

Completing the *Fiscal Year (FY)24 Grantee Survey*

Module 1 of the FY24 Low Income Home Energy Assistance Program (LIHEAP) Performance Data Form

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

NOVEMBER 19, 2024

WELCOME:

MEGAN MEADOWS (OCS)

PRESENTERS:

MELISSA TORGERSON (VERVE ASSOCIATES)

DAN BAUSCH (APPRISE)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Welcome

- **Purpose of This Webinar**

- To review the key requirements for completing the federal FY24 Grantee Survey.
- To review the data you need to prepare the report.
- To review the process for submitting and updating the report.

- **Audience for This Webinar**

- State LIHEAP Coordinators.
- Fiscal and program staff that assist with completing the Grantee Survey.

Presenter(s):
Megan Meadows



Webinar Overview

- **Structure of the Webinar**

- 60-minutes.
- **Slides, Spreadsheet Template 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.

Presenter(s):
Melissa Torgerson



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- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.

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Presenter(s):
Melissa Torgerson



Presentation Outline

Overview of the Grantee Survey	Slide 8
FY24 Reporting	Slide 11
Key Points for Reporting for Section III (Sources)	Slide 16
Key Points for Reporting for Section IV (Uses)	Slide 18
Steps to Take Now to Submit the Report	Slide 35
Reporting Examples	Slide 39
Final Reminders	Slide 42

Presenter(s):
Melissa Torgerson



LIHEAP Federal Reports

Recent Report Schedule

Report:	Due Date:	Focus of Report:
Household Report (FY24)	9/18/2024 (Est.) 12/31/2024 (Final)	Households served in the past FY
Carryover and Reallotment Report (FY24)	8/9/2024 (Est.) 12/31/2024 (Final)	Funds being carried over or returned
SF-425	12/31/2024	Federal financial reporting
Performance Data Form (FY24): Module 1 – Grantee Survey	1/31/2025	Sources/uses of funds, average benefits, maximum income cutoffs
Performance Data Form (FY24) Module 2 – Performance Measures	1/31/2025	Energy Burden Data, Restoration/Prevention Data
Quarterly Report (Quarter 1 of FY25)	2/28/2025	Summary of activity in the last quarter

Presenter(s):
Dan Bausch



Audience Poll Question #1

How prepared do you think your team is for completing the *FY24 Grantee Survey* (Module 1 of the Performance Data Form)?

Please select one:

- **Not at all prepared** (i.e. haven't turned attention to this)
- **A little prepared** (i.e. aware, but haven't planned yet)
- **Mostly prepared** (i.e. planning and working out nuances)
- **Very prepared** (i.e. working on it and understand it)

Presenter(s):
Melissa Torgerson



Overview of the Grantee Survey

Placement in The Performance Data Form

- The Grantee Survey is not a stand-alone report – it is included in the *LIHEAP Performance Data Form (LPDF)*.
- The LPDF one report that consists of multiple Modules:
 - **Module 1 (Grantee Survey)** – Mandatory
 - **Module 2 (Performance Measures)** – Mandatory
 - **Module 3 (Optional Performance Measures)** – Optional
- Modules 1 and 2 are distinct and different procedures are needed to complete each Module.

Presenter(s):
Dan Bausch



SECTION IV. ESTIMATED USES OF LIHEAP FUNDS

A. Type of LIHEAP Assistance--All Funds Except IJA (Items 1-4)

1. Heating Assistance Benefits

2. Cooling Assistance Benefits

3. Crisis Benefits by Type

a. Winter Crisis Benefits

b. Summer Crisis Benefits

c. Year-round Crisis Benefits

d. Other Crisis Benefits

(1) Specify

(2) Specify

(3) Specify

4. Weatherization Assistance Benefits

B. Other Permitted Uses of LIHEAP Funds (Items 6-13)

6. Nominal Payments

7. FFY Unobligated Funds (excluding funds in Items 8 & 9) Carried Over to next FFY

8. FFY Allowable Unobligated Emergency Contingency Funds, not Subject to 10% Carryover Limit, Obligated in next FFY

9. FFY Leveraging Incentive Award Obligated in next FFY

10. FFY LIHEAP Block Grant Allotment Used to Identify, Develop & Demonstrate Leveraging Incentive Activities

11. Assurance 16 Activities

12. FFY Residential Energy Assistance Challenge (REACH) Program

13. Administration/Planning Costs

C. Estimated Total Uses of Funds

14. Sum of Items 1-4 and 6-13. This should equal the sum in Section III, Column C, Item 10.

Q1. Obligated funding for a given type of assistance in current FFY, but will serve households in the subsequent FFY

Q2. Average Household Benefits are estimated due to unique program operation, rather than directly calculated

All of FFY 2024 (10/1/2023 to 9/30/2024)

Amount Rounded to the Nearest Dollar

Total Funds/Awards

Average Household
BenefitMaximum Annual Dollar Income for 4-
Person Household as of the effective date

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

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-Select-

-Select-

Module 1 (Grantee Survey) – Mandatory**Presenter(s):
Dan Bausch**

V. ENERGY BURDEN TARGETING

		Bill Payment-Assisted Household Main Fuel				
	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households	Auto-Calculated	0	0	0	0	0
B. 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)	Auto-Calculated	0	0	0	0	0
2. Average Annual Household Income	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
4. Average Annual Main Heating Fuel Bill	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
5. Average Annual Electricity Bill	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
6. Average Annual Total Residential Energy Bill	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
7. Average Annual Burden Before Receiving LIHEAP	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
8. Average Annual Burden After Receiving LIHEAP	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
9. Average Percentage Point Change in Energy Burden	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
10. Average Percentage Reduction in Energy Burden	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of High Burden Households (Top 25%) with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	Auto-Calculated	0	0	0	0	0
2. Average Annual Household Income for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
3. Average Annual Total LIHEAP Benefit per High Burden Household (including Heating, Cooling, Crisis, Supplemental Benefits)	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
4. Average Annual Main Heating Fuel Bill for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
5. Average Annual Electricity Bill for High Burden Households	Auto-Calculated	\$0	\$0	\$0	\$0	\$0
6. Average Annual Total Residential Energy Bill for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
7. Average Annual Burden Before Receiving LIHEAP for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
8. Average Annual Burden After Receiving LIHEAP for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
9. Average Percentage Point Change in Energy Burden for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
10. Average Percentage Reduction in Energy Burden for High Burden Households	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
D. Benefit Targeting Index for High Burden Households:	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
E. Burden Reduction Targeting Index for High Burden Households:	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated	Auto-Calculated
VI. RESTORATION OF HOME ENERGY SERVICE						
		Energy Source (where LIHEAP benefit was applied)				
A. All Occurrences of LIHEAP Households that Had:	All Occurrences	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
1. Energy Service Restored After Disconnection	Auto-Calculated	0	0			
2. Fuel Delivered to Home that Ran Out of Fuel	Auto-Calculated			0	0	0
3. Repair/Replacement of Inoperable Home Energy Equipment	Auto-Calculated	0	0	0	0	0
VII. PREVENTION OF LOSS OF HOME ENERGY SERVICE						
		Energy Source (where LIHEAP benefit was applied)				
A. All Occurrences of LIHEAP Households that Had:	All Occurrences	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
1. Past Due Notice or Utility Disconnect Notice	Auto-Calculated	0	0			
2. Imminent Risk of Running out of Fuel	Auto-Calculated			0	0	0
3. Repair/Replacement of Operable Equipment to Prevent Imminent Home Energy Loss	Auto-Calculated	0	0	0	0	0
NOTES: Include any notes.						
VIII. CERTIFICATION FOR REQUIRED SECTIONS I. - VII.						
1A. I certify to the best of my knowledge and belief that this report is correct and complete for Administration and Congressional oversight the program and for the purposes set forth in the award letter.						
2A. Typed or Printed Name and Title of Authorized Certifying Official:						
3A. Signature of Authorized Certifying Official: (click to sign)						
Date Submitted: Month Day Year						

Module 2 (Performance Measures) – Mandatory

Presenter(s):
Dan Bausch



LIHEAP Performance Measures

Module 3. (Optional LIHEAP Performance Measures)

V. ENERGY BURDEN TARGETING (OPTIONAL MEASURES)

		Bill Payment-Assisted Household Main Fuel					
A. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)		All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
1. Average Annual Electricity Usage	Auto-Calculated	0	0	0	0	0	0
2. Average Annual Main Heating Usage	Auto-Calculated	0	0	0	0	0	
B. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)							
1. Average Annual Electricity Usage for High Burden	Auto-Calculated	0	0	0	0	0	0
2. Main Heating Usage for High Burden	Auto-Calculated	0	0	0	0	0	
C. Unduplicated Number of LIHEAP Bill Payment-Assisted Households that Use:							
1. Electricity as Supplemental Heating Fuel	Auto-Calculated		0	0	0	0	0
2. Wood as Supplemental Heating Fuel	Auto-Calculated	0	0	0	0	0	0
3. Other Supplemental Heating Fuel	Auto-Calculated	0	0	0	0	0	0
4. Central Air Conditioning	Auto-Calculated	0	0	0	0	0	0
5. Window/Wall A/C (including evaporative cooler)	Auto-Calculated	0	0	0	0	0	0

VI. RESTORATION OF HOME ENERGY SERVICE (OPTIONAL MEASURES)

		Energy Source				
A. Number of All LIHEAP-Assisted Households that Had:	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
Unduplicated Count of Restorations of Home Energy Service	Auto-Calculated	0	0	0	0	0

VII. PREVENTION OF LOSS OF HOME ENERGY SERVICE (OPTIONAL MEASURES)

		Energy Source				
A. Number of All LIHEAP-Assisted Households that Had:	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
Unduplicated Count of Preventions of Loss of Home Energy Service	Auto-Calculated	0	0	0	0	0

NOTES: Include any notes.

Module 3 (Optional Performance Measures) – OptionalPresenter(s):
Dan Bausch

Overview of the Grantee Survey

Background

- The Grantee Survey...
 - has been collected by HHS for decades
 - is focused on funds available in the prior federal FY and how they were used.
 - is not an audit report.
 - provides a snapshot of how LIHEAP funds are obligated, the average benefits households receive, and the income eligibility criteria

Presenter(s):
Dan Bausch



Overview of the Grantee Survey

Background

- There are two sections requiring data: Section III (Sources) and Section IV (Uses).
- There are three main types of data that need to be reported in the Grantee Survey:
 1. The amount of funds **obligated** (for each funding source and type of assistance)
 2. The average benefit amounts provided to households (for each funding source and type of assistance)
 3. The maximum annual income limits for a 4-person household (for each funding source and type of assistance)

Presenter(s):
Dan Bausch



Overview of the Grantee Survey

How the Data are Used

Data from the Grantee Survey are...

- Published in the annual LIHEAP Report to Congress
- Published in the LIHEAP Data Warehouse.
- Used to respond to Congressional and White House inquiries.
- Useful for you to compare your program to other states.

Program Highlights: Preliminary FY23 data indicate that with the LIHEAP Program Funds:

- 51 state grant recipients provided an estimated **\$3.031 billion for heating assistance.**
- 23 state grant recipients provided an estimated **\$566 million for cooling assistance.**
- 49 state grant recipients provided an estimated **\$1.333 billion for crisis assistance.**

Presenter(s):
Dan Bausch



What's New for FY24 Reporting



FY24 Reporting

Report Announcements and Due Date

- **Report Announcement & Instructions** – OCS is preparing to release an Action Transmittal (AT) soon. [Note: The instructions published with the prior AT are still correct.]
- **Due Date** – Final data is due January 31, 2024.
- **Report Availability** – OCS will release the report in the Online Data Collection System (OLDC) when the Action Transmittal is published.
- **Submission** – The report must be submitted in OLDC and must be validated and certified by the designated authorized official.

Presenter(s):
Dan Bausch



FY24 Reporting

No Differences from Last Year

- **Good news:** There are no changes to the FY24 Grantee Survey from last year's FY23 report.
- The form has the same layout, lines, and requirements as last year.
- We encourage you to look back at the APPRISE emails about the FY23 form to see what questions you were asked or what updates you made after APPRISE's review of the FY23 report.

Presenter(s):
Dan Bausch



FY24 Reporting

Reporting Categories

The report asks you to separately report for two funding categories.

1. FY24 “non-supplemental” funds – This includes:

- Grant Number ending in “LIEA”; CAN = G992201 and G993134

2. Infrastructure Act Funds – This includes:

- Grant Number ending in “LIEI” and CAN = G992605

Example:

You see in your financial reports that you obligated \$500,000 to Heating Assistance in FY24.

For the Grantee Survey, you need report how much you obligated from 1) non-supplemental funds, and 2) Infrastructure Act funds. For example:

- Heating assistance - - non-supplemental funds = \$45,000
- Heating assistance - - IIA funds = \$5,000

Presenter(s):
Dan Bausch



FY24 Reporting

Report Preparations and Resources

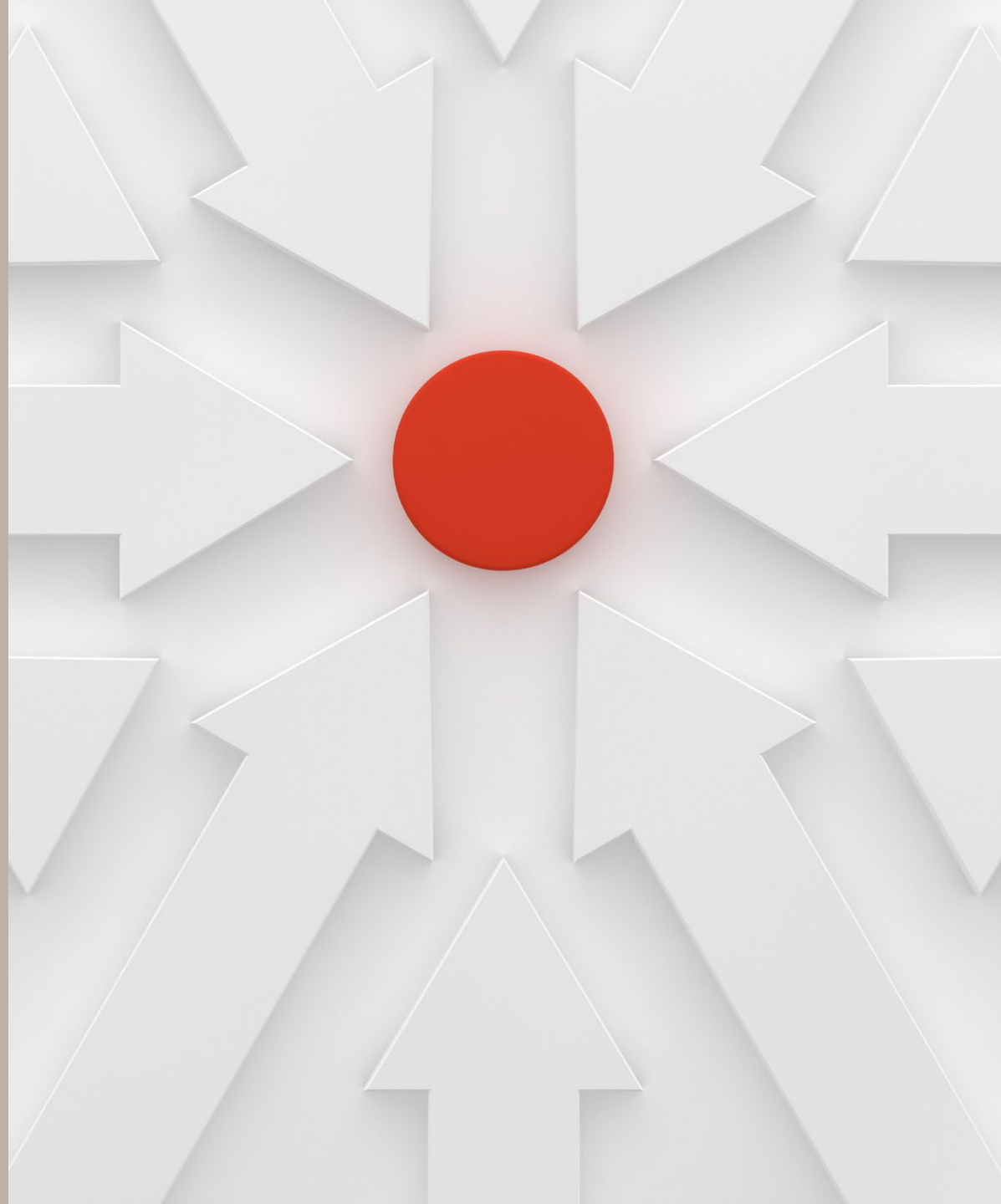
Because the due date is January 31, it is important to plan your schedule and resources accordingly to submit the report by this due date.

- ***Check Before You Submit*** - Included in the handouts is a “Check Before You Submit” document to help you confirm the report is ready to be submitted.
- ***Prior Instructions from FY23*** – These remain relevant and are included in the handouts.
- ***Helpful Guidance on Obligations, Expenditures, and Refunds*** – Included in the handouts is an Information Memorandum from OCS from Aug. 13, 2024.

Presenter(s):
Dan Bausch



Key Reporting Points for Section III (Sources)



Key Points for Reporting

#1 – Check Pre-populated Amounts

- Section III – Estimated Sources of LIHEAP Funds: is intended for reporting all federal LIHEAP funds available for obligation during FY24.
 - Funds awarded by HHS in FY24.
 - Funds that a grant recipient was awarded by HHS in FY23, but optionally carried over from FY23 to FY24.

OMB Control No. 0970-0449		LIHEAP Performance Data Form for Federal Fiscal Year (FFY) 2024		Expiration Date: 02/28/25	
MODULE 1 (LIHEAP Grantee Survey)					
SECTION I. GRANTEE INFORMATION					
Grantee Name:		Date:		Contact Person:	
				Phone Number:	
SECTION II. REPORTING REQUIREMENTS					
<p>The 50 States and the District of Columbia are required to complete the LIHEAP Grantee Survey Section of the LIHEAP Performance Data Form in providing estimates of sources and uses of funds, average benefits, and the maximum income cutoff in dollars for a 4-person household for each type of LIHEAP assistance provided in FFY 2024.</p> <p>Additionally, the 50 states and the District of Columbia are required to complete the LIHEAP Performance Measurement Section of the LIHEAP Performance Data Form. This Federal Report provides data on three required LIHEAP Performance Measures for Federal Fiscal Year (FFY) 2024, the period of October 1, 2023 - September 30, 2024. The Report consists of the following sections: (1) Energy Burden Targeting, (2) Restoration of Home Energy Service, and (3) Prevention of Loss of Home Energy Service. Timely responses to questions on this report is mandatory. The information will be used to respond to Congressional inquiries, to calculate LIHEAP benefit targeting, and to provide Federal Fiscal Year data for the Department's annual LIHEAP Report to Congress that is required under Section 2010 of Public Law 96-35, as amended. The data are also used in measuring LIHEAP performance under the Government Performance and Results Act (GPRA) of 1993, as amended by the GPRA Modernization Act of 2020. As the reported data are aggregated, the information in this report is not considered to be confidential.</p>					
SECTION III. ESTIMATED SOURCES OF LIHEAP FUNDS					
		ALL OF FFY 2024 (10/1/2023 TO 9/30/2024) Amount Rounded to the Nearest Dollar			
A. All Funds Except IHA Funding (Items 1-9)					
1. FFY LIHEAP Block Grant Allocation (Net of Indian Tribal Set-Asides) - regular funds		\$0			
2. FFY Emergency Contingency Funds (Net of Indian Tribal Set-Asides)		\$0			
3. LIHEAP Block Grant Funds from Previous FFY Reallocated to FFY		\$0			
4. Previous FFY Unobligated Emergency Contingency Funds, not Subject to 10% Carryover Limit		\$0			
5. All Funds Carried Over From Previous FFY (except Funds in Item 4 and 9 in this Section)		\$0			
6. Petroleum Violation Escrow (Oil Overcharge) Funds Obligated in FFY		\$0			
7. FFY Residential Energy Assistance Challenge (REACH) Program		\$0			
7a. Previous FFY REACH Program Award Funds Obligated in FFY		\$0			
8. FFY Leveraging Incentive Award		\$0			
9. Previous FFY Leveraging Incentive Award obligated in FFY		\$0			
B. Estimated Subtotal Sources of Funds - Non-ARPA/Supplemental Funding					
10. Sum of Items 1-9. This should equal the sum in Section IV, Column D, Item 14.		\$0			
C. All Supplemental Funds (Items 11-13)					
11. Previous unobligated CARES Act Allocation, not Subject to 10% Carryover Limit.		\$0			
12. Infrastructure Act Funds Carried Over From Previous FFY		\$0			
13. Infrastructure Act Funds Allocation (Net of Indian Tribal Set-Asides)		\$0			
D. Estimated Subtotal Sources of Supplemental Funds					
14. Sum of Items 11-13. This should equal the sum in Section IV, Column D, Item 45.		\$0			
E. Estimated Total of Sources of All Funds					
15. Item 10 plus Item 14. This should equal the sum in Section IV, Column D, Item 45.		\$0			

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#1 – Check Pre-populated Amounts

- To assist you, HHS pre-populated this section with values from their records. This includes the award records and information you reported last year on funds that would be carried over.
- It is important to check that pre-populated values are correct. Carryover amounts can be edited if needed to reflect updated estimates since you completed the year reports.
- If there is an issue with the pre-populated values that you cannot correct, please contact your Program Specialist.

Presenter(s):
Melissa Torgerson



Key Reporting Points for Section IV (Uses)



Key Points for Reporting

#1 – Main Fiscal Data Needed is Obligation Amounts

- Section IV – Estimated Use of LIHEAP Funds
- The main fiscal data you report is the dollar amount obligated during FY24.
- This is reported in the first column.



A. Type of LIHEAP Assistance--Non-Supplemental Funds (Items 1-4)	All of FFY 2024 (10/1/2023) to 9/30/2024		
	Amount Rounded to the Nearest Dollar		
	Total Funds/Awards	Average Household Benefit	Maximum Annual Dollar Income for 4-Person Household as of the effective
1. Heating Assistance Benefits--non-supplemental funds	\$0	\$0	\$0
2. Cooling Assistance Benefits--non-supplemental funds	\$0	\$0	\$0
3. Crisis Benefits by Type--non-supplemental funds			
a. Winter Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
b. Summer Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
c. Year-round Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
d. Other Crisis Benefits--non-supplemental funds	\$0		
(1) Specify--non-supplemental funds	\$0	\$0	\$0
(2) Specify--non-supplemental funds	\$0	\$0	\$0
(3) Specify--non-supplemental funds	\$0	\$0	\$0
4. Weatherization Assistance Benefits--non-supplemental funds	\$0		\$0

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#1 – Main Fiscal Data Needed is Obligation Amounts

- The LIHEAP statute provides grant recipients with flexibility in defining what constitutes the obligation of funds. As a result, the definition for "obligation" varies across grant recipients.
- **Obligations are not always the same as expenditures.**
 - Expenditures generally include benefits that are issued/paid.
 - In some cases, obligated funds are not actually expended until after the end of the FY. For example, a grant recipient may obligate funds for Heating Assistance during the FY, but a portion of those funds may not be expended as benefits issued to clients until subsequent FY.
- Examples of Obligations (as defined by some grant recipients):
 - Approval letters issued to clients
 - Credit lines established with vendors
 - Purchase Orders
 - Contracts to Perform Services

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#2 – Program Data Needed is the Average Benefit Amounts

- The main program data you report is the average dollar benefit amounts recipients received during FY24.
- This is reported in the second column.



A. Type of LIHEAP Assistance--Non-Supplemental Funds (Items 1-4)	All of FFY 2024 (10/1/2023) to 9/30/2024		
	Amount Rounded to the Nearest Dollar		
	Total Funds/Awards	Average Household Benefit	Maximum Annual Dollar Income for 4-Person Household as of the effective
1. Heating Assistance Benefits--non-supplemental funds	\$0	\$0	\$0
2. Cooling Assistance Benefits--non-supplemental funds	\$0	\$0	\$0
3. Crisis Benefits by Type--non-supplemental funds			
a. Winter Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
b. Summer Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
c. Year-round Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
d. Other Crisis Benefits--non-supplemental funds	\$0		
(1) Specify--non-supplemental funds	\$0	\$0	\$0
(2) Specify--non-supplemental funds	\$0	\$0	\$0
(3) Specify--non-supplemental funds	\$0	\$0	\$0
4. Weatherization Assistance Benefits--non-supplemental funds	\$0		\$0

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#2 – Program Data Needed is the Average Benefit Amounts


- **Calculating Average Benefits:**

- To report the average amounts, you should use your program data to identify the benefit amounts each household received during FY24 and to calculate the mean value.

- Example of Calculation:

Household	Benefit Amount
Household A	\$350
Household B	\$100
Household C	\$500
Average Amount	\$317

} add up benefit amounts and divide by the total number of households (3)



- If you cannot calculate this, you need to provide an estimate based on funds used and households served, and you need to indicate in the report that average benefits are not directly calculated.

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#3 – Remember to Report Maximum Income Values

- The final column is for reporting the cutoff annual dollar income value for a 4-person household.
- This should be based on your income-eligibility criteria used during FY24.
- This is reported in the third column.



A. Type of LIHEAP Assistance--Non-Supplemental Funds (Items 1-4)	All of FFY 2024 (10/1/2023) to 9/30/2024		
	Amount Rounded to the Nearest Dollar		
	Total Funds/Awards	Average Household Benefit	Maximum Annual Dollar Income for 4-Person Household as of the effective date
1. Heating Assistance Benefits--non-supplemental funds	\$0	\$0	\$0
2. Cooling Assistance Benefits--non-supplemental funds	\$0	\$0	\$0
3. Crisis Benefits by Type--non-supplemental funds			
a. Winter Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
b. Summer Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
c. Year-round Crisis Benefits--non-supplemental funds	\$0	\$0	\$0
d. Other Crisis Benefits--non-supplemental funds	\$0		
(1) Specify--non-supplemental funds	\$0	\$0	\$0
(2) Specify--non-supplemental funds	\$0	\$0	\$0
(3) Specify--non-supplemental funds	\$0	\$0	\$0
4. Weatherization Assistance Benefits--non-supplemental funds	\$0		\$0

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#3 – Remember to Report Maximum Income Values

- The LIHEAP statute allows grant recipients to set income-eligibility cutoffs at different levels for each component based on the Federal Poverty Guidelines or State Median Income levels in effect.
 - For example, different eligibility for weatherization component is commonly seen.
- You specify the criteria you plan to use in your Model Plan.
- In the Grantee Survey, you need to report the annual dollar amount cutoff for a 4-person household for each program component and funding category operating in FY24.
- You should use the criteria in effect at the beginning of FY24 or include a note if you updated to use criteria that was available later in fiscal year.
- These were the criteria HHS specified for use at the beginning of FY24 :
 1. The Federal Poverty Guidelines for Mandatory Use at the beginning of FY24
 2. The State Median Income Estimates for Mandatory Use at the beginning of FY24

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#3 – Remember to Report Maximum Income Values

- Example:
 - For Crisis Assistance, your maximum income criteria for FY24 was 150% of the Poverty Guidelines. Confirm the dollar amount to report in the Grantee Survey.
 - You should check your program records, but you can also verify by checking the HHS Poverty Guidelines for mandatory use in FY24.

100 Percent, 110 Percent and 150 Percent of the Federal Poverty Guidelines (FPG) for 50 states and the District of Columbia Published on January 19, 2023 by the U.S. Department of Health and Human Services

The tables below show the calculations for the FPG for optional use in Federal Fiscal Year (FFY) 2023 LIHEAP and mandatory use in FFY 2024 LIHEAP.

Select Percentages of FPG for All States except Alaska and Hawaii and for the District of Columbia:

Size of Household	100 Percent of FPG	110 Percent of FPG	150 Percent of FPG
1	\$14,580	\$16,038	\$21,870
2	\$19,720	\$21,692	\$29,580
3	\$24,860	\$27,346	\$37,290
4	\$30,000	\$33,000	\$45,000

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#4 – Reporting Carryover Funds

- Carryover Funds = LIHEAP funds that a grant recipient did not obligate during the same FY they were awarded because the grant recipient elected to “carry over” or hold available those funds for obligation in the subsequent fiscal year.
- In the Grantee Survey, you need to report multiple carryover values:
 - *In Section III (Sources)*: Funds carried into FY24 and available for obligation.
 - *In Section IV (Uses)*: Funds you did not obligate during FY24 and carried into FY25.
- For the Grantee Survey, the amounts you report as being carried over to FY25 should match the carryover amounts in your final FY24 Carryover & Reallotment Report (due December 31).
- If you need assistance in submitting a revision to your FY24 Carryover & Reallotment report, please contact APPRISE.

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#4 – Reporting Carryover Funds

Funding Type:	Carryover Rules:	Sources:	Uses:
Regular “non-supplemental” funds	Up to 10% of funds awarded in a FY can be carried over to the next FY.	FY24 awards from HHS are prepopulated. Report any funds you were awarded in FY23 and elected to carryover to FY24 in Line 5.	Report how you obligated available funds during FY24, or if you carried over funds to FY25.
IIJA		If you carried over funds to FY24, these are reported here. FY24 awards from HHS are prepopulated.	Report how you obligated available funds during FY24, or if you carried over funds to FY25.

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#5 – Consistency Between Sources and Uses

- Your Grantee Survey should reflect how all the funds you received in FY24 were obligated or not (in Section IV, Uses of Funds).
- This means, for each funding type, the total funding amounts in Section III (Sources of Funds) should match the total amounts in Section IV (Uses of Funds).
- *The following lines should match...*
 - Line 10 in Section III (Subtotal of Non-Supplemental Funds) should match Line 14 in Section IV (Total Uses of Funds – Non-Supplemental).
 - The sum of lines 12 and 13 in Section III (IIJA) should match Line 47 in Section IV (Total Uses of Funds – IIJA Funds).

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#5 – Consistency Between Sources and Uses

- Example

- You were awarded \$50 million regular LIHEAP block grant for FY24.
- You also had \$5 million in FY23 regular block grant funds you carried over and obligated during FY24.
- In Section IV, you report on how those \$55 million were obligated.

Section III Line	Line Number	Amount
Block Grant Allotment	Line 1	\$50 million
Funds Carried Over from Previous FY	Line 5	\$5 million
Total Regular Funds Available:	Line 10	\$55 million

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#5 – Consistency Between Sources and Uses

- Example

- In Section IV, you would report on how the \$55 million in regular funds were obligated during FY24.
- The Section IV total amount for regular funds should add up to \$55 million.

Section IV Line	Line Number	Amount
Heating Assistance – non-supplemental funds	Line 1	\$20 million
Cooling Assistance – non-supplemental funds	Line 2	\$10 million
Year-Round Crisis – non-supplemental funds	Line 3c	\$5 million
Weatherization Assistance – non-supplemental funds	Line 4	\$15 million
Administration/Planning Costs – non-supplemental	Line 13	\$5 million
Total Regular Fund Uses	Line 14	\$55 million

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#6 – Consistency with Household Report

- Data reported in Section IV “Uses of LIHEAP funds” should generally be consistent with the types of assistance reported in your Household Reports.
- Due to the supplemental funds and rules for obligations versus expenditures, you may have some assistance types that are reported in one report but not the other. Notes help clarify and explain this.
- For each assistance you offered in FY24, you should be able to report the following for that type of assistance:
 - Total Funds/Awards Funds
 - Average Household Benefit
 - Maximum Annual Dollar Income
- ***Please add a note if...***
 - If you obligated \$0 for a type of assistance reported in your Household Report.
 - If you obligated funds for assistance and reported zero assisted households for that type of assistance in your Household Report.

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#7 – Include Notes to Explain Reporting

- The Grantee Survey includes a **Notes** section.
- Notes allow for an accurate understanding of the reported data, and OCS uses information from these notes in the Report to Congress.
- Notes are reviewed and provide useful context. We encourage you to leave notes to explain information that is out of the ordinary or to provide context and clarification.
- Examples of when to add a note:
 - If a large amount of funds were obligated to a category, but few or no households were served with that assistance during FY24 (indicated in your FY24 Household Report) because funds were not expended until later.
 - If your carryover amounts do not match your FY24 Carryover & Reallotment Report.

Presenter(s):
Melissa Torgerson



Key Points for Reporting

#8 – Answering Questions

- Each funding section contains two questions which you are required to answer:
 1. Are there any funds that were obligated in the current FY, but will be used to serve households in the subsequent FY?
 2. Are average household benefits estimated due to unique program operation, rather than directly calculated?

C. Estimated Total Uses of Funds--non-supplemental funds	
Q1. Obligated funding for a given type of assistance in current FFY, but will serve households in the subsequent FFY--regular funds	-Select-
Q2. Average Household Benefits are estimated due to unique program operation, rather than directly calculated--regular funds	-Select-

Presenter(s):
Melissa Torgerson



Key Points for Reporting

Summary of Reporting

Reporting Item	Reporting funds in Section III (Sources)	Reporting Total Obligations in Section IV (Uses – first column)	Reporting Average Benefits in Section IV (Uses – second column)	Reporting Maximum Income in Section IV (Uses – third column)
Data Type Needed	Fiscal Data	Fiscal Data	Program Data	Program Information
Guidance	<p>Include all funds awarded by OCS in FY24, and funds optionally carried into FY24 for obligation during FY24.</p> <p>This is all federal LIHEAP funds available for obligation during FY24.</p>	<p>Report on how the funds available for obligation during FY24 were obligated in FY24 (or carried over to FY25) to different assistance types and components.</p> <p>This is how all federal LIHEAP funds available for obligation during FY24 were obligated to different categories of use.</p>	<p>Report the mean (average) benefit amounts households received during FY24.</p> <p>This should be calculated only using benefits provided to households during FY24</p>	<p>Report the maximum income cutoff levels for a 4-person household set at the start of FY24 program components.</p> <p>These need to be annual dollar cutoff amounts for assistance at the start of each component in FY24.</p>

Presenter(s):
Melissa Torgerson



Steps to Take Now to Submit the Report



Steps Now to Prepare to Submit the Report by January

#1: Coordinating with Fiscal and Program Staff

- To complete the report, you will need fiscal and program information.
- Fiscal staff may be less familiar with LIHEAP and need to understand the report requirements and the focus on obligation values.

Example Schedule:

Task:	Date:
Meet with fiscal staff to review report	November 25
Provide instructions for program staff for obtaining average benefit data	December 2
Review provided information and send questions	January 4
Enter report in OLDC and validate/Review warnings	January 25
Add notes as needed and submit in OLDC	January 31

Presenter(s):
Dan Bausch



Steps Now to Prepare to Submit the Report by January

#2: Confirming Access to OLDC

- The OLDC system requires credentials to access and submit reports.
- We recommend you confirm your access to OLDC and that you locate and initiate the report before the due date. Contact the GrantSolutions Help Desk to resolve the issue.
- The report will be found in this location when it is available:
 - Program Name: Low Income Home Energy Assistance
 - Grantee Name: *State Abbreviation [Code] (Reporting Years) Name of Department – No. 01*
 - Report Name: Performance Data Form (LIHEAP PDF)
 - Reporting Period: 10/01/2023 – 09/30/2024

Presenter(s):
Dan Bausch



Steps Now to Prepare to Submit the Report by January

#3: Review APPRISE Emails from FY23 Review

- APPRISE reviews the reports each year and sends questions about any items identified as potential reporting issues or items for clarification.
- We recommend you review any emails regarding the FY23 Grantee Survey to make sure the items are addressed in the FY24 report submission.
- APPRISE can assist you with addressing issues or confirming issues found in FY24.

Presenter(s):
Dan Bausch



Reporting Examples



Reporting Examples

Grant Recipient X – Prioritized Regular Funds, Saved Infrastructure Act Funds

Funds Awarded in FY24: \$25 million in regular funds and \$5 million in Infrastructure Act Funds.

Grant Recipient X Decisions

- **Regular**: They obligated all their regular funds, not carrying over any to FY25.
- **Infrastructure Act**: Grant Recipient X obligated 98% of their Infrastructure Act funds, carrying over 2% to FY25.

Reporting in the FY24 Grantee Survey

Section III – Sources

- Regular funds: \$25 million
 - Infrastructure funds: \$5 million
-
- **TOTAL: \$30 million**

Section IV – Uses

- Regular Funds
 - \$25 million split across assistance types
 - \$0 carried over to FY25 (line 7)
 - Infrastructure Act Funds
 - \$4.9 million split across assistance types
 - \$0.1 million carried over to FY25 (line 43)
-
- **TOTAL: \$30 million**

Presenter(s):
Dan Bausch



Reporting Examples

Grant Recipient Y – Used Some Regular & Infrastructure Act Funds

Funds Awarded in FY24: \$30 million in regular funds and \$7 million in Infrastructure Act Funds.

Grant Recipient Y Decisions

- **Regular:** They obligated 90% of their regular funds, carrying over 10% to FY25.
- **Infrastructure Act:** Grant Recipient Y obligated all their Infrastructure Act funds in FY24.

Reporting in the FY24 Grantee Survey

Section III – Sources

- Regular funds: \$30 million
 - Infrastructure funds: \$7 million
-
- **TOTAL: \$37 million**

Section IV – Uses

- Regular Funds
 - \$27 million split across assistance types
 - \$3 million carried over to FY25 (line 7)
 - Infrastructure Act Funds
 - \$7 million split across assistance types
 - \$0 carried over to FY25 (line 43)
-
- **TOTAL: \$37 million**



Presenter(s):
Dan Bausch



Final Reminders



Final Reminders

Due Date and Submission Process

- **The report is due on January 31, 2025.** Grant recipients should be planning to complete by this date.
- The FY24 Performance Data Form will be submitted in OLDC.
- The Grantee Survey is not an audit report. The report asks you to use the current information available to report information on FY24 activity.
- If you need technical assistance in completing the report, please contact APPRISE as soon as possible (do not wait until the report is due).

Presenter(s):
Melissa Torgerson



Final Reminders

Differences from Last Year

- **Good news:** There are no changes to the FY24 Grantee Survey from last year's FY23 report.
- The form has the same layout, lines, and requirements as last year.
- We encourage you to look back at the APPRISE emails about the FY23 form to see what questions you were asked or what updates you made after APPRISE's review of the FY23 report.
- As with last year, you will report on two categories of funds:
 - I. "Regular" (non-supplemental) funds
 - II. Infrastructure Investment and Jobs Act (IIJA) Funds

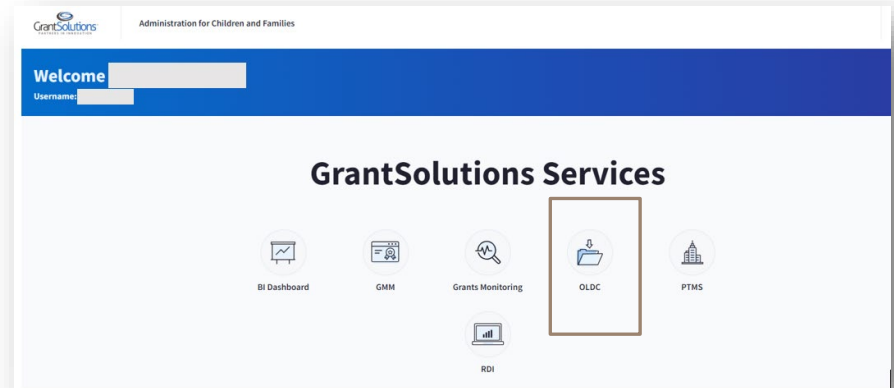
Presenter(s):
Melissa Torgerson



Final Reminders

OLDC Resources

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- OLDC is accessed through Grant Solutions.
- Log-in to Grant Solutions at <https://www.grantsolutions.gov/gs>
- Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
- If you need assistance, please contact the GrantSolutions Help Desk:
 - (866) 577-0771
 - help@grantsolutions.gov



Presenter(s):
Melissa Torgerson



ADMINISTRATION FOR
CHILDREN & FAMILIES

Final Reminders

Submission Process

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- The individuals who have permission to certify and submit may vary based on how you initially set up your OLDC account, but the user with the role "**Grant Administrator**" may perform all actions by default.
- To submit the form, first enter and save your report. When ready, **validate** it. Once the form is valid and correct, **certify and submit**.



OLDC Home Form Selection **Report** Report Form Status

Program Name: Low Income Home Energy Assistance

Grantee Name: [REDACTED]

Report Name: Household Report - Long Form

Report Period: 10/01/2020 - 09/30/2021

Report Status: Initialized

Report Progress

Initialized	Edit-Saved	Validated	Certified	Submitted	In Review	C/O Approved
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save](#) [View/Add Attachments](#) [Validate](#) [Print](#)

Presenter(s):
Melissa Torgerson



Final Reminders

OLDC Warning & Error Messages

- Several validation checks are programmed into OLDC, and a warning or error message will appear if a check fails.
 - Warning Messages indicate data that may be correct but require confirmation and additional explanation in the “Notes” section of the form.
 - Fatal Error Messages indicate inconsistent data that must be corrected before Grant Recipients are able to submit their Grantee Survey in OLDC.
- **If either a warning or error message appears and you are unable to resolve it, contact APPRISE for assistance.**

Presenter(s):
Melissa Torgerson



Final Reminders

Updating & Revising the Report

- After you submit your report...
 - APPRISE will e-mail grant recipients to alert them to any issues or questions based on a review of the submitted report.
 - Grant recipients should provide a response and make any corrections to the report.
 - When the report is confirmed to be complete, your liaison will accept it in OLDC.
- If you later identify a correction or change is needed, you will need to submit a revision in OLDC.

Presenter(s):
Melissa Torgerson



Final Reminders

Grantee Survey Resources

OCS LIHEAP Forms:

- <https://www.acf.hhs.gov/ocs/form/liheap-forms-and-funding-applications>

Required Reports Support on the LIHEAP PMW:

- <https://liheappm.acf.hhs.gov/required-reports/>

“Check Before You Submit” Document:

- [https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/PDF-Module-1-\(Grantee Survey\)-Check-Before-You Submit-Document.pdf](https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/PDF-Module-1-(Grantee%20Survey)-Check-Before-You%20Submit-Document.pdf)

2023 HHS Poverty Guidelines:

- <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-im-2023-01-federal-poverty-guidelines-optional-use-ffy-2023and-mandatory>

2023 SMI Estimates:

- <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-im-2023-02-state-median-income-estimates-optional-use-ffy-2023-and>

Past Years’ Grantee Survey Data:

- <https://liheappm.acf.hhs.gov/datawarehouse>
- <https://secure.login.gov/>

FY23 Performance Data Form Action Transmittal, Excel Template, and Instructions:

- <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-2024-01-liheap-performance-data-form-fy23>

Presenter(s):
Melissa Torgerson



Final Reminders

Upcoming Training Webinars

Completing the Performance Data Form, Module 2

- December 10th, 2:00pm ET – 3:00pm ET

Completing Quarterly Reports

- December 17th, 2:00pm ET – 3:00pm ET

Presenter(s):
Melissa Torgerson



Final Reminders

Performance Measures (Module 2) Reminder

- As a reminder, each state needs to collect annual energy expenditure data from a sample of top vendors.
- To complete the energy burden targeting sections of this Module (Section V), grant recipients need to:
 1. Identify the top energy vendors for each main heating fuel type.
 2. Request data from the sample of vendors (e.g., procuring the vendor data)
 3. Review the returned vendor data
 4. Combine their LIHEAP client/program data with the vendor data and generate statistics (e.g., average annual heating bills, average annual electricity bills, average annual income, etc.)
- Please contact APPRISE if you require any assistance with this.

Presenter(s):
Melissa Torgerson



Audience Poll Question #2

How helpful was this webinar in understanding what is needed to complete the *FY24 Grantee Survey*?

Please select one:

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

Presenter(s):
Melissa Torgerson



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.

The screenshot shows the GoToWebinar interface with a sidebar on the left. The sidebar contains icons for Audio, Questions, and a hand icon. The main content area is divided into two sections: Audio and Questions.

Audio Section:

- Computer audio (unselected)
- Phone call (selected)
- Dial: +1 (562) 247-8422
- Access Code: 978-261-249 #
- Audio PIN: 45 #
- Problem dialing in?

Questions Section:

- Text input field: [Enter a question for staff]
- Send button
- Test section: Webinar ID: 619-143-667
- GoToWebinar logo

Callouts:

- Enter text here to ask a question. (points to the text input field)
- If the sidebar is minimized, it will look like this: (points to a minimized sidebar icon)
- Click this button to expand sidebar. (points to the expand sidebar button in the sidebar)

Presenter(s):
Melissa Torgerson



Final Reminders

Support Resources

- OCS Liaisons
 - <http://www.acf.hhs.gov/programs/ocs/resource/division-of-energy-assistance-federal-staff>
- LIHEAP Map State and Territory Contact Listing
 - <https://www.acf.hhs.gov/ocs/map/liheap-map-state-and-territory-contact-listing>
- APPRISE Team
 - Daniel Bausch, Daniel-Bausch@appraiseinc.org; 609-252-9050
 - Melissa Torgerson, melissa@verveassociates.net; 503-706-2647
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 - Jeb Jacob, Jeb-Jacob@appraiseinc.org; 609-252-0005
 - Luke Gooding, Luke-Gooding@appraiseinc.org; 609-454-3777

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