

LIHEAP Performance Management Implementation Work Group:

Fall 2021 Update

Fall NEADA Meeting
October 13, 2021

Presentation Goals

During this presentation, we will:

1. Provide a very brief overview of Performance Management Implementation Work Group (PMIWG)
2. Share the work of each PMIWG project team – including past accomplishments, current projects, and planned future directions
3. Discuss the PMIWG communications strategy and approaches for sharing information with grantees
4. Request your feedback and suggestions and answer any questions you have.

LIHEAP PMIWG: Background

- **What the PMIWG Is:** A special purpose working group that consists of a diverse group of state LIHEAP coordinators, state LIHEAP staff, and OCS staff.
- **The PMIWG's Mission:** Help state grantees develop and implement methods for recording, collecting, tracking, analyzing, and using data for LIHEAP Performance Management.
- **The PMIWG's Activities:**
 - Monthly Full Group and Team Meetings
 - Development of Tools and Resources
 - Facilitate Performance Management initiatives and collaboration
 - Enhance and improve the availability of information and data using the LIHEAP Performance Management Website

LIHEAP PMIWG: Members

Current PMIWG Members

Jane Blank	Wisconsin	jane.blank@wisconsin.gov
Debra Brown	California	debra.brown@csd.ca.gov
Andrew Bryk	New York	andrew.bryk@otda.ny.gov
Kinisha Floyd	Tennessee	kfloyd@thda.org
Lisa Goben	Oregon	lisa.goben@oregon.gov
Casey Letran	Oklahoma	casey.letran@okdhs.org
Lorraine Portis	Mississippi	lorraine.portis@mdhs.ms.gov
Brian Sarensen	Washington	brian.sarensen@commerce.wa.gov
Tracy Smetana	Minnesota	tracy.m.b.smetana@state.mn.us
Sheri Shephard	Montana	sshepherd2@mt.gov
Jenni Sullivan	Montana	jenni.sullivan@ngc.com
Christine Taylor	Iowa	christine.taylor@iowa.gov
Brian Whorl	Pennsylvania	bwhorl@pa.gov

LIHEAP PMIWG: Where to Learn More

You can learn more about the PMIWG and its history on the LIHEAP Performance Management Website:

<https://liheappm.acf.hhs.gov/index.php/grantee-resources>

The screenshot shows the LIHEAP Performance Management website's "Grantee Resources" page. At the top is a dark blue navigation bar with links: HOME, PUBLICATIONS, DATA WAREHOUSE, PERFORMANCE MEASURES, GRANTEE RESOURCES, IMPORTANT LINKS, WHAT'S NEW?, DASHBOARD, HELP, and LOG IN. Below this is a white header area with a dark blue "Grantee Resources" title on the left and "LIHEAP Glossary" and "Site Feedback" links on the right. The main content area is white and contains a paragraph: "This section of the LIHEAP Performance Management website contains materials and tools designed to help LIHEAP program administrators to effectively implement LIHEAP Performance Management in the design and implementation of their programs." Below the paragraph are six resource boxes. The first four are light gray, and the fifth is yellow. The sixth is light gray. Each box contains a title and a dropdown arrow.

HOME PUBLICATIONS DATA WAREHOUSE PERFORMANCE MEASURES GRANTEE RESOURCES IMPORTANT LINKS WHAT'S NEW? DASHBOARD HELP LOG IN

Grantee Resources

LIHEAP Glossary Site Feedback

This section of the LIHEAP Performance Management website contains materials and tools designed to help LIHEAP program administrators to effectively implement LIHEAP Performance Management in the design and implementation of their programs.

- Required Reports - Access resources to help you with the LIHEAP reports.
- Data Accuracy and Reliability - Resources to ensure your data represents your program accurately. ▼
- Using Data for Performance Management - How to use data for program decision-making. ▼
- Talking about LIHEAP Data - View resources to present information about your program. ▼
- [PMIWG - Learn about the Performance Management Implementation Work Group.](#)** ▼
- Performance Management Training Resources — Find Past Training Webinars and Tools ▼

Data Case Studies Team

Presenter: Tracy Smetana
Minnesota

Project Team Members:

Debra Brown (CA)
Christine Taylor (IA)
Tracy Smetana (MN)
Brian Whorl (PA)
Brian Sarensen (WA)
Sharnice Peters (OCS)

PMIWG Project Team Updates

Data Case Studies Team

Team Mission:

- Help grantees interpret and understand their performance management data and how to make use of those data to take action

Team Approach:

- We demonstrate to grantees how to use the data that they collect and report to make data-driven decisions by:
 1. Formulating research questions that are of interest to LIHEAP stakeholders and using real data provided by PMIWG members to explore those questions
 2. Presenting the process and findings of our case studies using different formats (reports, videos, webinars) to reach a broad audience

PMIWG Project Team Updates

Data Case Studies Team

Past Accomplishments

1. Developed in-depth data case studies and tools to demonstrate ways in which grantees could use their program and performance data to assess their programs
2. Expanded our analyses – going beyond the Data Warehouse to include types of questions grantees could examine and answer using their own raw program data
3. Developed a “vignette” approach to demonstrating data-informed program decisions that focuses on presenting bite-sized pieces of information
4. Enhanced how the data case studies training materials are made available on the Performance Management Website

https://liheappm.acf.hhs.gov/data_case_studies/

PMIWG Project Team Updates

Data Case Studies Team

Current Project

- 1. Iowa Case Study: Examining Benefit Determination Procedures and Simulating Changes to Model impacts**
 - a) Working with Chris Taylor (IA), who is on the Data Case Studies Team
 - b) Examining performance outcomes, identifying areas where better targeting could be achieved, and simulating changes to the benefit matrix to assess the potential impact of modifications
 - c) Presenting results via Training Webinar scheduled for November 18th @ 3:00PM ET

PMIWG Project Team Updates

Data Case Studies Team

Future Directions

- 1. Complete Vignette on Electric Benefit Determination Procedures in Wisconsin**
 - a) Working with Jane Blank (WI) from the Performance Management Integration (PMI) Team
 - b) Demonstrating how Wisconsin determines benefits for households who heat with electricity
- 2. Conduct in-depth geospatial study to understand program participation in Washington.**
- 3. Develop vignettes to highlight or expand from past Case Studies.**

Performance Management Integration Team

Presenter: Lisa Goben
Oregon

Project Team Members:

Andrew Bryk (NY)
Lisa Goben (OR)
Jane Blank (WI)
Iris Curtis (OCS)

PMIWG Project Team Updates

Performance Management Integration Team

Team Mission:

- Help grantees understand what they need to know about Performance Management and the LIHEAP Performance Measures by integrating key pieces of information together

Team Approach:

- We work to identify information and resource needs and to:
 1. Improve existing Performance Management tools and create new tools and resources that help grantees implement Performance Management in their own programs.
 2. Assist with the organization of content and information to make it more digestible and accessible to grantees.

PMIWG Project Team Updates

Performance Management Integration Team

Past Accomplishments

1. Designed Customized Performance Measures Resources for Each State
2. Supported Grantee Communication Efforts by Drafting Performance Measures Talking Points Resources

ARIZONA FY 2019 LIHEAP PERFORMANCE MANAGEMENT SNAPSHOT

In FY 2019, Arizona furnished LIHEAP bill payment assistance to 29,155 households. They collected energy burden data for 15,147 households (52%)

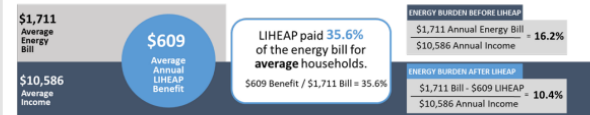
Does LIHEAP furnish higher benefits to higher burden households?

Yes. In Arizona, the total LIHEAP benefit received by high burden households in FY 2019 was about **\$13 (2%) more** than the total LIHEAP benefit received by the average recipient household.

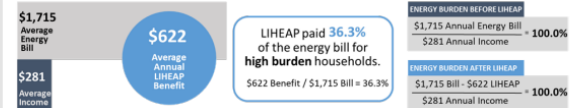
Does LIHEAP pay a larger share of the home energy bill for high burden households?

Yes. In FY 2019, LIHEAP paid **35.6%** of the energy bill for average households in Arizona, while LIHEAP paid **36.3%** of the energy bill for high burden households.

All Households



High Burden Households



Prevention and Restoration of Home Energy Service Loss

As a Result of Bill Payment Assistance



As a Result of Equipment Repair or Replacement



- In FY 2019, LIHEAP benefits in Arizona **prevented the loss of service 20,281 times**, by stopping threatened utility service disconnections and by delivering fuels to homes that were at risk of running out. In addition, the program **repaired or replaced heating or cooling equipment at imminent risk of failure 288 times**.
- In FY 2019, LIHEAP benefits **restored home energy service 6,327 times** for households who had been disconnected by their utility provider or who had run out of fuel oil, propane, or wood. In addition, the program **restored home energy service 227 times by repairing or replacing inoperable heating or cooling equipment**.

PMIWG Project Team Updates

Performance Management Integration Team

Past Accomplishments, *continued*..

3. Created the [LIHEAP Virtual Library](#)

4. Built a [Grantee Search Portal](#)

LIHEAP GRANTEE SEARCH PORTAL [LIHEAP Glossary](#) [Reports help](#) [Site feedback](#) Report search:

The Grantee Search Portal allows you to identify LIHEAP state grantees that share one or more common characteristics and look at program information from those states.

There are three steps to using the tool. First, you will select the information that you want a display as a table. Next, you will select filters to look only at states that match the characteristics that you are interested in. Lastly, you will be able to view the results and download the table.

Perform a Search

Click on the checkboxes next to the information that you want to include in the table. You can select more than one to display the information side-by-side. After you are done, click "Next" to move on to the next screen.

General Information <ul style="list-style-type: none"><input type="checkbox"/> Contact Information<input type="checkbox"/> Grantee Profile	Program Components <ul style="list-style-type: none"><input type="checkbox"/> Cooling Program Description<input type="checkbox"/> Weatherization Program Description<input type="checkbox"/> Assurance 16 Program Description<input type="checkbox"/> Nominal Benefits (Heat and Eat)	Eligibility <ul style="list-style-type: none"><input type="checkbox"/> Crisis Definition<input type="checkbox"/> Categorical Eligibility Policies<input type="checkbox"/> Income Threshold (Heating Assistance)<input type="checkbox"/> Subsidized Housing Policies
Targeting <ul style="list-style-type: none"><input type="checkbox"/> Benefit Matrix<input type="checkbox"/> Heating Assistance Criteria<input type="checkbox"/> Benefit Levels	Program Administration <ul style="list-style-type: none"><input type="checkbox"/> Outreach Practices<input type="checkbox"/> Percentage of Funds Obligated to Weatherization<input type="checkbox"/> Type of Organization Performing Intake (Heating Assistance)	Performance Measures <ul style="list-style-type: none"><input type="checkbox"/> Benefit Targeting Index<input type="checkbox"/> Burden Reduction Targeting Index

Next **Clear selections**



PMIWG Project Team Updates

Performance Management Integration Team

Past Accomplishments, *continued*..

5. Developed a Commonly Used Reports Tool

Example LIHEAP Report Menu		
Click the icons below to view example reports for a specific purpose.		
	Program Planning	Reports used to make projections, track progress, and evaluate potential program changes.
	Program Delivery	Reports used to process applications, prioritize tasks, and facilitate workflow.
	Fiscal Controls	Reports used to project and track allocations, spending, payments, and refunds.
	Vendor Management	Reports used to track vendor data, payments, and refunds.
	Compliance	Reports used to aid in periodic desk reviews or monitoring.
	Reporting	Reports used to produce program data for legislators, funders, stakeholders, or the public.

PMIWG Project Team Updates

Performance Management Integration Team

Current Project

1. Developing a LIHEAP “Data Interpretation Tool”

- a) Phase I – Build an interactive web-tool that walks grantees through a comparative analysis of their Benefit Targeting and Burden Reduction Targeting Indices
- b) Present Completed Phase I Tool via Webinar on October 27, 2021.
- c) Phase II – Expand the tool to include more information about ways that grantees can improve their indices

PMIWG Project Team Updates

Performance Management Integration Team

Future Directions

1. Work on Phase II of the “Data Interpretation” Tool
2. Add Additional Reports to the Common Reports Tool
3. Share information on these resources on the Grantee Forum of the Performance Management Website.

Data Reliability Team

Presenter: Kinisha Floyd
Tennessee

Project Team Members:

Lorraine Portis (MS)
Jenni Sullivan (MT)
Sheri Shepherd (MT)
Casey Killion-Letran (OK)
Kinisha Floyd (TN)
Peter Edelman (OCS)

PMIWG Project Team Updates

Data Reliability Team

Team Mission:

- Help grantees determine whether the performance measures data they have collected are reliable and representative enough to inform decisions about program changes

Team Approach:

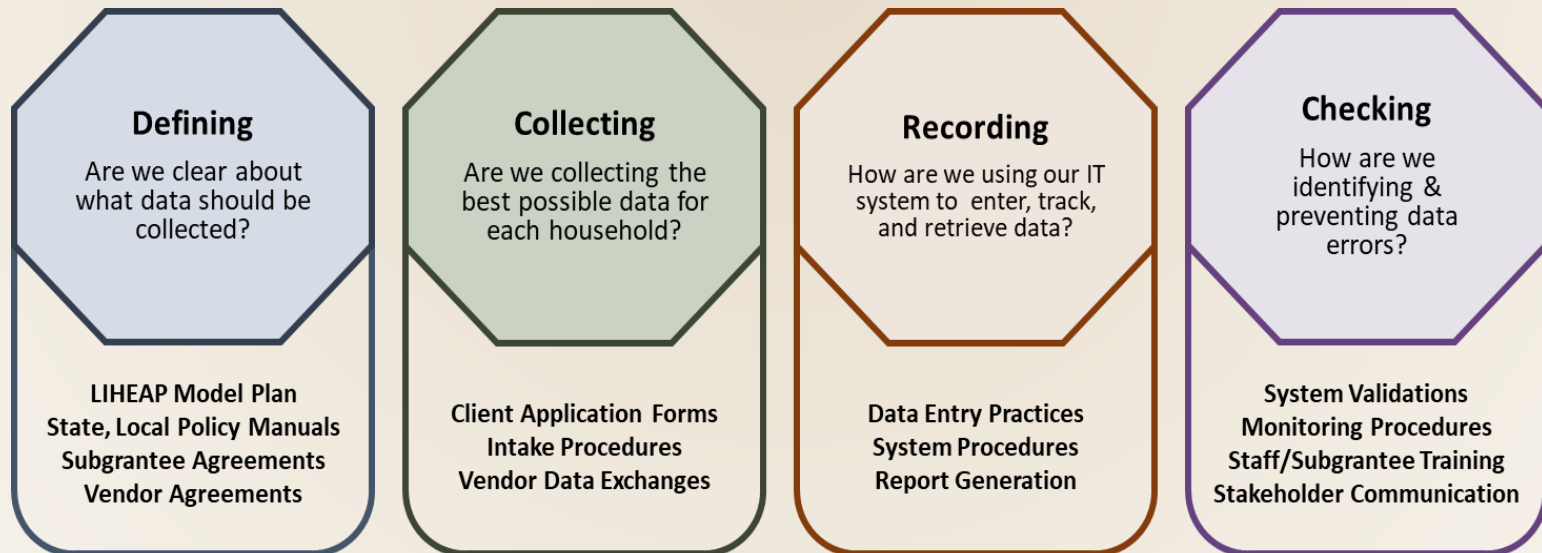
- Researching concerns about data quality and identifying ways to increase data reliability through improved data collection and processing practices
- Developing automated tools to guide grantees through a review of their data, helping them to identify areas of concern and providing recommendations for improvement

PMIWG Project Team Updates

Data Reliability Team

Past Accomplishments

1. Conducted a [Case Study on Montana's Propane Data](#)
 - a) Presented to Grantees via [Webinar](#) on September 19, 2019
1. Developed a Framework for Assessing Data Reliability
 - a) Presented to Grantees via [Webinar](#) on September 19, 2019



PMIWG Project Team Updates

Data Reliability Team

Past Accomplishments, *continued*..

3. Developed a Data Reliability Tool for Main Heating Expenditures

a) Presented to Grantees via Webinar on August 12, 2020

4. Developed a Data Reliability Tool for Electric Baseload Expenditures

a) Presented to Grantees via Webinar on April 28, 2021

LIHEAP Data Reliability Assessment Tool - Main Heating Expenditures

Overall Reliability Assessment
New Jersey, 2019

Assessment 1

Assessment 1 checks your low-income average main heating expenditure data against the average main heating expenditure data found within the EIA's State Energy Data System (SEDS).

If the PM data for the year you are trying to evaluate is available in the LIHEAP Data Warehouse, then it has been auto populated in the appropriate column below. If you are trying to evaluate a year for which data has not yet been added to the Data Warehouse, you will need to manually enter the calculated average expenditures for each fuel type, which can be found in Section V, Part B, Line 4 of your Performance Data Form.

Main Heating Fuel	Computed Average Expenditures from Performance Measures Report	Average Expenditures from SEDS	Computed Average from Performance Measures Report as % of SEDS	Status
Electric	1465	\$1,523	96%	No Issue Flagged – The average main heating bill you reported is within the expected range for Electric households.
Natural Gas	856	\$726	118%	No Issue Flagged – The average main heating bill you reported is within the expected range for Natural Gas households.
Fuel Oil	1515	\$944	160%	Potential Issue – The average main heating bill you reported is above the expected range for Fuel Oil households.
Propane	1469	\$1,874	78%	No Issue Flagged – The average main heating bill you reported is within the expected range for Propane households.

LIHEAP Data Reliability Assessment Tool - Electric Baseload Expenditures

Overall Reliability Assessment
New Jersey, 2019

Assessment 1

Assessment 1 checks your low-income average electric expenditure data against a reasonable estimate of what low-income households are spending on baseload electricity in your state using data from the American Community Survey (ACS).

If the PM data for the year you are trying to evaluate is available in the LIHEAP Data Warehouse, then it has been auto populated in the appropriate column below. If you are trying to evaluate a year for which data has not yet been added to the Data Warehouse, you will need to manually enter the calculated average expenditures for each fuel type, which can be found in Section V, Part B, Line 5 of your Performance Data Form.

Main Heating Fuel	Average Annual Electric Bill from Performance Measures	Estimated Average Annual Electric Bill Based on ACS	Your Data as % of Estimate	Status
Natural Gas	1175	\$850	138%	No Issue Flagged – The average electric bill you reported is within the expected range for Natural Gas households.
Fuel Oil	1696	\$885	192%	Potential Issue – The average electric bill you reported is above the expected range.
Propane	1638	\$981	167%	Potential Issue – The average electric bill you reported is above the expected range.

Auto populated from the LIHEAP Data Warehouse or provided from your LIHEAP Performance Data Form.
Auto populated from an outside data source, such as the ACS.
Information that you will need to provide from your own records.
No issue was found in the data entered for the corresponding fuel type.
Issues were found in the data entered for the corresponding fuel type.

PMIWG Project Team Updates

Data Reliability Team

Past Accomplishments, *continued*..

- Published 4 Data Reliability Tips on the [Grantee Forum](#) to Kick Off the *Tip of the Week* campaign

The screenshot displays the LIHEAP Performance Management website. The header includes the logo for the Administration for Children & Families, LIHEAP Performance Management, and a website navigator. A search bar is present with the text "Search this Site:" and a "Submit" button. The navigation menu includes links for HOME, PUBLICATIONS, DATA WAREHOUSE, PERFORMANCE MEASURES, GRANTEE RESOURCES, IMPORTANT LINKS, WHAT'S NEW?, DASHBOARD, HELP, PMIWG, GRANTEE FORUM, and LOG OUT. The main content area shows a link to "Add new Forum topic" and a table of forum posts.

Topic	Replies	Last reply ▼
LIHEAP Tips – Getting Data Directly from Clients By KFloyd 1 month ago	2 2 new posts	By brian.sarensen... 5 days 15 hours ago
LIHEAP Tips - Collecting Delivered Fuel Data By sshepherd 4 weeks ago	2 2 new posts	By sshepherd 5 days 18 hours ago
LIHEAP Tips - Checking Your Main Heating Bills Using The Assessment Tools By cletran 4 months 3 weeks ago	1	By BLANKJ 1 month ago
LIHEAP Tips – Splitting Benefits By tsmetana 1 month 1 week ago	0	n/a

PMIWG Project Team Updates

Data Reliability Team

Current Projects

1. Sending Custom Emails to each grantee to promote and encourage use of the Main Heating and Electric Baseload Expenditure Tools
2. Continue to contribute to information shared on the Grantee Forum and the Performance Management Website.

PMIWG Project Team Updates

Data Reliability Team

Future Directions

1. Continue user testing of existing Main Heating and Electric Baseload Expenditure Tools and make any necessary adjustments
2. Plan and film 5-minute vignettes to serve as video tutorials for each assessment of the Main Heating and Electric Baseload Expenditure Tools
3. Continue development of the remaining Data Reliability Tools
 - a) Household Income
 - b) LIHEAP Benefit Amount
 - c) Main Heating Fuel Type

PMIWG Communications

Presenter: Jane Blank
Wisconsin

**A PUBLICATION OF THE
PERFORMANCE MEASURES IMPLEMENTATION WORK GROUP**



LIHEAP PERFORMANCE MEASURES UPDATE

**“I can’t change the direction of the
wind, but I can adjust my sails to
always reach my destination.”**

Jimmy Dean

PMIWG Communications

Current Approaches

- **Official ACF/OCS Events:**
 - Regional Calls with Operations Staff
 - Training Webinars
- **LIHEAP Performance Management Website**
 - What's New Box on Homepage
 - Training Vignettes
 - Tips and Posts on the Grantee Forum
- **Conference Presentations by PMIWG Members:**
 - National and Regional LIHEAP Training Conferences
 - National Energy and Utility Affordability Conference (NEUAC)
 - NEADA Meetings

PMIWG Communications

Future Directions

- **Continue to attend Regional Calls/support webinars**
- **Continue to provide support with LIHEAP tips and Grantee Forum**
- **Continue to present at Conferences**
- **Explore other avenues for communication**

Feedback and Suggestions

- We would appreciate any suggestions or feedback from NEADA members, especially for the following:
 - **Value of Resources and Tools** – Have you found the tools and resources highlighted today to be useful or valuable when you have used them?
 - **Performance Management Questions** – What topics and questions are you interested in trying to answer for your own program? Do you have ideas for items the PMIWG could explore?
 - **Resource Needs** – What tools or resources do you need to help with Performance Management?
 - **Best Ways to Communicate** – Program Managers are busy! How can we best share information with you about new resources or tools?

Questions and Discussion

