

# Completing the *Fiscal Year 2025* *(FY2025) Performance Measures*

## Module 2 of the FY25 Low Income Home Energy Assistance Program (LIHEAP) Performance Data Form

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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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JANUARY 6<sup>TH</sup>, 2026

WELCOME:  
KATE THOMAS (OCS)

PRESENTERS:  
BRIAN WHORL (PENNSYLVANIA)  
MELISSA TORGERSON (VERVE ASSOCIATES)  
DAN BAUSCH (APPRISE)



ADMINISTRATION FOR  
CHILDREN & FAMILIES

# Welcome

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- **Purpose of This Webinar**

- To review the key requirements for completing the Federal Fiscal Year 2025 (FY25) 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.



# 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**

**Melissa Torgerson**

**Brian Whorl**

Senior Project Director – APPRISE

Owner – Verve Associates LLC

Director - Division of Federal  
Programs and Program Management  
Commonwealth of Pennsylvania



# Webinar Overview

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- **Structure of the Webinar**

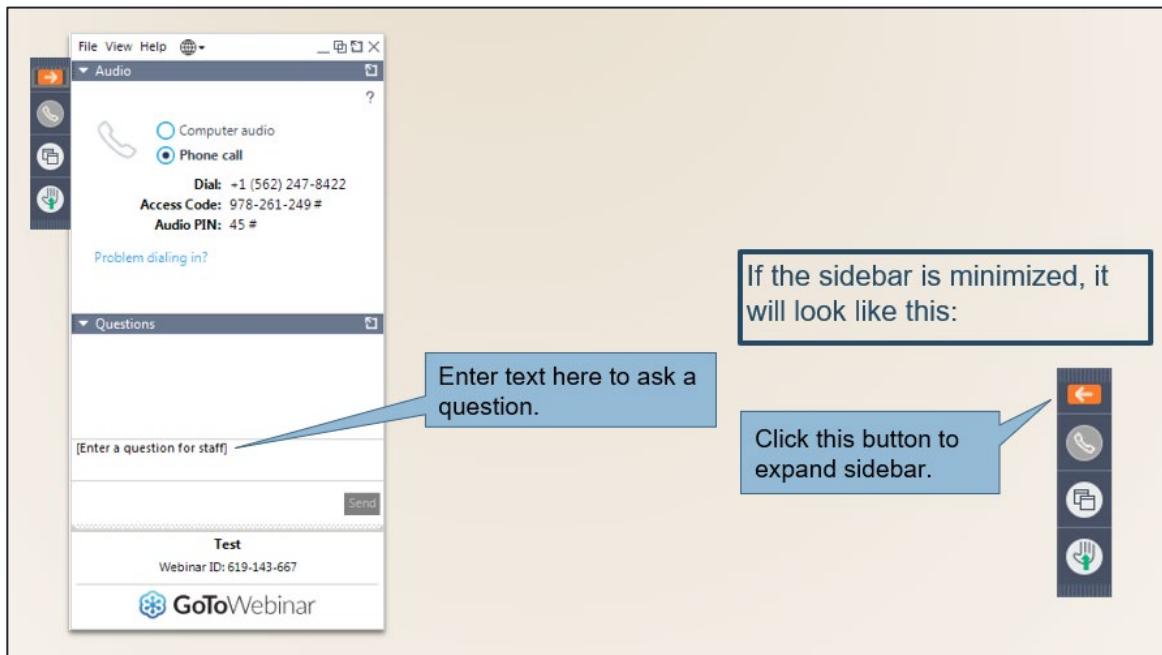
- 60-minutes.
- **Slides and other resources available for download now under “Handouts” in the GoToWebinar Sidebar.**
- The webinar is being recorded and will be published on the ACF YouTube channel.



# 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.



# Presentation Outline

Overview of the Performance Measures	<b>Slide 9</b>
What's New for FY25	<b>Slide 17</b>
Collecting Vendor Data – State Example	<b>Slide 22</b>
Key Reporting Steps for Section V (Energy Burden Targeting)	<b>Slide 28</b>
Key Reporting Steps for Section VI (Restoration of Lost Service)	<b>Slide 38</b>
Key Reporting Steps for Section VII (Prevention of Loss of Service)	<b>Slide 42</b>
Final Reminders	<b>Slide 46</b>
Extra Slides on Using OLDC	<b>Slide 58</b>



# LIHEAP Federal Reports

## *Recent Report Schedule*

Report:	Due Date:	Focus of Report:
<i>Model Plan for FY26</i>	9/02/2025	<i>Application and plans for FY26</i>
<i>Quarterly Report (Quarter 4 of FY25)</i>	10/31/2025	<i>Summary of activity in the last quarter</i>
Household Report (FY25)	12/31/2025 (Final)	Households served FY25
Carryover & Reallotment Report (FY25)	12/31/2025	Unobligated FY25 funds being carried over or returned
SF-425 (FY25 funding awards)	12/31/2025	Federal financial reporting
Performance Data Form (FY25)	1/31/2026	<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

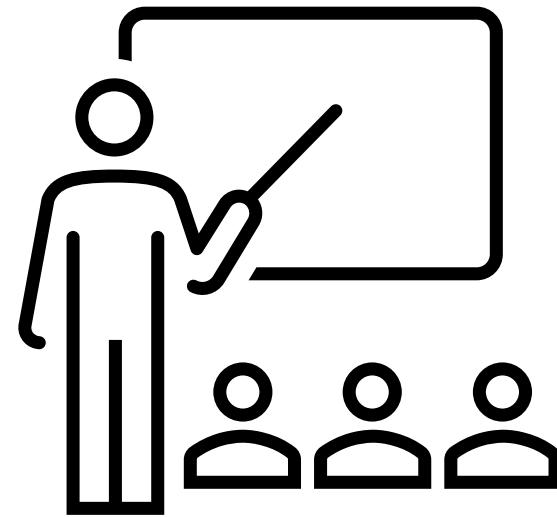
**How prepared do you think your team is for completing the *FY25 Performance Measures (Module 2 of the Performance Data Form)*?**

*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 Report



# Overview of the Performance Measures

## *Placement in The Performance Data Form*

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- 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.



**MODULE 1 (LIHEAP Grantee Survey)**

	Amount Rounded to the Nearest Dollar		
	Total Funds/Awards	Average Household Benefit	Maximum Annual Dollar Income for 4-Person Household as of the effective date
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	\$0	\$0
(1) Specify	\$0	\$0	\$0
(2) Specify	\$0	\$0	\$0
(3) Specify	\$0	\$0	\$0
4. Weatherization Assistance Benefits	\$0		\$0
<b>B. Other Permitted Uses of LIHEAP Funds (Items 6-13)</b>			
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		
<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.	\$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 2A (Required LIHEAP Performance Measures)

### V. ENERGY BURDEN TARGETING

	All Households	Bill Payment-Assisted Household Main Fuel				
		Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
<b>A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households</b>	Auto-Calculated	0	0	0	0	0
<b>B. Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)</b>	Auto-Calculated	0	0	0	0	0
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
<b>C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)</b>	Auto-Calculated	0	0	0	0	0
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
<b>D. Benefit Targeting Index for High Burden Households:</b>	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
<b>E. Burden Reduction Targeting Index for High Burden Households:</b>	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated

### VI. RESTORATION OF HOME ENERGY SERVICE

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

	All Occurrences	Energy Source (where LIHEAP benefit was applied)				
		Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
<b>A. All Occurrences of LIHEAP Households that Had:</b>	Auto-Calculated	0	0	0	0	0
1. Past Due Notice or Utility Disconnect Notice	Auto-Calculated	0	0	0	0	0
2. Imminent Risk of Running out of Fuel	Auto-Calculated	0	0	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:  
 3A. Signature of Authorized Certifying Official: (click to sign)

Date Submitted:  
 Month Day Year



## 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
	2. Average Annual Main Heating Usage	Auto-Calculated	0	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	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	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					
		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

#### 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

**NOTES:** Include any notes.



# Overview of the Performance Measures

## *Background*

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- 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 Performance Measures

## *How the Data are Used*

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- 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.

**FY24 Program Highlights:** Preliminary FY24 data indicates that LIHEAP assisted with:

- ❖ 279,244 Restorations of Home Energy Service.
- ❖ 1,776,751 Preventions of Home Energy Service Loss.

Presenter(s):  
Dan Bausch



# Overview of Performance Measures

## *How the Data are Used*

### LIHEAP Data Warehouse

**Single State Reports**

LIHEAP Glossary Reports Help Site Feedback

1 Start: Topics 2 States 3 Years 4 Results

Who is income-eligible for assistance ▾

How much funding comes from each source ▾

How are funds used ▾

Who is assisted ▾

Energy Burden ▾

- Average Annual Income by Main Heating Fuel Type - All & High Burden LIHEAP Households
- Average Annual Total Energy Bill by Main Heating Fuel Type - All & High Burden LIHEAP Households
- Average Annual Total LIHEAP Benefits by Main Heating Fuel Type - All & High Burden LIHEAP Households
- Energy Burden Before LIHEAP by Main Heating Fuel Type - All & High Burden LIHEAP Households

Energy Burden ▾

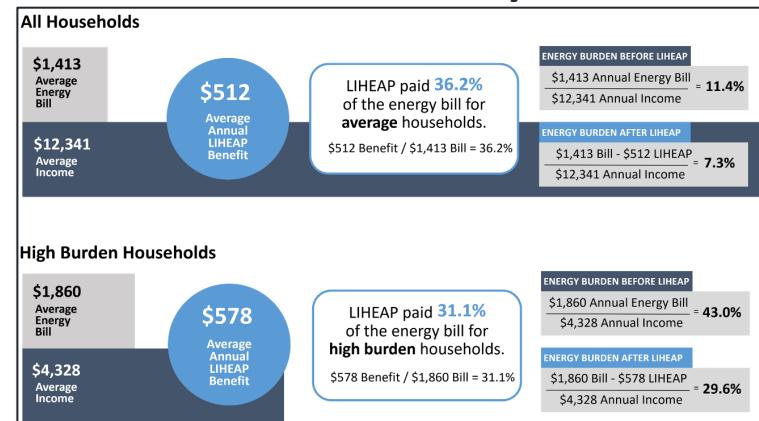
LIHEAP Targeting Indexes ▾

- Benefit Targeting Index for High Burden Households by Main Heating Fuel Type
- Burden Reduction Targeting Index for High Burden Households by Main Heating Fuel Type
- Benefit & Burden Reduction Targeting Indexes for High Burden Households by Main Heating Fuel Type

Service Loss Restoration & Prevention ▾

- Prevention & Restoration of Home Energy Service Loss Due to Bill Payment Issues by Fuel Type
- Prevention & Restoration of Home Energy Service Loss Due to Energy Equipment Issues by Fuel Type

### Performance Measures Executive Summary



### Prevention and Restoration of Home Energy Service Loss

#### *As a Result of Bill Payment Assistance*

Prevention (87%)  
21,939 Occurrences

Restoration (13%)  
3,421 Occurrences

#### *As a Result of Equipment Repair or Replacement*

Prevention (95%)  
811 Occurrences

Restoration (5%)  
39 Occurrences



# What's New for FY25 Reporting



# FY25 Reporting

## *No Differences from Last Year*

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- Good news: There are no changes to the FY25 Performance Measures from last year's FY24 report.
- The form has the same layout, lines, and requirements as last year.



# FY25 Reporting

## *Report Announcements and Due Date*

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- **Report Announcement & Instructions** – OCS issued a communication yesterday with the instructions.
- **Due Date** – Final data is due January 31, 2026.
- **Report Availability** – OCS expects to release the report in the Online Data Collection System (OLDC) in the next week.
- **Submission** – The report must be submitted in OLDC and must be validated and certified by the designated authorized official.



# 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.
- ***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.
- ***Instructions Document*** – These are included in the handouts and explain each line in the report.



# FY25 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		

#### 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

13	All Households
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B. 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
11.8%	
9	Average Percentage Point Change in Energy Burden
3.3%	
10	Average Percentage Reduction in Energy Burden
25.4%	

C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)

3	
1	Unduplicated Number of High Burden Households (Top 25%) with 12 Consecutive Months of Bill Data (Main Fuel and Electric)
\$5,333	
2	Average Annual Household Income for High Burden Households
\$3,650	
3	Average Annual Total LIHEAP Benefit per High Burden Household (including Heating, Cooling, Crisis, Supplemental Benefits)
\$1,733	
4	Average Annual Main Heating Fuel Bill for High Burden Households
\$957	
5	Average Annual Electricity Bill for High Burden Households
\$2,600	
6	Average Annual Total Residential Energy Bill for High Burden Households
\$5,867	
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%	

The diagram shows a large blue arrow pointing from the main table on the left to the detailed query results on the right. A smaller blue arrow points from the 'Household in top 25% with highest Burden?' column in the main table to the 'Yes' row in the detailed query results table.



# Collecting Vendor Data – State Example



# Collecting Vendor Data

## *Pennsylvania*

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- 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 6 electric utility providers
  - The top 6 gas providers
  - The top 12 fuel oil providers
  - The top 9 Propane vendors top delivered fuel providers.
  - The top 9 Kerosene vendors
  - 5 “other” vendors (coal)

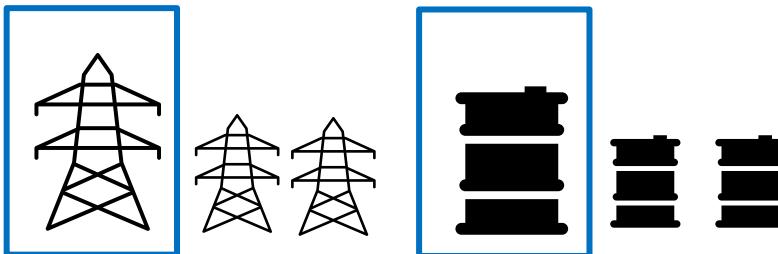


# Collecting Vendor Data

## *How do we do this?*

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



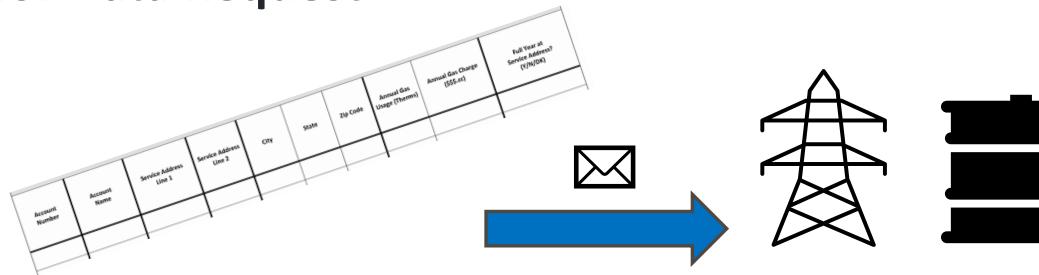
### 2. For each selected vendor, we create a Data Request spreadsheet

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)

# 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?*

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### 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*

# Collecting Vendor Data

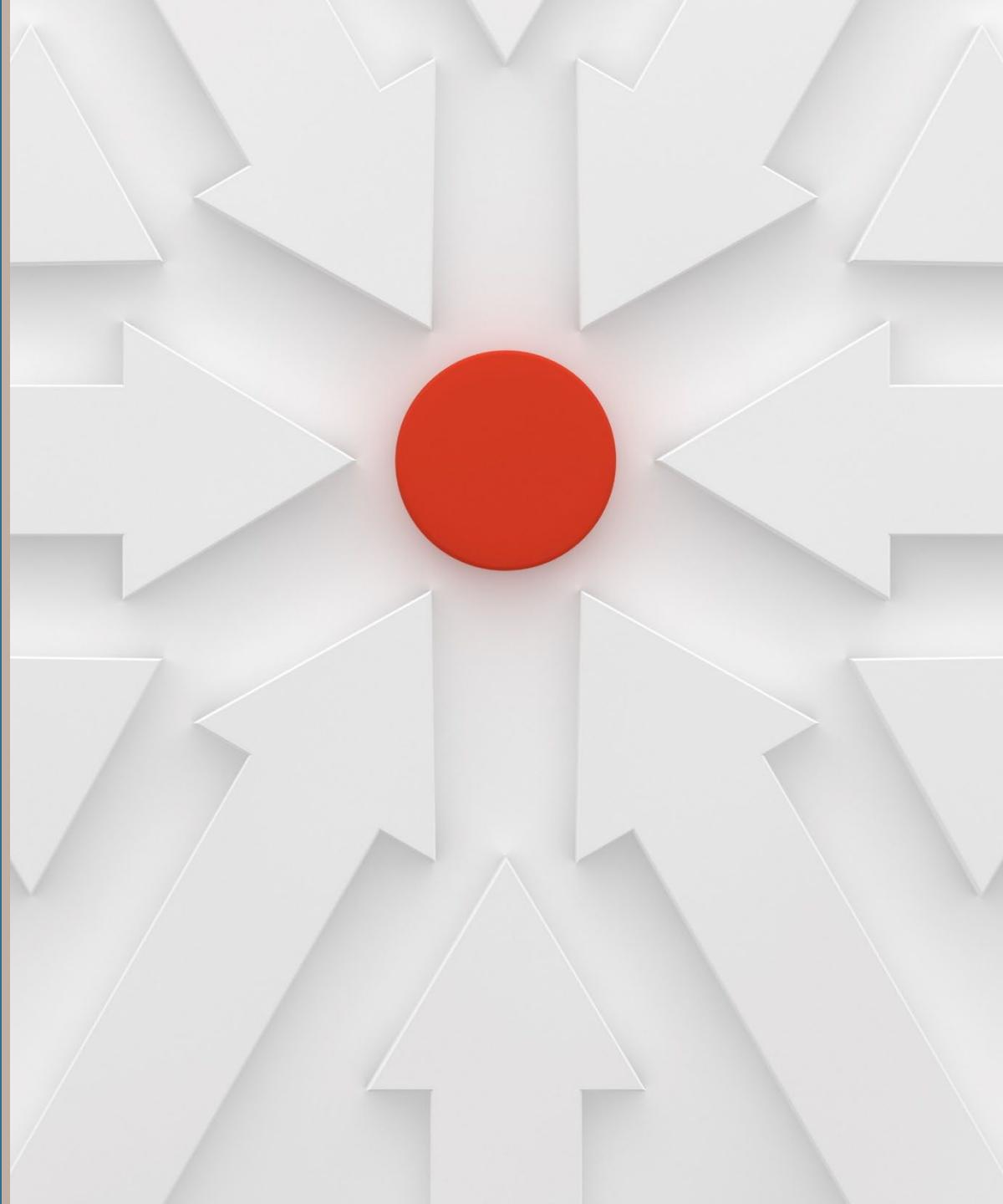
## *Key Takeaways from PA*

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- **Focus on the 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*

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- 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 FY25.



**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)

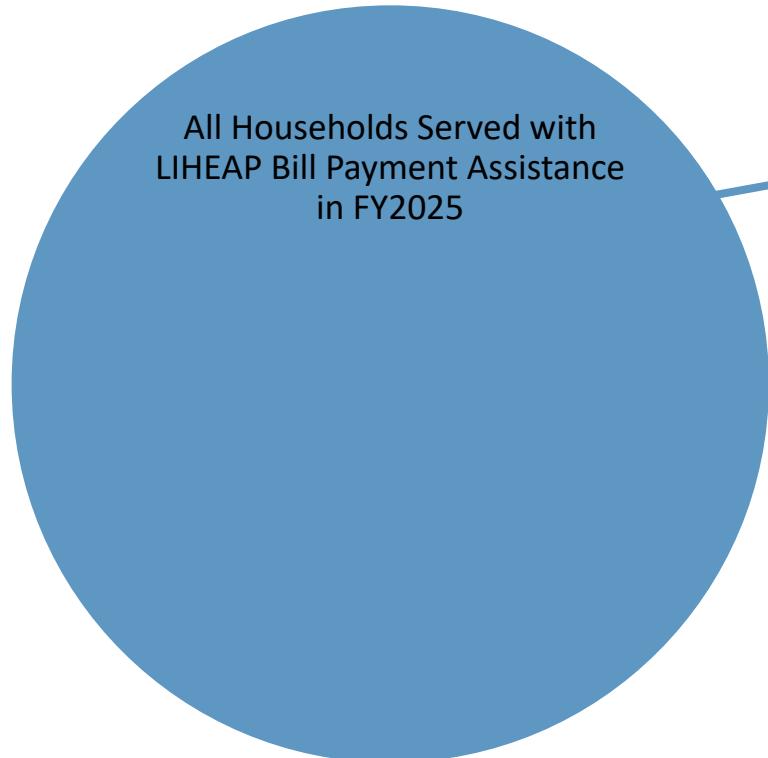
## Parts of Section V

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>B. Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)</b>						
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
<b>C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)</b>						
1. Unduplicated Number of High Burden Households (Top 25%) with 12 Consecutive Months of Bill Data (Main Fuel)	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, Supplements)	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
<b>D. Benefit Targeting Index for High Burden Households:</b>	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
<b>E. Burden Reduction Targeting Index for High Burden Households:</b>	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated



# Section V (Energy Burden Targeting)

## Part A



30,000 households  
served in FY2025

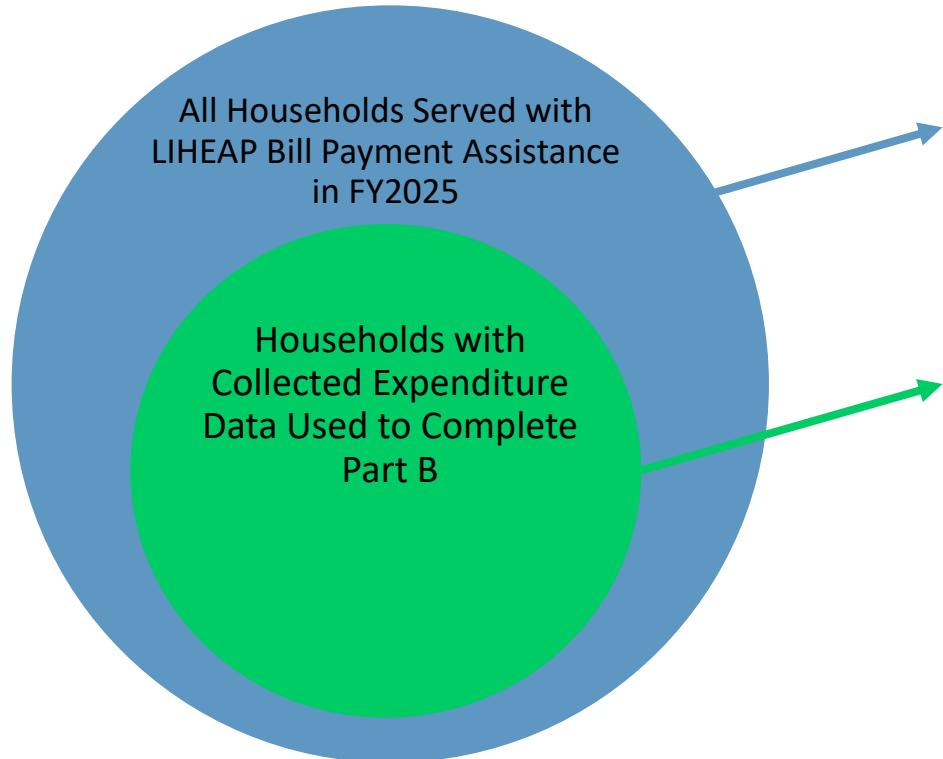
- These are the households to report in Part A, Section V of Module 2A.

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



# Section V (Energy Burden Targeting)

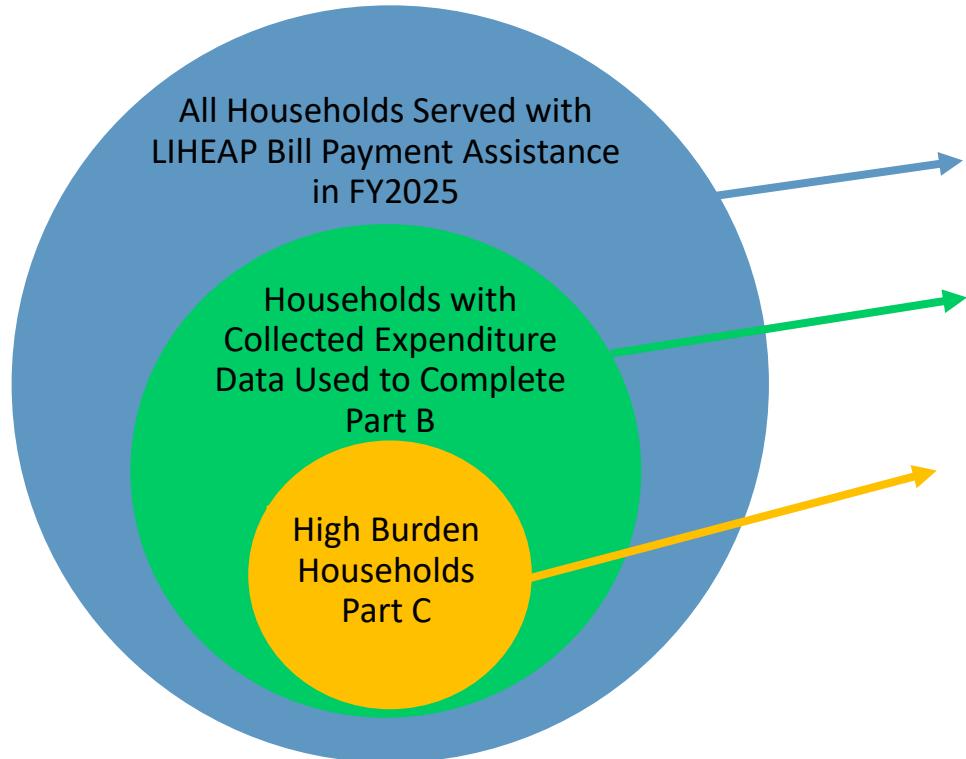
## Part B



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	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 FY25
- 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 FY25.
  - 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



# Section VI (Restoration of Service)

## *Examples*

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- 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*

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- 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:
  - Identify all the LIHEAP Benefits provided in FY25.
  - Identify the benefits in #1 that prevented the imminent loss of energy service for a household.

VII. PREVENTION OF LOSS 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. 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



# Section VII (Prevention of Loss of Service)

## *Examples*

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- 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.](#)



# 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.
- **Report Availability** – OCS expects to release the report in the Online Data Collection System (OLDC) in the next week.
- **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*

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- Good news: There are no changes to the FY25 Performance Measures from last year's FY24 report.
- The form has the same layout, lines, and requirements as last year.



# Final Reminders

## *OLDC Resources*

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.

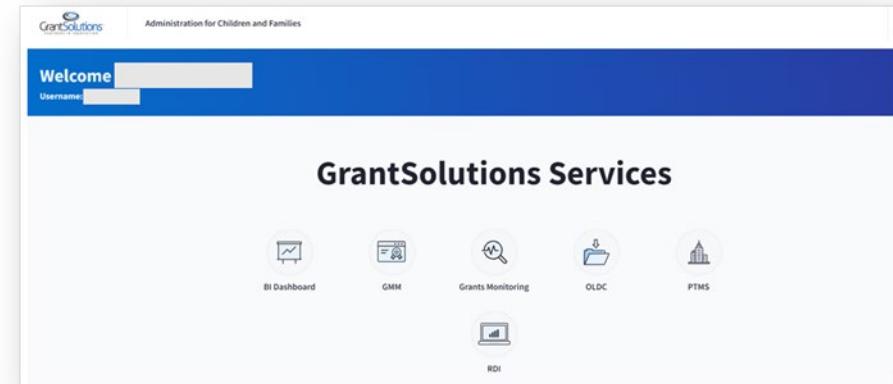
- OLDC is accessed through Grant Solutions.

- 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:

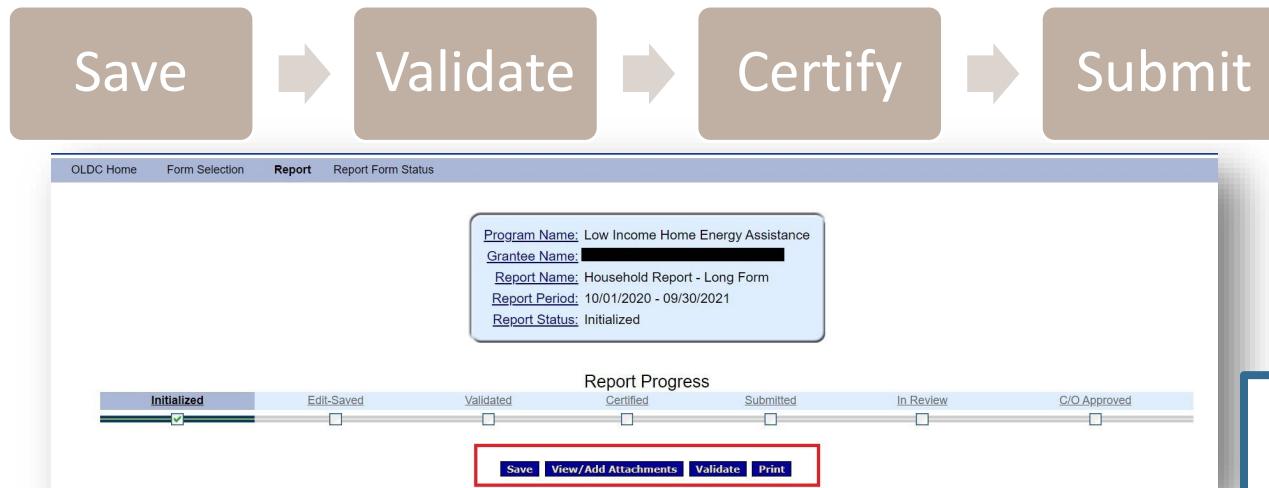
- (866) 577-0771
- [help@grantsolutions.gov](mailto:help@grantsolutions.gov)



# 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**.



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 Performance Measures in OLDC.
- **If either a warning or error message appears and you are unable to resolve it, contact APPRISE for assistance.**



# Final Reminders

## *Updating & Revising the Report*

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- 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*

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- **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](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/>

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

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



# Audience Poll Question #2

**How helpful was this webinar in understanding what is needed to complete the *FY25 Performance Measures*?**

*Please select one:*

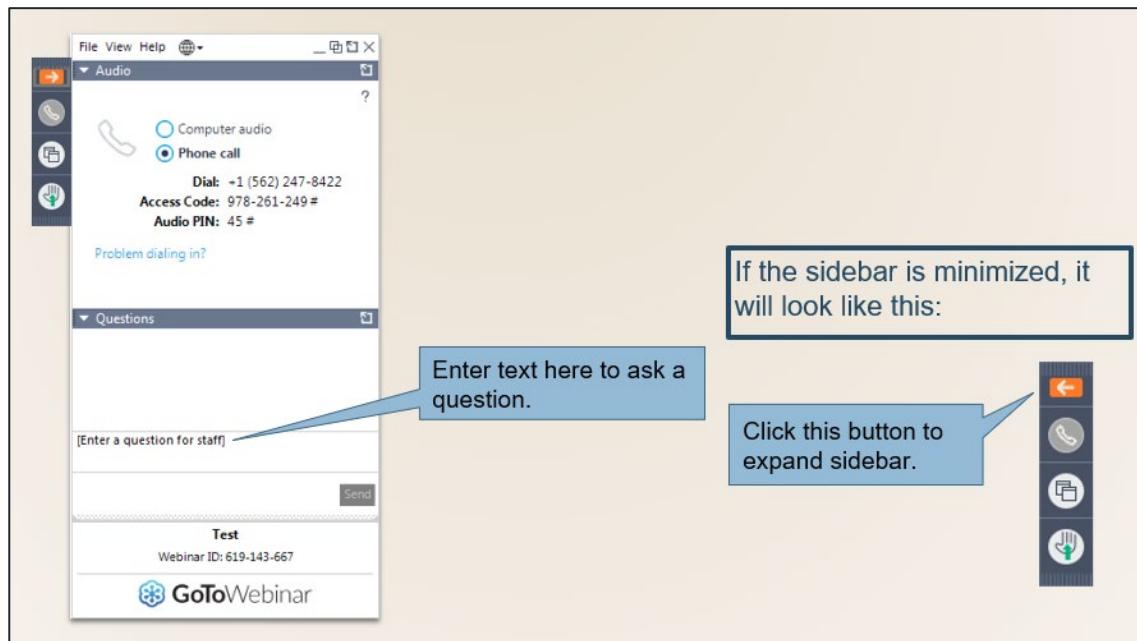
- **Not at all helpful**
- **Not too helpful**
- **Somewhat helpful**
- **Very helpful**



# 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.



Presenter(s):  
Melissa Torgerson

# 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@appriseinc.org](mailto:Daniel-Bausch@appriseinc.org); 609-252-9050
  - Melissa Torgerson, [melissa@verveassociates.net](mailto:melissa@verveassociates.net); 503-706-2647
  - Nicolas Mititelu, [nicolas-mititelu@appriseinc.org](mailto:nicolas-mititelu@appriseinc.org); 646-854-4982
  - Luke Gooding, [Luke-Gooding@appriseinc.org](mailto:Luke-Gooding@appriseinc.org); 609-454-3777
  - Jason Casado, [Jason-Casado@appriseinc.org](mailto:Jason-Casado@appriseinc.org); 609-252-9052



# 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="#">HTML Print Form</a> <a href="#">Go</a>
			<a href="#">Review</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		<a href="#">+</a>
10/01/2023 - 09/30/2024	Annual	Submission Accepted by CO	<a href="#">📄</a> <a href="#">🖨️</a> <a href="#">🖨️</a> <a href="#">👁️</a>
10/01/2022 - 09/30/2023	Annual	Submission Accepted by CO (Revision #1)	<a href="#">📄</a> <a href="#">🖨️</a> <a href="#">🖨️</a> <a href="#">👁️</a>

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

