

Completing the *Federal Fiscal Year 2024 (FY24)* *Performance Measures*

Module 2 of the FY24 Low Income Home Energy Assistance Program (LIHEAP) Performance Data Form

LIHEAP WEBINAR HOSTED BY THE OFFICE OF COMMUNITY SERVICES (OCS) IN THE ADMINISTRATION FOR CHILDREN AND FAMILIES (ACF) PRESENTED BY APPRISE UNDER CONTRACT TO OCS

DECEMBER 10, 2024

WELCOME:

AKM RAHMAN (OCS)

PRESENTERS:

BRIAN WHORL (PENNSYLVANIA)

MELISSA TORGERSON (VERVE ASSOCIATES)

DAN BAUSCH (APPRISE)



Welcome

- **Purpose of This Webinar**

- To review the key requirements for completing the federal Fiscal Year 2024 (FY24) Performance Measures.
- To review the data you need to prepare the report.
- To review the process for submitting and updating the report.

- **Audience for This Webinar**

- State LIHEAP Coordinators.
- Program staff that assist with completing the Performance Measures.

Webinar Overview

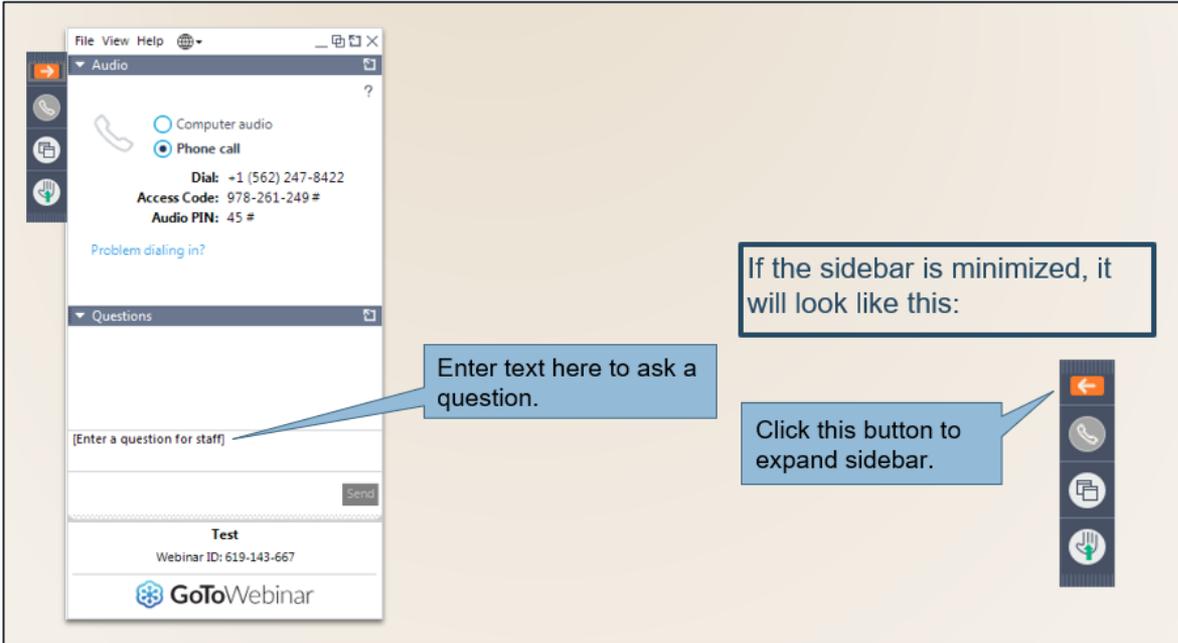
- **Structure of the Webinar**

- 60-minutes.
- **Slides, Spreadsheet Template and other resources available for download now** under “Handouts” in the GoToWebinar Sidebar.
- The webinar is being recorded and will be published on the ACF YouTube channel.

GoToWebinar Question Box

Have a question?

- You are encouraged to ask questions as you have them by typing them into the GoToWebinar “Question” box.
- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.



The screenshot shows the GoToWebinar interface with a sidebar on the left. The sidebar is minimized, showing icons for audio, questions, and chat. The main content area displays the audio settings, including a radio button for "Computer audio" and a selected radio button for "Phone call". Below the audio settings, there is a "Questions" section with a text input field containing the placeholder "[Enter a question for staff]" and a "Send" button. A callout box points to the input field with the text "Enter text here to ask a question." Another callout box points to the "Send" button with the text "Click this button to expand sidebar." A third callout box points to the sidebar area with the text "If the sidebar is minimized, it will look like this:".

Presenter(s):
Melissa Torgerson

Presentation Outline

Overview of the Performance Measures	Slide 8
What's New for FY24	Slide 16
Collecting Vendor Data – State Example	Slide 21
Key Reporting Steps for Section V (Energy Burden Targeting)	Slide 26
Key Reporting Steps for Section VI (Restoration of Lost Service)	Slide 36
Key Reporting Steps for Section VII (Prevention of Loss of Service)	Slide 40
Reporting Guidance for Module 2C (Households Served with Supplemental ARPA Funds)	Slide 44
Final Reminders	Slide 50

LIHEAP Federal Reports

Recent Report Schedule

Report:	Due Date:	Focus of Report:
Household Report (FY24)	9/18/2024 (Est.) 12/31/2024 (Final)	Households served in the past FY
Carryover and Reallotment Report (FY24)	8/9/2024 (Est.) 12/31/2024 (Final)	Funds being carried over or returned
SF-425	12/31/2024	Federal financial reporting
Performance Data Form (FY24): Module 1 – Grantee Survey	1/31/2025	Sources/uses of funds, average benefits, maximum income cutoffs
Performance Data Form (FY24) Module 2 – Performance Measures	1/31/2025	Energy Burden Data, Restoration/Prevention Data
Quarterly Report (Quarter 1 of FY25)	2/28/2025	Summary of activity in the last quarter

Presenter(s):
Melissa Torgerson



Audience Poll Question #1

How prepared do you think your team is for completing the *FY24 Performance Measures* (Module 2 of the Performance Data Form)?

Please select one:

- **Not at all prepared** (i.e. haven't turned attention to this)
- **A little prepared** (i.e. aware, but haven't planned yet)
- **Mostly prepared** (i.e. planning and working out nuances)
- **Very prepared** (i.e. working on it and understand it)

Overview of the Performance Measures

Placement in The Performance Data Form

- The Performance Measures is not a stand-alone report – it is included in the *LIHEAP Performance Data Form (LPDF)*.
- The Performance Data Form is one report that consists of multiple Modules:
 - Module 1 (Grantee Survey) – Mandatory
 - **Module 2 (Performance Measures)** – Mandatory
 - Module 3 (Optional Performance Measures) – *Optional*
- Modules 1 and 2 are distinct and different procedures are needed to complete each Module.

Presenter(s):
Dan Bausch

MODULE 1 (LIHEAP Grantee Survey)

SECTION I. GRANTEE INFORMATION

Grantee Name: _____ Date: _____ Contact Person: _____ Phone Number: _____

SECTION II. REPORTING REQUIREMENTS

The 50 States and the District of Columbia are required to complete the LIHEAP Grantee Survey Section of the LIHEAP Performance Data Form in providing estimates of sources and uses of funds, average benefits, and the maximum income cutoff in dollars for a 4-person household for each type of LIHEAP assistance provided in FFY 2024.

Additionally, the 50 states and the District of Columbia are required to complete the LIHEAP Performance Measurement Section of the LIHEAP Performance Data Form. This Federal Report provides data on three required LIHEAP Performance Measures for Federal Fiscal Year (FFY) 2024, the period of October 1, 2023 - September 30, 2024. The Report consists of the following sections: (1) Energy Burden Targeting, (2) Restoration of Home Energy Service, and (3) Prevention of Loss of Home Energy Service.

Timely response to questions on this report is mandatory. The information will be used to respond to Congressional inquiries, to calculate LIHEAP benefit targeting, and to provide Federal Fiscal Year data for the Department's annual LIHEAP Report to Congress that is required under Section 2610 of Public Law 967-35, as amended. The data are also used in measuring LIHEAP performance under the Government Performance and Results Act (GPRA) of 1993, as amended by the GPRA Modernization Act of 2010. As the reported data are aggregated, the information in this report is not considered to be confidential.

SECTION III. ESTIMATED SOURCES OF LIHEAP FUNDS

	ALL OF FFY 2024 (10/1/2023 TO 9/30/2024) Amount Rounded to the Nearest Dollar
A. All Funds Except IJIA Funding (Items 1-9)	
1. FFY LIHEAP Block Grant Allotment (Net of Indian Tribal Set-Asides)--regular funds	\$0
2. FFY Emergency Contingency Funds (Net of Indian Tribal Set-Asides)	\$0
3. LIHEAP Block Grant Funds from Previous FFY Reallotted to FFY	\$0
4. Previous FFY Unobligated Emergency Contingency Funds, not Subject to 10% Carryover Limit	\$0
5. All Funds Carried Over From Previous FFY (except Funds in item 4 and 9 in this Section)	\$0
6. Petroleum Violation Escrow (Oil Overcharge) Funds Obligated in FFY	\$0
7. FFY Residential Energy Assistance Challenge (REACH) Program	\$0
7b. Previous FFY REACH Program Award Funds Obligated in FFY	\$0
8. FFY Leveraging Incentive Award	\$0
9. Previous FFY Leveraging Incentive Award obligated in FFY	\$0
B. Estimated Subtotal Sources of Funds--Non-ARPA/Supplemental Funding	
10. Sum of Items 1-9. This should equal the sum in Section IV, Column D, Item 14.	\$0
C. All Supplemental Funds (Items 11-13)	
11. Previous unobligated CARES Act Allotment, not Subject to 10% Carryover Limit.	\$0
12. Infrastructure Act Funds Carried Over From Previous FFY.	\$0
13. Infrastructure Act Funds Allotment (Net of Indian Tribal Set-Asides).	\$0
D. Estimated Subtotal Sources of Supplemental Funds	
14. Sum of Items 12-13. This should equal the sum in Section IV, Column D, Item 48.	\$0
E. Estimated Total of Sources of All Funds	
15. Item 10 plus item 14. This should equal the sum in Section IV, Column D, Item 49.	\$0

SECTION IV. ESTIMATED USES OF LIHEAP FUNDS

A. Type of LIHEAP Assistance--All Funds Except IJIA (Items 1-4)	All of FFY 2024 (10/1/2023 to 9/30/2024) Amount Rounded to the Nearest Dollar		
	Total Funds/Awards	Average Household Benefit	Maximum Annual Dollar Income
1. Heating Assistance Benefits	\$0	\$0	\$0
2. Cooling Assistance Benefits	\$0	\$0	\$0
3. Crisis Benefits by Type			
a. Winter Crisis Benefits	\$0	\$0	\$0
b. Summer Crisis Benefits	\$0	\$0	\$0
c. Year-round Crisis Benefits	\$0	\$0	\$0
d. Other Crisis Benefits	\$0		
(1) Specify	\$0	\$0	\$0
(2) Specify	\$0	\$0	\$0
(3) Specify	\$0	\$0	\$0
4. Weatherization Assistance Benefits	\$0		\$0
B. Other Permitted Uses of LIHEAP Funds (Items 6-13)			
6. Nominal Payments	\$0		
7. FFY Unobligated Funds (excluding funds in Items 8 & 9) Carried Over to next FFY	\$0		
8. FFY Allowable Unobligated Emergency Contingency Funds, not Subject to 10% Carryover Limit, Obligated in next FFY	\$0		
9. FFY Leveraging Incentive Award Obligated in next FFY	\$0		
10. FFY LIHEAP Block Grant Allotment Used to Identify, Develop & Demonstrate Leveraging Incentive Activities	\$0		
11. Assurance 16 Activities	\$0		
12. FFY Residential Energy Assistance Challenge (REACH) Program	\$0		
13. Administration/Planning Costs	\$0		
C. Estimated Total Uses of Funds			
14. Sum of Items 1-4 and 6-13. This should equal the sum in Section III, Column C, item 10.	\$0		
Q1. Obligated funding for a given type of assistance in current FFY, but will serve households in the subsequent FFY	-Select-		
Q2. Average Household Benefits are estimated due to unique program operation, rather than directly calculated	-Select-		

Module 1 (Grantee Survey) – Mandatory

Presenter(s):
Dan Bausch



Module 2A (Required LIHEAP Performance Measures)

V. ENERGY BURDEN TARGETING

		Bill Payment-Assisted Household Main Fuel					
		All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households		Auto-Calculated	0	0	0	0	0
B. Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)							
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	Auto-Calculated	0	0	0	0	0	0
2. Average Annual Household Income	Auto-Calculated	\$0	\$0	\$0	\$0	\$0	\$0
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	Auto-Calculated	\$0	\$0	\$0	\$0	\$0	\$0
4. Average Annual Main Heating Fuel Bill	Auto-Calculated	\$0	\$0	\$0	\$0	\$0	\$0
5. Average Annual Electricity Bill	Auto-Calculated	\$0	\$0	\$0	\$0	\$0	\$0
6. Average Annual Total Residential Energy Bill	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
7. Average Annual Burden Before Receiving LIHEAP	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
8. Average Annual Burden After Receiving LIHEAP	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
9. Average Percentage Point Change in Energy Burden	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
10. Average Percentage Reduction in Energy Burden	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)							
1. Unduplicated Number of High Burden Households (Top 25%) with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	Auto-Calculated	0	0	0	0	0	0
2. Average Annual Household Income for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0	\$0
3. Average Annual Total LIHEAP Benefit per High Burden Household (including Heating, Cooling, Crisis, Supplemental Benefits)	Auto-Calculated	\$0	\$0	\$0	\$0	\$0	\$0
4. Average Annual Main Heating Fuel Bill for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0	\$0
5. Average Annual Electricity Bill for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0	\$0
6. Average Annual Total Residential Energy Bill for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
7. Average Annual Burden Before Receiving LIHEAP for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
8. Average Annual Burden After Receiving LIHEAP for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
9. Average Percentage Point Change in Energy Burden for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
10. Average Percentage Reduction in Energy Burden for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
D. Benefit Targeting Index for High Burden Households:	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
E. Burden Reduction Targeting Index for High Burden Households:	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated

VI. RESTORATION OF HOME ENERGY SERVICE

		Energy Source (where LIHEAP benefit was applied)					
		All Occurrences	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. All Occurrences of LIHEAP Households that Had:							
1. Energy Service Restored After Disconnection	Auto-Calculated	0	0	0	0	0	0
2. Fuel Delivered to Home that Ran Out of Fuel	Auto-Calculated	0	0	0	0	0	0
3. Repair/Replacement of Inoperable Home Energy Equipment	Auto-Calculated	0	0	0	0	0	0

VII. PREVENTION OF LOSS OF HOME ENERGY SERVICE

		Energy Source (where LIHEAP benefit was applied)					
		All Occurrences	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. All Occurrences of LIHEAP Households that Had:							
1. Past Due Notice or Utility Disconnect Notice	Auto-Calculated	0	0	0	0	0	0
2. Imminent Risk of Running out of Fuel	Auto-Calculated	0	0	0	0	0	0
3. Repair/Replacement of Operable Equipment to Prevent Imminent Home Energy Loss	Auto-Calculated	0	0	0	0	0	0

NOTES: Include any notes.

VIII. CERTIFICATION FOR REQUIRED SECTIONS I - VII.

1A. I certify to the best of my knowledge and belief that this report is correct and complete for Administration and Congressional oversight the program and for the purposes set forth in the award letter.
 2A. Typed or Printed Name and Title of Authorized Certifying Official: _____ Date Submitted: _____
 3A. Signature of Authorized Certifying Official: (click to sign) _____ Month Day Year

Module 2 (Performance Measures) – Mandatory

Presenter(s):
Dan Bausch



LIHEAP Performance Measures

Module 3. (Optional LIHEAP Performance Measures)

V. ENERGY BURDEN TARGETING (OPTIONAL MEASURES)

		Bill Payment-Assisted Household Main Fuel					
		All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)							
1. Average Annual Electricity Usage	Auto-Calculated	0	0	0	0	0	0
2. Average Annual Main Heating Usage	Auto-Calculated	0	0	0	0	0	
B. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)							
1. Average Annual Electricity Usage for High Burden	Auto-Calculated	0	0	0	0	0	0
2. Main Heating Usage for High Burden	Auto-Calculated	0	0	0	0	0	
C. Unduplicated Number of LIHEAP Bill Payment-Assisted Households that Use:							
1. Electricity as Supplemental Heating Fuel	Auto-Calculated		0	0	0	0	0
2. Wood as Supplemental Heating Fuel	Auto-Calculated	0	0	0	0	0	0
3. Other Supplemental Heating Fuel	Auto-Calculated	0	0	0	0	0	0
4. Central Air Conditioning	Auto-Calculated	0	0	0	0	0	0
5. Window/Wall A/C (including evaporative cooler)	Auto-Calculated	0	0	0	0	0	0

VI. RESTORATION OF HOME ENERGY SERVICE (OPTIONAL MEASURES)

		Energy Source					
		All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Number of All LIHEAP-Assisted Households that Had:							
Unduplicated Count of Restorations of Home Energy Service	Auto-Calculated	0	0	0	0	0	0

VII. PREVENTION OF LOSS OF HOME ENERGY SERVICE (OPTIONAL MEASURES)

		Energy Source					
		All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Number of All LIHEAP-Assisted Households that Had:							
Unduplicated Count of Preventions of Loss of Home Energy Service	Auto-Calculated	0	0	0	0	0	0

NOTES: Include any notes.



Overview of the Performance Measures

Background

- **The Performance Measures** have been submitted by state grant recipients since 2016 in Module 2 of the LIHEAP Performance Data Form.
- There are three main types of data that need to be reported in the Performance Measures report:
 1. LIHEAP Energy Burden Targeting Information (Section V)
 2. LIHEAP Restorations of Lost Energy Service (Section VI)
 3. LIHEAP Preventions of the Loss of Energy Service (Section VII)
- The Performance Measures provide information on LIHEAP impacts and targeting performance. These data are used to assist OCS and Grant Recipients with LIHEAP Performance Management.

Presenter(s):
Dan Bausch

Overview of the Performance Measures

Background

- In 2020, OCS updated the Performance Measures report to collect additional data for the supplemental funds issued during the pandemic.
- The form was changed to add in two submodules to report information for the subset of households receiving CARES and/or ARPA benefits:
 - Module 2A (All Households) [i.e. Main Report]
 - Module 2B (CARES Subset)
 - Module 2C (ARPA Subset)

Overview of Performance Measures

How the Data are Used

- Data from the Performance Measures are...
 - Published in the annual LIHEAP Report to Congress.
 - Published in the LIHEAP Data Warehouse.
 - Used to respond to Congressional and White House inquiries.
- The data can help you to...
 - **Document** the energy burdens faced by different fuel types using real utility billing data.
 - **Assess** whether your benefit determination procedures are meeting your goals to reduce burden or provide benefits equitably
 - **Track** progress over time in preventing or alleviating energy emergencies.

FY23 Program Highlights: Preliminary FY23 data indicates that LIHEAP assisted with:

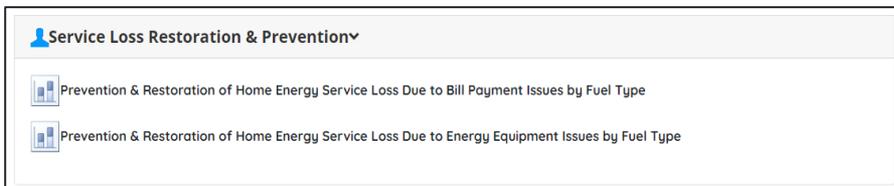
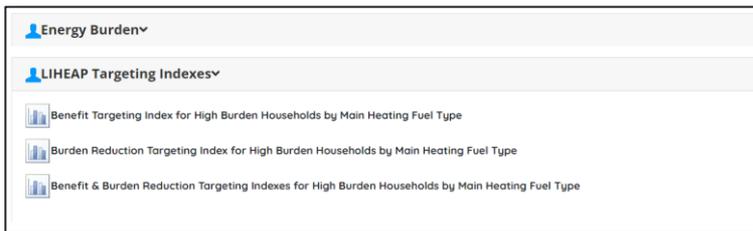
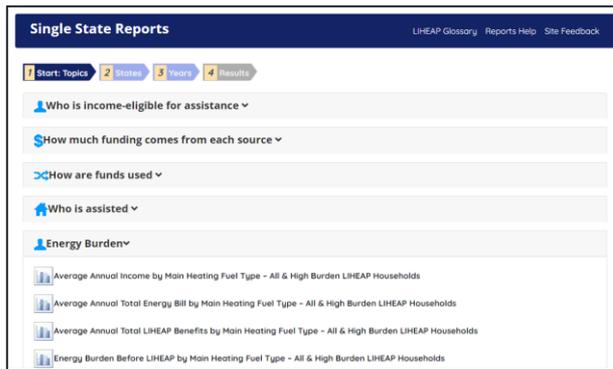
- ❖ 260,910 Restorations of Home Energy Service.
- ❖ 1,898,574 Preventions of Home Energy Service Loss.

Presenter(s):
Dan Bausch

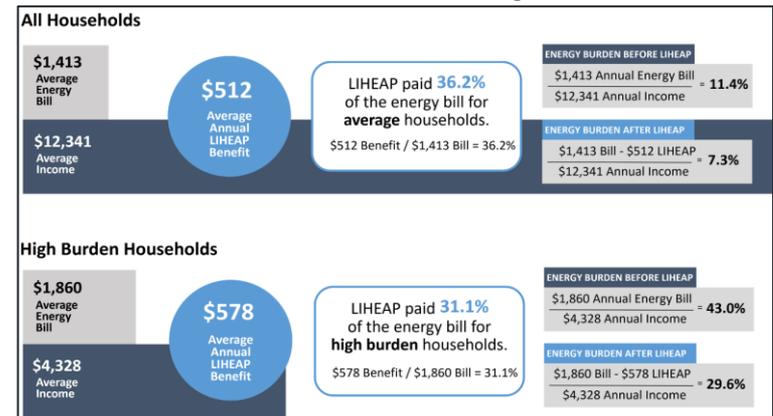
Overview of Performance Measures

How the Data are Used

LIHEAP Data Warehouse



Performance Measures Executive Summary



Prevention and Restoration of Home Energy Service Loss

As a Result of Bill Payment Assistance



As a Result of Equipment Repair or Replacement



What's New for FY24 Reporting



FY24 Reporting

No Differences from Last Year

- **Good news:** There are no changes to the FY24 Performance Measures from last year's FY23 report.
- The form has the same layout, lines, and requirements as last year.
- There is one item to note:
 - **For most grant recipients, Module 2B (CARES) and Module 2C (ARPA) are NOT applicable since the supplemental CARES and ARPA funds were exhausted and not used to provide benefits during FY24.**
 - If you expended remaining supplemental LIHEAP ARPA or CARES Act funds to provide benefits to households in FY24, you should still complete the applicable submodule(s).

FY24 Reporting

Report Announcements and Due Date

- **Report Announcement & Instructions** – OCS has released an [Action Transmittal \(AT\)](#).
- **Due Date** – Final data is due January 31, 2025.
- **Report Availability** – OCS has released the report in the Online Data Collection System (OLDC).
- **Submission** – The report must be submitted in OLDC and must be validated and certified by the designated authorized official.

FY24 Reporting

Report Preparations and Resources

Because the due date is January 31, it is important to plan your schedule and resources accordingly to submit the report by this due date.

- ***Check Before You Submit*** - Included in the handouts is a “Check Before You Submit” document to help you confirm the report is ready to be submitted.
- ***Examples of Data Calculations and Reporting spreadsheet*** – Included in the handouts is a spreadsheet resource with examples of the data needed for the LIHEAP Performance Measures and how to report it.

FY24 Reporting Report Preparations and Resources

Performance Measures Section V - Example Data & Calculations

Example of Raw Data Needed

Note: In this example, there are 13 households that received LIHEAP bill payment assistance in the fiscal year. Key data on each household is shown, including LIHEAP program data (income and benefit amounts) AND annual energy bill data that was collected from energy vendors and the matched to LIHEAP program data on each household. Electricity main heat households have \$0 for Annual Electricity Bill because they have only one bill (electricity) and the full bill amount is included in the Annual Main Heating Bill for the purposes of this report.

	Main Heating Fuel	Household Income	LIHEAP Benefit Amount	Annual Heating Bill	Annual Electricity Bill
Household 1	Natural Gas	\$13,000	\$350	\$1,000	\$2,000
Household 2	Fuel Oil	\$3,000	\$500	\$2,000	\$2,000
Household 3	Electricity	\$10,000	\$400	\$750	\$0
Household 4	Electricity	\$9,000	\$400	\$800	\$0
Household 5	Propane	\$8,000	\$400	\$2,000	\$400
Household 6	Natural Gas	\$7,000	\$450	\$1,100	\$300
Household 7	Fuel Oil	\$5,000	\$450	\$1,200	\$200
Household 8	Electricity	\$11,000	\$300	\$800	\$0
Household 9	Propane	\$15,000	\$500	\$900	\$580
Household 10	Natural Gas	\$25,000	\$100	\$400	\$600
Household 11	Natural Gas	\$7,000	\$350	\$350	\$300
Household 12	Fuel Oil	\$5,000	\$450	\$400	\$200
Household 13	Natural Gas	\$0	\$300	\$0	\$0

Example of Queries / Equations to Identify Households for Parts B and C and Calculate Total Energy Bills and Energy Burden

	Has Data for Section V?	Total Energy Bill (Main heat + electric)	Energy Burden (before LIHEAP)	Topcoded Energy Burden (before LIHEAP)	Household in top 25% with highest Burden?
Household 1	Household with Data	\$3,000	23%	23%	No
Household 2	Household with Data	\$4,000	133%	100%	Yes
Household 3	Household with Data	\$750	8%	8%	No
Household 4	Household with Data	\$800	9%	9%	No
Household 5	Household with Data	\$2,400	30%	30%	Yes
Household 6	Household with Data	\$1,400	20%	20%	No
Household 7	Household with Data	\$1,400	28%	28%	No
Household 8	Household with Data	\$800	7%	7%	No
Household 9	Household with Data	\$1,480	10%	10%	No
Household 10	Household with Data	\$1,000	4%	4%	No
Household 11	Household with Data	\$650	9%	9%	No
Household 12	Household with Data	\$600	12%	12%	No
Household 13	No Data				

A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households		749 HOUSEHOLDS
13		
B. Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)		
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	12	
2. Average Annual Household Income	\$9,833	
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	\$388	
4. Average Annual Main Heating Fuel Bill	\$975	
5. Average Annual Electricity Bill	\$548	
6. Average Annual Total Residential Energy Bill	\$1,523	
7. Average Annual Burden Before Receiving LIHEAP	15.5%	
8. Average Annual Burden After Receiving LIHEAP	11.6%	
9. Average Percentage Point Change in Energy Burden	3.9%	
10. Average Percentage Reduction in Energy Burden	25.4%	
C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)		
1. Unduplicated Number of High Burden Households (Top 25%) with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	3	
2. Average Annual Household Income for High Burden Households	\$5,333	
3. Average Annual Total LIHEAP Benefit per High Burden Household (including Heating, Cooling, Crisis, Supplemental Benefit)	\$450	
4. Average Annual Main Heating Fuel Bill for High Burden Households	\$1,758	
5. Average Annual Electricity Bill for High Burden Households	\$467	
6. Average Annual Total Residential Energy Bill for High Burden Households	\$2,600	
7. Average Annual Burden Before Receiving LIHEAP for High Burden Households	48.8%	
8. Average Annual Burden After Receiving LIHEAP for High Burden Households	40.3%	
9. Average Percentage Point Change in Energy Burden for High Burden Households	8.4%	
10. Average Percentage Reduction in Energy Burden for High Burden Households	17.3%	



Collecting Vendor Data – State Example



Collecting Vendor Data

Pennsylvania

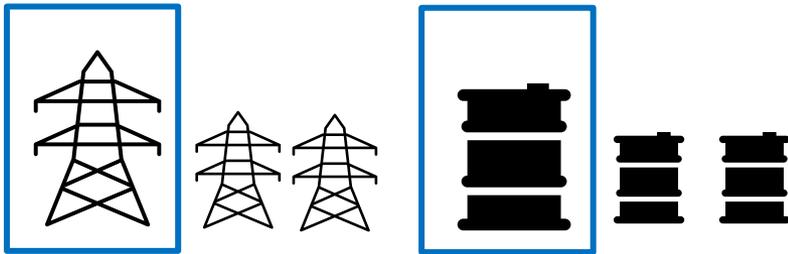
- PA has developed a process for collecting the vendor data each year for the report.
- The process is semi-automated – A system does some work, but staff manually do some work.
- **Results:** PA has been successful in obtaining data from...
 - The top 5 electric utility providers
 - The top 6 gas providers
 - The top 12 fuel oil providers
 - The top 11 Propane vendors top delivered fuel providers.
 - 8 “other” vendors (wood/coal)

Presenter(s):
Brian Whorl

Collecting Vendor Data

How do we do this?

1. Identify Large Vendors (based on number of LIHEAP recipients)



2. For each selected vendor, we create a Data Request spreadsheet

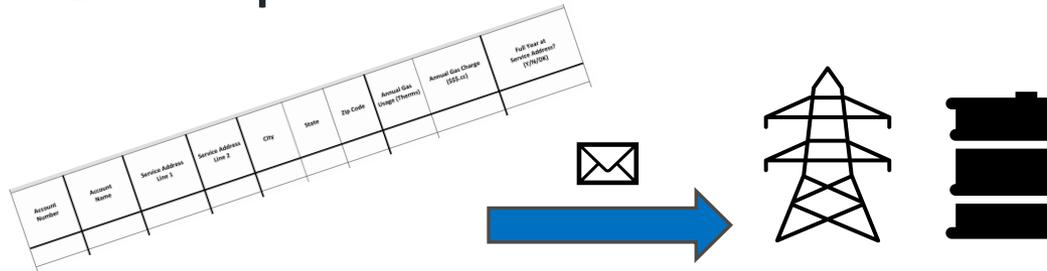
Account Number	Account Name	Service Address Line 1	Service Address Line 2	City	State	Zip Code	Annual Gas Usage (Therms)	Annual Gas Charge (\$\$\$cc)	Full Year at Service Address? (Y/N/DK)

Presenter(s):
Brian Whorl

Collecting Vendor Data

How do we do this?

3. Send Vendor Data Request



4. Vendors Fill in Files and Securely Report It



Collecting Vendor Data

How do we do this?

5. We conduct a basic quality review.



6. Usable data is matched to our program data.

NOTE: Ensure timely and complete delivery of vendor data by outlining expectations in vendor agreements.

The vendor agrees to cooperate with the following conditions in order to receive energy assistance payments through the Commonwealth of Pennsylvania:

1. To cooperate with the Department of Human Services (DHS) by providing all requested information established in DHS policies and procedures including information on the annual heating usage and cost incurred by LIHEAP households necessary for

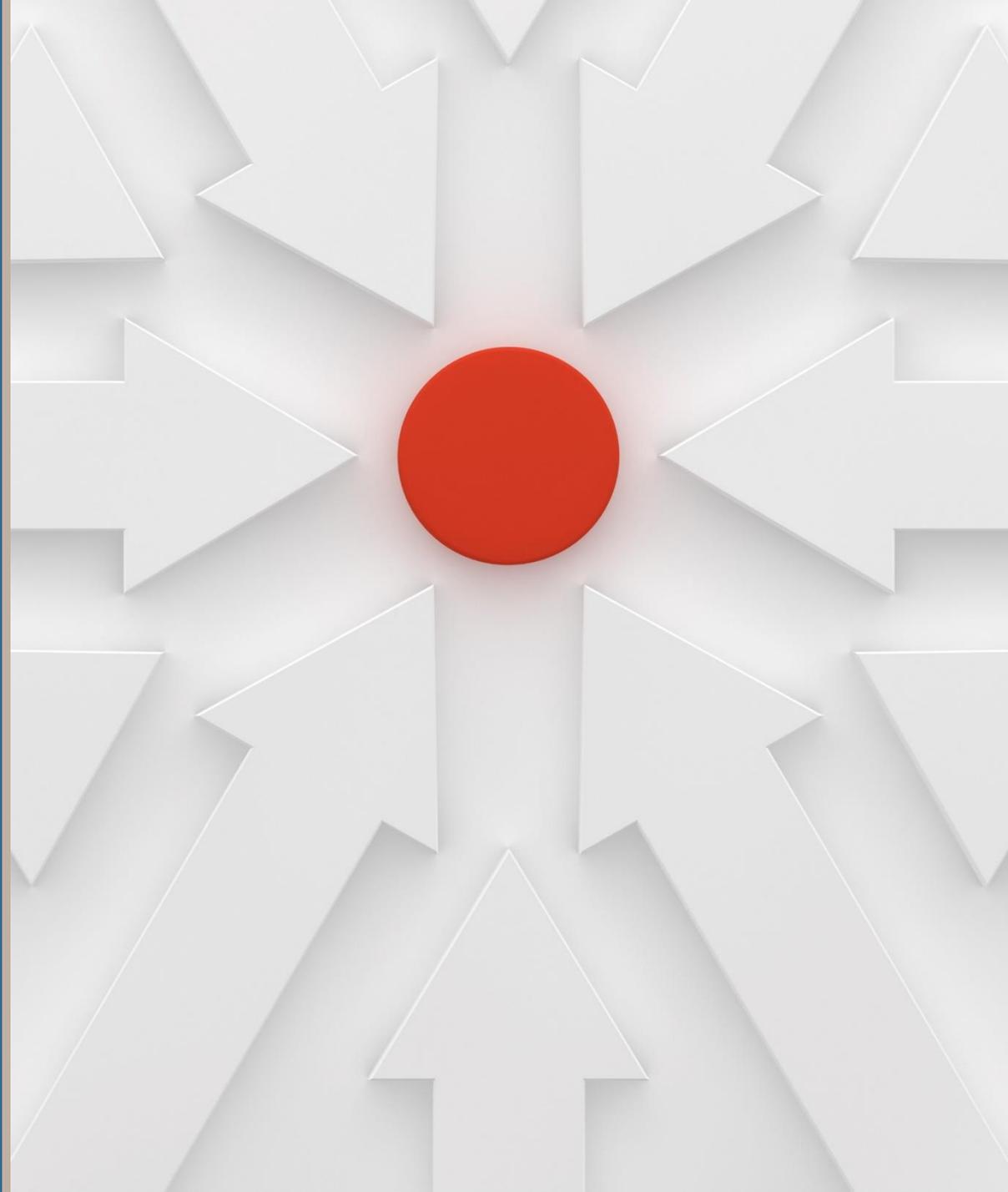
Presenter(s):
Brian Whorl

Collecting Vendor Data

Key Takeaways from PA

- **Focus on Largest Vendors** – these are most important to meet the requirements.
- **Set clear Deadlines and Procedures** – Makes the process smoother
- **Make incremental improvements** – Can gradually improve
- **Not all Vendors are alike** – Delivered fuels especially challenging; target approaches
- **Document process for future staff** – Makes it easier with changing staff

Key Reporting
Steps for
Section V
(Energy Burden
Targeting)



Section V (Energy Burden Targeting) *Overview*

- There are three sections to the report:

- **Section V: LIHEAP Energy Burden Targeting Information**

- **Section VI: LIHEAP Restorations of Lost Energy Service**

- **Section VII: LIHEAP Preventions of the Loss of Energy Service**

Section V (Energy Burden Targeting)

Parts (subsections) of Section V

- Section V consists of three parts:

Part A: Total Number of Bill Payment Assisted Households in FY24.



Part B: Bill Payment Assisted Households for whom 12 months of complete billing data were collected.



Part C: High Burden Households with 12 months of complete billing data (top 25% of households reported in Part B with the highest household energy burdens)

Section V (Energy Burden Targeting)

Parts of Section V

V. ENERGY BURDEN TARGETING						
		Bill Payment-Assisted Household Main Fuel				
	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households	Auto-Calculated	0	0	0	0	0
B. Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	Auto-Calculated	0	0	0	0	0
2. Average Annual Household Income	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
4. Average Annual Main Heating Fuel Bill	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
5. Average Annual Electricity Bill	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
6. Average Annual Total Residential Energy Bill	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
7. Average Annual Burden Before Receiving LIHEAP	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
8. Average Annual Burden After Receiving LIHEAP	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
9. Average Percentage Point Change in Energy Burden	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
10. Average Percentage Reduction in Energy Burden	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of High Burden Households (Top 25%) with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	Auto-Calculated	0	0	0	0	0
2. Average Annual Household Income for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
3. Average Annual Total LIHEAP Benefit per High Burden Household (including Heating, Cooling, Crisis, Supplemental Benefits)	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
4. Average Annual Main Heating Fuel Bill for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
5. Average Annual Electricity Bill for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
6. Average Annual Total Residential Energy Bill for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
7. Average Annual Burden Before Receiving LIHEAP for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
8. Average Annual Burden After Receiving LIHEAP for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
9. Average Percentage Point Change in Energy Burden for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
10. Average Percentage Reduction in Energy Burden for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
D. Benefit Targeting Index for High Burden Households:	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
E. Burden Reduction Targeting Index for High Burden Households:	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated



Presenter(s):
Dan Bausch



Section V (Energy Burden Targeting) Part A

All Households Served with
LIHEAP Bill Payment Assistance
in FY24

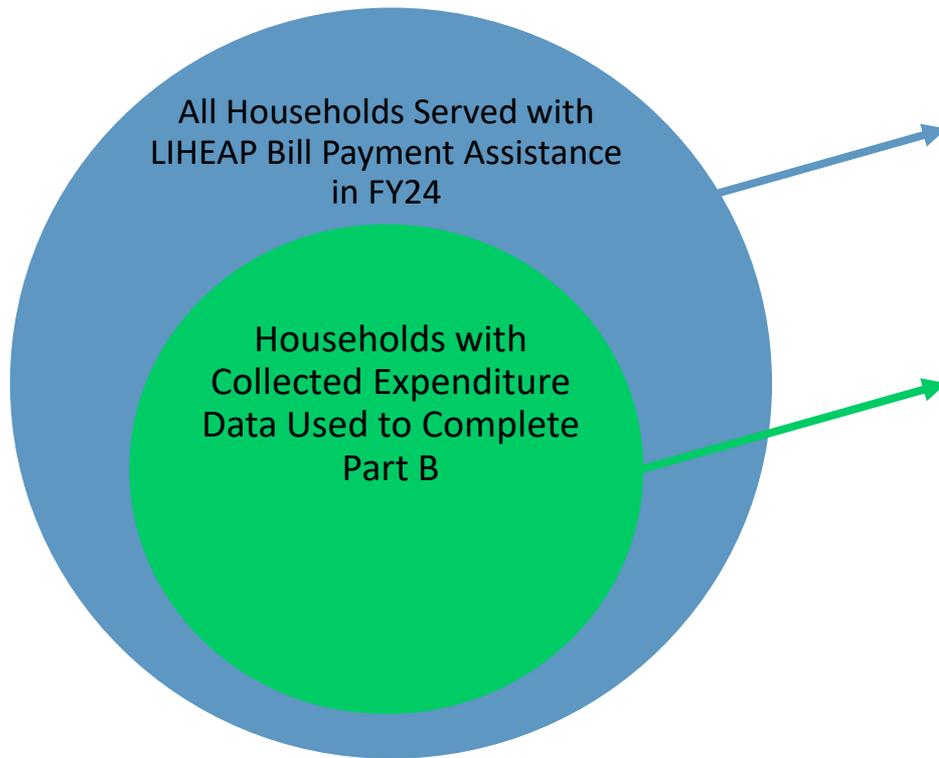
30,000 households
served in FY24

- These are the households to report in Part A, Section V of Module 2A.

Section V	Value
Part A – Unduplicated Number of LIHEAP Bill Payment Assistance Households	30,000

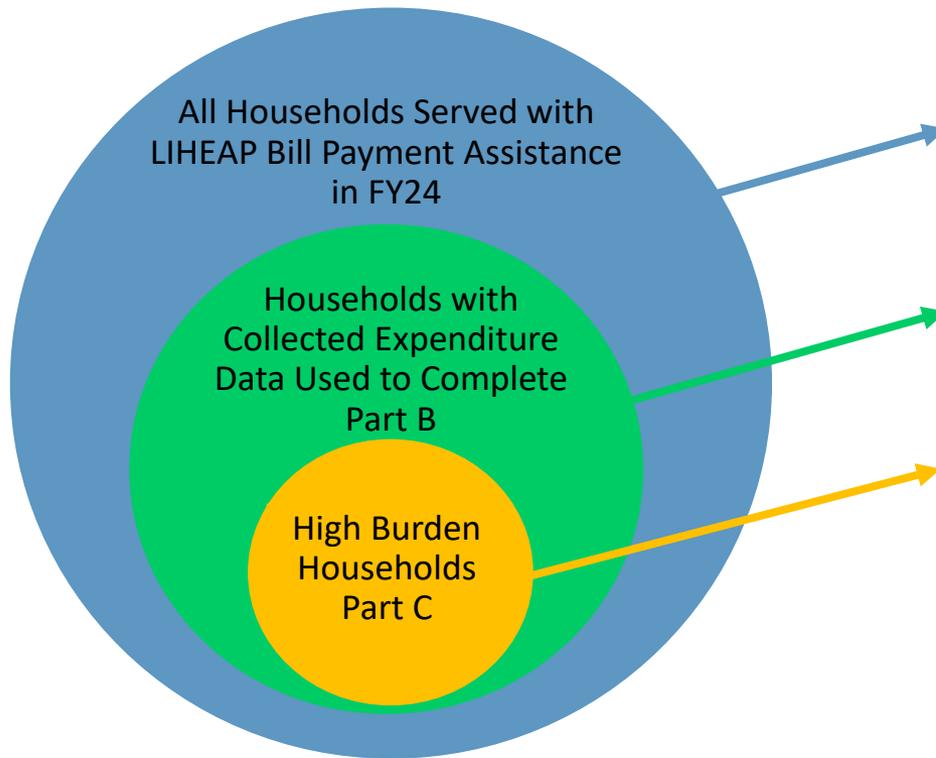
Presenter(s):
Dan Bausch

Section V (Energy Burden Targeting) Part B



Section V	Value
Part A – Unduplicated Number of LIHEAP Bill Payment Assistance Households	30,000

Section V (Energy Burden Targeting) Part C



Section V	Value
Part A – Unduplicated Number of LIHEAP Bill Payment Assistance Households	30,000
Part B – Unduplicated Number of LIHEAP Bill Payment Assistance Households (with collected expenditure data)	20,000

Section V (Energy Burden Targeting)

Data Items Needed for Parts B and C

- You need 4 or 5 pieces of information for each household you include in Part B (and for the top 25% in Part C):
 - Annual Main Heating Expenditures
 - Annual Electricity Expenditures (if electricity is not the main heating fuel)
 - Annual Household Income
 - Main Heating Fuel Type
 - Total LIHEAP Benefit Amounts Received for FY24
- Blue = From Vendors;
- Orange = From Program Data

Section V (Energy Burden Targeting)

Identifying the High Burden to Include in Part C

- Identify “high burden” households in the top quartile (top 25%) of households with the highest calculated energy burdens (regardless of main heating fuel type and not just those with the highest bills) from those reported in Part B.
- To identify High Burden households, follow these steps:
 1. For each household in Part B, calculate their total energy bill (the sum of their main heating bill and their electricity bill).
 2. Calculate the energy burden for each household (= total annual household energy bill / total annual household income).
 3. Assign a value of 100% burden to households with \$0 income or with a calculated energy burden above 100%.
 4. Sort the combined set of ALL households from highest to lowest energy burden.
 5. Draw the top 25% of households with the highest energy burden, **regardless of their main heating fuel type and not just those with the highest bills.**
 6. Produce the same statistics as you did for Part B but just for the 25% of high burden households drawn.

Module 2A – Key Step #4

Identifying the High Burden to Include in Part C

Household ID	Main Heating Fuel	Annual Income	Step 1: Annual Total Residential Energy Bill	Step 2: Energy Burden
Household 5	Electricity	\$0	\$1,000	100%
Household 2	Fuel Oil	\$10,000	\$3,000	30%
Household 1	Propane	\$16,000	\$4,000	25%
Household 8	Natural Gas	\$10,000	\$1,500	15%
Household 7	Fuel Oil	\$24,000	\$2,400	10%
Household 6	Electricity	\$10,000	\$800	8%
Household 3	Electricity	\$15,000	\$1,200	8%
Household 4	Natural Gas	\$30,000	\$1,800	6%

Step 5: Top 25% Selected



Step 3: Zero-Income Household was assigned 100% energy burden



Step 4: Households sorted by energy burden

Presenter(s):
Dan Bausch

Key Reporting
Steps for
Section VI
(Restoration of
Lost Service)



Section VI (Restoration of Service) *Overview*

- There are three sections to the report:
 - **Section V: LIHEAP Energy Burden Targeting Information**
 - **Section VI: LIHEAP Restorations of Lost Energy Service**
 - **Section VII: LIHEAP Preventions of the Loss of Energy Service**

Section VI (Restoration of Service)

Key Reporting Steps

- For Section VI, grant recipients need to report **occurrences** of LIHEAP assistance used to restore energy service to a household that lost it.
 - If a household ran out of fuel twice and LIHEAP provided fuel to them on each occasion, then this should be reported as 2 occurrences.
- These occurrences should be **broken down by the fuel type to which the benefit was applied**, i.e., not by the household's main heating fuel type.
- Follow these steps to complete this section:
 - Identify all the LIHEAP Benefits provided in FY24.
 - Identify the benefits in #1 that restored energy service that had been lost.

VI. RESTORATION OF HOME ENERGY SERVICE						
A. All Occurrences of LIHEAP Households that Had:	All Occurrences	Energy Source (where LIHEAP benefit was applied)				
		Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
1. Energy Service Restored After Disconnection	Auto-Calculated	0	0			
2. Fuel Delivered to Home that Ran Out of Fuel	Auto-Calculated			0	0	0
3. Repair/Replacement of Inoperable Home Energy Equipment	Auto-Calculated	0	0	0	0	0

Presenter(s):
Dan Bausch



Section VI (Restoration of Service)

Examples

- Disconnections where LIHEAP restored service.
- Households without any delivered fuel who received LIHEAP fuel payment or fuel delivery.
- Inoperable Equipment repaired or replaced with LIHEAP federal funds.

For more information, view the [Supplement on Determining Service Restoration](#).

Key Reporting
Steps for
Section VII
(Prevention of
Loss of Service)



Section VII (Prevention of Loss of Service)

Key Reporting Steps

- There are three sections to the report:
 - **Section V: LIHEAP Energy Burden Targeting Information**
 - **Section VI: LIHEAP Restorations of Lost Energy Service**
 - **Section VII: LIHEAP Preventions of the Loss of Energy Service**

Section VII (Prevention of Loss of Service)

Overview of Section VII (Prevention of Loss of Service)

- For Section VII, grant recipients need to report **occurrences** of LIHEAP assistance used to prevent the imminent loss of energy service.
 - If a household had an imminent disconnection in the winter and summer and LIHEAP prevented both from occurring, then this should be reported as 2 occurrences.
- These occurrences should be **broken down by the fuel type to which the benefit was applied**, i.e., not by the household's main heating fuel type.
- Follow these steps to complete this section:
 - 1) Identify all the LIHEAP Benefits provided in FY24.
 - 2) Identify the benefits in #1 that prevented the imminent loss of energy service for a household.

VII. PREVENTION OF LOSS OF HOME ENERGY SERVICE						
		Energy Source (where LIHEAP benefit was applied)				
A. All Occurrences of LIHEAP Households that Had:	All Occurrences	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
1. Past Due Notice or Utility Disconnect Notice	Auto-Calculated	0	0			
2. Imminent Risk of Running out of Fuel	Auto-Calculated			0	0	0
3. Repair/Replacement of Operable Equipment to Prevent Imminent Home Energy Loss	Auto-Calculated	0	0	0	0	0

Presenter(s):
Dan Bausch



Section VII (Prevention of Loss of Service)

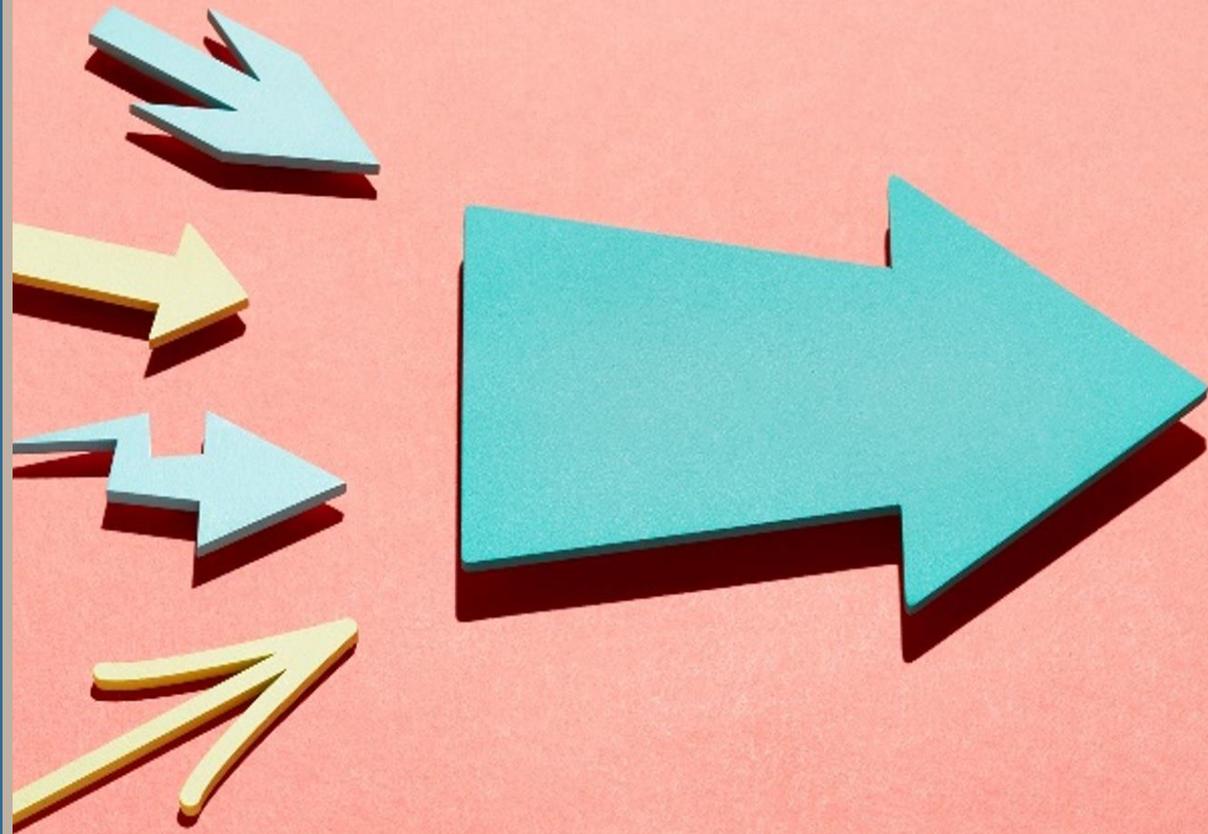
Examples

- Households with a disconnect notice who received a LIHEAP benefit applied to that account.
- Households low on delivered fuel who received LIHEAP fuel payment or fuel delivery.
- Operable, but failing equipment repaired or replaced with LIHEAP federal funds.

***NOTE: Each Grant Recipient determines what constitutes an “imminent” loss of service to characterize assistance as a prevention of loss.

For more information, view the [Supplement on Determining At-Risk Households](#).

Reporting
Guidance for
Module 2C
(Households
Served with
Supplemental
ARPA Funds)



Module 2C (ARPA)

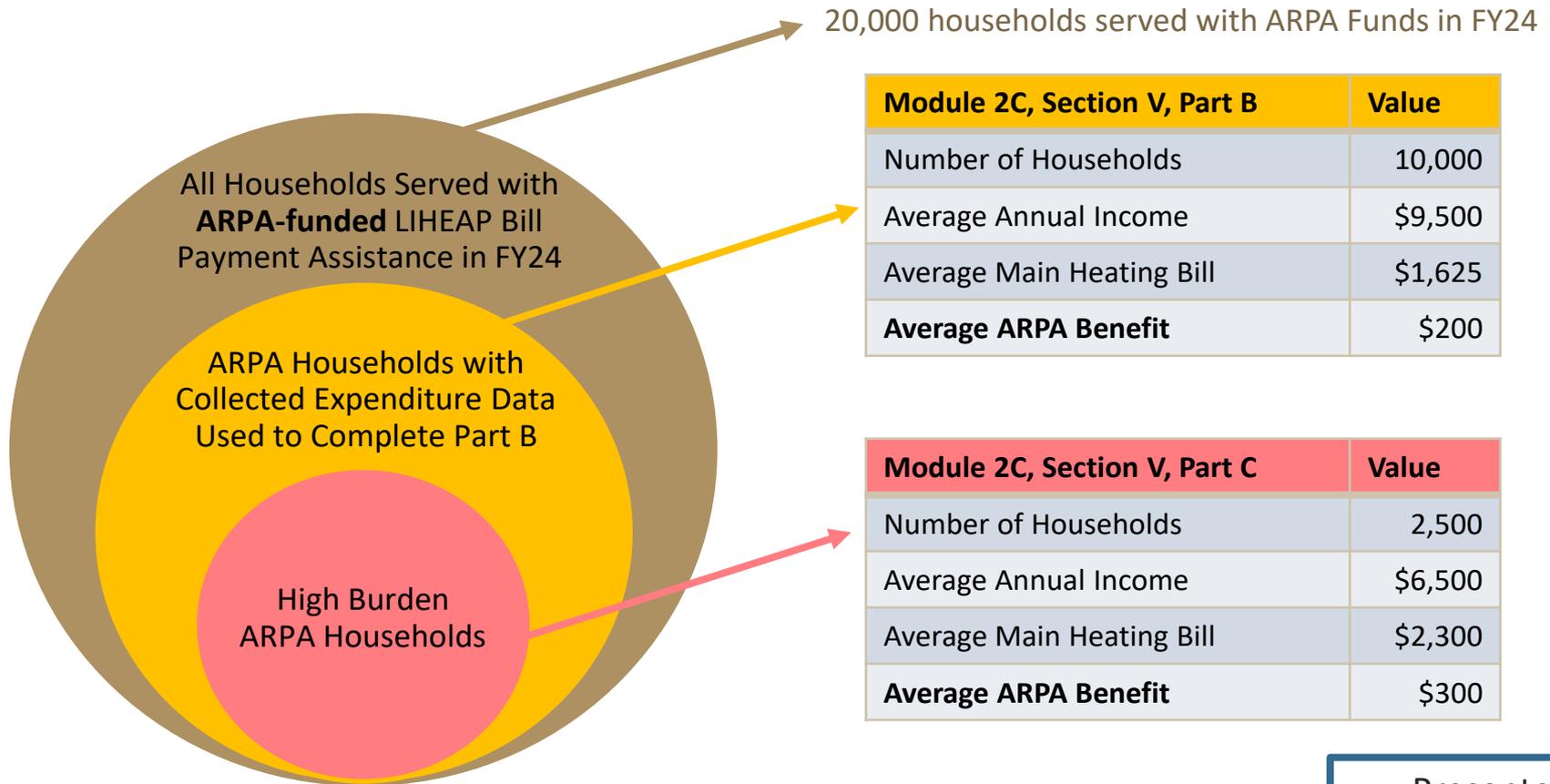
Overview

- Module 2C asks grant recipients to produce the same statistics as Module 2A, but only for **the subset of households that received assistance in FY24 with ARPA** (Module 2C).
- **This is only applicable if you had remaining ARPA funds you expended as benefits in FY24.**
- This means identifying/filtering to the ARPA households/benefits. *(This does not require any new or additional vendor requests.)*
- If your program provided LIHEAP assistance to 30,000 total households (as reported in Part A of Module 2A) Module 2C asks you to identify:
 - Which of the 30,000 households received assistance *fully or partially* using ARPA funds. You would report this in Part A of Module 2C.
- For Parts B & C of the Supplemental Funds Modules (i.e., households with complete bill data and high-burden households, respectively), grant recipients should do the following...

Presenter(s):
Dan Bausch

Module 2C

Overview of Section V (Energy Burden Data)



Presenter(s):
Dan Bausch

Module 2C

What is Needed for Section V (Energy Burden Data)

- You need one additional piece of information to fill out Module 2C – The ARPA benefit amount that a household received.
- All other information remains the same as in the main Module 2A.

Module 2C

What is Needed for Sections VI & VII (Restorations & Preventions)

- The Section VI (Restoration of Energy Service) and Section VII (Prevention of Loss of Energy Service) reporting rules for Module 2C are the same as they are for Module 2A.
- The only difference here is that, in Module 2C, you should only report on the number of occurrences of energy service restoration and prevention loss that were *fully or partially* funded by LIHEAP ARPA funds.

Cheat Sheet Table for Performance Measures

	Item	Module 2A (All Households)	Module 2C (ARPA)
Section V Energy Burden	Population to Use for Section V Line A	All Households who received LIHEAP bill payment assistance in FY24 [This should match your Household Report]	Subset who received ARPA assistance in FY24 (if any) [This should match your Household Report]
	Population to Use for Section V Parts B and C	Households with annual main heating and electricity energy expenditure data collected from vendors	Households with energy expenditure data who received ARPA assistance in FY24 (if any)
	Benefit Data to Use	Total amount in LIHEAP benefits each household received during FY24	ARPA benefit amount each household received during FY24
Section VI Restoration of Service	Population to Use	Count all occurrences for any households assisted in FY24	Count all occurrences where the benefit was partially or fully funded with ARPA
Section VII Prevention of Loss	Population to Use	Count all occurrences for any households assisted in FY24	Count all occurrences where the benefit was partially or fully funded with ARPA

Final Reminders



Final Reminders

Due Date and Submission Process

- **The report is due on January 31, 2025.** Grant recipients should be planning to complete by this date.
- **Report Availability** – OCS has released the report in the Online Data Collection System (OLDC).
- **Submission** – The report must be submitted in OLDC and must be validated and certified by the designated authorized official.
- **If you need technical assistance in completing the report, please contact APPRISE as soon as possible (do not wait until the report is due).**

Final Reminders

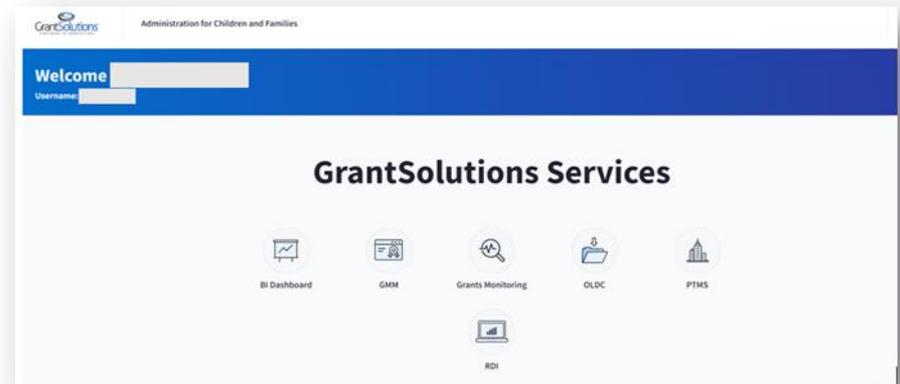
No Differences from Last Year

- **Good news:** There are no changes to the FY24 Performance Measures from last year's FY23 report.
- The form has the same layout, lines, and requirements as last year.
- There is one item to note:
 - **For most grant recipients, Module 2B (CARES) and Module 2C (ARPA) are NOT applicable since the supplemental CARES and ARPA funds were exhausted and not used to provide benefits during FY24.**
 - If you expended remaining supplemental LIHEAP ARPA or CARES Act funds to provide benefits to households in FY24, you should still complete the applicable submodule(s).

Final Reminders

OLDC Resources

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- OLDC is accessed through Grant Solutions.
- Log-in to Grant Solutions at <https://www.grantsolutions.gov/gs>
- Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
- If you need assistance, please contact the GrantSolutions Help Desk:
 - (866) 577-0771
 - help@grantsolutions.gov



Presenter(s):
Melissa Torgerson

Final Reminders

Submission Process

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- The individuals who have permission to certify and submit may vary based on how you initially set up your OLDC account, but the user with the role "**Grant Administrator**" may perform all actions by default.
- To submit the form, first enter and save your report. When ready, **validate** it. Once the form is valid and correct, **certify and submit**.



OLDC Home Form Selection **Report** Report Form Status

Program Name: Low Income Home Energy Assistance
Grantee Name: [REDACTED]
Report Name: Household Report - Long Form
Report Period: 10/01/2020 - 09/30/2021
Report Status: Initialized

Report Progress

Initialized Edit-Saved Validated Certified Submitted In Review C/O Approved

Save View/Add Attachments Validate Print

Presenter(s):
Melissa Torgerson

Final Reminders

OLDC Warning & Error Messages

- Several validation checks are programmed into OLDC, and a warning or error message will appear if a check fails.
 - Warning Messages indicate data that may be correct but require confirmation and additional explanation in the “Notes” section of the form.
 - Fatal Error Messages indicate inconsistent data that must be corrected before Grant Recipients are able to submit their Performance Measures in OLDC.
- **If either a warning or error message appears and you are unable to resolve it, contact APPRISE for assistance.**

Presenter(s):
Melissa Torgerson

Final Reminders

Updating & Revising the Report

- After you submit your report...
 - APPRISE will e-mail grant recipients to alert them to any issues or questions based on a review of the submitted report.
 - Grant recipients should provide a response and make any corrections to the report.
 - When the report is confirmed to be complete, your liaison will accept it in OLDC.
- If you later identify a correction or change is needed, you will need to submit a revision in OLDC.

Presenter(s):
Melissa Torgerson

Final Reminders

Performance Measures Resources

- **FY24 Performance Data Form Action Transmittal, Template, and Instructions:**

- <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-2025-02-liheap-performance-data-form-fiscal-year-fy-2024>

- **OCS LIHEAP Forms:**

- <https://www.acf.hhs.gov/ocs/form/liheap-forms-and-funding-applications>

- **Required Reports Support on the LIHEAP PMW:**

- <https://liheappm.acf.hhs.gov/required-reports/>

- **“Check Before You Submit” Document:**

- https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/LIHEAP-PDF-Section-V-Before-You-Submit-Document.pdf

- **Past Years’ Performance Measures Data:**

- <https://liheappm.acf.hhs.gov/datawarehouse>
- <https://secure.login.gov/>

Final Reminders

Upcoming Training Webinars

Completing the FY25 LIHEAP Quarterly Reports

- December 17th, 2:00pm ET – 3:00pm ET

Audience Poll Question #2

How helpful was this webinar in understanding what is needed to complete the *FY24 Performance Measures*?

Please select one:

- **Not at all helpful**
- **Not too helpful**
- **Somewhat helpful**
- **Very helpful**

GoToWebinar Question Box

Have a question?

- You are encouraged to ask questions as you have them by typing them into the GoToWebinar “Question” box.
- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.

The screenshot shows the GoToWebinar interface with two main sections: 'Audio' and 'Questions'. The 'Audio' section includes options for 'Computer audio' and 'Phone call', along with dialing information: 'Dial: +1 (562) 247-8422', 'Access Code: 978-261-249 #', and 'Audio PIN: 45 #'. The 'Questions' section has a text input field with the placeholder '[Enter a question for staff]' and a 'Send' button. A sidebar on the right contains icons for audio, chat, and help. Callouts provide instructions: 'Enter text here to ask a question.' points to the input field, 'Click this button to expand sidebar.' points to the sidebar expand button, and 'If the sidebar is minimized, it will look like this:' points to the sidebar area.

Presenter(s):
Melissa Torgerson

Final Reminders

Support Resources

- OCS Liaisons
 - <http://www.acf.hhs.gov/programs/ocs/resource/division-of-energy-assistance-federal-staff>
- LIHEAP Map State and Territory Contact Listing
 - <https://www.acf.hhs.gov/ocs/map/liheap-map-state-and-territory-contact-listing>
- APPRISE Team
 - Daniel Bausch, Daniel-Bausch@appraiseinc.org; 609-252-9050
 - Melissa Torgerson, melissa@verveassociates.net; 503-706-2647
 - Nicolas Mititelu, nicolas-mititelu@appraiseinc.org; 646-854-4982
 - Jeb Jacob, Jeb-Jacob@appraiseinc.org; 609-252-0005
 - Luke Gooding, Luke-Gooding@appraiseinc.org; 609-454-3777

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