

CHAPTER 13: Program tracking

Information management is vital to the successful administration of energy efficiency program portfolios. Tracking and reporting functions are used to assess program performance against goals, to monitor program expenditures, and to manage information about program participants. Evaluators use tracking system data in their independent assessments of program performance.

Given the small size of many public power utilities, there are often limited resources to support the development of comprehensive information management systems. Many smaller utilities have billing systems that were not designed to collect and store information needed for program tracking. Many lack sophisticated customer relationship management databases. However, a variety of tracking system options are available to meet basic portfolio management objectives. The least-cost option generally involves the use of an off-the-shelf software package such as Microsoft Excel or Access. Customizable internet-based software packages are at the other end of the cost spectrum.

In its [Portfolio Best Practices Report](#), the National Energy Efficiency Best Practices Study identifies key recommendations for successful tracking and reporting of energy efficiency program results. A number of these best practice recommendations are applicable no matter the scope or sophistication of the tracking system:




- **Determine the information that will be tracked.** Data tracking needs are primarily based on established goals and objectives for the energy efficiency program portfolio. The tracking system should be able to deliver all necessary information for measuring the success of the program and the overall portfolio.
- **Design the tracking system so that it is useful to all potential user groups.** Potential users include portfolio-level administrators, program managers, outside consultants/contractors, and program evaluators. If possible, consult with program evaluators during the planning stage so that they can provide input on their data requirements. Ensuring that the necessary data are collected from the start of program implementation will save time and money during the evaluation process.
- **Include cost tracking functions.** Even if direct interoperability between the program tracking system and the utility's accounting system is not feasible, it is useful to include high-level financial tracking capability in the tracking system so that program savings results can be easily measured against program costs. Cost information is often disaggregated between incentive costs and administrative (non-incentive) costs.
- **Institute a regular process for reviewing tracking system data.** Use the tracking system as a portfolio management tool for assessing the performance of individual programs and the entire portfolio on a regular basis—at least monthly. Develop a clear set of performance metrics and build in reporting capabilities that make it easy to review performance benchmarks. Common performance metrics include program cost per unit of energy savings and program cost per participant.
- **Include capability for monitoring the progress of customer projects.** For programs that involve long, multi-stage projects (e.g., new construction programs; custom incentive programs), it is useful to include capability for tracking program status by stage (e.g., feasibility assessment; implementation; verification; incentive payment). This will allow the program manager to track the status of projects in the pipeline before incentives are paid.

For utilities that are able to allocate resources to developing a state-of-the-art tracking system, desirable features to consider include:

- Web-based systems that facilitate data entry and reporting by a variety of different users

- Systems that offer interoperability between other utility databases (billing systems; accounting systems; customer relationship management systems)
 - Automated data validation systems that streamline data quality verification processes
 - Automated reporting functions
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Resources

- Johnson Consulting Group: [Best Practices for Developing Cost Effective Evaluation, Measurement, and Verification Plans: Lessons Learned from 12 Northern California Municipal Utilities](#) 
- [National Action Plan for Energy Efficiency Report](#) 
- National Energy Efficiency Best Practices Study: [Portfolio Best Practices Report](#) 

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