



**Ontario Energy Board**

Commission de l'énergie de l'Ontario

# Sample Reporting Spreadsheets

LEAP Financial Assistance Working Group

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# Overview

- Consists of 4 separate worksheets.
  1. Intake Application Data
  2. Intake Demographic Information
  3. Tracking Utility Funds
  4. Monthly Report Data
- Sheets designed to match the application process.
- Very basic to account for varying degrees of technical competency.
- Worksheets prepared on a monthly basis.
  - Can then be aggregated to produce annual reports.



# 1) Intake Application Data Worksheet

- Where each application is inputted digitally.
- Worksheet organized to match application form.
- When calculating demographic information, user will just sum data across rows.
- When inputting check boxes, user inputs a 1 one for a check and a 0 otherwise.
- Lead agencies will only have to edit recommendation information once decisions are made.
  - Can search by client #.

	A	B	C
1	<u>Intake Agency Name</u>		
2			
3	Month of:	Oct-11	
4			
5	<b>1. Applicant Information</b>		
6	Client #		12345
7	How Applicants Heard about Program	Word of Mouth	0
8		Utility referral	0
9		Utility website	1
10		OEB website	0
11		OEB customer relations centre	0
12		TV	0
13		Radio	0
14		Newspaper	0
15		Billing Insert	0
16		Poster	0
17	Other	0	
18	<b>2. Household Information</b>		
19	Household Size	Adults	2
20		Children	3
21	HH type	Single (no children)	0
22		Single (children)	0
23		Married (no children)	0
24		Married (children)	1
25		Other	0
26	<b>3. Housing Information</b>		
27	HH type of applicant	Rent	0
28		Owned	1
29		Social Housing	0



## 2) Intake Demographic Information Worksheet

- This sheet aggregates the individual data of each applicant by utility.
- Numbers are obtained by sorting data in the Application Data sheet and performing a summation across each row.
- NOTE: under “Reasons funding was denied to applicants” lead agencies must manually enter counts for “Insufficient funds remaining” and “Already accessed funds this year”

					Source of Income				Applicant Housing Type				
6													
7	Utility Name	Total Adults Assisted	Total Children Assisted	Avg. monthly income of accepted applicants	Employment Income	Social Assistance (i.e. ODSP, OW, etc.)	Employment Insurance	Other	Average arrears per owed household	Rent	Owned	Community or Social Housing	Other
8	A												
9	B												
10	C												
11	<b>Total</b>												



### 3) Tracking of Utility Funds Worksheet

- Tracks dispersion of funds by intake agency.
- One sheet per affiliated utility.
- Information obtained from Application Data spreadsheet.
- Some monthly totals can be confirmed with standard remittance form.
  - This is why data on this sheet is separated by agency and not utility.
- Data tracked for direct utility and suite metering customers separately.

					Direct Customer Applicants							
Intake Agency Name	Total Admin Costs	Non-utility funds earmarked for LEAP	Total Households Assisted	Average Grant per Household	Total Number	Approved	Total Grant Amount	Denied	Average Grant/HH	Total Arrears	Additional Funds Leveraged	Total Number
A												
B												
C												
<b>TOTAL</b>												



## 4) Monthly Report Data for Utils Worksheet

- Simple sheet providing the information required by utilities on a monthly basis.
- Data obtained from appropriate columns in Utility Funds Worksheet and from lead agency tracking remaining balances.

	A	B	C	D	E	F	G	H	I	J	K	L
1	LEAD AGENCY NAME											
2												
3												
4		Number of Applicants			Households Assisted			Total Funds Spent	Total Approved Grants		Funds Remaining	
5	Utility Name	Total	Utility	SSM	Total	Utility	SSM		Utility	SSM		
6												
7	Utility 1											
8	Intake Agency A											
9	Intake Agency B											
10	Intake Agency C											
11	Util 1 Total											
12												
13	Utility 2											
14	Intake Agency F											
15	Util 2 Total											
16												
17	Utility 3											
18	Intake Agency X											
19	Intake Agency Y											
20	Util 3 Total											
21												
22	TOTALS											



## Questions for Discussion

- Is this practical?
- Can intake agencies handle the work of entering all applications into the spreadsheet?
- Should lead agencies be responsible for preparing all reports?
- Have we assumed too much/too little computer literacy?

