

FY 2020 Performance Data Form Module 2 (Performance Measures): *Step-By-Step Review*

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

January 19, 2021

Welcome:

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Presenters:

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Welcome

- **Purpose of This Webinar**

- To furnish an in-depth overview of Module 2 (Performance Measures) of the FY 2020 Performance Data Form, including a line-by-line review of each reporting item and instruction.
- To provide guidance related to including households served with CARES Act funds.
- To highlight key reminders and ways to avoid common reporting issues.

- **Audience for This Webinar**

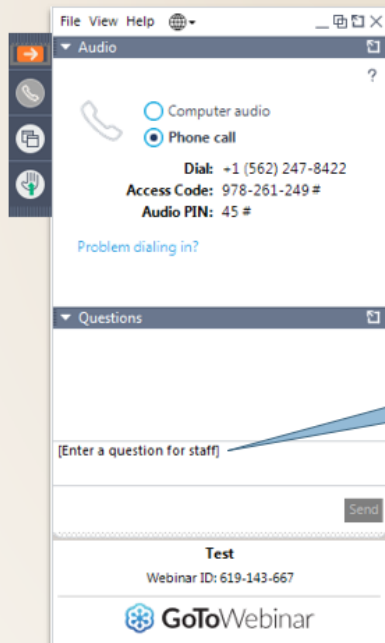
- New LIHEAP Coordinators and staff who have not worked on completing the Performance Measures.
- Experienced LIHEAP Coordinators and staff that would like to review the requirements in detail to understand all of the instructions and avoid reporting issues.

Webinar Overview

- **Structure of The Webinar**
 - 90 minutes with question breaks.
 - **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.



Enter text here to ask a question.

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Presentation Outline

- | | | |
|-----|---|-----------------|
| 1. | Overview of the LIHEAP Performance Measures | Slide 6 |
| 2. | FY 2020 Performance Measures: CARES & COVID Impacts | Slide 13 |
| 3. | Reporting Rules for Module 2 | Slide 18 |
| 4. | Section V: Energy Burden Targeting | Slide 24 |
| 5. | Part A: All LIHEAP Bill Payment-Assisted Households | Slide 31 |
| 6. | Part B: LIHEAP Bill Payment-Assisted Households with Available Data | Slide 35 |
| 7. | Part C: High Burden LIHEAP Bill Payment-Assisted Households with Available Data | Slide 44 |
| 8. | Part D & E: Targeting Indexes for High Burden Households | Slide 51 |
| 9. | Section VI – Restoration of Home Energy Service | Slide 56 |
| 10. | Section VII – Prevention of Loss of Home Energy Service | Slide 61 |
| 11. | Final Reminders | Slide 66 |

Overview of the LIHEAP Performance Measures



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Overview of the Performance Measures

The Performance Data Form

- The Performance Data Form is one report consisting of three modules:
 - Module 1 (Grantee Survey) – Mandatory
 - ➔ • Modules 2 (Performance Measures) - Mandatory
 - Module 3 (Optional Performance Measures) – Optional

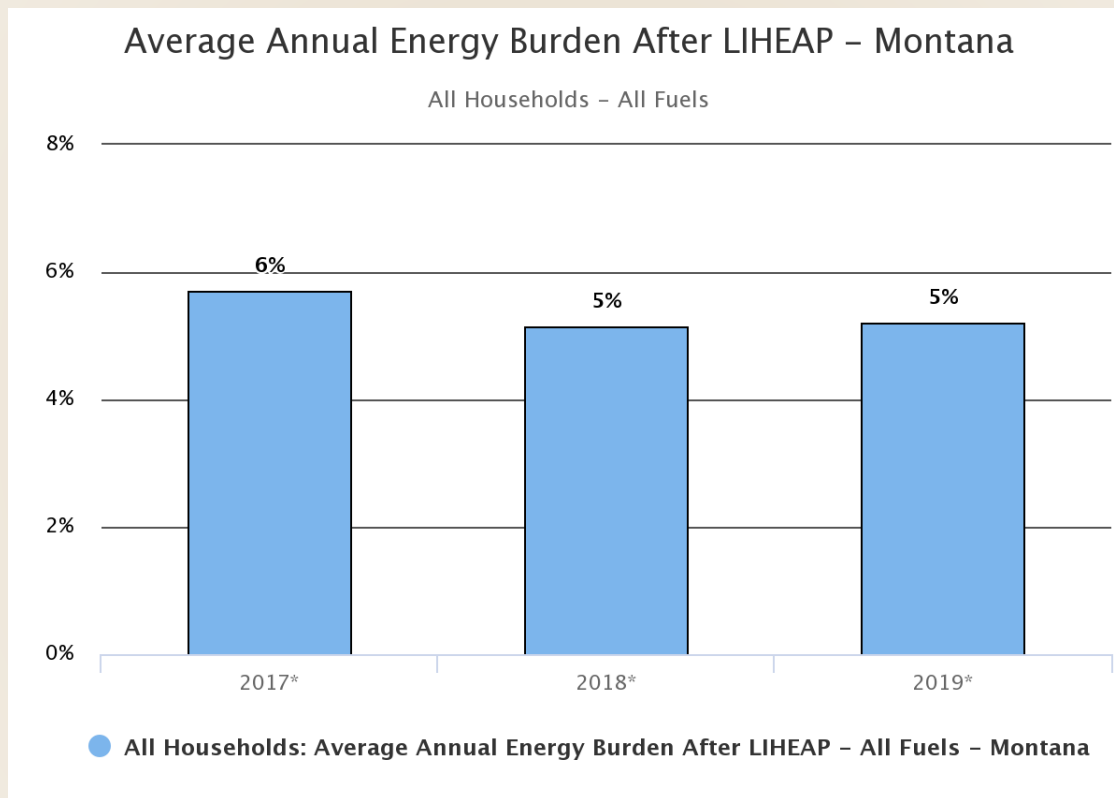
Overview of Performance Measures

Background

- The Performance Measures have been submitted by state grantees since 2016 in Module 2 of the *LIHEAP Performance Data Form*.
- The Performance Measures provide measurable information on annual LIHEAP impacts and targeting performance.
- Three main types of data need to be reported:
 - Average annual income, benefits, and energy bill amounts for a sample of households
 - Occurrences where LIHEAP assistance restored lost energy service
 - Occurrences where LIHEAP assistance prevented loss of service
- **The data provide grantees with information to help with Performance Management.**

Overview of the Performance Measures

Example of Performance Measures Data



- Charts and tables with state Performance Measures data are available in the [LIHEAP Data Warehouse](#) under “Standard Reports”.

Overview of the Performance Measures

Relation to Other Reports

Model Plan

Program Components
Benefit determination procedures
Minimum and maximum benefit levels

Grantee Survey

How you obligated your LIHEAP funds
Average benefits
Income eligibility criteria

LIHEAP Reports

Household Report

Households Served by Assistance Type
Total Households Served
Households by Poverty Interval
Households by Vulnerability

Performance Measures

Energy burden reduction impacts
Benefit targeting
Restoration of energy service
Prevention of loss of energy service

Update on Status & Due Date



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Update on Status & Due Date

- To allow OCS to monitor the use of CARES Act Funds, OCS is implementing changes to Module 1 (the Grantee Survey). These are currently in progress.
- OCS is expected to issue an Action Transmittal soon with the revised due date for the FY 2020 Performance Data Form. This is expected to be in late March.
- Grantees are encouraged to prepare their FY 2020 Performance Measures reports **now** to be ready to submission.

FY 2020 Performance Measures: *CARES & COVID Impacts*



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CARES & COVID Impacts

Any Changes to Reporting Requirements?

- There are no changes to Module 2. The requirements for the Performance Measures remain the same as those for last year's FY 2019 report.
- Grantees can download the prior instructions for reporting each item in the Performance Data Form here:
https://www.acf.hhs.gov/sites/default/files/documents/ocs/liheap_at01lp_dfatt1_fy2020_1.pdf
- Grantees are also encouraged to review information from last year's report review.

CARES & COVID Impacts

Guidance for CARES

- **Households provided with CARES benefits in FY 2020 should be included when preparing information for the Performance Measures report.**
- For the FY 2020 Performance Measures, grantees should:
 - Include households that received any federal LIHEAP assistance during FFY 2020. This includes households assisted with regular LIHEAP funds, LIHEAP CARES funds, or both.
 - Include regular and CARES-funded benefits when calculating the total benefit amounts households received and calculating the total average LIHEAP benefit amounts.

FY 2020 Reporting & CARES

Impact of CARES on Results

- **Grantees may see changes in their FY 2020 Performance Measures results because of the use of LIHEAP CARES funds.**
- *Examples of CARES Impacts*
 - If you provided extra benefits to a larger portion of your clients, the average benefit amounts in your report will be higher.
 - If you targeted additional or new benefits for crisis situations, you may see a larger number of restoration or prevention occurrences.
 - If you served more households than normal, you may see other differences in the characteristics of households served.

FY 2020 Reporting & CARES

Impact of COVID on Results

- **Grantees may see changes in their FY 2020 Performance Measures results because of the pandemic.**
- *Examples of Pandemic Impacts*
 - Because of utility shutoff moratoriums, you may also see changes compared to prior years, such as fewer occurrences where LIHEAP restored lost service.
 - If you expanded or changed your eligibility requirements, you may see changes in the characteristics of your LIHEAP population.
 - You may also see differences in the average annual income or the annual energy bills due to the economic and social impacts of COVID-19.

Reporting Rules for Module 2 (Performance Measures)



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Reporting Rule #1:

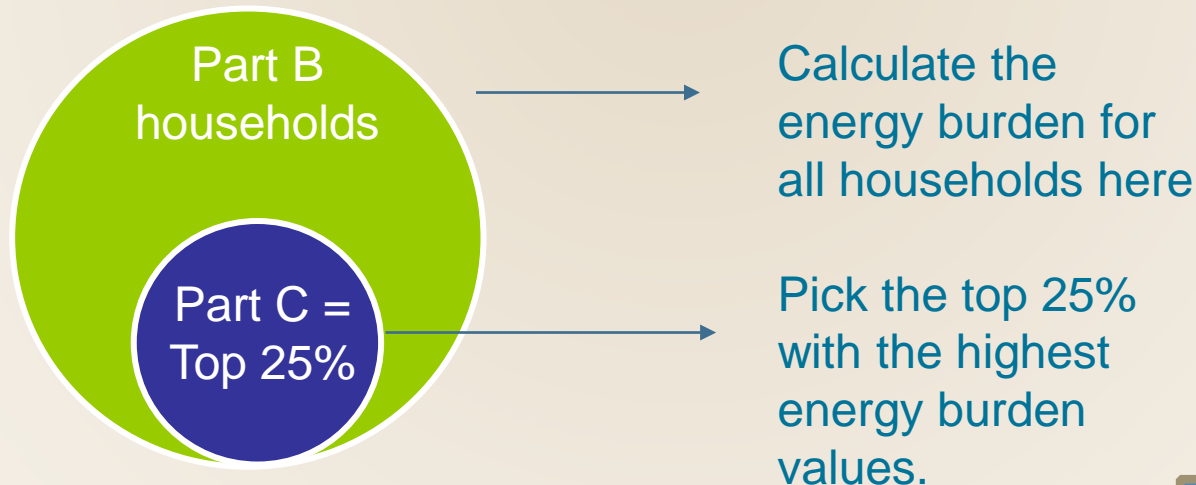
Collect Main Heating Fuel Bill Information and Electricity Bill Information From a Sample of Energy Vendors

- The Performance Measures require grantees to:
 1. Identify the top energy vendors for each fuel based on the number of LIHEAP households and percent of LIHEAP households served.
 2. Request data from the top vendors for each fuel. More information on how to select vendors can be found here:
https://liheappm.acf.hhs.gov/sites/default/files/private/training/pm_webinar/PM_vendor_selection_supplement.pdf
 3. Use the data furnished by the vendors to calculate and report the average annual main heating bill for each fuel type AND the average annual electricity bill.
- To submit requests to vendors, grantees need to collect the following from all LIHEAP bill-payment recipients.
 - Main Heating Type
 - Main Heating Vendor Name and Account Number
 - Electricity Vendor Name and Account Number

Reporting Rule #2:

Calculating Statistics in Section V

- Section V asks for average statistics for two groups
 - All households with annual energy bill data (main heat and electricity)
 - The top 25% (or top quartile) with the highest energy burden.
- Any household missing a piece of information should be excluded from Parts B and C.



Reporting Rule #3:

Include CARES Benefits / Households

- The Performance Measures are intended to provide information about your program impacts during FFY 2020.
- If you used your LIHEAP CARES fund to provide benefits during FFY 2020, those benefits and households should be included in the report.
- *Examples:*
 - You provided a \$200 supplemental benefit to all your Heating Assistance households. That \$200 supplemental benefit should be included when calculating the average annual LIHEAP benefit amount.
 - You served extra households with CARES. When you are collecting your energy bill data from vendors, you should include these extra households.

Reporting Rule #4

Reporting on Restorations and Preventions

- For Sections VI and VII, the Performance Measures form asks grantees to report on occurrences where LIHEAP resulted in a restoration of lost energy service or prevented the loss of energy service.
- Reminders:
 - These sections ask you to report occurrences, not households. If you provide households with multiple benefits, you may have multiple occurrences for a single household.
 - These sections asks you to report on any instances that meet the conditions described in the instructions. This is not limited to crisis assistance only.
 - **To report the information in Sections VI and VII, you need:**
 - Data from applicants or vendors on their home energy status at the time of application/assistance.
 - Assurance that the LIHEAP benefit did restore service or prevent imminent loss of service.
 - Data on the fuel source where the LIHEAP benefit was paid to do this.

Audience Poll Question #1

QUICKPOLL

If a household got a regular heating benefit AND a supplemental benefit during FY 2020, what do you do for Section V?

Please select one:

- Use the regular heating benefit only (exclude the supplemental benefit)
- Use the total combined benefit amount (regular + supplemental)
- Use both, but keep them as separate benefits / households
- I'm not sure



Section V: Energy Burden Targeting



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Overview of Section V

V. ENERGY BURDEN TARGETING						
	Bill Payment- Assisted Household Main Heating Fuel					
	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households	164,731	17,412	89,855	43,122	3,883	10,459
B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
2. Average Annual Household Income	\$23,022.00	\$20,430.00	\$22,252.00	\$24,977.00	\$22,780.00	\$20,881.00
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	\$672.00	\$589.00	\$602.00	\$771.00	\$787.00	\$801.00
4. Average Annual Main Heating Fuel Bill	\$1,479.00	\$1,689.00	\$1,141.00	\$1,836.00	\$1,763.00	\$1,348.00
5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00	\$363.00	\$487.00
6. Average Annual Total Residential Energy Bill	\$1,962.00	\$1,689.00	\$1,681.00	\$2,407.00	\$2,126.00	\$1,835.00
7. Average Annual Burden Before Receiving LIHEAP	8.52%	8.27%	7.55%	9.64%	9.33%	8.79%
8. Average Annual Burden After Receiving LIHEAP	5.60%	5.38%	4.85%	6.55%	5.88%	4.95%
9. Average Percentage Point Change in Energy Burden	2.92%	2.88%	2.71%	3.09%	3.45%	3.84%
10. Average Percentage Reduction in Energy Burden	34.25%	34.87%	35.81%	32.03%	37.02%	43.65%
C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						

Overview of Section V

Key Concept Cheat Sheet

- **Energy Burden**
 - The percentage of annual household income spent on annual home energy costs.
 - *For details, see Slide 30.*
- **Bill Payment-Assisted Households**
 - Households that were provided with a LIHEAP benefit used to pay a share of a household's energy bills and utility deposits.
 - *For details, see Slide 33.*
- **High Burden Households**
 - *The top 25 percent with the highest energy burden of all Bill Payment-Assisted household with available data.*
 - *For details, see Slide 46.*
- **Annual Total Residential Energy Bill**
 - The dollar amount that a household spent on home energy costs in one year.
 - This equals the annual Main Heating Bill + the annual Electricity Bill
 - *For details, see Slide 46.*

Overview of Section V

What is “Energy Burden Targeting”?

- This section collects data to understand how LIHEAP benefits impact **energy burden** and how well benefits are targeted to households with higher energy burdens.
 1. **Change in Energy Burden** - How much is energy burden reduced as a result of receiving LIHEAP bill-payment assistance? How does this vary by main heating type?
 2. **Benefit Targeting Index** – Are high burden households receiving LIHEAP benefits that are higher, lower, or about the same as all households?
 3. **Burden Reduction Targeting Index** – Do high burden households have a greater, equal, or lesser share of their energy bill paid as a result of receiving LIHEAP bill-payment assistance than all households?

Section V:

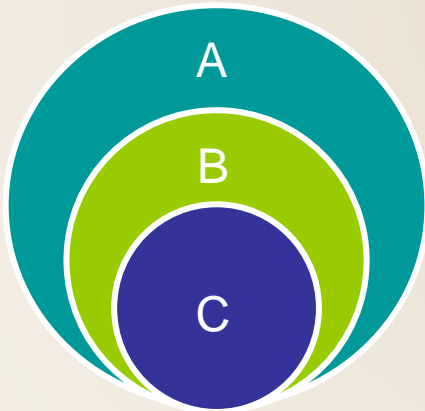
Why “Energy Burden Targeting”?

- Per the LIHEAP Statute...
 - LIHEAP provides grants to states *“to assist low-income households, particularly those with the lowest incomes, that pay a high proportion of household income for home energy, primarily in meeting their immediate home energy needs.”* – Section 2602(b)
 - *“The State agrees to...provide, in a timely manner, that the highest level of assistance will be furnished to those households which have the lowest incomes and the highest energy costs or needs in relation to income”* - Section 2605(b)(5)

Overview of Section V

What is “Energy Burden Targeting”?

- Section V categorizes LIHEAP assisted households into three groups:
 - A. All LIHEAP bill payment-assisted households
 - B. LIHEAP bill payment-assisted households *with available bill data*
 - C. *High burden* LIHEAP bill payment-assisted households with available bill data



- Households in group B are a subset of the households in group A.
- Households in group C are a subset of the households in group B.
- The purpose is to compare results for households in group B to group C.

Presenter(s):
Melissa Torgerson

Key Concept: Energy Burden

- What is Energy Burden?
 - **Energy Burden** is the percentage of annual household income spent on annual home energy costs.

- Energy Burden is calculated as follows:

$$\frac{\text{Household's Total Annual Residential Energy Bill}}{\text{Household's Annual Income}} * 100$$

- Energy Burden can vary greatly for LIHEAP households depending on income and energy bills.
- Examples will be shown on Slide 49.

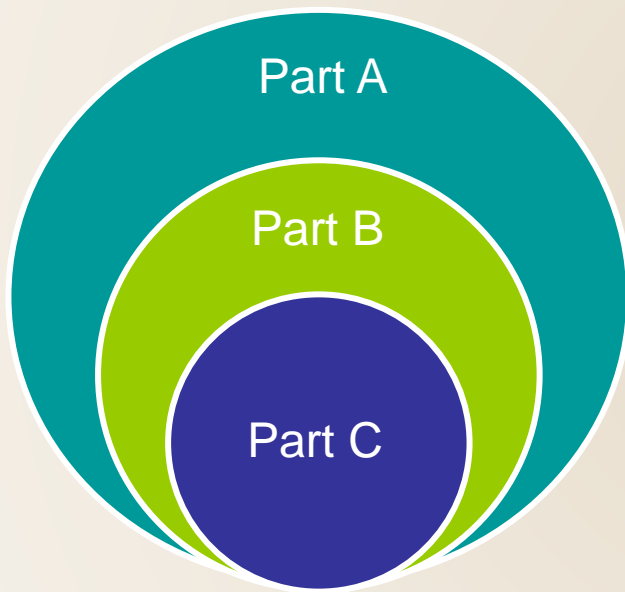
Part A: All LIHEAP Bill Payment-Assisted Households



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Section V – Part A

Bill Payment-Assisted Households



- Part A – LIHEAP bill payment-assisted households
- Part B – LIHEAP bill payment-assisted households *with available bill data*
- Part C – *High burden* LIHEAP bill payment-assisted households with available bill data

Key Concept:

Bill Payment-Assisted Households

- **LIHEAP Bill Payment-Assisted Households** – Any household provided with a LIHEAP benefit used to pay a share of a household's energy bills and utility deposits.
 - *This should include:*
 - Households receiving heating, cooling, and crisis assistance benefits to pay a share of a household's energy bills or utility deposits.
 - Households receiving Heat-in-Rent payments.
 - *This should exclude:*
 - Households receiving only LIHEAP weatherization assistance or energy-related equipment repair or replacement services.
 - SNAP households that only received a nominal LIHEAP benefit (if applicable).
- Same definition as in the Household Report.

Section V – Part A

Unduplicated Number of Bill Payment-Assisted Households

- Report on all households that received LIHEAP Bill Payment Assistance during the fiscal year (Regular and/or CARES Act), by main heating fuel type.
- Households that received Bill Payment Assistance, but have an unknown main heating fuel type should go in the “Other Fuels” column.
- This should match Line 14 of your Household Report.

V. ENERGY BURDEN TARGETING						
	All Households	Bill Payment-Assisted Household Main Fuel				
		Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households	390,708	83,916	212,925	77,472	11,822	4,573

Note: Report households only in the individual fuel type columns. The “All Households” field in Part A is **auto-calculated** from the counts reported for each main heating fuel type and “locked” from editing.

Part B:

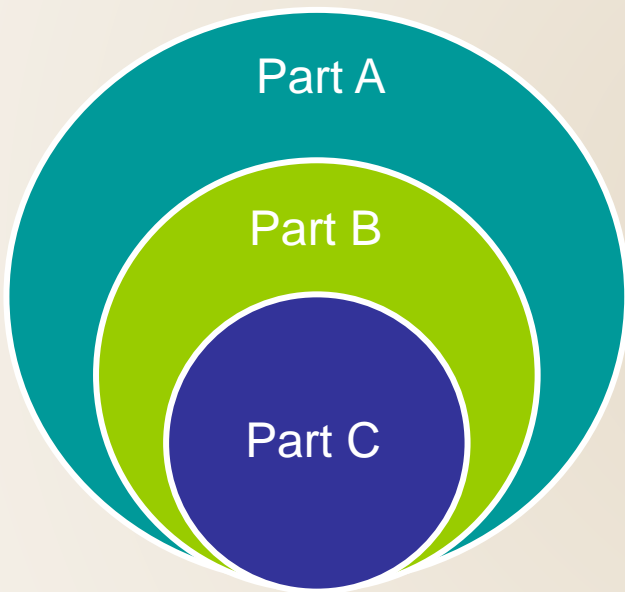
LIHEAP Bill Payment-Assisted Households *with Available Data*



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Section V – Part B

Bill Payment-Assisted Households with Available Bill Data



- Part A – LIHEAP bill payment-assisted households
- Part B – LIHEAP bill payment-assisted households *with available bill data*
- Part C – *High burden* LIHEAP bill payment-assisted households with available bill data

Section V – Part B

Who is included in Part B?

- For a household to be included in Part B, you must have the following information for that household:
 1. Main Heating Fuel Type (*Note: this was also needed for Part A*)
 2. Annual Household Income
 3. Annual Total LIHEAP Bill-Payment Assistance Benefits
 4. **The total annual main heating fuel bill**
 5. **The total annual electricity bill (if electricity is not the main heating source)**
- Where does the information come from?
 - Item 1 and 2 should be collected on your client application.
 - Item 3 should be documented in your program records.
 - *Items 4 and 5 must be collected from or verified by energy vendors.*

Section V – Part B

Line 1 – Unduplicated Count of Households with 12 Months of Bill Data

- Report an unduplicated count of all LIHEAP bill payment-assisted households *with available data*, by main heating fuel type.
- Report households only in the fuel type columns. The “All Households” field in Line 1 is **auto-calculated** from the counts reported for each main heating fuel type and “locked” from editing.

Auto-calculated

Report Here

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
2. Average Annual Household Income	\$23,022.00	\$20,430.00	\$22,252.00	\$24,977.00	\$22,780.00	\$20,881.00
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	\$672.00	\$589.00	\$602.00	\$771.00	\$787.00	\$801.00
4. Average Annual Main Heating Fuel Bill	\$1,479.00	\$1,689.00	\$1,141.00	\$1,836.00	\$1,763.00	\$1,348.00
5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00		

Presenter(s):
Dan Bausch

Section V – Part B

Line 2 – Average Annual Household Income

- Report the average annual household income for households in Part B.
- Steps to remember:
 - All households reported in line 1 should be used in this calculation, including households with very low or zero income.
 - Report the *gross* household income.
 - Remember to verify that each client has an annual income amount. If income is monthly or quarterly, convert to an annual income amount.

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
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5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00		

Presenter(s):
Dan Bausch

Section V – Part B

Line 3 – Average Annual Total LIHEAP Benefit per Household

- Report the average annual total LIHEAP benefit per household for households in Part B.
- Steps to remember:
 - All households reported in line 1 should be used in this calculation.
 - Add up all bill payment assistance benefits a household received prior to calculating the average amount for each group.
 - Exclude non-bill payment assistance (weatherization, equipment repair, etc.)

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
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5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00		

Presenter(s):
Dan Bausch

Section V – Part B

Line 4 – Average Annual Main Heating Fuel Bill

- Report the average annual main heating fuel bill for households in Part B.
- Steps to remember:
 - This data is collected from a sample of energy vendors.
 - This should include all required customer payments, such as monthly service charge, usage charge and taxes.
 - Exclude optional charges, such as equipment service plans.
 - For electricity main-heat households, the electricity bill *is* the main heating fuel bill, and should be reported in this line (line 4).

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
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5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00		

Presenter(s):
Dan Bausch

Section V – Part B

Line 5 – Average Annual Electricity Bill

- Report the average annual electricity bill for households in Part B.
- Steps to remember:
 - This data is collected from a sample of electricity vendors.
 - This should include all required customer payments, such as monthly service charge, usage charge and taxes.
 - Exclude optional charges, such as equipment service plans.
 - For electricity main-heat households, report \$0 here and include the average in Line 4 (per the previous slide).

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
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Presenter(s):
Dan Bausch

Section V – Part B

“All Households” Column

- The “All Households” values are intended for you to report the average values across all fuel types.
- Since the number of households with each fuel type vary, you **cannot** compute a simple average using the average values for each fuel type.
- Instead, Grantees have two main options to correctly calculate the averages to report in the “All Households” column.
 - **Option 1:** Use the [Excel workbook](#) that automatically calculates weighted averages based on the information entered for each heating fuel type.
 - **Option 2:** Calculate the averages directly in your data system using all of the household-level data in your database.

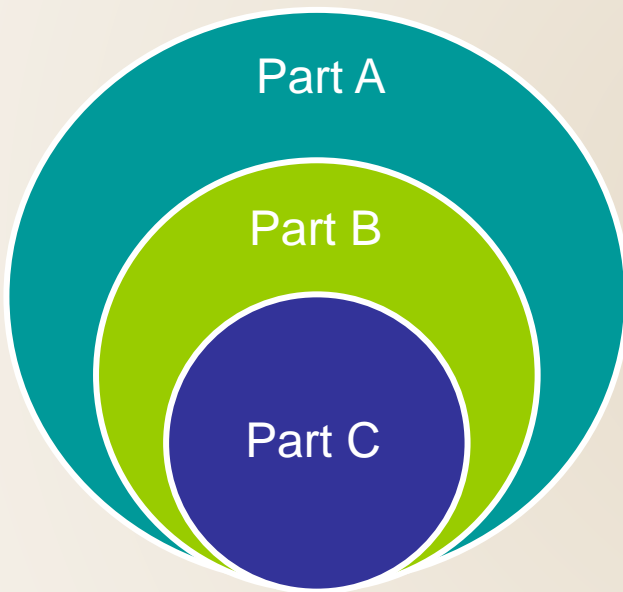
Part C:
***High Burden* LIHEAP Bill Payment-**
Assisted Households with Available Data



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Section V – Part C

High Burden Households with Available Bill Data



- Part A – LIHEAP bill payment-assisted households
- Part B – LIHEAP bill payment-assisted households *with available bill data*
- Part C – *High burden* LIHEAP bill payment-assisted households with available bill data

Key Concepts: *High Burden* Households & Total Residential Energy

- What are *High Burden* households?
 - For the Performance Data Form, *High Burden* has a specific definition:
 - High Burden = **The top 25 percent of households from Part B with the highest calculated energy burden.**
- **Annual Total Residential Energy Bill**
 - Defined as the dollar amount that a household spent on home energy costs in one year.
 - For Module 2, this equals the annual Main Heating Bill + the annual Electricity Bill

Section V – Part C

Identifying High Burden Households

- **Step 1:** For each household included in Part B, calculate the household's *annual total residential energy bill*.
 - Add the annual main heating bill and annual electricity bill together.
 - Verify that the electricity bill doesn't get double-counted when calculating the annual residential energy bill.

Household ID	Main Heating Fuel	Annual Main Heating Bill	Annual Electricity Bill	Annual Total Residential Energy Bill
Household 1	Propane	\$2,800	\$1,200	\$4,000
Household 2	Fuel Oil	\$1,500	\$1,500	\$3,000
Household 3	Electricity	\$1,200	\$0	\$1,200
Household 4	Natural Gas	\$1,000	\$800	\$1,800
Household 5	Electricity	\$1,000	\$0	\$1,000

Note:
Correct -
Electricity bill
was not double-
counted.

Presenter(s):
Dan Bausch

Section V – Part C

Identifying High Burden Households

- **Step 2:** Calculate *energy burden* for each of these households.

$$\frac{\text{Household's Total Annual Residential Energy Bill}}{\text{Household's Annual Income}} * 100$$

- **Step 3:** Assign a value of 100% energy burden to households with income equal to \$0 or with an *annual total residential energy bill* that is larger than the household's annual income.
- **Step 4:** Sort the combined set of ALL households from highest to lowest energy burden.
- **Step 5:** Draw the top 25% of households with the highest energy burden, *regardless of fuel type*.

Section V – Part C

Identifying High Burden Households

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

Section V – Part C

Completing the Report

- Part C should be completed following the same instructions as Part B.
- The only difference is the subset of households that is included in the calculations.
 - The calculations for Part B include all households with available data.
 - The calculations for Part C only include high burden households (the top 25% of households from Part B based on energy burden).

Part D and Part E: ***Targeting Indexes for High Burden Households***



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Section V – Parts D & E

- Sections D & E are auto-calculated by the Form using the information in Sections B and C.
- Section D is the **benefit targeting index** for high burden households. This quantifies how LIHEAP benefits are targeted to high burden households compared to all households.
- Section E is the **burden reduction targeting index** for high burden households. This quantifies whether LIHEAP pays a greater share of the energy bill (and reduces energy burden by a greater percentage) for high burden households compared to the average household receiving LIHEAP.

Section V – Part D

The Benefit Targeting Index

- Section D is auto-calculated by the Form using the information in Sections B and C.
- The **benefit targeting index** for high burden households quantifies how LIHEAP benefits are targeted to high burden households compared to all households.
 - For example, a score of 138 means 38% higher benefits to high burden households

Score Results	Score Interpretation
Less than 100	The average benefit amount provided to High Burden households is less than the average benefit amount provided to all households.
100	The average benefit amount provided to High Burden households is equal to the average benefit amount provided to all households.
Greater than 100	The average benefit amount provided to High Burden households is greater than the average benefit amount provided to all households.

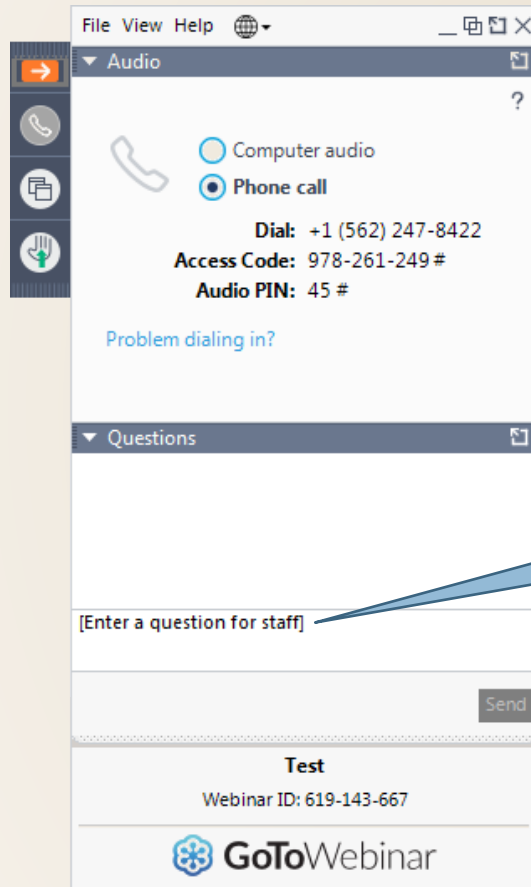
Section V – Part E

The Burden Reduction Targeting Index

- Section E is auto-calculated by the Form using the information in Sections B and C.
- The **burden reduction targeting index** for high burden households quantifies whether LIHEAP pays a greater share of the energy bill (and reduces energy burden by a greater percentage) for high burden households compared to the average household receiving LIHEAP.
 - For example, a score of 90 means 10% less share of the energy bill for high burden households

Score Results	Score Interpretation
Less than 100	The average share of the energy bill paid by the LIHEAP program for High Burden households is less than the share paid for all households.
100	The average share of the energy bill paid by the LIHEAP program for High Burden households is equal to the share paid for all households.
Greater than 100	The average share of the energy bill paid by the LIHEAP program for High Burden households is greater than the share paid for all households.

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Section VI – Restoration of Home Energy Service



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Section VI – Restoration of Home Energy Service

What information should be reported?

- The data fields in Section VI require specific information on the number of occurrences in which LIHEAP assistance led to the restoration of a household's energy service during the fiscal year.
- This includes:
 - Energy Service Restored After Disconnection
 - Fuel Delivered to Home that Ran Out of Fuel
 - Repair/Replacement of Inoperable Home Energy Equipment
- This is **not** an unduplicated count of households. A household might have had energy service restored more than once in a year and each occurrence should be counted and reported.

Section VI – Restoration of Home Energy Service

Line 1 – Energy Service Restored after Disconnection

- Report on the number of occurrences during the fiscal year in which **LIHEAP assistance led to the restoration of a household's energy service after a disconnection.**
- Steps to Remember:
 - Report based on the *fuel source where the LIHEAP benefit was applied.*
 - Households could have experienced multiple instances in which LIHEAP assistance was used to restore service after a disconnection. Include each occurrence.
 - **Include** electric pre-pay clients whose account ran out of funds, and who had their energy service restored with a LIHEAP benefit. If applicable, include a note.

Section VI – Restoration of Home Energy Service

Line 2 – Fuel Delivered to Home that Ran Out of Fuel

- Report on the number of occurrences during the fiscal year in which LIHEAP assistance resulted in the delivery of fuel after the household had run out of fuel.
- Steps to Remember:
 - Report based on the *fuel source where the LIHEAP benefit was applied.*
 - Households could have experienced multiple instances in which LIHEAP assistance resulted in the delivery of fuel to a household that ran out. Include each occurrence.

Section VI – Restoration of Home Energy Service

Line 3 – Repair/Replacement of Inoperable Home Energy Equipment

- Report on the number of occurrences during the fiscal year in which households had inoperable heating or cooling equipment repaired or replaced using LIHEAP funds.
- Steps to Remember:
 - Report based on the *on the fuel source for the equipment that was repaired or replaced.*
 - Households could have experienced multiple instances in which LIHEAP assistance was used to restore/replace their *inoperable* energy equipment. Include each occurrence.
 - **Include** repairs/replacements of red-tagged energy equipment.
 - Grantees with equipment repair/replacement programs that include repairing/replacing inoperable equipment should report information here.
 - *NOTE:* Obtaining this data may require coordination with your weatherization partners (where relevant).

Presenter(s):
Melissa Torgerson

Section VII – Prevention of Loss of Home Energy Service



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Section VII – Prevention of Loss of Home Energy Service

What information should be reported?

- The data fields in Section VII require specific information on the number of occurrences in which **LIHEAP assistance prevented the loss of energy service for a household at risk of losing their home energy service during the fiscal year.**
- This includes:
 - Households with a Utility Past Due or Disconnect Notice
 - Households with Limited Fuel
 - Households in Need of Equipment Repair/Replacement
- Grantees define criteria for being “at risk” of losing energy service.

Section VII – Prevention of Loss of Home Energy Service

Line 1 – Past Due Notice or Utility Disconnect Notice

- Report on the number of occurrences in which households had a past due or disconnect notice at the time of application and receipt of LIHEAP assistance resulted in the continuance of home energy service.
- Steps to Remember:
 - Report based on the *fuel source where the LIHEAP benefit was applied*.
 - Households could have experienced multiple instances in which LIHEAP assistance was used to prevent a household from losing their home energy service due to an upcoming disconnection. Include each occurrence.
 - **Exclude** households who had been disconnected by the time that they received the LIHEAP benefit.
 - **Include** electric pre-pay households whose accounts were low on funds and who received a LIHEAP benefit that prevented the loss of their energy service.

Section VII – Prevention of Loss of Home Energy Service

Line 2 – Imminent Risk of Running Out of Fuel

- Report on the number of occurrences in which households were at imminent risk of running out of fuel at the time of application and receipt of LIHEAP assistance resulted in the delivery of fuel.
- Steps to Remember:
 - Report based on the *fuel source where the LIHEAP benefit was applied*.
 - Households could have experienced multiple instances in which LIHEAP assistance was used to deliver fuel to a household at risk of running out of fuel. Include each occurrence.
 - **Exclude** households who had run out of fuel by the time that they received the LIHEAP benefit.

Section VII – Prevention of Loss of Home Energy Service

Line 3 – Repair/Replacement of Operable Home Energy Equipment

- Report on the number of **occurrences** during the fiscal year in which households had **operable, but failing heating or cooling equipment** repaired or replaced using LIHEAP funds.
- Steps to Remember:
 - Report based on the *on the fuel source for the equipment.*
 - Households could have experienced multiple instances in which LIHEAP assistance was used to restore/replace their *operable* energy equipment. Include each occurrence.
 - **Exclude** repairs/replacements of red-tagged energy equipment or inoperable energy equipment.
 - Grantees with equipment repair/replacement programs that include repairing/replacing operable, but failing equipment should report information here.
 - **NOTE:** Obtaining this data may require coordination with your weatherization partners (where relevant).

Final Reminders



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Final Reminders

FY 2020 Report Deadline

- OCS is expected to issue an Action Transmittal soon with the revised due date for the FY 2020 Performance Data Form. This is expected to be late March.
- **There are no changes to Module 2 for FY 2020 reporting.**
 - The Performance Measures data fields remain the same as those used for FY 2019 Form.
 - The Performance Measures reporting requirements also remain unchanged.
- **Reminder:** You should include CARES benefits and households as part of your Module 2 statistics.
- Grantees are encouraged to prepare their FY 2020 Performance Measures reports now to be ready to submission.

Final Reminders

Due Dates, Submission, Validation

- The FY 2020 Performance Data Form will be made available in OLDC once proposed changes to Module 1 (the Grantee Survey) are finalized.
- ❑ Remember that the Performance Data Form must be:
 - ❑ Entered in OLDC
 - ❑ Saved in OLDC
 - ❑ Certified by the appropriate person
 - ❑ Submitted by the appropriate person

Final Reminders

Updating and Revising Report

- After you submit your report...
 - APPRISE will e-mail grantees to alert them to any issues or questions based on reviewing their submitted data.
 - Grantees should provide a response and make any corrections to their submitted report.
 - When your report is confirmed to be complete, your liaison will accept your report in OLDC. Your final approved report information will be used for the LIHEAP Report to Congress.
- If you later identify a correction or change is needed, you will need to submit a revision in OLDC.

Final Reminders

OLDC Resources

- ❑ 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 Grants Center Of Excellence Systems Help Desk:
 - ❑ (202) 401-5282 or (866) 577-0771
 - ❑ help@grantsolutions.gov

Final Reminders

Performance Measures Resources

- **FY 2019 Performance Data Form Instructions:**

https://www.acf.hhs.gov/sites/default/files/documents/ocs/liheap_at01lpdfatt1_fy2020_1.pdf

- **Section V “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

- **Past Years’ Performance Measures Data:**

https://liheappm.acf.hhs.gov/data_warehouse/index.php?report=homepage

- **LIHEAP Performance Measures Data Collection Guide Documents:**

<https://liheappm.acf.hhs.gov/node/60>

- **Find Performance Management Resources using the LIHEAP Virtual Library**

Final Reminders

Reports and Training Webinars

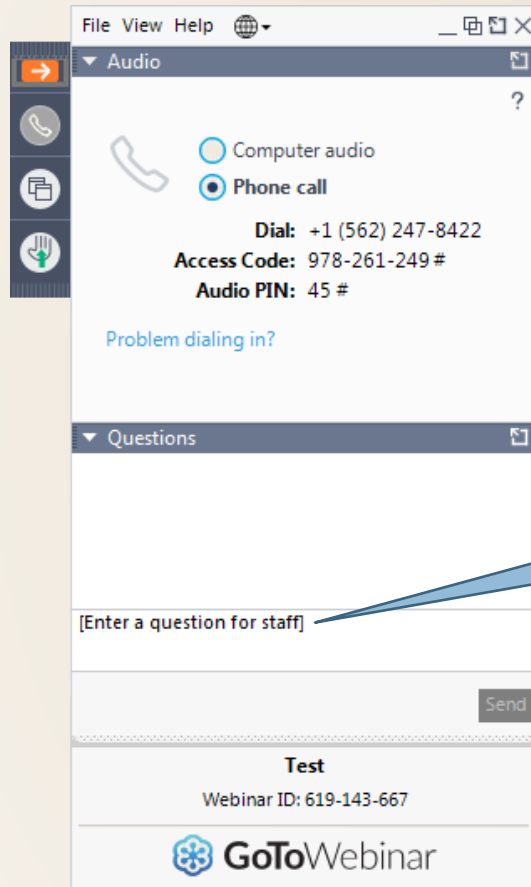
- ❑ The training webinars for Module 1 (the Grantee Survey) will take place in February. OCS will send emails to announce the dates and provide registration information.
- ❑ Past Training Webinars
 - ❑ Recent webinar recordings are available on the ACF LIHEAP Trainings Page: <https://www.acf.hhs.gov/ocs/training-technical-assistance/liheap-tools-training-resources>
 - ❑ Please contact APPRISE if you need copies of any prior presentation slides.

Final Reminders

Support Resources

- OCS liaisons
 - <http://www.acf.hhs.gov/programs/ocs/resource/division-of-energy-assistance-federal-staff>
- Grants Center Of Excellence systems Help Desk
 - help@grantsolutions.gov
 - (202) 401-5282 or (866) 577-0771
- APPRISE Team
 - Daniel Bausch, Daniel-Bausch@appraiseinc.org; 609-252-9050
 - Jorge Mancilla, Jorge-MancillaUribe@appraiseinc.org; 609-252-9009
 - Pragya Chauhan, Pragya-Chauhan@appraiseinc.org; 609-252-9057
 - Thomas Hanes, Tom-Hanes@appraiseinc.org; 609-252-9055
 - Melissa Torgerson, melissa@verveassociates.net

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Audience Poll Question #2

QUICKPOLL

How confident are you that you understand how to correctly complete the FY 2020 Performance Measures?

Please select one:

- **Not at all Confident**
- **Not Too Confident**
- **Somewhat Confident**
- **Very Confident**

