

LIHEAP Performance Data Form

List of Checks to Complete Before Submission

This document provides a list of items to check in the Performance Measures portion (Module 2) of your annual *LIHEAP Performance Data Form*. If you can answer “yes” to all of the following questions, then you are ready to certify and submit your final Performance Measures portion (Module 2).

<u>General Checks</u>			
1.	Did you make sure that the data you used represents <u>annual</u> amounts? The data you used should be data that corresponds to one year (12 months). The amounts reported for average annual household income, average annual total LIHEAP benefit per household, average annual main heating fuel bill, and average annual electricity bill should be reasonable amounts for a full year. Very low amounts could indicate that a portion of the data you used was monthly or quarterly data, rather than annual data.	YES	NO
2.	Have you included any important information for understanding or interpreting your data in the “Notes”? The “Notes” portion of the form should contain your responses to any warning messages you received when submitting your report, as well as descriptions of any data anomalies or important program changes or characteristics relevant to the data.	YES	NO

<u>Part A: Unduplicated Number of Bill Payment Assisted Households</u>			
3.	Did you check that the total unduplicated number of households that received Bill Payment Assistance matches the total reported in your <i>LIHEAP Household Report</i>? In Part A, the “All Households” column will be auto-calculated by adding the number of bill payment-assisted households with each main heating fuel type. You should confirm that the number of households in the “All Households” column of Part A is equal to the number of households reported in Section I, line 6 of your <i>LIHEAP Household Report</i> .	YES	NO

<u>Part B: All Households with 12 Consecutive Months of Bill Data</u> <u>(Main Fuel and Electric)</u>			
4.	<p>Are each of the statistics you reported in Part B calculated using only information for households from Part A for which you collected main heat bill data AND annual electricity bill data?</p> <p>Part B should only include the data for those households for which you collected annual bill data for the main heating fuel and for electricity (if electricity is not the main heating fuel). Households missing the annual main heating fuel bill amount or the annual electricity bill amount should be excluded. For each main heating fuel type, the number of households reported in line 1 of Part B should be less than or equal to the number of households reported in Part A. As with Part A, only households that received bill payment assistance are included.</p>	YES	NO
5.	<p>For all the statistics you reported in lines 2 to 5, did you include the same exact households when calculating those statistics?</p> <p>The number of households you used to calculate the average statistics you report in lines 2-5 for each main heating fuel type should be equal to the number of households you reported for each main heating fuel type in line 1 of Part B. Households missing any of the data needed to be included in the calculations for lines 2 to 5 should be excluded from all calculations so that the same households are used in each calculation.</p>	YES	NO
6.	<p>For households with electricity as their main heating fuel, did you report the average annual main heating fuel bill in line 4 (average annual main heating fuel bill), rather than in line 5 (average annual electricity bill)?</p> <p>For households with electricity as their main heating fuel, you should report the average annual main heating fuel bill in line 4 of Part B. This allows the auto-calculations for “All Households” to more accurately present the average costs for heating across all fuel types.</p>	YES	NO
7.	<p>Did you report the average annual electricity bill for households whose main heating fuel type is <u>not</u> electricity?</p> <p>The average annual electricity bill should be calculated and reported in line 5 of Part B for the non-electricity main heating fuel types (e.g. Natural Gas, Fuel Oil, Propane, and Other Fuels).</p>	YES	NO
8.	<p>Did you enter \$0.00 for the average annual electricity bill for electric main heat households in line 5?</p>	YES	NO

	The dollar amount entered in line 5 of Part B for households with a main heating fuel type of Electricity should be \$0.00. This allows the auto-calculations for “All Households” to more accurately present the average costs for non-heating electricity use across fuel types.	
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Part C : High Burden Households with 12 Consecutive Months of Bill Data
(Main Fuel and Electric)

9.	Are the statistics you reported in Part C calculated for only the top 25% of households from Part B with the highest energy burdens? The “All Households” number reported in line 1 of Part C should be equal to 25% of the “All Households” number reported in line 1 of Part B. You should select the top 25% of households by first calculating the energy burden for each household in Part B, then sorting the households from the highest to lowest calculated energy burden, and then selecting the 25% of households with the highest burden. You should not select the top 25% by main heating type, but across all households. Further information on calculating energy burden is below.	YES	NO
10.	When you calculated each household’s energy burden, if a household’s annual income was \$0 or if a household’s energy burden was greater than 100%, did you record the household’s energy burden as 100%? Energy burden should be calculated as follows: [(annual main heating fuel bill + annual electricity bill) / annual household income] * 100. If a household’s income is \$0, that household’s energy burden should be recorded as 100%. A household’s energy burden should also not be greater than 100%, so if a household’s calculated energy burden is greater than 100% because the household’s energy expenses are greater than its income, that household’s energy burden should be recorded as 100%.	YES	NO
11.	For all the statistics you reported in lines 2 to 5, did you include the same exact households when calculating those statistics? The number of households you used to calculate the average statistics you report in lines 2-5 for each main heating fuel type should be equal to the number of households you reported for each main heating fuel type in line 1 of Part C. Households missing any of the data needed to be included in the calculations for lines 2 to 5 should be excluded from all calculations so that the same households are used in each calculation.	YES	NO

12.	<p>For households with electricity as their main heating fuel, did you report the average annual main heating fuel bill in line 4 (average annual main heating fuel bill), rather than in line 5 (average annual electricity bill)?</p> <p>For households with electricity as their main heating fuel, you should report the average annual main heating fuel bill in line 4 of Part C. This allows the auto-calculations for “All Households” to more accurately present the average costs for heating across all fuel types.</p>	YES	NO
13.	<p>Did you report the average annual electricity bill for households whose main heating fuel type is <u>not</u> electricity?</p> <p>The average annual electricity bill should be calculated and reported in line 5 of Part B for the non-electricity main heating fuel types (e.g. Natural Gas, Fuel Oil, Propane, and Other Fuels).</p>	YES	NO
14.	<p>Did you enter \$0.00 for the average annual electricity bill for electric main heat households in line 5?</p> <p>The dollar amount entered in line 5 of Part C for households with a main heating fuel type of Electricity should be \$0.00. This allows the auto-calculations for “All Households” to more accurately present the average costs for non-heating electricity use across fuel types.</p>	YES	NO
15.	<p>Is the average annual income lower for the high burden households in Part C than for all households included in Part B?</p> <p>The average annual income of high burden households reported in line 2 of Part C for each main heating fuel type should generally be less than the average annual income of households reported in line 2 of Part B, although there can be some exceptions.</p>	YES	NO
16.	<p>Is the average annual burden before receiving LIHEAP greater for the high burden households in Part C than for all households included in Part B?</p> <p>As a check to confirm high burden households were selected correctly, you should confirm that the auto-calculated averages in line 7 of Part C for each fuel type is greater than the auto-calculated averages in line 7 of Part B.</p>	YES	NO

Section VI: Restoration of Home Energy Service

17.	<p>Are you reporting on all instances in which federal LIHEAP dollars helped restore home energy service during the Fiscal Year?</p> <p>For each line in Section VI, you should report the total number of instances where a household did not have home energy service for the listed reason AND federal LIHEAP funds helped restore home energy service to the household during the</p>	YES	NO
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	fiscal year. Restorations include: 1) households with disconnected energy service that were reconnected due to receiving LIHEAP assistance, 2) households without any fuel who received fuel due to LIHEAP assistance, or 3) households with inoperable home energy equipment who received LIHEAP assistance that repaired or replaced the broken equipment. For grant recipients to report that a LIHEAP benefit restored service, they must have some assurance that the benefit was successful in restoring home heating or cooling service. You should report each occurrence based on the fuel type where the LIHEAP benefit was applied.	
18.	<p>Do your counts include instances where your regular, non-crisis assistance prevented the imminent loss of home energy service?</p> <p>Section VI is meant to include all instances where federal LIHEAP funds helped restore home energy services during the fiscal year. This often includes instances where crisis assistance was provided. However, it should also include any instances where regular non-crisis assistance was provided to restore home energy services that were lost to a household.</p>	YES NO

Section VII: Prevention of loss of Home Energy Service

19.	<p>Are you reporting on all instances in which federal LIHEAP dollars helped prevent the imminent loss of home energy service during the Fiscal Year?</p> <p>For each line in Section VII, you should report the total number of instances where federal LIHEAP funds helped prevent the imminent loss of home energy service during the fiscal year. Preventions typically include: 1) households that received a past due notice or utility disconnect notice who received LIHEAP assistance that prevented disconnection, 2) households with an imminent risk of running out of fuel who received LIHEAP assistance that prevented running out of fuel, and 3) households with failing home energy equipment who received LIHEAP assistance that repaired or replaced the equipment prior to failure. "Imminent risk" should be defined by the grant recipient based on local conditions and should correspond with existing definitions used to determine home energy emergencies (as outlined in the grant recipient's Model Plan and/or policy manuals). You should report each occurrence based on the fuel type where the LIHEAP benefit was applied.</p>	YES NO
20.	<p>Do your counts include instances where your regular, non-crisis assistance prevented the imminent loss of home energy service?</p> <p>Section VII is meant to include all instances where federal LIHEAP funds helped prevent the imminent loss of home energy service during the fiscal year. This often includes instances where crisis assistance was provided. However, it should also include any instances where regular non-crisis assistance was provided that helped prevent an imminent loss of home energy service to a household.</p>	YES NO