

**LIHEAP Performance Data - Energy Burden Data Quality Assessment**

**Assessment Number #1 - For what share of clients are you getting energy burden data?**

Sources: 2016, 2017, & 2018 Performance Data Forms, Module 2, Part V: All Households Column - Line A and Line B1

	2016 Data	2017 Data	2018 Data
All Households	104,480	98,938	97,499
Households with Data	19,695	85,036	74,243
Percent with Data	19%	86%	76%

**Question #1:** The average state was able to report on the data for about 45% of households. How does your number for the most recent year compare?

Notes: It is above average.

**Question #2:** Have you been increasing the share of households that have data over the last three years?

Notes: Yes and No. It increased from 2016 to 2017, but decreased in 2018.

**Question #3:** When a state starts collecting electric baseload data, the share of households with data can decline. Did that happen to your state?

Notes: Answer?

**Question #4:** Sometimes vendor management changes can disrupt data exchanges. Did that happen to your state?

Notes: Answer?

**Assessment Number #2 - How does this look by Main Heating Fuel?**

Sources: Performance Data Form, Module 2, Part V - Line A and Line B1 for Current Year

	All Households	Electric	Natural Gas	Fuel Oil	Propane	Other
All Households	97,499	45,766	38,456	7,852	3,513	1,912
Households with Data	74,243	41,952	24,168	5,326	2,416	381
Percent with Data	76%	92%	63%	68%	69%	20%

**Question #1:** Which heating fuels present the greatest challenge?

Notes: Other is the most difficult.

**Question #2:** Looking at the share of households that use that fuel, are those data the highest priority?

Notes: No. Electric and Gas are the highest priority. We do best with electric, but pretty well with all but Other.

**Assessment Number #3 - Have you been able to get the top 5 companies for electric and for natural gas to report? Have you been able to get the top 10 companies for each delivered fuel to report?**

Source: Administrative Records for Current Year

	Electric	Natural Gas	Fuel Oil	Propane	Other
Number of Vendors Reporting					
Total Number of Vendors					
Vendor Percentages	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

**Question #1:** Do you need to focus your efforts on meeting the reporting requirements? Or, would you consider going beyond the reporting requirements?

Notes:

LIHEAP Performance Data - Benefit Targeting Statistics

Assessment Number #1 - What is your Benefit Targeting Index Value?

Sources: 2016, 2017, & 2018 Performance Data Forms, Module 2, Part V: All Households Column - Line B3 and Line C3

	2016 Data	2017 Data	2018 Data
All Households - Average LIHEAP Benefit	\$732	\$612	\$583
High Burden Households - Average LIHEAP Benefit	\$804	\$818	\$912
Benefit Targeting Index	110	134	156

Question #1: The average state has a Benefit Targeting Index of 119. How does your Index compare to that?

Notes: It is higher than the average state.

Assessment Number #2 - Does LIHEAP furnish higher benefits to high burden households?

Source: Performance Management Snapshot - Executive Summary

	All Households	High Burden	Ratio of High Burden / All Households	Percent High Burden is Higher (+) or Lower (-) than All Households
Energy Burden Before LIHEAP	13.6%	25.2%	1.85	85%
Average Annual LIHEAP Benefit	\$583	\$912	1.56	56%
Energy Burden After LIHEAP	9.9%	16.6%	1.68	68%

Question #1: The Energy Burden Before LIHEAP for high burden households is 1.85 times the Energy Burden Before LIHEAP for all households. The LIHEAP Benefit for high burden households is 1.56 times the LIHEAP Benefit for all households. Comparing those numbers, does it make sense to consider raising the benefit for high burden households?

Notes: Answer?

Question #2: The Energy Burden After LIHEAP for high burden households is 1.68 times the Energy Burden After LIHEAP for all households. The Annual Average LIHEAP Benefit for high burden households is 1.56 times the Annual Average LIHEAP Benefit for all households. Comparing those numbers, does it make sense to consider raising the benefit for high burden households?

Notes: Answer?

Assessment Number #3 - To what extent does higher burden result from higher energy bills?

Source: Performance Management Snapshot - Executive Summary

	All Households	High Burden	Ratio of High Burden / All Households	Percent High Burden is Higher (+) or Lower (-) than All Households
Average Energy Bill	\$2,137	\$2,690	1.26	26%
Average Annual LIHEAP Benefit	\$583	\$912	1.56	56%

Question #1: The Average Energy Bill for high burden households is 1.26 times the Average Energy Bill for all households. The Annual Average LIHEAP Benefit for high burden households is 1.56 times the Annual Average LIHEAP Benefit for all households. Comparing those numbers, does it make sense to consider raising the benefit for high burden households?

Notes: Answer?

Assessment Number #4 - To what extent does higher burden result from lower income?

Source: Performance Management Snapshot - Executive Summary

	All Households	High Burden	Ratio of High Burden / All Households	Percent High Burden is Higher (+) or Lower (-) than All Households
Average Income	\$15,765	\$10,685	0.68	-32%
Average Annual LIHEAP Benefit	\$583	\$912	1.56	56%

Question #1: The Average Income for high burden households is 0.68 times the Average Income for all households. The Annual Average LIHEAP Benefit for high burden households is 1.56 times the Annual Average LIHEAP Benefit for all households. Comparing those numbers, does it make sense to consider raising the benefit for high burden households?

Notes: Answer?

Question #2: Some states have a high percentage of households with zero income because of seasonal employment or other factors. Does that affect the average income statistic for your high burden households?

Notes: Answer?

**LIHEAP Performance Data - Burden Reduction Targeting Statistics**

**Assessment Number #1 - What is your Burden Reduction Targeting Index Value?**

Sources: 2016, 2017, & 2018 Performance Data Forms, Module 2, Part V: All Households Column - Line E

	2016 Data	2017 Data	2018 Data
Burden Reduction Targeting Index	79	74	124

**Question #1:** The average state has a Burden Reduction Targeting Index of 99. How does your Index compare to that?

Notes: For 2018 we got above the average.

**Assessment Number #2 - Where does the Burden Reduction Targeting Index come from?**

Sources: Performance Management Snapshot - Executive Summary

	All Households	High Burden	
Average Annual LIHEAP Benefit	\$583	\$912	
Average Energy Bill	\$2,137	\$2,690	
Percent of Energy Bill Paid	27.3%	33.9%	
Burden Reduction Targeting Index = 100 * Percent of Bill Paid for High Burden / Percent of Bill Paid for All			
	27.3%	33.9%	<b>Burden Reduction Targeting Index</b> 124

**Assessment Number #3 - Is the energy burden for households "affordable" after receiving LIHEAP?**

Sources: Performance Management Snapshot - Executive Summary

	All Households	High Burden
Energy Burden Before Receiving LIHEAP	13.6%	25.5%
Average LIHEAP Benefit	\$583	\$912
Energy Burden After Receiving LIHEAP	9.9%	16.6%

**Question #1:** Some states target energy burden of 6% as affordable. Some states target 10% energy burden as affordable. Some states target 15% energy burden as affordable. Does your average household reach any of those affordability targets before LIHEAP? After LIHEAP?

Notes: Before LIHEAP, the average household is below 15%. After LIHEAP, the average household is below 10%

**Question #2:** Some states target energy burden of 6% as affordable. Some states target 10% energy burden as affordable. Some states target 15% energy burden as affordable. Do your HIGH BURDEN households reach any of those affordability targets before LIHEAP? After LIHEAP?

Notes: Before LIHEAP, the high burden households are way above the targets. After LIHEAP, the high burden households get closer to the target.

**LIHEAP Performance Data - Benefit and Burden Reduction Targeting Statistics by Heating Fuel**

**Assessment Number #1** - For all households, does LIHEAP furnish higher benefits to those main heating fuels with the highest burdens before LIHEAP?

	Source: Snapshot Figure 2-3		Source: Snapshot Figure 2-4	
	Average Annual Energy Burden Before LIHEAP	Percent Higher(+) or Lower(-) than All Households	Average Annual LIHEAP Benefit	Percent Higher(+) or Lower(-) than All Households
All Households	13.6%	N/A	\$583	N/A
Electric	11.7%	-14%	\$379	-35%
Natural Gas	15.0%	10%	\$661	13%
Fuel Oil	17.2%	26%	\$1,346	131%
Propane	22.7%	67%	\$1,605	175%
Other	16.0%	18%	\$1,120	92%

**Question #1:** Which households have the highest energy burdens? What percent are they above the average?

**Notes:** Propane has the highest burden. It is 67% above the average. Fuel Oil and Other also are well above the average.

**Question #2:** Which households get the highest average LIHEAP benefits? What percentage are they above the average?

**Notes:** Propane, Fuel Oil, and Other get higher benefits. They are 175%, 131%, and 92% above the average.

**Question #3:** Do households with the highest burden main heating fuels have the highest benefits? Do the differences in benefits seem consistent with the differences in burden?

**Notes:** Yes. The households with the highest burden get the highest burden. We need to examine these numbers and think about whether the large differences in benefits are justified by the somewhat smaller differences in burden.

**Assessment Number #2** - For all households, does LIHEAP pay a larger share of the bill to those main heating fuel with the highest burdens?

	Source: Snapshot Figure 2-2	Source: Snapshot Figure 2-3	Source: Snapshot Figure 2-4	Share of Bill Paid (LIHEAP Benefit / Average Energy Bill)
	Average Energy Bill	Annual Average Energy Burden Before LIHEAP	Average Annual LIHEAP Benefit	
All Households	\$2,137	13.6%	\$583	27.3%
Electric	\$1,837	11.7%	\$379	20.6%
Natural Gas	\$2,361	15.0%	\$661	28.0%
Fuel Oil	\$2,817	17.2%	\$1,346	47.8%
Propane	\$2,576	22.7%	\$1,605	62.3%
Other	\$2,475	16.0%	\$1,120	45.3%

**Question #1:** Which heating fuel has the highest energy burden?

**Notes:** Propane, Fuel Oil, and Other have the highest burden.

**Question #2:** Does the heating fuel with the highest burden have the largest share of the bill paid?

**Notes:** Those fuels also have the highest share of the bill paid.