validation Rules
- Access Controls
- Data History Tracking
- Data Governance/Policies
- Database User Guide
- Subgrantee Workgroup
- Reports Building
- Desk Audit
- Dashboards
- A main database hub



## Data Tools & Practices - What do you use?

0 surveys completed

0 surveys underway

- Stakeholders/subgrantees should be involved and participate in your systems
- An agile framework allows for an iterative and adaptable process. Developments take time!
- A data tool often addresses multiple data challenges. No one size fits all but a multitude/combination of tools and practices leads to enhancements
- Data tools are essential for efficient and effective program administration & management

## Main benefits of efficient data systems:

- Budgeting
- Reporting
- Compliance
- Communication



## Budgeting

- Fiscal dashboards allow us to more accurately budget funds appropriately (**dashboards**)
- Required fields in Salesforce allow us to determine specific costs of jobs, measures, audits, etc. (**validation rules**)
- Forecasting - data systems allow us to forecast hyper-specific budgets with new projects or initiatives, the new optional budget categories for BIL, etc. (**dashboards**)

## Reporting

- Our metrics, desk audit, and dashboards have streamlined reporting across all our funding sources (**metrics and dashboards**)
- DOE QPRs are much simpler now that we have metrics reports that are customizable (**reports building**)
- We can be more nimble with specific reporting requirements from other funders as well, such as our HB-1105 funds (**agile**)



## Compliance

- All of these data systems enhance and improve our monitoring process (**desk audit**)
- Dashboards allow us to readily see agency-specific and network-wide ACPUs in seconds (**dashboards**)
- Metrics and dashboards allow us to monitor production, Per Unit Averages, and adherence to a variety of policies (**dashboards**)

## Communication

- Our monthly subgrantee check-ins are centered around these systems (**agency check ins**)
- It allows us to hold subgrantees accountable while also empowering them to provide accurate updates (**dashboards**)
- Several of our subgrantee working groups now depend on these systems
- SF workgroup (**agile**), fiscal work group (**fiscal dashboard**), etc.
- Transparency - these tools allow us to share exactly what we see with our subgrantees in real time (**dashboards**)





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# Questions?

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# Thank You!

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Mitch Foresman: [mitch.foresman@state.co.us](mailto:mitch.foresman@state.co.us)

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Your feedback helps shape future conferences and let's us know what we need to add, change, remove, etc.

Please complete the evaluation by scanning the QR code or using this link –

<https://www.surveymonkey.com/r/CCNCTWX>

