

# Completing the *Federal Fiscal Year 2025 (FY2025) Grant Recipient Survey*

## *Module 1 of the FY25 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

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DECEMBER 18TH , 2025

**WELCOME:**

MARY WATTS (OCS)

**PRESENTERS:**

MELISSA TORGERSON (VERVE ASSOCIATES)

DAN BAUSCH (APPRISE)

# Webinar Overview

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- **Purpose of this Webinar**

- To review the key requirements for completing the federal Fiscal Year 2025 (FY25) Performance Data Form – Module 1 (*the Grant Recipient Survey*).
- To explain changes made to the report for FY25.
- To review the data that is needed to complete the report.
- To review the process for submitting and updating the report.

- **Audience for this Webinar**

- State grant recipients, including D.C., and program staff who work on Module 1.
- Fiscal staff that assist with LIHEAP obligation reporting for Module 1.
- IT or data contractors who assist with Module 1.

Presenter(s):  
Mary Watts

# Speakers

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- Today's webinar is being conducted by APPRISE, a non-profit research institute that is contracted with ACF to provide LIHEAP training and technical assistance.
- APPRISE works with LIHEAP grant recipients by assisting with reviewing LIHEAP federal reports and providing one-on-one technical assistance for reporting or performance management.

Daniel Bausch

Senior Project Director – APPRISE

Melissa Torgerson

Owner – Verve Associates LLC



Presenter(s):  
Mary Watts

# Webinar Overview

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- **Structure of the Webinar**
  - 60 minutes to review key information.
  - **Slides 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.

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Click this button to expand sidebar.

Presenter(s):  
Melissa Torgerson

# Presentation Outline

Overview of the Grant Recipient Survey	<b>Slide 9</b>
What's New for FY25 Reporting	<b>Slide 17</b>
Reporting Guidance for Sections III (Sources)	<b>Slide 22</b>
Reporting Guidance for Sections IV (Uses)	<b>Slide 25</b>
Key Reporting Points: Ensuring Report Consistency	<b>Slide 34</b>
Steps to Take Now to Submit the Report	<b>Slide 41</b>
Reporting Examples	<b>Slide 45</b>
Final Reminders	<b>Slide 48</b>
Extra Slides for using OLDC	<b>Slide 60</b>

# LIHEAP Federal Reports

## *Reporting Schedule*

Report:	Due Date:	Focus of Report:
<i>Model Plan for FY26</i>	<i>9/02/2025</i>	<i>Application and plans for FY26</i>
<i>Quarterly Report (Quarter 4 of FY25)</i>	<i>10/31/2025</i>	<i>Summary of activity in the last quarter</i>
<i>Household Report (FY25)</i>	<i>10/15/2025 (Estimated)</i>	<i>Households served in FY25</i>
Household Report (FY25)	<b>12/31/2025 (Final)</b>	Households served FY25
Carryover & Reallotment Report (FY25)	<b>12/31/2025</b>	Unobligated FY25 funds being carried over or returned
SF-425 (FY25 funding awards)	<b>12/31/2025</b>	Federal financial reporting
Performance Data Form (FY25)	<b>1/31/2026</b>	<u>Module 1</u> = Obligation of funds and average benefits <u>Module 2</u> = performance measures on burden, restoration of service, prevention of loss

# Audience Poll Question #1

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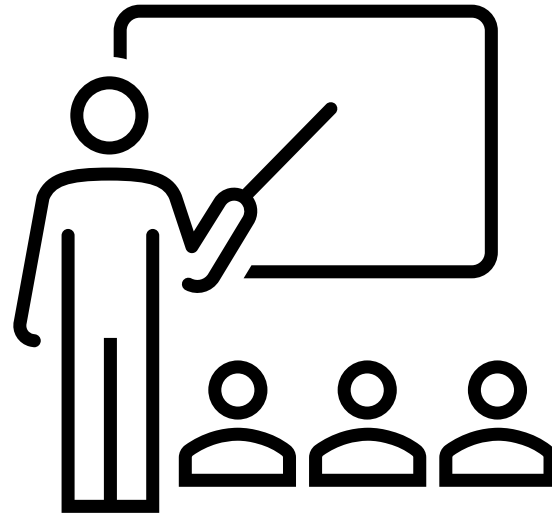
## How prepared do you think your team is for completing the FY25 Grant Recipient Survey?

*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 Report



# Overview of the Report

## *Placement in The Performance Data Form*

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- The Grant Recipient Survey is not a stand-alone report – it is included in the *LIHEAP Performance Data Form (LPDF)*.
- The LPDF one report that consists of multiple Modules:
  - **Module 1 (Grant Recipient 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.

SECTION IV. ESTIMATED USES OF LIHEAP FUNDS																						
<b>A. Type of LIHEAP Assistance--All Funds Except IJIA (Items 1-4)</b>		<b>All of FFY 2024 (10/1/2023 to 9/30/2024)</b> Amount Rounded to the Nearest Dollar																				
		<table border="1"> <thead> <tr> <th>Total Funds/Awards</th> <th>Average Household Benefit</th> </tr> </thead> <tbody> <tr> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>\$0</td> <td>\$0</td> </tr> </tbody> </table>	Total Funds/Awards	Average Household Benefit	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Funds/Awards	Average Household Benefit																					
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1. Heating Assistance Benefits																						
2. Cooling Assistance Benefits																						
3. Crisis Benefits by Type																						
a. Winter Crisis Benefits																						
b. Summer Crisis Benefits																						
c. Year-round Crisis Benefits																						
d. Other Crisis Benefits																						
(1) Specify																						
(2) Specify																						
(3) Specify																						
4. Weatherization Assistance Benefits																						
<b>B. Other Permitted Uses of LIHEAP Funds (Items 6-13)</b>																						
6. Nominal Payments																						
7. FFY Unobligated Funds (excluding funds in Items 8 & 9) Carried Over to next FFY																						
8. FFY Allowable Unobligated Emergency Contingency Funds, not Subject to 10% Carryover Limit, Obligated in next FFY																						
9. FFY Leveraging Incentive Award Obligated in next FFY																						
10. FFY LIHEAP Block Grant Allotment Used to Identify, Develop & Demonstrate Leveraging Incentive Activities																						
11. Assurance 16 Activities																						
12. FFY Residential Energy Assistance Challenge (REACH) Program																						
13. Administration/Planning Costs																						
<b>C. Estimated Total Uses of Funds</b>																						
14. Sum of Items 1-4 and 6-13. This should equal the sum in Section III, Column C, Item 10.																						
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 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
		Auto-Calculated	0	0	0	0	0
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households							
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	
E. Burden Reduction Targeting Index for High Burden Households:		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			
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

### 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

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: Month Day Year
3A. Signature of Authorized Certifying Official: (click to sign)							

## LIHEAP Performance Measures

### Module 3. (Optional LIHEAP Performance Measures)

#### V. ENERGY BURDEN TARGETING (OPTIONAL MEASURES)

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

#### VI. RESTORATION OF HOME ENERGY SERVICE (OPTIONAL MEASURES)

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

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

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

**NOTES:** Include any notes.

# Overview of the Grant Recipient Survey

## *Background*

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- The Grant Recipient Survey...
  - Was previously called the Grantee Survey
  - has been collected by HHS for decades
  - is focused on funds available in the prior federal FY and how they were used.
  - is not an audit report.
  - provides a snapshot of how LIHEAP funds are obligated and the average benefits households receive

# Overview of the Grant Recipient Survey

## *Background*

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- There are two sections requiring data: Section III (Sources) and Section IV (Uses).
- There are two main types of data that need to be reported in the Grant Recipient Survey:
  1. The amount of funds obligated (for each funding source and type of assistance)
  2. The average benefit amounts provided to households (for each funding source and type of assistance)
- ***No longer being collected: the maximum annual income limits for a 4-person household. This column can be left blank.***

Presenter(s):  
Dan Bausch

# Overview of the Grant Recipient Survey

## *How the Data are Used*

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Data from the Grant Recipient Survey are...

- Published in the annual LIHEAP Report to Congress
- Published in the LIHEAP Data Warehouse.
- Used to respond to Congressional and White House inquiries.
- Useful for you to compare your program to other states.

**Program Highlights:** Preliminary FY24 data indicate that with the LIHEAP Program Funds:

- 50 state grant recipients provided an estimated **\$1.911 billion for heating assistance.**
- 22 state grant recipients provided an estimated **\$442 million for cooling assistance.**
- 48 state grant recipients provided an estimated **\$890 million for crisis assistance.**



# What's New for FY25 Reporting



# FY25 Reporting

## *Report Announcements and Due Date*

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- **Report Announcement & Instructions** – OCS is expecting to issue a communication soon about the FY25 report.
- **Due Date** – Final data is due January 31, 2026.
- **Report Availability** – The report will be available in the Online Data Collection System (OLDC) soon.
- **Submission** – The report must be submitted in OLDC and must be validated and certified by the designated authorized official.

# FY25 Reporting

## *Changes for FY25 Report*

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- The Performance Data Form was recently renewed by the Office of Management and Budget (OMB). The renewal included approved changes to Module 1. [Note: no changes were made to Module 2.]
- There are three main changes to Module 1:
  1. Language - The module was renamed the Grant Recipient Survey.
  2. Section IV - The maximum annual income cut-off for a four-person household is no longer being collected in the report. This column can be left blank.
  3. Section IV - If you obligated FY25 funds for non-administrative IT system enhancements, this should be reported in the Remarks section.

Presenter(s):  
Dan Bausch

# FY25 Reporting

## *Reporting Categories*

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The report asks you to separately report for two funding categories.

**1. FY25 “non-supplemental” funds** – Grant Number ending in “LIEA”

**2. Infrastructure Act Funds** – Grant Number ending in “LIEI”

Example:

You see in your financial reports that you obligated \$500,000 to Heating Assistance in FY25.

For the Grant Recipient Survey, you need report how much you obligated from 1) non-supplemental funds, and 2) Infrastructure Act funds. For example:

- Heating assistance - - non-supplemental funds = \$450,000
- Heating assistance - - IIA funds = \$50,000

Presenter(s):  
Dan Bausch

# FY25 Reporting

## *Report Preparations and Resources*

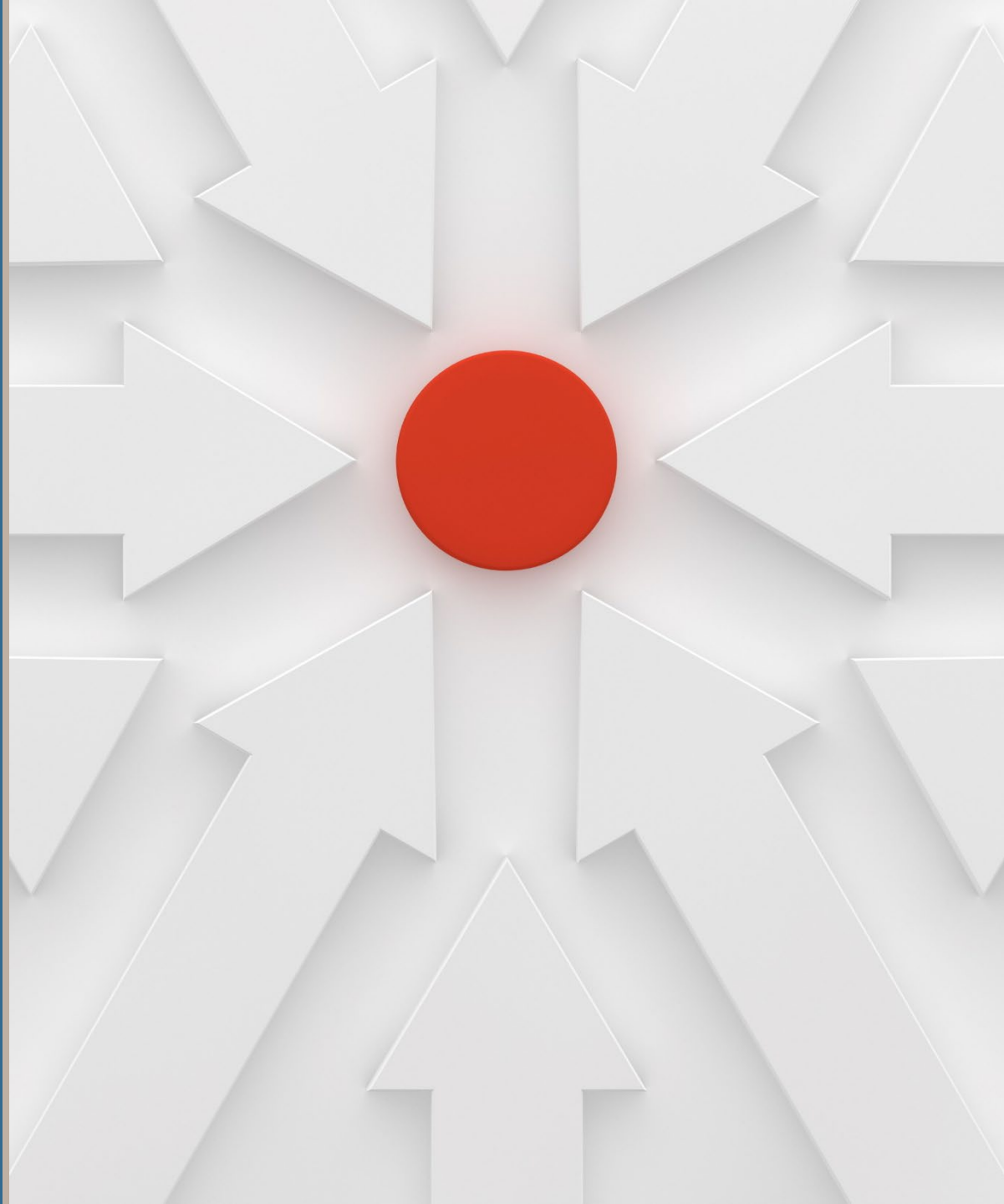
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Because the due date is January 31, it is important to plan your schedule and resources accordingly to submit the report by this due date.

- ***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.
- ***Prior Instructions from FY24*** – These remain relevant except for the changes mentioned earlier.
- ***Helpful Guidance on Obligations, Expenditures, and Refunds*** – Included in the handouts is an [Information Memorandum](#) from OCS from Aug. 13, 2024.

Presenter(s):  
Dan Bausch

# Key Reporting Points for Section III (Sources)



# Key Points for Reporting

## #1 – Check Pre-populated Amounts

• **Section III – Estimated Sources of LIHEAP Funds:** is intended for reporting all federal LIHEAP funds available for obligation during FY25.

- Funds awarded by HHS in FY25.
- Funds that a grant recipient was awarded by HHS in FY24, but optionally carried over from FY24 to FY25.

**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 BJA 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 (PEACH) Program	\$0
7a. Previous FFY PEACH 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
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**C. All Supplemental Funds (Items 11-13)**

11. Previous unobligated CAPES 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
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**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
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Presenter(s):  
Melissa Torgerson

# Key Points for Reporting

## #1 – Check Pre-populated Amounts

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- To assist you, HHS is pre-populating this section with values from their records. **It is important to check that pre-populated values are correct.**
- The pre-populated values include:
  - The award amounts
  - Funds that were carried into the fiscal year from the prior year (*or funds not obligated in the prior year that were held to be available for obligation in the subsequent fiscal year*)
- The Carryover amounts can be edited if needed to reflect updated estimates since you completed the prior year reports.
- If there is an issue with the pre-populated values that you cannot correct, please contact your Program Specialist.

Presenter(s):  
Melissa Torgerson



# Key Reporting Points for Section IV (Uses)



# Key Points for Reporting

## #1 – Main Fiscal Data Needed is Obligation Amounts

- Section IV – Estimated Use of LIHEAP Funds
- The main fiscal data you report is the dollar amount obligated during FY25.
- This is reported in the first column.



		Amount Rounded to the Nearest Dollar	
		Total Funds/Awards	Average Household Benefit
1. Heating Assistance Benefits--non-supplemental funds		\$0	\$0
2. Cooling Assistance Benefits--non-supplemental funds		\$0	\$0
3. Crisis Benefits by Type--non-supplemental funds			
a. Winter Crisis Benefits--non-supplemental funds		\$0	\$0
b. Summer Crisis Benefits--non-supplemental funds		\$0	\$0
c. Year-round Crisis Benefits--non-supplemental funds		\$0	\$0
d. Other Crisis Benefits--non-supplemental funds		\$0	
(1) Specify--non-supplemental funds		\$0	\$0
(2) Specify--non-supplemental funds		\$0	\$0
(3) Specify--non-supplemental funds		\$0	\$0
4. Weatherization Assistance Benefits--non-supplemental funds		\$0	

Presenter(s):  
Melissa Torgerson

# Key Points for Reporting

## *#1 – Main Fiscal Data Needed is Obligation Amounts*

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- The LIHEAP statute provides grant recipients with flexibility in defining what constitutes the obligation of funds. As a result, the definition for "obligation" varies across grant recipients.
- **Obligations are not always the same as expenditures.**
  - Expenditures generally include benefits that are issued/paid.
  - In some cases, obligated funds are not actually expended until after the end of the FY. For example, a grant recipient may obligate funds for Heating Assistance during the FY, but a portion of those funds may not be expended as benefits issued to clients until subsequent FY.
- Examples of Obligations (as defined by some grant recipients):
  - Approval letters issued to clients
  - Credit lines established with vendors
  - Purchase Orders
  - Contracts to Perform Services

Presenter(s):  
Melissa Torgerson

# Key Points for Reporting

## #2 – Program Data Needed is the Average Benefit Amounts

- The main program data you report is the average dollar benefit amounts recipients received during FY25.
- This is reported in the second column.



		Amount Rounded to the Nearest Dollar	
		Total Funds/Awards	Average Household Benefit
1. Heating Assistance Benefits--non-supplemental funds		\$0	\$0
2. Cooling Assistance Benefits--non-supplemental funds		\$0	\$0
3. Crisis Benefits by Type--non-supplemental funds			
a. Winter Crisis Benefits--non-supplemental funds		\$0	\$0
b. Summer Crisis Benefits--non-supplemental funds		\$0	\$0
c. Year-round Crisis Benefits--non-supplemental funds		\$0	\$0
d. Other Crisis Benefits--non-supplemental funds		\$0	
(1) Specify--non-supplemental funds		\$0	\$0
(2) Specify--non-supplemental funds		\$0	\$0
(3) Specify--non-supplemental funds		\$0	\$0
4. Weatherization Assistance Benefits--non-supplemental funds		\$0	

# Key Points for Reporting

## #2 – Program Data Needed is the Average Benefit Amounts


- **Calculating Average Benefits:**

- To report the average amounts, you should use your program data to identify the benefit amounts each household received during FY25 and to calculate the mean value.

- Example of Calculation:

Household	Benefit Amount
Household A	\$350
Household B	\$100
Household C	\$500
<b>Average Amount</b>	<b>\$317</b>

} add up benefit amounts and divide by the total number of households (3)



- If you cannot calculate this, you need to provide an estimate based on funds used and households served, and you need to indicate in the report that average benefits are not directly calculated.

Presenter(s):  
Melissa Torgerson

# Key Points for Reporting

## #3 – Reporting Carryover Funds

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- Carryover Funds = LIHEAP funds that a grant recipient did not obligate during the same FY they were awarded because the grant recipient elected to “carry over” or hold available those funds for obligation in the subsequent fiscal year.
- In the Grant Recipient Survey, you need to report multiple carryover values:
  - *In Section III (Sources)*: Funds carried into FY25 and available for obligation.
  - *In Section IV (Uses)*: Funds you did not obligate during FY25 and carried into FY26.
- For the Grant Recipient Survey, the amounts you report as being carried over to FY26 should match the carryover amounts in your final FY25 Carryover and Reallotment Report (due December 31).
- If you need assistance in submitting a revision to your FY25 Carryover & Reallotment report, please contact APPRISE.

# Key Points for Reporting

## #3 – Reporting Carryover Funds

Funding Type:	Carryover Rules:	Sources:	Uses:
Regular “non-supplemental” funds	Up to 10% of funds awarded in a FY can be carried over to the next FY.	<p>FY25 awards from HHS are prepopulated.</p> <p>Report any funds you were awarded in FY24 and elected to carryover to FY25.</p>	Report how you obligated available funds during FY25, or if you carried over funds to FY26.
Infrastructure (IIJA) funds		<p>FY25 awards from HHS are prepopulated.</p> <p>Report any funds you were awarded in FY24 and elected to carryover to FY25.</p>	Report how you obligated available funds during FY25, or if you carried over funds to FY26.

# Key Points for Reporting

## *#4 – Include Notes to Explain Reporting*

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- The Grant Recipient Survey includes a **Notes** section.
- Notes allow for an accurate understanding of the reported data, and OCS uses information from these notes in the Report to Congress.
- Notes are reviewed and provide useful context. We encourage you to leave notes to explain information that is out of the ordinary or to provide context and clarification.
- Examples of when to add a note:
  - If a large amount of funds were obligated to a category, but few or no households were served with that assistance during FY25 (indicated in your FY25 Household Report) because funds were not expended until later.
  - If your carryover amounts do not match your FY25 Carryover and Reallotment Report.

Presenter(s):  
Melissa Torgerson



# Key Points for Reporting

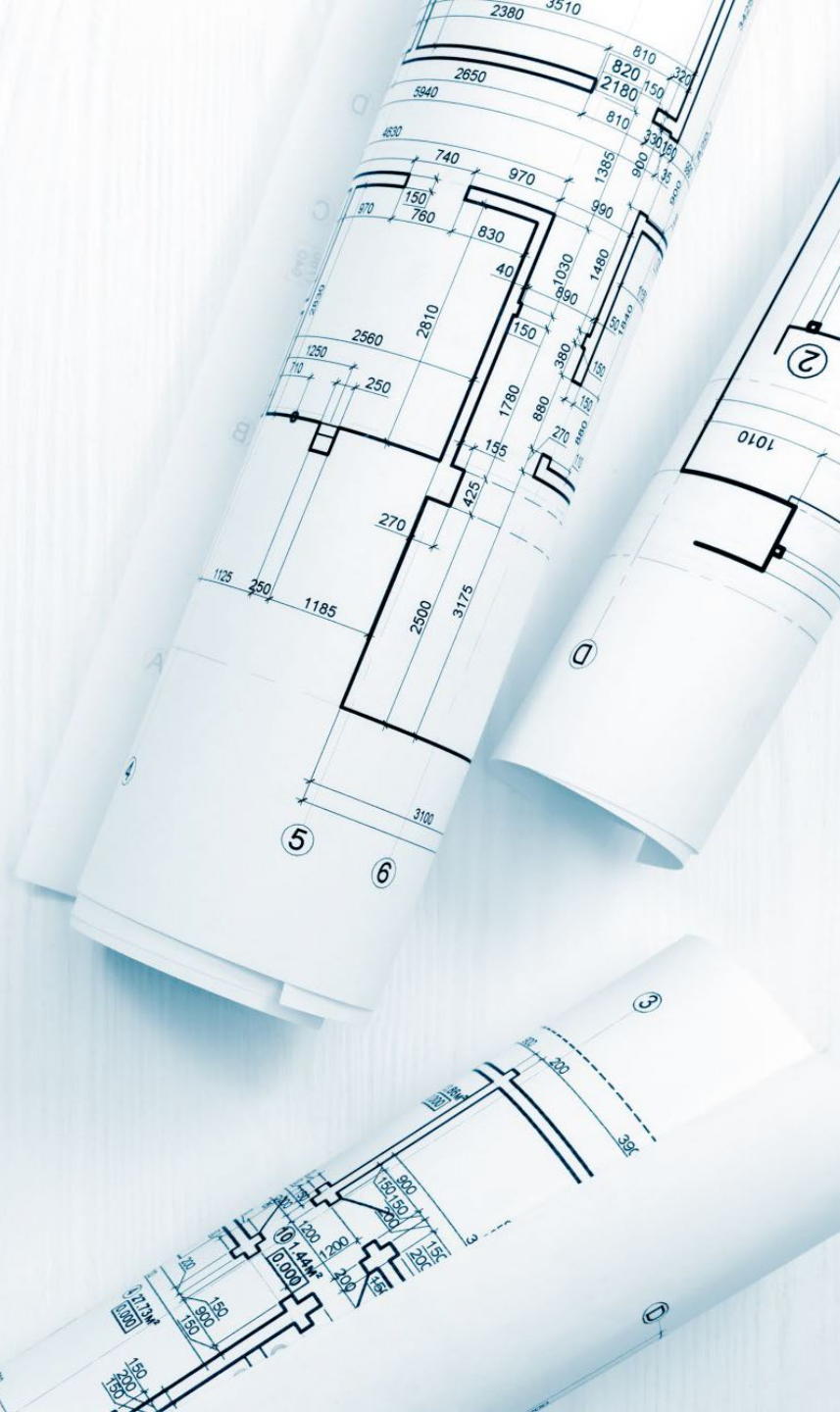
## #5 – Answering Questions

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- Each funding section contains two questions which you are required to answer:
  1. Are there any funds that were obligated in the current FY, but will be used to serve households in the subsequent FY?
  2. Are average household benefits estimated due to unique program operation, rather than directly calculated?

<b>C. Estimated Total Uses of Funds--non-supplemental funds</b>	
Q1. Obligated funding for a given type of assistance in current FFY, but will serve households in the subsequent FFY--regular funds	-Select-
Q2. Average Household Benefits are estimated due to unique program operation, rather than directly calculated--regular funds	-Select-

# Key Reporting Points: Ensuring Report Consistency



# Key Points for Reporting

## *#1 – Consistency Between Sources and Uses*

---

- Your Grant Recipient Survey should reflect how all the funds you received in FY25 were obligated or not (in Section IV, Uses of Funds).
- This means, for each funding type, the total funding amounts in Section III (Sources of Funds) should match the total amounts in Section IV (Uses of Funds).

# Key Points for Reporting

## #1 – Consistency Between Sources and Uses

---

- Example

- You were awarded \$50 million regular LIHEAP block grant for FY25.
- You also had \$5 million in FY24 regular block grant funds you carried over and obligated during FY25.
- In Section IV, you report on how those \$55 million were obligated.

Section III line	Line Number	Amount
Block Grant Allotment	Line 1	\$50 million
Funds Carried Over from Previous FY	Line 5	\$5 million
<b>Total Regular Funds Available:</b>	<b>Line 10</b>	<b>\$55 million</b>

# Key Points for Reporting

## #1 – Consistency Between Sources and Uses

- Example

- In Section IV, you would report on how the \$55 million in regular funds were obligated during FY25.
- The Section IV total amount for regular funds should add up to \$55 million.

Section IV Line	Line Number	Amount
Heating Assistance – non-supplemental funds	Line 1	\$20 million
Cooling Assistance – non-supplemental funds	Line 2	\$10 million
Year-Round Crisis – non-supplemental funds	Line 3c	\$5 million
Weatherization Assistance – non-supplemental funds	Line 4	\$15 million
Administration/Planning Costs – non-supplemental	Line 13	\$5 million
<b>Total Regular Fund Uses</b>	<b>Line 14</b>	<b>\$55 million</b>

# Key Points for Reporting

## #2 – Consistency with Household Report

---

- Data reported in Section IV “Uses of LIHEAP funds” should generally be consistent with the types of assistance reported in your Household Reports.
- Due to the supplemental funds and rules for obligations versus expenditures, you may have some assistance types that are reported in one report but not the other. Notes help clarify and explain this.
- For each assistance you offered in FY25, you should be able to report the following for that type of assistance:
  - Total Funds/Awards Funds
  - Average Household Benefit
- ***Please add a note if...***
  - If you obligated \$0 for a type of assistance reported in your Household Report.
  - If you obligated funds for assistance and reported zero assisted households for that type of assistance in your Household Report.

# Key Points for Reporting

## #3 – Consistency with the Carryover and Reallotment Report

---

- The Carryover amounts of awarded funds reported in Section IV should match the unobligated balances reported in the FY25 Carryover and Reallotment Report:
  - Line 1.3 of the Carryover and Reallotment Report should match the non-supplemental carryover amount in Section IV.
  - Line 1.4 of the Carryover and Reallotment Report should match the Infrastructure Act carryover amount in Section IV.
- ***Please add a note if...***
  - If you expect to return funds to the federal government.

# Key Points for Reporting

## *Summary of Reporting*

Reporting Item	Reporting funds in Section III (Sources)	Reporting Total Obligations in Section IV (Uses – first column)	Reporting Average Benefits in Section IV (Uses – second column)
Data Type Needed	Fiscal Data	Fiscal Data	Program Data
Guidance	<p>Include all funds awarded by OCS in FY25, and funds optionally carried into FY25 for obligation during FY25.</p> <p>This is all federal LIHEAP funds available for obligation during FY25.</p>	<p>Report on how the funds available for obligation during FY25 were <b>obligated</b> in FY25 (or carried over to FY26) to different assistance types and components.</p> <p>This is how all federal LIHEAP funds available for obligation during FY25 were obligated to different categories of use.</p>	<p>Report the mean (average) benefit amounts households received during FY25.</p> <p>This should be calculated only using benefits provided to households during FY25</p>

Presenter(s):  
Melissa Torgerson



# Steps to Take Now to Submit the Report



# Steps Now to Prepare to Submit the Report by January

## *#1: Coordinating with Fiscal and Program Staff*

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- To complete the report, you will need fiscal and program information.
- Fiscal staff may be less familiar with LIHEAP and need to understand the report requirements and the focus on obligation values.

### **Example Schedule:**

Task:	Date:
Meet with fiscal staff to review report	November 25
Provide instructions for program staff for obtaining average benefit data	December 2
Review provided information and send questions	January 4
Enter report in OLDC and validate/Review warnings	January 25
Add notes as needed and submit in OLDC	January 31

# Steps Now to Prepare to Submit the Report by January

## *#2: Confirming Access to OLDC*

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- The OLDC system requires credentials to access and submit reports.
- We recommend you confirm your access to OLDC and that you locate and initiate the report before the due date. Contact the GrantSolutions Help Desk to resolve the issue.
- The report will be found in this location when it is available:
  - Program Name: Low Income Home Energy Assistance
  - Grantee Name: *State Abbreviation [Code] (Reporting Years) Name of Department – No. 01*
  - Report Name: Performance Data Form (LIHEAP PDF)
  - Reporting Period: 10/01/2024 – 09/30/2025

# Steps Now to Prepare to Submit the Report by January

## *#3: Review APPRISE Emails from FY24 Review*

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- APPRISE reviews the reports each year and sends questions about any items identified as potential reporting issues or items for clarification.
- We recommend you review any emails regarding the FY24 Grant Recipient Survey to make sure the items are addressed in the FY25 report submission.
- APPRISE can assist you with addressing issues or confirming issues found in FY25.

# Reporting Examples



# Reporting Examples

## Grant Recipient X – Prioritized Regular Funds, Saved Infrastructure Act Funds

Funds Awarded in FY25:

### Reporting in the FY25 Grant Recipient Survey

#### *Section III – Sources*

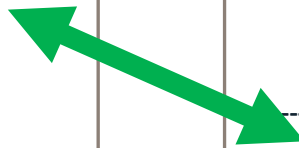
- Regular funds:
- Infrastructure funds:

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• **TOTAL:**

#### *Section IV – Uses*

- Regular Funds
- Infrastructure Act Funds

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• **TOTAL:**



Presenter(s):  
Dan Bausch

# Reporting Examples

## *Grant Recipient Y – Used Some Regular & Infrastructure Act Funds*

Funds Awarded in FY25:

### Reporting in the FY25 Grant Recipient Survey

#### *Section III – Sources*

- Regular funds:
- Infrastructure funds:
- 
- **TOTAL:**

#### *Section IV – Uses*

- Regular Funds
- Infrastructure Act Funds
- 
- **TOTAL:**



Presenter(s):  
Dan Bausch

# Final Reminders





# Final Reminders

## *Due Date and Submission Process*

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- **The report is due on January 31, 2026.** Grant recipients should be planning to complete by this date.
- The FY25 Performance Data Form must be submitted in OLDC.
- The Grant Recipient Survey is not an audit report. The report asks you to use the current information available to report information on FY25 activity.
- 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

## *Differences from Last Year*

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- There are three main changes to Module 1:
  1. Language - The module was renamed the Grant Recipient Survey.
  2. Section IV - The maximum annual income cut-off for a four-person household is no longer being collected in the report. This column can be left blank.
  3. Section IV - If you obligated FY25 funds for non-administrative IT system enhancements, this should be reported in the Remarks section.
- As with last year, you will report on two categories of funds:
  - I. “Regular” (non-supplemental) funds
  - II. Infrastructure Investment and Jobs Act (IIJA) Funds
- We encourage you to review APPRISE emails regarding your prior FY24 report.

# Final Reminders

## *OLDC Resources*

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- 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 GrantSolutions Help Desk:
  - (866) 577-0771
  - [help@grantsolutions.gov](mailto:help@grantsolutions.gov)

Presenter(s):  
Melissa Torgerson

# Final Reminders

## *OLDC Warning & Error Messages*

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- 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 Household Report in OLDC.
- If either a warning or error message appears and you are unable to resolve it, contact APPRISE for assistance.
- Some outdated validation checks have been triggered in the past, and if an incorrect check appears for you, please notify APPRISE so that it may be resolved.

Presenter(s):  
Melissa Torgerson

# Final Reminders

## *Updating & Revising the Report*

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- After you submit your report...
  - APPRISE will email 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

## *Resources*

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- **Prior Year FY24 Performance Data Form Report AT & Instructions**
  - <https://acf.gov/ocs/policy-guidance/liheap-2025-02-liheap-performance-data-form-fiscal-year-fy-2024>
- **“Check Before You Submit” Document:**
  - [https://liheappm.acf.gov/sites/default/files/private/grantee\\_tools/best\\_practices/PDF-Module-1-\(Grantee-Survey\)-Check-Before-You-Submit-Document.pdf](https://liheappm.acf.gov/sites/default/files/private/grantee_tools/best_practices/PDF-Module-1-(Grantee-Survey)-Check-Before-You-Submit-Document.pdf)
- **LIHEAP Financial Reporting Strategies and the Payment Management System (PMS)**
  - **November 14, 2024:**
    - <https://youtu.be/h7oRfsPCLZk>

# Final Reminders

## *Performance Measures (Module 2) Reminder*

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- As a reminder, each state (including D.C.) needs to collect annual energy expenditure data from a sample of top vendors.
- To complete the energy burden targeting sections of this Module (Section V), grant recipients need to:
  1. Identify the top energy vendors for each main heating fuel type.
  2. Request data from the sample of vendors (e.g., procuring the vendor data)
  3. Review the returned vendor data
  4. Combine their LIHEAP client/program data with the vendor data and generate statistics (e.g., average annual heating bills, average annual electricity bills, average annual income, etc.)
- Please contact APPRISE if you require any assistance with this.

# Final Reminders

## *Upcoming Training Webinars*

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- **Completing the Performance Data Form, Module 2**
  - *January 6<sup>th</sup> , 2:00pm ET – 3:00pm ET*
  - *For state grant recipients, including D.C.*



# Final Reminders

## *Support Resources*

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- LIHEAP Map State and Territory Contact Listing
  - <https://www.acf.hhs.gov/ocs/map/liheap-map-state-and-territory-contact-listing>
- LIHEAP Map Tribal Contact Listing
  - <https://www.acf.hhs.gov/ocs/map/liheap-map-tribal-contact-listing>
- APPRISE Team
  - Daniel Bausch, [Daniel-Bausch@appraiseinc.org](mailto:Daniel-Bausch@appraiseinc.org); 609-252-9050
  - Melissa Torgerson, [melissa@verveassociates.net](mailto:melissa@verveassociates.net); 503-706-2647
  - Nicolas Mititelu, [nicolas-mititelu@appraiseinc.org](mailto:nicolas-mititelu@appraiseinc.org); 646-854-4982
  - Luke Gooding, [Luke-Gooding@appraiseinc.org](mailto:Luke-Gooding@appraiseinc.org); 609-454-3777
  - Jason Casado, [Jason-Casado@appraiseinc.org](mailto:Jason-Casado@appraiseinc.org); 609-252-9052

Presenter(s):  
Melissa Torgerson

## Audience Poll Question #2

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**How helpful was this webinar in understanding what is needed to complete the FY25 Grant Recipient Survey?**

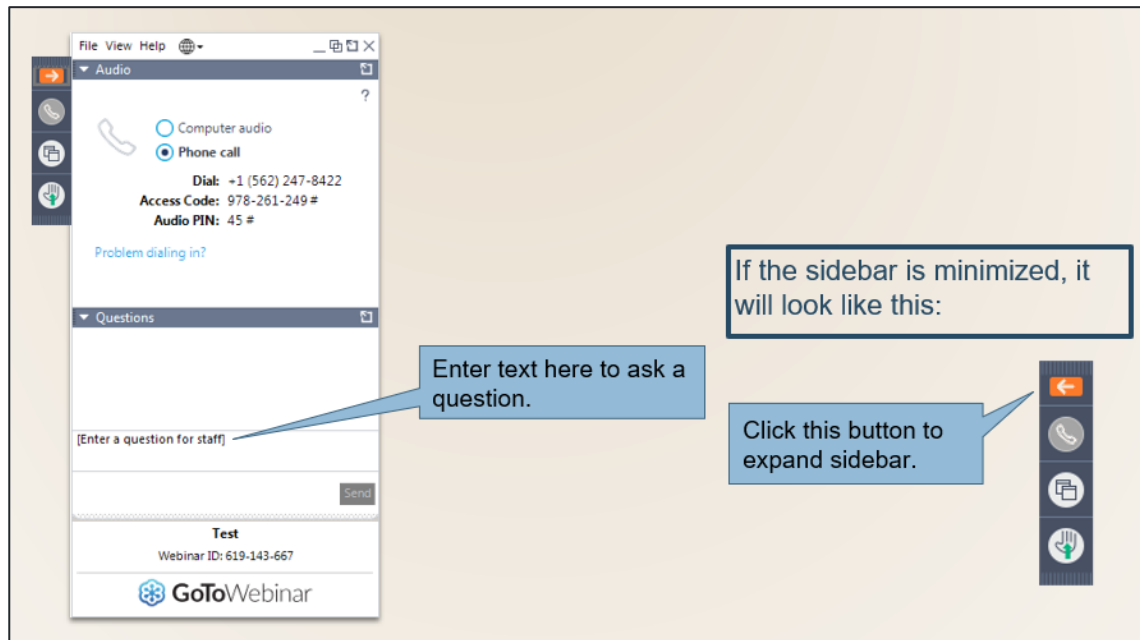
*Please select one:*

- **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.



Presenter(s):  
Melissa Torgerson




# Extra Slides on Using OLDC


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# Submitting the Report

## *Accessing OLDC*

- OLDC is accessed through Grant Solutions, accessed at <https://www.grantsolutions.gov/gs>
  - Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
  - Click “Report Form Entry”
  - Select, “Low Income Home Energy Assistance” as the program, your state/agency as the grant recipient, and “Household Report” as the report.
  - Click the plus sign icon under the **10/01/2024 - 09/30/2025** to access the report.

Reporting Period ▾	Type ▾	Report Status ▾	Actions ▾
10/01/2024 - 09/30/2025	Annual		+ 
10/01/2023 - 09/30/2024	Annual		+ 
10/01/2022 - 09/30/2023	Annual		+ 











# Submitting Your Final Report

- If the preliminary form status is “Submitted” (not yet accepted by your program specialist):
  - In the Report Status page screen, click “Unsubmit Report”.

Report Form Status				
Report Submissions:	Report Status:	Status Date:	Report Action:	Print:
<a href="#">View Original</a>	Submitted	08/26/2025	<a href="#">Unsubmit Report</a> <a href="#">Review</a>	HTML Print Form <a href="#">Go</a>

- Then you will have to click “View Original” to go into your report and click “Uncertify”. At that point, the fields in your report will become editable again. The system will not keep a copy of your old report.
- If the preliminary form status is “Submission Accepted by CO” (i.e. accepted by your program specialist):
  - In the Form Selection Page, click the icon that resembles a blank sheet of paper:

Reporting Period	Type	Report Status	Actions
10/01/2024 - 09/30/2025	Annual		+
10/01/2023 - 09/30/2024	Annual	Submission Accepted by CO	   
10/01/2022 - 09/30/2023	Annual	Submission Accepted by CO (Revision #1)	   

- This will create a new, editable version of your report. A copy of the old one will be kept in the system.