

Taking Stock Worksheet

Purpose: Use program performance during the past Program Year (PY) to identify areas where you want to improve your program in the next cycle. Lay the groundwork for strategic T&TA Planning.

Feel free to add different issues or topics in the space provided.

Instructions:

Info Source - Where you would find this information. *Examples* : Monitoring reports, staff and client interviews, V.6 Weatherization Analysis of Effectiveness from previous approved State Plan, etc.

PY Goal - Your goal for the previous PY; What did you hope to achieve?

PY Reality - What you did achieve in that PY

Improve (Y/N) - In your opinion, is there room for improvement in this area? Y = Yes, N = No

Desired Outcome - What would improvement look like? Reduction in call-backs, streamlined intake, etc. Try to record measurable goals, e.g., If the issue is that all eligible lighting retrofits aren't being installed, consider, "Reduce lighting-related final inspection findings and call-backs by 50% compared to previous PY."

T&TA Resources - List resources available to address this T&TA need, e.g., training partner, in-house expertise, on-line training course

Issue/Topic	Info Source(s)	PY Goal	PY Reality	Improve (Y/N)	Desired Outcome	T&TA Resources
Production goals						
ACPU						
Work Scope						

Issue/Topic	Info Source(s)	PY Goal	PY Reality	Improve (Y/N)	Desired Outcome	T&TA Resources
Work Quality						
Water heating						
Showerheads/ Aerators						
Smoke/ CO Alarms						
A/C						
Processes						
Intake						
Logistics						
Reporting						