CED

Community Economic Development

Quick Tips for Using the PPR Data Collection Tool

The Data Collection Tool is designed to help CED grantees collect all information needed for Form A of the Performance Progress Report (PPR) over the course of their grant period. Once the project data has been entered and updated into the tool, a version of PPR Form A will be populated and the numbers from the form can be entered into the online data collection system.

The Performance Progress Report (PPR)

- The PPR will need to be completed and submitted through the online system by October 30 and April 30 during each year of your grant.
- The PPR includes three forms: Form A, Form B and Form E. Keep in mind this tool only focuses on one component of the PPR – Form B and Form E must also be completed in the online system.

Accessing the Data Collection Tool:

- The tool is in Excel 2007-10 format. If you have an earlier version of Excel, you need to download the free compatibility pack from the Microsoft website. It is available here: http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=3
- To access the tool, email OCSRegistrar@icfi.com .

Important Things to Know about the Data Collection Tool:

- This tool will help you complete Form A by simplifying data entry, breaking down indicators and completing calculations for you.
- For the tool to work correctly, you will need fill out the entire workbook, including providing information on businesses, positions and employees. The workbook can only calculate totals based on what you enter.
- Using the data collection tool is not a requirement, but rather a tool to help you complete the PPR.
- You must copy the numbers from this tool into the online system to fulfill the reporting requirement each that period.
- Be sure to save the workbook and continue to update the same version over time.

Key Tips for Entering Data:

- The PPR data collection tool has eight tabs at the bottom of the screen. All entries must be entered continuously down the rows. Do not skip rows.
- You **must** complete the tabs in the tool in order from left to right. Successive tabs will use information from prior tabs to autopopulate fields.

- To delete a selection from a dropdown box, use the arrow keys on your keyboard to navigate to the cell with the dropdown menu. Hit the delete button on your keyboard.

An Overview of the Data Collection Tool Tabs

There are seven tabs in the Data Collection Tool. Data for the tabs should be entered in order from left to right because each tab builds on the previous one.

- **Start Here** – This tab provides instructions and explanations of the tabs. No data entry is required in this tab.
- **Businesses** – This is where you will keep track of all the businesses you help create or expand**.**
    - All businesses should be entered continuously down the rows. Do **not** skip rows.
    - Make sure to account for *all businesses* in which jobs were created with your grant.
    - For those working with microenterprises or self-employment, each microenterprise or self-employment operation should be considered a business.
    - For revolving loan funds, any business that you helped to create through the revolving loan fund should be counted as a business created — and any existing business that used funds from the revolving loan fund to expand should be counted as a business expanded
    - The **Creation or Expansion Date** (Column C) should be the day the first employee started working — not necessarily the day the business opened to the public. In the case of expanding an existing business, this date should be the first day that an employee *hired through OCS funds* worked at the business.
    - The **Close Date** (Column D) should be entered when the business is no longer open and no longer has any employees. If the business is still open, leave this field blank.
- **Positions** – This is where you will keep track of all the positions you create. This tab is not concerned with the number of new hires, but rather the positions themselves.
    - Not every new hire is a new position. The same position might be held by a number of different individuals over time.
    - All positions should be entered continuously down the rows. Do **not** skip rows.
    - When entering the name of a position, make sure to differentiate between similar positions at the same business and similar positions across multiple businesses.
        - For positions with the same title in the same business, we recommend adding a letter to the end. For example: Sales Clerk (A) and Sales Clerk (B).
        - For positions with the same title in different businesses, we recommend adding the business name or first letter of the business name to the position title. For example: *J Sales Clerk (A)* for a sales clerk at Joe's Shoe Store, and *S Sales Clerk (A)* for a sales clerk at Stan's Grocery.
    - Be sure to select a business from the dropdown menu in Column B (this list of businesses will be autopopulated from the businesses entered in the Businesses tab). All positions must be associated with a business.

- **Employees** - This is where you will keep track of the employees hired into the positions you have helped create.
    - All employees should be entered continuously down the rows. Do **not** skip rows.
    - You can use the employee name or ID number.
    - Enter "Y" in Low-income column if the employee qualified as low-income at the time of their initial employment. ***Note: Only information about low-income employees should be entered in the tool.***
        - Under CED, low-income is 125 percent of the HHS poverty line.
        - HHS poverty guidelines are available here: http://aspe.hhs.gov/poverty/
        - If the employee was a TANF recipient, they should automatically be counted as low-income.
    - Raises and promotions only needed to be documented once by entering "Y" in the column. — do not note this change in any other field. If the answer to the question is No (for example the employee did not receive a raise or promotion, leave this cell blank).
    - If an employee is replaced, add the replacement as a new employee in the same position.
- **Leveraging -** This is where you will keep track of all additional funding you have secured for your project.
    - Each leveraging category is mutually exclusive — select *loans* for all loans, regardless of whether they were government loans, private loans or some other type of loan. For grants, specify *government*, *private* or *other*.
    - The *Total Leveraged Funds* field will continue to update as you enter additional sources.
- **Program Income** – This is where you will track any program income your project has generated.
    - Not all programs will generate income — if yours doesn't, you can leave this tab blank.
    - The *Total Program Income* field will continue to update as you enter additional sources.
- **Data for Form A** – This tab will compile the information entered in all previous tabs.
    - You cannot edit this tab.
    - Review all information in this tab to ensure it is correct before entering it into the online system and pressing the Finalize button. If something looks off, go back to the previous tabs and review your data there.
    - Select the correct recording period from the dropdown menu in the upper right hand corner of your screen — If you accidentally select reporting period you have already completed and click the Finalize button, *it will overwrite your old records*.
    - Keep in mind that **clicking the Finalize button will not submit your form to OCS**. You still need to copy the numbers you see here into the online Form A.
- **Records** – This page is updated when you press the finalize button on the Data for PPR tab.
    - You will be able to find the data for all the PPRs you have submitted since you started using the tool.
    - You should not edit any of the information on this page.