

# Understanding LIHEAP Performance Measures

Presentation hosted by the Office of Community Services (OCS) in the Administration for Families and Children (ACF) presented by APPRISE under contract to OCS

**May 1, 2019**

**Moderator:**

David Carroll (APPRISE)

**Presenters:**

Melissa Torgerson (Verve Associates)  
Holly Ravesloot (OCS)



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# Introduction & Welcome

- Welcome & Overview
  - David Carroll, APPRISE
- Presentation Speakers
  - Melissa Torgerson, Verve Associates
  - Holly Ravesloot, OCS
- Facilitators
  - Grantees

# Objectives for Session

- Performance Measures Reminder or Introduction
  - Performance Data Form Module 2
  - Performance Measures State Executive Summary
  - Performance Measures State SNAPSHOT
- Discussion of National Trends and Distributions
  - Improvements in Reporting Data Quality
  - Medians and Distributions for Key Measures
  - Performance Reporting
- Hands-On Training with ***Your*** Data

# Session Overview

- Presentation (30 Minutes) – Melissa and Holly
- Introduction to Performance Measures Assessment Form (30 Minutes) – Melissa and David with Bill [*Computers and Template Spreadsheet*]
- Small Group Breakouts (30 Minutes) – Joe, Brenda, Melissa, Heather, Christine, Jennifer, Jane, Brian, and Tracy [*Computers, Template Spreadsheet, Folders*]

# What's New?

- 2017 Training – Data Collection and Reporting
- 2018 Training – Looking at Performance Measures Data for ***Other*** States
- 2019 Training – Looking at Performance Measures Data for ***Your*** State

**Part I - Using the LIHEAP Performance  
Measures Executive Summary:  
*Idaho FY 2016 Performance Measures Data***

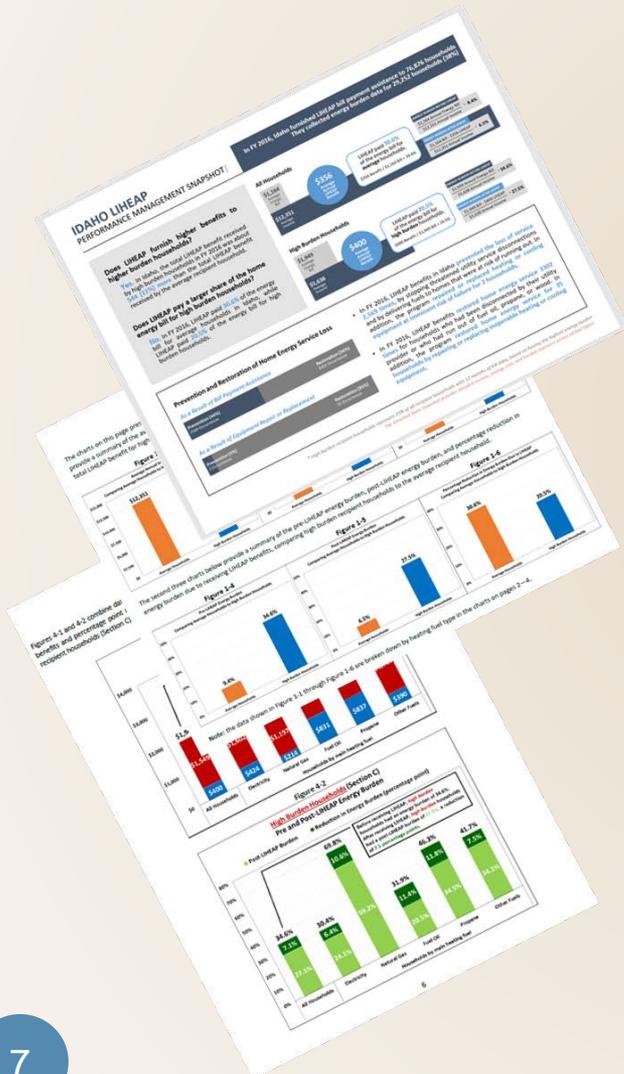


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# Understanding LIHEAP Performance Measures

## The LIHEAP Performance Measures State Snapshot

- The **LIHEAP Performance Measures State Snapshot** was designed by the Performance Measures Implementation Work Group (PMIWG) and APPRISE.
- The purpose of this tool is to make it easier for grantees to interpret, share, and use their LIHEAP Performance Measure data.



# Understanding LIHEAP Performance Measures

## State Snapshot—Executive Summary

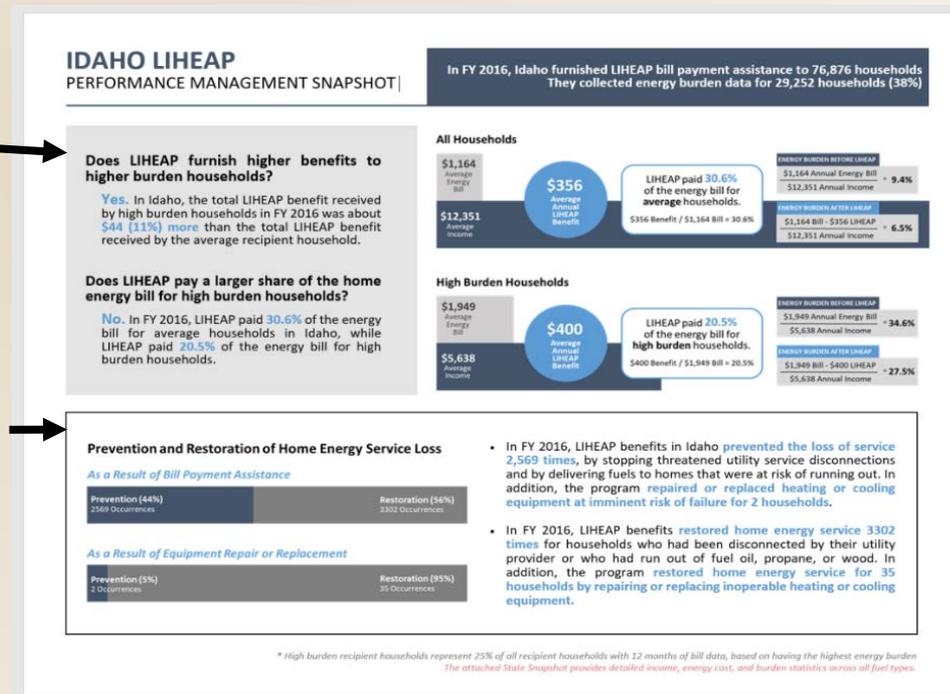
The **Snapshot Executive Summary** is a new addition to the *LIHEAP Performance Measures State Snapshot*. It focuses on the four primary Performance Measures.

### Energy Burden Measures

1. Benefit Targeting
2. Burden Reduction Targeting

### Prevention and Restoration Measures

1. Prevention of Home Energy Loss
2. Restoration of Home Energy



# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot (Executive Summary—Energy Burden Measures)

### Does LIHEAP furnish higher benefits to higher burden households?

**Yes.** In Idaho, the total LIHEAP benefit received by high burden households in FY 2016 was about **\$44 (12%) more** than the total LIHEAP benefit received by the average recipient household.

#### All Households

\$1,164  
Average  
Energy  
Bill

\$12,351  
Average  
Income

\$356

Average  
Annual  
LIHEAP  
Benefit

LIHEAP paid **30.6%**  
of the energy bill for  
**average** households.

$\$356 \text{ Benefit} / \$1,164 \text{ Bill} = 30.6\%$

#### ENERGY BURDEN BEFORE LIHEAP

$\frac{\$1,164 \text{ Annual Energy Bill}}{\$12,351 \text{ Annual Income}} = 9.4\%$

#### ENERGY BURDEN AFTER LIHEAP

$\frac{\$1,164 \text{ Bill} - \$356 \text{ LIHEAP}}{\$12,351 \text{ Annual Income}} = 6.5\%$

#### High Burden Households

\$1,949  
Average  
Energy  
Bill

\$5,630  
Average  
Income

\$400

Average  
Annual  
LIHEAP  
Benefit

LIHEAP paid **20.5%**  
of the energy bill for  
**high burden** households.

$\$400 \text{ Benefit} / \$1,949 \text{ Bill} = 20.5\%$

#### ENERGY BURDEN BEFORE LIHEAP

$\frac{\$1,949 \text{ Annual Energy Bill}}{\$5,630 \text{ Annual Income}} = 34.6\%$

#### ENERGY BURDEN AFTER LIHEAP

$\frac{\$1,949 \text{ Bill} - \$400 \text{ LIHEAP}}{\$5,630 \text{ Annual Income}} = 27.5\%$

### Why is this important?

*Section 2605(b)(5) of the Low Income Home Energy Assistance Act of 1981 (42 U.S. C. §8624(b)(5))* states that grantees “provide, in a timely manner, that the highest level of energy assistance will be furnished to those households that have the lowest incomes and the highest energy costs or needs in relation to income, taking into account family size.”

# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot (Executive Summary—Energy Burden Measures)

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

**No.** In FY 2016, LIHEAP paid **30.6%** of the energy bill for average households in Idaho, while LIHEAP paid **20.5%** of the energy bill for high burden households.

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Average  
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## Why is this important?

It is important to understand the extent to which the LIHEAP benefit is reducing household energy burden. **In Idaho, although high burden households are receiving a \$44 higher LIHEAP benefit, they are having less of their bill paid than average households (and therefore, less of their energy burden reduced).**

# Understanding LIHEAP Performance Measures

## Accessing the Executive Summary in the PM Website

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### Welcome to the LIHEAP Performance Management Website!

This federal website provides resources, tools, and a dynamic Data Warehouse to help local program administrators, policymakers, and the public access performance management information and performance measurement data for the Low Income Home Energy Assistance Program (LIHEAP).

The LIHEAP Virtual Library

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#### Assisted Households by Percent of HHS Poverty Guideline - FY 2010

All Grantees

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Assisted Households - >150% Poverty - Heating	24.6%

### Create Reports and Analyze Data

The LIHEAP Data Warehouse contains data reported by grantees and developed by the Office of Community Services (OCS) since 2001. The Data Warehouse has four different options for accessing data:

- The **Grantee Profiles (2014)** tool allows you to access 1-page profiles for each LIHEAP state grantee, compiled using the Data that OCS published in the 2014 LIHEAP Report to Congress.

# Grantee Questions

Questions?

**Part II - Using the LIHEAP Performance  
Measures State Snapshot:  
*Idaho FY 2016 Performance Measures Data***



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# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot



The remainder of the *LIHEAP Performance Measures State Snapshot* contains charts that compare the following statistics between **average** and **high burden** households, and **across fuel types**:

- Annual Income
- Annual Total Residential Energy Bill
- Energy Burden Before LIHEAP
- Annual Total LIHEAP Benefit
- Energy Burden After LIHEAP
- Percentage of Energy Bill Paid

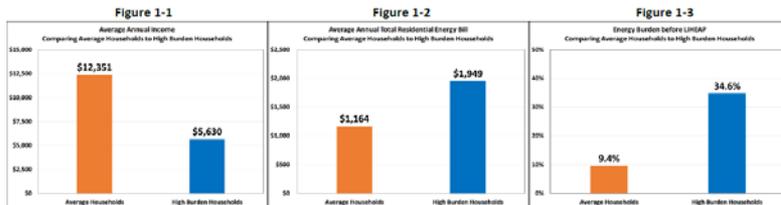
# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot

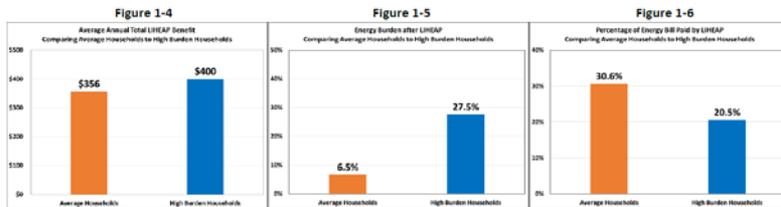
The first set of tables in the *LIHEAP Performance Measures State Snapshot* (Figures 1.1 through 1.6) compare the following statistics between **average** and **high burden** households:

FY 2016 LIHEAP Performance Measures  
State Snapshot – Idaho

The charts on this page present key metrics comparing high burden recipient households to the average recipient household. The first three charts provide a summary of the average annual income, average annual total residential energy bill (main heating fuel bill and electric), and energy burden before LIHEAP for high burden recipient households and the average recipient household.



The second three charts below provide a summary of the average annual total LIHEAP benefit, energy burden after LIHEAP, and percentage reduction in energy burden due to receiving LIHEAP benefits, comparing high burden recipient households to the average recipient household.



Note: the data shown in Figure 1-1 through Figure 1-6 are broken down by heating fuel type in the charts on pages 2–4.

- Annual Income
- Annual Total Residential Energy Bill
- Energy Burden Before LIHEAP
- Annual Total LIHEAP Benefit
- Energy Burden After LIHEAP
- Percentage of Energy Bill Paid

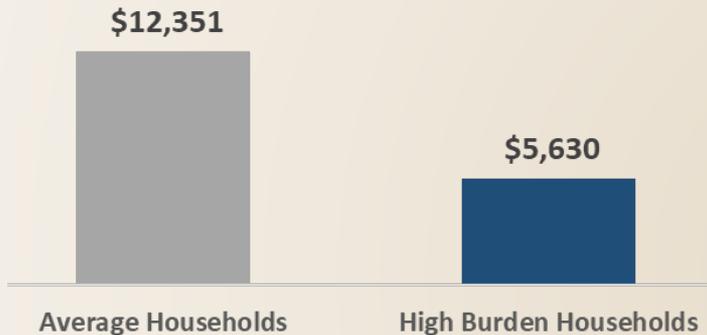
# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot

**Fig 1.1: Average Annual Income**

Comparing Average Households to High Burden Households

*LIHEAP Perf Data Form, Part V, Sections B and C, Line 2*



### Annual Income

High burden households have an average annual income that is **\$6,721 or 54% less** than average households.

Energy Burden is the percentage of income a household pays toward energy bills:

$$\frac{\text{Energy Bill}}{\text{Income}} = \text{Energy Burden}$$

Understanding whether differences in household energy burden are a product of lower income or higher energy costs (or both) can help grantees hone in on particular areas of their benefit matrix to improve targeting.

**Fig 1.2: Average Annual Total Residential Energy Bill**

Comparing Average Households to High Burden Households

*LIHEAP Perf Data Form, Part V, Sections B and C, Line 6*



### Annual Energy Bill

High burden households have an average energy bill that is **\$785 or 67% greater** than average households.

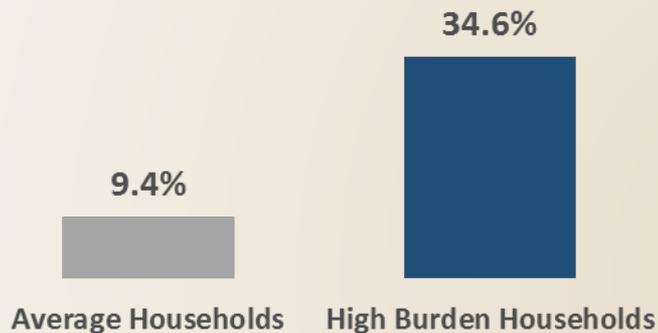
In Idaho, the difference in energy burden between average and high burden households is a product of **both** lower income and higher energy costs.

# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot

**Fig 1.3: Average Energy Burden Before LIHEAP**  
Comparing Average Households to High Burden Households

*LIHEAP Perf Data Form, Part V, Sections B and C, Line 7*



### Energy Burden before LIHEAP

Before LIHEAP, high burden households are paying **3.7 times** as much of their income toward energy costs than average households.

Comparing Figures 1.3 and 1.4 in the State Snapshot provides some initial insight into whether LIHEAP benefits are effectively targeting energy burden.

*For example:*

**Fig 1.4: Average Annual Total LIHEAP Benefit**  
Comparing Average Households to High Burden Households

*LIHEAP Perf Data Form, Part V, Sections B and C, Line 3*



### Annual LIHEAP Benefit

High burden households receive an average annual LIHEAP benefit that is **\$44 or 12% higher** than average households.

Although high burden households in Idaho are paying **3.7 times** as much of their income toward energy bills, they are only receiving a LIHEAP benefit that is **12% higher** than average households.

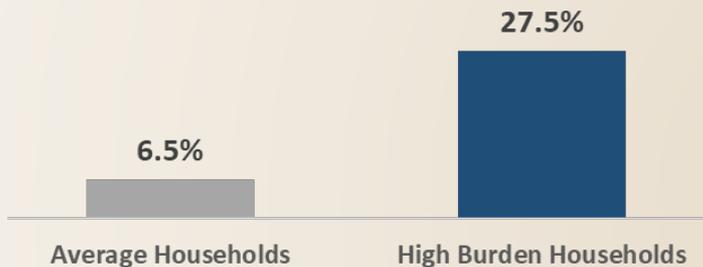
# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot

**Fig 1.5: Average Energy Burden After LIHEAP**

Comparing Average Households to High Burden Households

*LIHEAP Perf Data Form, Part V, Sections B and C, Line 8*



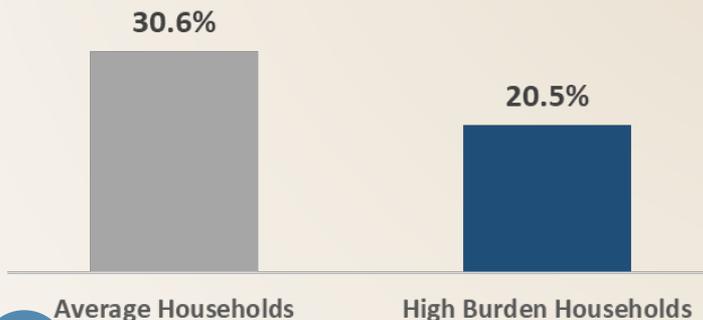
### Energy Burden after LIHEAP

After LIHEAP, high burden households are paying **4.2 times** as much of their income toward energy costs than average households.

**Fig 1.6: Percentage of Energy Bill Paid by LIHEAP**

Comparing Average Households to High Burden Households

*LIHEAP Perf Data Form, Part V, Sections B and C, Line 10*



### Percentage of Bill Paid

On average, high burden households have **33% less** of their energy bill paid with LIHEAP than average households.

Figures 1.5 and 1.6 of the Snapshot allow grantees to compare outcomes against overarching program goals.

- Some grantees have a goal of bringing all LIHEAP households to a “maximum” or “manageable” energy burden level (Figure 1.5).
- Other grantees have a goal of paying a minimum or specific percentage of the bill for all LIHEAP households (Figure 1.6).

# Understanding LIHEAP Performance Measures

## Accessing the State Snapshot in the PM Website

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# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot



The remainder of the *LIHEAP Performance Measures State Snapshot* provides grantees with detailed statistics **broken out by fuel type**.

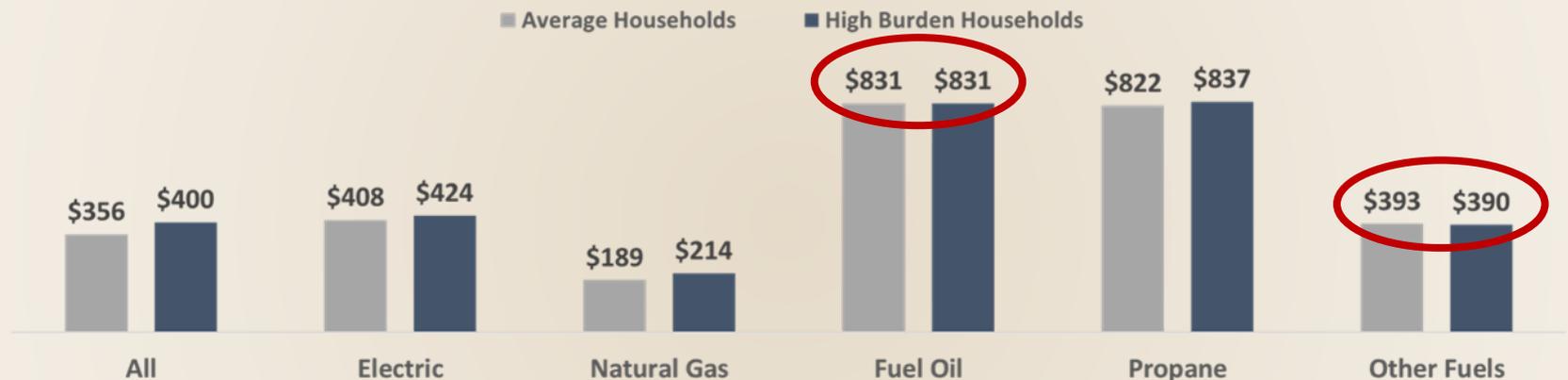
# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot

**Fig 2.4: Average Annual Total LIHEAP Benefit**

Comparing Average Households to High Burden Households

*LIHEAP Perf Data Form, Part V, Sections B and C, Line 3*



Does LIHEAP furnish higher benefits to higher burden households **across all fuel types?**

**No.** In FY 2016, high burden households in Idaho who used fuel oil for main heat received the **same** LIHEAP benefit as average fuel oil households. High burden households who used “other fuels” (e.g., wood) received a **lower** benefit than average “other fuel” households.

# Understanding LIHEAP Performance Measures

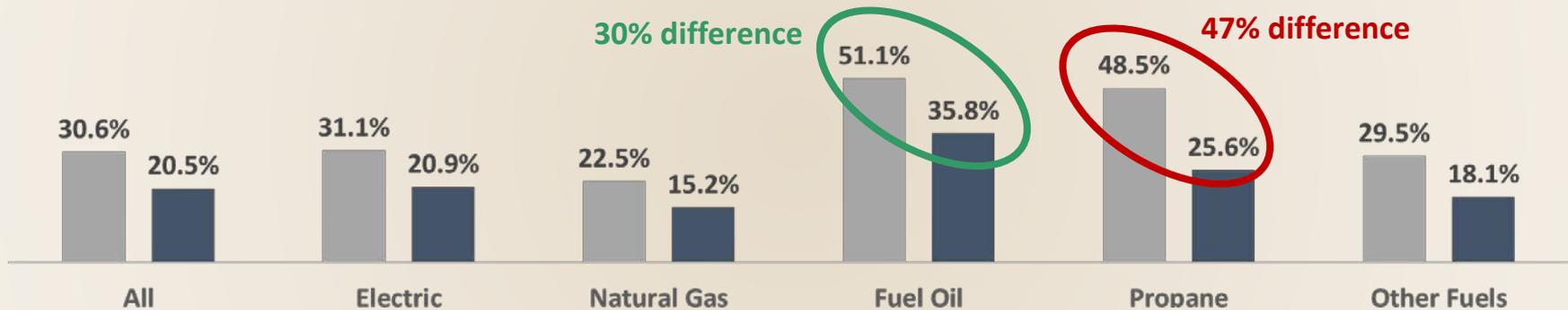
## IDAHO State Snapshot

**Fig 2.6: Percentage of Bill Paid**

Comparing Average Households to High Burden Households

*LIHEAP Perf Data Form, Part V, Sections B and C, Line 10*

■ Average Households      ■ High Burden Households



Does LIHEAP pay more of the energy bill for high burden households across all fuel types?

**No.** In FY 2016, high burden households in Idaho had less of their energy bill paid with LIHEAP than average households, *regardless of fuel type*. However, the extent of this difference varies by fuel type.

# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot—Summary of Key Findings

### Key Findings

In FY 2016, high burden households in Idaho paid **3.7 times** as much of their income toward energy costs as average households. However, high burden households only received an **11% higher** LIHEAP benefit than average households.

High burden and average **fuel oil** households received **equal** benefits in FY 2016. High burden **“other fuels”** households received a **lower** benefit than average “other fuels” households.

### Possible Next Questions

- How is our current matrix designed to target higher benefits to higher burden households? Is our matrix yielding expected results? If not, why?
- Does our current benefit matrix accurately reflect income and energy cost differences among deliverable fuel households?
- Are there specific benefit determination or payment processes related to deliverable fuels that impact the way our matrix works?

# Understanding LIHEAP Performance Measures

## IDAHO State Snapshot—Summary of Key Findings

Key Findings	Possible Next Questions
<p>For all households (both average and high burden), the percentage of bill paid with LIHEAP varies considerably between fuel types.</p>	<ul style="list-style-type: none"><li>• Is it our intention to vary the percentage of bill we pay based on fuel type? Or is our goal to pay the same percentage of a household’s energy bill regardless of fuel type? Does our benefit matrix reflect our goal?</li></ul>
<p>Compared to average households, high burden households <b><i>across all fuel types</i></b> have a lesser share of their energy bill paid with LIHEAP. The extent of this difference varies by fuel type.</p>	<ul style="list-style-type: none"><li>• Is it our expectation that all households will have an equal share of their bill paid? Or that high burden households should have a higher share of their bill paid? Is our matrix designed to reflect our expectations?</li></ul>
<p>In FY 2016, bill payment assistance used to pay natural gas and “other fuel” benefits resulted in more occurrences of restoration (relative to prevention).</p>	<ul style="list-style-type: none"><li>• Why are more natural gas and “other fuel” households waiting until they are disconnected or out of fuel to access LIHEAP? How can we work with local partners and utilities to encourage households to apply sooner?</li></ul>

# Understanding LIHEAP Performance Measures

## Accessing the State Snapshot in the PM Website

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# Grantee Questions

Questions?

# Part III - LIHEAP Performance Measures: *National Trends and Distributions*



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# Reporting Trends

- Number of Grantees Reporting Energy Burden Data
  - 2015 – 10 states
  - 2016 – 40 states
  - 2017 – 47 states
  - 2018 – 47+ states

# Data Quality Trends

- Not Reporting Electric Baseload Data
  - 2016 – 7 states
  - 2017 – 6 states
  - 2018 – 4 states
- Reporting Delivered Fuel Data for Less Than 5%
  - 2016 – 23 states
  - 2017 – 22 states
  - 2018 – 20 states

# Data Quality Trends

## Percent of Households with Data

Percent with Data	Number of States	Percent of States
Less than 10%	4	9%
10% to LT 25%	5	11%
25% to LT 50%	16	36%
50% to LT 75%	14	32%
75% or More	5	11%
<b>TOTAL</b>	<b>44</b>	<b>100%</b>
<b>Median Value = 45%</b>		

# Information Trends

## Distribution of Benefit Targeting Index

Index Value	Number of States	Percent of States
Less than 75	0	0%
75 to LT 100	4	8%
<b>100 to LT 110</b>	<b>10</b>	<b>22%</b>
110 to LT 125	14	30%
125 or More	18	39%
TOTAL	44	100%
<b>Median Value = 119</b>		

# Information Trends

## Distribution of Burden Reduction Targeting Index

Index Value	Number of States	Percent of States
Less than 75	8	17%
75 to LT 100	17	37%
<b>100 to LT 110</b>	<b>13</b>	<b>28%</b>
110 to LT 125	7	15%
125 or More	<b>1</b>	2%
TOTAL	44	100%
<b>Median Value = 99</b>		

# OCS Performance Reporting

- FY Congressional Budget Justification – Chapter on Program Performance (Developmental Measures)
- LIHEAP Report to Congress – Performance Measures Section
- Ad Hoc Questions from the Administration and Congress

# Grantee Questions

Questions?