

Using the LIHEAP Performance Management Website to Access LIHEAP Data and Performance Resources

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

OCTOBER 22, 2024

WELCOME:

MEGAN MEADOWS(OCS)

PRESENTERS:

MICHELLE GILLHAM (ARKANSAS)
RICHARD GIDDINGS (VERMONT)
LISA GOBEN-TONINATO (OREGON)

KATRINA METZLER (NEUAC)
MELISSA TORGERSON (VERVE ASSOCIATES)
DAN BAUSCH (APPRISE)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Welcome

- **Purpose of this Webinar**

- Explain why there are three websites funded by OCS.
- Give an overview of the Performance Management Website (PMW) and its key content.
- Highlight some important resources on the PMW for LIHEAP stakeholders.

- **Audience for this Webinar**

- All LIHEAP stakeholders

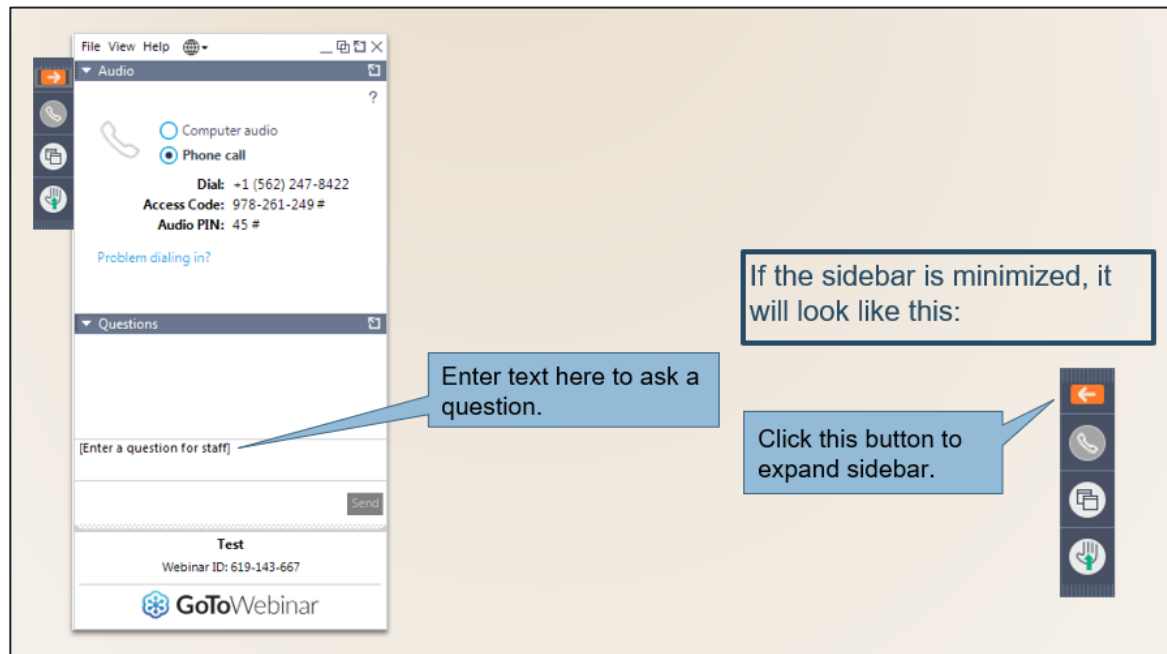
- **Structure of this Webinar**

- 45 minutes.
- **Slides are available for download** under “Handouts” in the GoTo Webinar Sidebar.
- The webinar is being recorded and will be published on the ACF YouTube channel.

GoTo Webinar Question Box

Have a question?

- You are encouraged to ask questions as you have them by typing them into the GoTo Webinar “Question” box.
- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.



Presenter:
Megan Meadows

Presenters & Presentation Outline

Introduction – Explaining the Three LIHEAP Websites • Melissa Torgerson (VERVE Associates)	Slide 5
Overview of the Performance Management Website • Dan Bausch (APPRISE)	Slide 9
Exploring the Data Warehouse • Michelle Gillham (Arkansas)	Slide 15
Program Resources and Performance Measures • Richard Giddings (Vermont)	Slide 20
Exploring the LIHEAP Virtual Library • Lisa Goben-Toninato (Oregon)	Slide 28
Stakeholder Testimonial • Katrina Metzler (NEUAC)	Slide 39
Final Reminders • Melissa Torgerson (VERVE Associates)	Slide 46

Introduction

Explaining the Three LIHEAP Websites

Melissa Torgerson (VERVE)

OFFICE OF COMMUNITY SERVICES

An Office of the Administration for Children & Families



LIHEAP

Low Income Home Energy Assistance Program

**PERFORMANCE
MANAGEMENT**



LIHEAP

Low Income Home Energy Assistance Program

CLEARINGHOUSE

Three LIHEAP Websites, Each with a Different Purpose

OFFICE OF COMMUNITY SERVICES

An Office of the Administration for Children & Families

acf.hhs.gov/ocs/programs/liheap

Federal LIHEAP page on Health and Human Services (HHS)/ACF website with official guidance regarding program rules, regulations, and policies. The site also includes training and other resources for program managers.



liheapch.acf.hhs.gov

Hub with detailed information about each state, territorial, and tribal LIHEAP grant recipient's program as well as other low-income energy assistance programs and resources.

Hosts the National Energy Assistance Referral (NEAR) service, which refers households needing assistance to a local LIHEAP office.

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liheappm.acf.hhs.gov

Resources and tools to help program administrators, policymakers, the public, and other stakeholders access performance management information and performance measurement data.

Presenter:
Melissa Torgerson

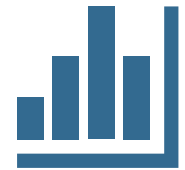


ADMINISTRATION FOR
CHILDREN & FAMILIES

A Brief Overview of the LIHEAP Performance Management Website

History

- The PMW was first developed a decade ago by OCS with the help of the **LIHEAP Performance Management Implementation Work Group (PMIWG)**.
- The PMW was first available to LIHEAP grant recipients and was then made publicly available in 2017.
- Today, the PMW is regularly updated and expanded.



Role of the Website

- Make historic data accessible to grant recipients, stakeholders, and the public
- Function as a one-stop location for LIHEAP performance management tools, resources, and training materials.



Tools & Resources on the Performance Management Website

Since being launched, the PMW has expanded to include a **comprehensive set of tools and resources** to help grant recipients and stakeholders collect, analyze, and utilize data, while supporting a broad range of other Performance Management activities.



Access & Visualize Data

- Data Warehouse
 - Standard Reports
 - Custom Reports
- Grant Recipient Profiles



Analyze, Use, & Verify Quality of Data

- Data Reliability Tools
- Next Steps Tool
- Data Case Studies
- Communication templates
- Executive Summaries



Find Resources & Information

- LIHEAP Virtual Library
- LIHEAP Website Navigator
- Federal reports
- LIHEAP Grantee Search Portal



Webinars & Other Training Resources

- Required report training
- Performance Management webinars
- NEUAC presentations
- Guides and issue briefs

Overview of the Performance Management Website

Dan Bausch (APPRISE)



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).



Access Reports to Congress and 1-Page Grant Recipient Profiles

The [Reports to Congress](#) page includes the most recent published annual LIHEAP Reports to Congress and 1-page Grant Recipient Profiles that provide a snapshot of each Grant Recipient's LIHEAP program using 2014 Report to Congress Data.

The Report to Congress provides detailed national and state-level information on LIHEAP each year. This includes: ➤

- Fiscal Data
- Home Energy Data
- Household Data
- Program Implementation Data
- Data Collection Activities
- Performance Measurement

MOST COMMON LINKS

[Required Reports](#)

[Performance Measures Data
Collection Guide](#)

[Performance Management
Training Webinars](#)

[Data Warehouse Tutorial](#)

[Data Warehouse Custom Reports](#)

[Data Case Studies Page](#)

LINK TO THE PMW:

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

LIHEAP Publications

[LIHEAP Glossary](#) [Site Feedback](#)

This section of the LIHEAP Performance Management website contains recent published annual LIHEAP reports.

LIHEAP Reports to Congress - Access detailed reports prepared for Congress on LIHEAP.

LIHEAP Home Energy Notebooks - View reports on the home energy mission and impacts of LIHEAP.



MOST COMMON LINKS

[Required Reports](#)[Performance Measures Data
Collection Guide](#)[Performance Management
Training Webinars](#)[Data Warehouse Tutorial](#)[Data Warehouse Custom Reports](#)[Data Case Studies Page](#)



LIHEAP Data Warehouse

[LIHEAP Glossary](#) [Reports Help](#) [Site Feedback](#)

The LIHEAP Data Warehouse allows users to access historic national and state-level LIHEAP data to build instant reports, tables, and charts. Users can access data through three different options: the Grant Recipient Profiles tool, Standard Reports tool, and Custom Reports tool. Resources and tutorials to aid users in utilizing these tools are provided below.

Grant Recipient Profiles — One-page snapshots of state LIHEAP Programs. ▼

Standard Reports — Receive step-by-step guidance on creating reports.

Custom Reports — Generate customized reports and figures.

Resources and Tutorial — Information on the Data Warehouse and its uses.▼



MOST COMMON LINKS

[Required Reports](#)[Performance Measures Data
Collection Guide](#)[Performance Management
Training Webinars](#)[Data Warehouse Tutorial](#)[Data Warehouse Custom Reports](#)[Data Case Studies Page](#)

LIHEAP Performance Measures

[LIHEAP Glossary](#) [Site Feedback](#)

Grant Recipient Profiles — One-page snapshots of state LIHEAP Programs. ▾

What are LIHEAP Performance Measures? — Information on the four LIHEAP Performance Measures.

State Snapshots and Executive Summaries — Resources to help interpret Performance Measures data. ▾

Accessing Performance Measures Data through the Data Warehouse — Guidance for using the Data Warehouse. ▾

Next Steps Tool for LIHEAP Targeting — An Interactive Tool for Examining Performance Measures Data.

Data Reliability Assessment Tools. ▾



MOST COMMON LINKS

[Required Reports](#)

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[Data Case Studies Page](#)



Program Resources

[LIHEAP Glossary](#) [Site Feedback](#)

MOST COMMON LINKS

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Required Reports - Access resources to help you with the LIHEAP reports.

Data Accuracy and Reliability - Resources to ensure your data represents your program accurately. ▾

Using Data for Performance Management - How to use data for program decision-making. ▾

Talking about LIHEAP Data – View resources to present information about your program. ▾

PMIWG - Learn about the Performance Management Implementation Work Group. ▾

Performance Management Training Resources — Find Past Training Webinars and Tools ▾

Exploring the Data Warehouse

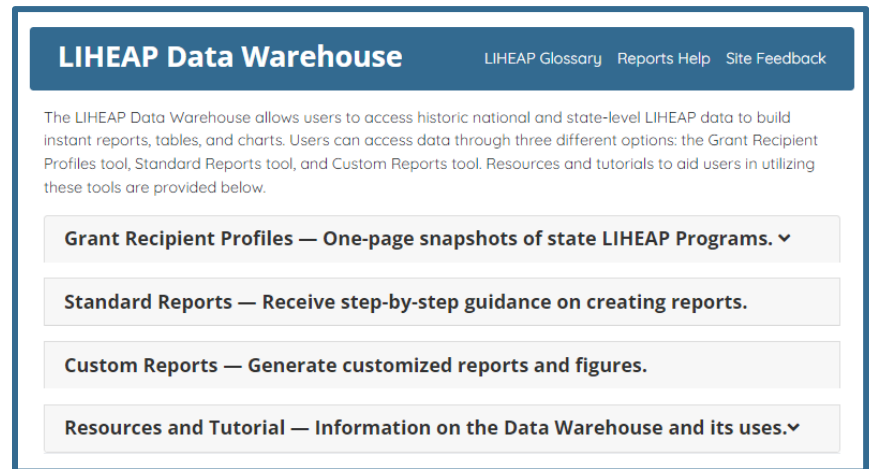
Michelle Gillham (AR)



Data Warehouse: Three Ways to Explore the Data

- **Grant Recipient Profiles:**

Furnish a summary picture of each state grant recipient's LIHEAP program in a one-page report.



- **Standard Reports:** Provide step-by-step guidance to create predefined data reports, tables, and charts to help users efficiently generate structured and consistent insights.
- **Custom Reports:** Enable users to generate personalized reports by selecting and combining any data fields of their choice.

Presenter:
Michelle Gillham

Standard & Custom Reports

Standard Reports

- Generate **predefined** data reports, tables, and charts.
- Efficiently generate structured and consistent insights.
- Three types of reports are available: single state reports, state comparison reports, and national reports.

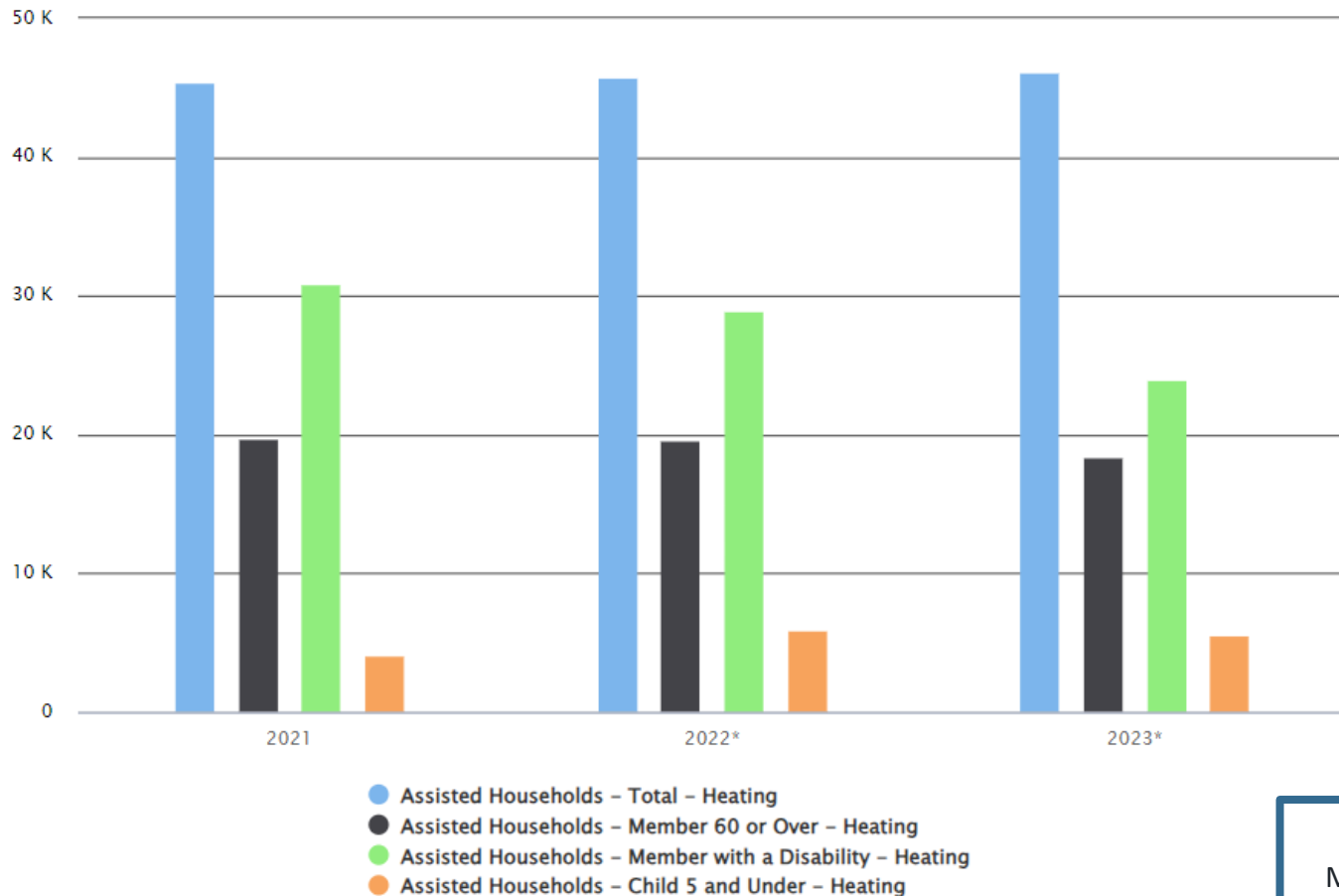
Custom Reports

- Users can select multiple data fields and customize elements such titles and type of chart.
- This flexibility allows users to tailor their analysis and presentation, ensuring the reports provide targeted insights and address specific needs.

The image displays two screenshots of the LIHEAP reporting interface. The top screenshot, titled 'Single State Reports', shows a navigation bar with links to 'LIHEAP Glossary', 'Reports Help', and 'Site Feedback'. Below the navigation bar is a progress indicator with four steps: '1 Start: Topics', '2 States', '3 Years', and '4 Results'. The main content area lists four predefined report topics: 'Who is income-eligible for assistance', 'How much funding comes from each source', 'How are funds used', and 'Who is assisted'. The bottom screenshot, titled 'Custom Reports', also features the same navigation bar. It shows a two-step process for creating a custom report. Step 1, 'Select the data fields you want to use:', includes three columns: 'Select the kind of data you want:' (with options like LIHEAP Funding, Recipients, etc.), 'Select a data category:' (with options like Uses of Funds, Allocation of Funds, etc.), and 'Select data fields (hover for help):' (with checkboxes for various funding and allocation metrics). Step 2, 'Filter your data for analysis:', includes three columns: 'Data fields selected:' (with checkboxes for 'Percent of Total Funds Allocated to Non-Benefits' and 'Percent of Total Funds Allocated to Administration And Planning'), 'Select grantees:' (with checkboxes for various states like Alabama, Alaska, etc.), and 'Select fiscal years:' (with checkboxes for years from 2001 to 2006).

Standard Report Example

Households Receiving Heating Assistance by Vulnerability – Arkansas

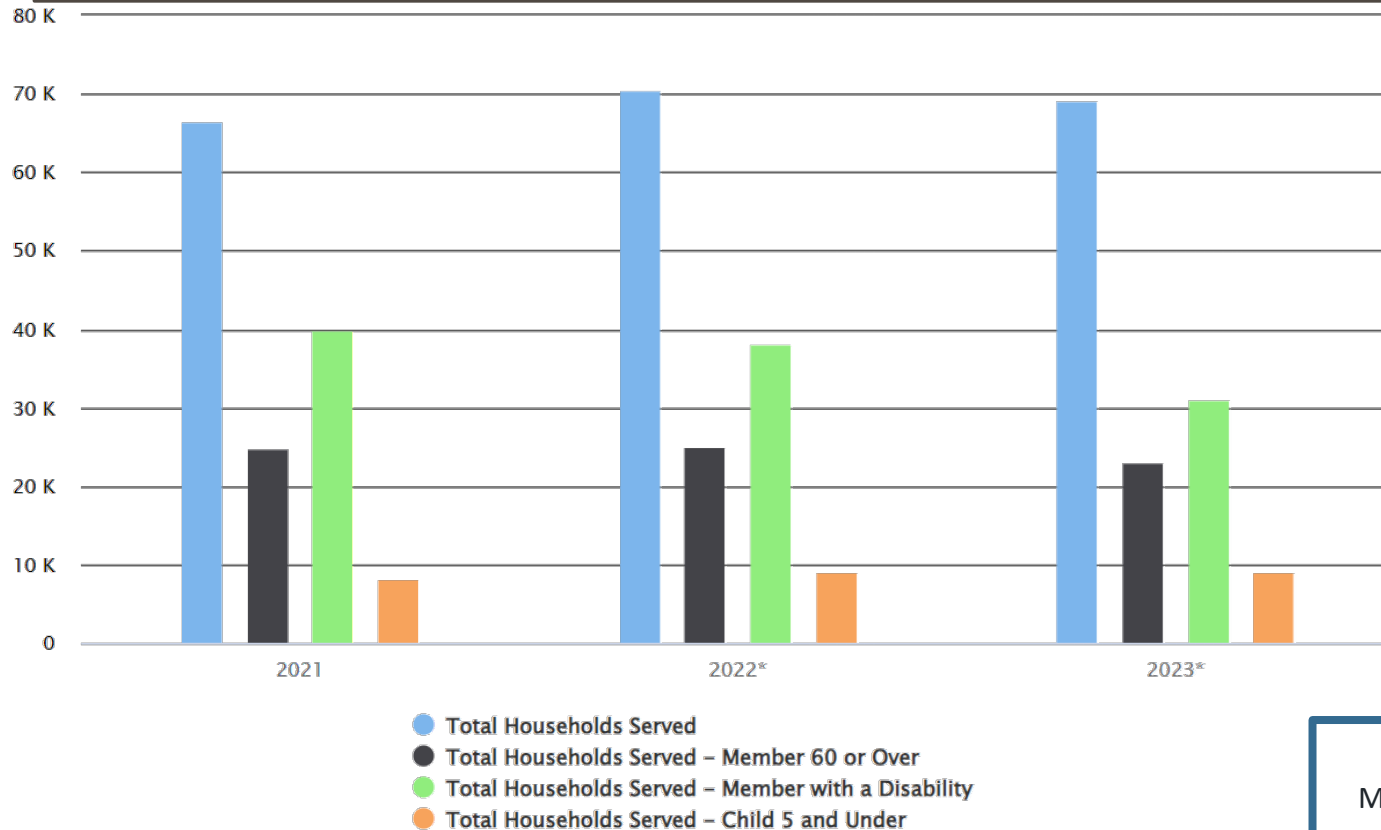


Presenter:
Michelle Gillham

Custom Report Example

LIHEAP Households Receiving Any Type of Assistance by Vulnerability Type (FY 2021 – FY 2023) – Arkansas

A “vulnerable household” is a household that has at least one member who is over the age of 60, a child under the age of 5, or a member with a disability. Vulnerability types are not mutually exclusive.



Presenter:
Michelle Gillham

Program Resources and Performance Measures

Richard Giddings (Vermont)



Program Resources & Performance Measures

- The Program Resources page and LIHEAP Performance Measures page each contain materials to help understand and leverage Performance Management and contain resources that can:
 - Ensure data accuracy and reliability
 - Use data for program decision-making
 - Talk about LIHEAP data with stakeholders
 - And more!
- Today's focus:
 1. Performance Measures Executive Summaries
 2. Communication Templates
 3. LIHEAP Conference Presentations

Program Resources [LIHEAP Glossary](#) [Site Feedback](#)

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- Required Reports - Access resources to help you with the LIHEAP reports.**
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LIHEAP Performance Measures [LIHEAP Glossary](#) [Site Feedback](#)

- Grant Recipient Profiles — One-page snapshots of state LIHEAP Programs.** ▼
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- Accessing Performance Measures Data through the Data Warehouse — Guidance for using the Data Warehouse.** ▼
- Next Steps Tool for LIHEAP Targeting — An Interactive Tool for Examining Performance Measures Data.**
- Data Reliability Assessment Tools.** ▼

Presenter:
Richard Giddings

Executive Summary: A Performance Management SNAPSHOT

- One-page explanation of key Performance Measures data.
- Visually depicts energy burden statistics and how LIHEAP has assisted with the prevention of home energy loss or the restoration of home energy service.
- Answers two important questions:
 1. Does the LIHEAP program furnish **higher benefits to higher burdened households?**
 2. Does the LIHEAP program pay a **larger share of the home energy bill for higher burdened households?**

LIHEAP Performance Measures [LIHEAP Glossary](#) [Site Feedback](#)

[Grant Recipient Profiles — One-page snapshots of state LIHEAP Programs.](#) ▼

[What are LIHEAP Performance Measures? — Information on the four LIHEAP Performance Measures.](#)

[State Snapshots and Executive Summaries — Resources to help interpret Performance Measures data.](#) ▼

[State Performance Measures Executive Summary — One-page explanation of each grant recipient's Performance Measures results.](#) ▼

Choose a year:

2023 ▼

- Choose a State - ▼

*The presented data for fiscal years 2022 to 2023 should be considered preliminary pending final data validation.

[State Performance Measures Snapshots — Step-by-step walkthrough of the Performance Measures reported by grant recipients.](#) ▼

VERMONT FY2023 LIHEAP

PERFORMANCE MANAGEMENT SNAPSHOT

In FY2023, Vermont furnished LIHEAP bill payment assistance to 26,119 households. They collected energy burden data for 6,580 households (25.2%).

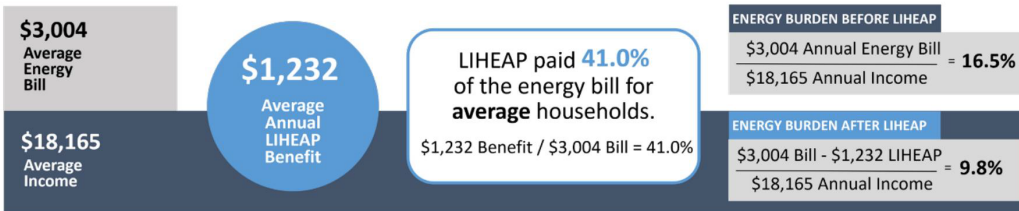
Does LIHEAP furnish higher benefits to higher burden households?

Yes. In Vermont, the total LIHEAP benefit received by high burden households in FY2023 was about **\$494 (40.1%) more** than the total LIHEAP benefit received by the average recipient household.

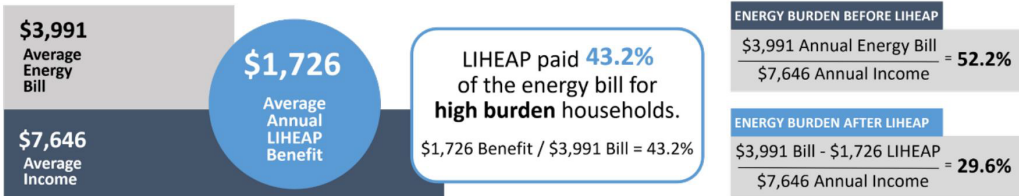
Does LIHEAP pay a larger share of the home energy bill for high burden households?

Yes. In FY2023, LIHEAP paid **41.0%** of the energy bill for average households in Vermont, while LIHEAP paid **43.2%** of the energy bill for high burden households.

All Households



High Burden Households



Prevention and Restoration of Home Energy Service Loss

As a Result of Bill Payment Assistance



As a Result of Equipment Repair or Replacement



- In FY2023, LIHEAP benefits in Vermont **prevented the loss of service 2,760 times**, by stopping threatened utility service disconnections and by delivering fuels to homes that were at risk of running out. In addition, the program **repaired or replaced heating or cooling equipment at imminent risk of failure 551 times**.
- In FY2023, LIHEAP benefits **restored home energy service 569 times** for households who had been disconnected by their utility provider or who had run out of fuel oil, propane, or wood.

Communication Templates

Talking about LIHEAP Data - View resources to present information about your program. ▼

This section includes resources that LIHEAP grant recipients can use to discuss performance measures with LIHEAP stakeholders.

[LIHEAP Grantee Search Portal](#)

The Grantee Search Portal is a tool developed by the PMIWG. It allows you to identify LIHEAP state grant recipients that share one or more common characteristics and look up program information for those states.

Communication Templates ▼

[Letter Template with Talking Points for Subgrantees](#) - WORD Document

Use this template to communicate with subgrantees about the importance of Performance Measures and to share results for your state.

[Letter Template with Talking Points for Energy Vendors](#) - WORD Document

Use this template to communicate with vendors about the importance of Performance Measures and to share results for your state.

[Letter Template with Talking Points for Legislators](#) - WORD Document

Use this template to communicate about Performance Measures results with legislators.



Program Resources

[LIHEAP Glossary](#) [Site Feedback](#)

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[Letter Template with Talking Points for Legislators](#) - WORD Document
Use this template to communicate about Performance Measures results with legislators.

[Grant Recipient Profiles](#) - One-page snapshots of state LIHEAP Programs. ▼



Example: Template with Talking Points for Energy Vendors

- Please contact APPRISE if you are interested in receiving this data for your state.

Dear Home Energy Vendor:

Thank you for your cooperation and assistance with collecting data needed to report on Low Income Home Energy Assistance Program (LIHEAP) Performance Measures. The purpose of these new measures is to demonstrate the effectiveness of LIHEAP, and how the program impacts those we serve.

For years, [STATE OR AGENCY] has collected data related to LIHEAP household income, age, vulnerability status, and benefit levels. Recently expanded data collection also allows us to demonstrate:

- The energy burden of all households who apply, and how LIHEAP benefits lower that burden.
- Whether or not high energy burden households (those with lower income and higher energy bills) are receiving greater benefits, and/or having a greater share of their energy costs offset by LIHEAP than average households.
- The number of occurrences where a LIHEAP benefit restored home energy [service](#)
- The number of occurrences where a LIHEAP benefit prevented loss of home energy service (e.g., disconnection, running out of fuel, or inoperable equipment).

[STATE OR AGENCY] would like to take this opportunity to share the [REPORTING PERIOD] results of our LIHEAP data collection.

What We Learned

- Last year [STATE OR AGENCY] assisted [#] [Line A, Column I, Part V of LIHEAP Performance Data Form \(PDF\)](#) households with LIHEAP bill payment assistance, helping to defray their heating and cooling costs.
- Out of these [#] [Line A, Column I, Part V of LIHEAP PDF](#) of households receiving bill payment assistance, [STATE OR AGENCY] was able to collect billing data and determine the energy burden for [#] [Line B1, Column I, Part V of LIHEAP PDF](#) of households.
- The average income for all bill payment assisted households was [\$\$] [Line B2, Column I, Part V of LIHEAP PDF](#). The average energy bill (main heating + electric) was [\$\$] [Line B6, Column I, Part V of LIHEAP PDF](#). **This means that before receiving LIHEAP, households are paying an average of [%] [Line B7, Column I, Part V of LIHEAP PDF](#) of their annual income on home energy costs (energy burden).**
- In [REPORTING PERIOD], the average annual total LIHEAP bill payment assistance benefit per household was [\$\$] [Line B3, Column I, Part V of LIHEAP PDF](#)—paying [%] [Line B10, Column I, Part V of LIHEAP PDF](#) of the average household's energy bill.

NEUAC Presentations

2024 — Access PMIWG Presentations from NEUAC 2024. ▼

[LIHEAP 101: Serving Clients & Empowering Staff - YouTube](#)

[LIHEAP 102: Delivering Benefits that Match Clients' Needs - YouTube](#)

[LIHEAP State-Tribe Agreements: Building Effective Relationships - YouTube](#)

2023 — Access PMIWG Presentations from NEUAC 2023. ▼

2022 — Access PMIWG Presentations from NEUAC 2022. ▼

2021 — Access PMIWG Presentations from NEUAC 2021. ▼

2019 — Access PMIWG Presentations from NEUAC 2019. ▼

2018 — Access PMIWG Presentations from NEUAC 2018. ▼

2017 — Access PMIWG Presentations from NEUAC 2017. ▼

NEADA Presentations

NEADA 2021 Fall Meeting — PMIWG Update ▼

NEUAC & NEADA Presentations



NEUAC Presentations

LIHEAP 101

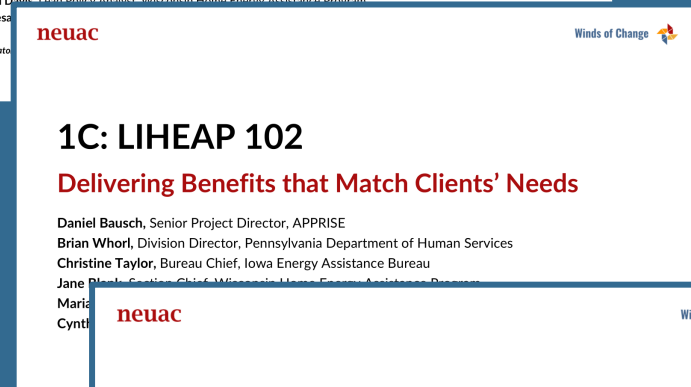
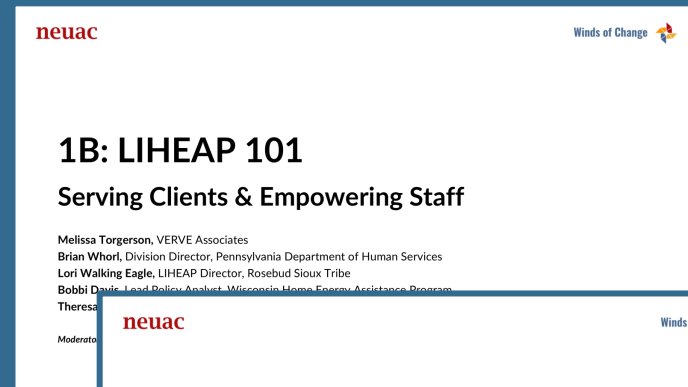
- Basic rules, guidelines, and considerations when designing and delivering LIHEAP
- Different ways to interpret federal statute and laws

LIHEAP 102

- How benefit determination procedures are implemented
- Advantages and disadvantages of different benefit determination procedures

State-Tribe Agreements

- How state-tribe agreements are developed



Exploring the LIHEAP Virtual Library

Lisa Goben-Toninato (OR)



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).



What's New in October 2024

◦ *New for October*

- A "Most Common Links" box was added to the right-side of the website, where you can find links to the most useful resources and training materials.

◦ *Recent Training Webinars*

- APPRISE conducted the following two webinars that will be posted soon:

MOST COMMON LINKS

[Required Reports](#)

[Performance Measures Data
Collection Guide](#)

[Performance Management
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Presenter:
Lisa Gobin-Toninato

The LIHEAP Virtual Library allows grant recipients to locate resources based on their unique needs. This tool not only provides basic T/TA resources for each area, but also highlights those areas where Performance Management and the everyday administration of LIHEAP intersect. To begin, select an area of interest. The tool will allow you to select and review multiple program areas before generating resources.

[Back to Main Page](#) [Help](#) [Suggest A Resource](#) [Leave Feedback](#)



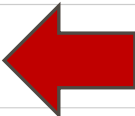
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LIHEAP Program Basics

Need a brief overview?
[Get the LIHEAP Program Basics Training Snapshot](#)



...or dig a little deeper:

Expand the categories below and check the items you'd like to add to your toolbox.

What are the basic responsibilities under the law?

[expand/collapse](#)



What requirements and guidance does OCS provide grant recipients under the law?

[expand/collapse](#)



What key activities and tasks should I plan each year to comply with the law?

[expand/collapse](#)



LIHEAP PROGRAM BASICS SNAPSHOT

This is a grant recipient's first stop for information on LIHEAP. This page includes guidance on how to administer a LIHEAP program, as well as information for grant recipients on the structure of LIHEAP, grant recipients' legal and fiscal responsibilities, what grant recipients should expect to do to meet those responsibilities, and where grant recipients can find further information and resources.

What is LIHEAP?

The Low Income Home Energy Assistance Program (LIHEAP) is a federal government program which provides grants to states, tribes and territories so they can administer programs to provide home energy assistance to low income households. Since LIHEAP is a block-grant program, grant recipients have many options and flexibility for program design. These assistance programs can include components that provide standard credits applied to the energy bills of any applicants who meet certain income thresholds, individualized energy credits in emergencies, funding to make weatherization related home improvements, or other program assistance.

What are the Rules?

The LIHEAP statute and regulations provide a framework under which grant recipients administer LIHEAP and deliver program service. Grants are provided by the Office of Community Services (OCS) in the Administration for Children and Families (ACF) which also issues guidance to grant recipients on program administration and ensures compliance with the statute.

Highlighted Resources:

The following resources related to LIHEAP business processes are included in the Virtual Library. **Note:** This list is not comprehensive.

Download files individually by clicking the links or use the checkboxes to add them to your toolbox.

- ☐ [LIHEAP Statute](#)
- ☐ [LIHEAP Grant Recipient Resources](#)
- ☐ [LIHEAP Grant Recipient Resource Guide](#)
- ☐ [LIHEAP 101 Primer](#)
- ☐ [OCS LIHEAP Lifecycle Guide](#)
- ☐ [Grant Recipient Search Portal](#)

[Back to main page](#)

Ways to use these resources:

1. **Review the basics** Review the Primer, the Statute and Assurances, and the Lifecycle Guide to get a better understanding of LIHEAP and the requirements on LIHEAP grant recipients.
2. **Survey your Options and Requirements.** Look through guidance from OCS for information on requirements and recommendations for LIHEAP grant recipients, and use the Grant Recipient Search Portal to find ideas for program structure used by other grant recipients.
3. **Keep an eye on strengthening program integrity.** Can areas of your vendor agreement be revised, or new areas added to reduce the potential for fraud, waste, and abuse?
4. **Reach out to OCS and your Peers.** OCS and other grant recipients can help answer any of your questions on LIHEAP, helping you with program design and outlining grant recipients 's responsibilities.
5. **Make a Model Plan.** Each year, grant recipients submit a Model Plan informing OCS of their planned program design. Use the Model Plan reference guide and the example planning timelines to plan out a LIHEAP program as a grant recipient and complete a Model Plan based on the program planned.



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What key activities and tasks should I plan each year to comply with the law?

[expand/collapse](#)



LIHEAP Program Basics

Need a brief overview?

[Get the LIHEAP Program Basics Training Snapshot](#)

...or dig a little deeper:

Expand the categories below and check the items you'd like to add to your toolbox.

What are the basic responsibilities under the law?

Download files individually by clicking the links or use the checkboxes to add them to your toolbox

- ☒ [LIHEAP Primer](#) ←
- ☒ [LIHEAP Statute](#) ←
- ☐ [LIHEAP Assurances](#)
- ☐ [Training on Assurances](#)
- ☐ [LIHEAP Required Reports](#)
- ☐ [LIHEAP Model Plan Reference Guide](#)
- ☐ [State and Territory Model Plans and Manuals](#)
- ☐ [LIHEAP Program and Funding](#)
- ☐ [LIHEAP Grant Recipient Resource Guide \(see Section C\)](#)

[expand/collapse](#)

What requirements and guidance does OCS provide grant recipients under the law?


[expand/collapse](#)

What key activities and tasks should I plan each year to comply with the law?

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Presenter:
Lisa Goben-Toninato

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- ☒ LIHEAP Primer
- ☒ LIHEAP Statute and Regulations

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Subgrantee Contracts and Agreements

Subgrantee contract or agreements are utilized by LIHEAP Grant Recipients so subgrantees can process applications, determine eligibility and pay utility suppliers. LIHEAP Grant Recipients issue these contracts or agreements to ensure compliance with LIHEAP federal and grant recipient requirements.

Need a brief overview?

[Get the Subgrantee Contracts and Agreements Snapshot](#)

A Summary and Citation of Legal Requirements Related to LIHEAP Subgrantee Contracts and Agreements

...or dig a little deeper:

Expand the categories below and check the items you'd like to add to your toolbox.

I'm creating or updating subgrantee agreements and would like to have a list of elements I should be including (or at least thinking about).

[expand/collapse](#)

I'd like to see examples of LIHEAP subgrantee agreements.

[expand/collapse](#)

I'd like to see examples of subgrantee agreements specific to LIHEAP Weatherization.

[expand/collapse](#)

I need to know what I should be updating in my subgrantee agreements to meet LIHEAP Performance Measure requirements.

[expand/collapse](#)

LIHEAP SUBGRANTEE CONTRACTS AND AGREEMENTS SNAPSHOT

Subgrantee contracts and agreements formally define the relationship between LIHEAP grant recipients, local administering agency, and clients. This includes expectations, roles, and responsibilities of each party.

Why is this important?

Subgrantee contracts and agreements outline how local agencies will administer LIHEAP funding. This includes, but is not limited to providing LIHEAP applications, completing LIHEAP applications, determining eligibility and benefit levels, processing LIHEAP benefit payments, and conducting local outreach. Additionally, subgrantee contracts and agreements establish expectations in terms of oversight and accountability (e.g., data exchanges, fiscal integrity, monitoring requirements).

Who says so?

The requirement for grant recipients to establish subgrantee contracts and agreements stems from Assurance 10 of the LIHEAP statute (Section 2605(b)(10)). OMB Uniform Administrative Requirements also mandate that subgrantees know the requirements, regulations, terms and conditions of their award (45 CFR Part 75).

Highlighted Resources:

The following resources related to LIHEAP business processes are included in the Virtual Library. **Note:** This list is not comprehensive. Download files individually by clicking the links or use the checkboxes to add them to your toolbox.

- ☐ [OMB Uniform Administrative Guidance Webinar](#) (August 2015)
- ☐ [Weatherization: Grant Recipient Roles and Responsibilities Podcast](#) (June 2015)
- ☐ [NCAT LIHEAP Clearinghouse Subgrantee Agreement Examples](#)
- ☐ [NCAT LIHEAP Clearinghouse Weatherization MOU Examples](#)
- ☐ [Working with Subgrantees to Collect LIHEAP Performance Measure Data](#) (PMIWG Newsletter, April 2015)

[Back to main page](#)

Ways to use these resources:

1. **Take a look at your subgrantee contacts and agreements.** Do they cover everything they need to? Are there areas that should be updated or revised?
2. **Read through examples of other grant recipient subgrantee contracts and agreements.** Are there ideas you'd like adopt or consider for your own state?
3. **Keep an eye on strengthening program integrity.** Can areas of your subgrantee contracts and agreements be revised, or new areas added to reduce the potential for fraud, waste, and abuse?
4. **Partner with subgrantees.** Many grant recipients report that working alongside subgrantees to update agreements makes the process easier for everyone.
5. **Align program elements.** Be sure that the expectations spelled out in the State Plan, policy manuals, monitoring tools, data exchange agreements, and risk assessments align with the terms and conditions in subgrantee contracts and agreements.

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- ☒ LIHEAP Primer
- ☒ LIHEAP Statute and Regulations

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- ☐ [NCAT Local Administering Agency Agreements Overview](#)
- ☐ [OMB Uniform Administrative Guidance](#) (August 2015)
- ☒ [Subgrantee Risk Assessments](#) (2015 National Conference) ←
- ☐ [Effective Oversight of Subrecipients](#) (2021 National Training)
- ☐ [Subgrantee Monitoring and Oversight](#) (NCAT)
- ☐ [Weatherization: Grant Recipient Roles and Responsibilities Podcast](#)
- ☐ [Weatherization: Coordinating LIHEAP and WAP](#)
- ☐ [Developing Weatherization Guidelines and Monitoring](#) (2017 National Training)

expand/collapse

Stakeholder Testimonial

Katrina Metzler (NEUAC)



LIHEAP Data Warehouse

[LIHEAP Glossary](#) [Reports Help](#) [Site Feedback](#)

The LIHEAP Data Warehouse allows users to access historic national and state-level LIHEAP data to build instant reports, tables, and charts. Users can access data through three different options: the Grant Recipient Profiles tool, Standard Reports tool, and Custom Reports tool. Resources and tutorials to aid users in utilizing these tools are provided below.



Grant Recipient Profiles — One-page snapshots of state LIHEAP Programs. ▾

Standard Reports — Receive step-by-step guidance on creating reports.

Custom Reports — Generate customized reports and figures.

Resources and Tutorial — Information on the Data Warehouse and its uses. ▾



MOST COMMON LINKS

[Required Reports](#)[Performance Measures Data
Collection Guide](#)

Presenter:
Katrina Metzler

Grant Recipient Profiles

The Grant Recipient Profile:

- Uses information from the Household Report and Grantee Survey to summarize the main features of a LIHEAP program for each fiscal year.
- Includes the following information:
 - Total Funding and Allocation of Funds
 - Eligible Households and Households Served
 - Vulnerable Populations Served
 - Average Benefits by Program Component
 - Historical Data on Funding

➤ **Tribal and Territory Profiles coming soon!**

Minnesota

LIHEAP FY2023 State Profile

Total Funding Available
\$172,440,433

Total Households Served
133,166

Income Eligibility Requirements
\$58,793
for a 4-person household

% of State Income-Eligible Population Served

23%

State Income-Eligible Population

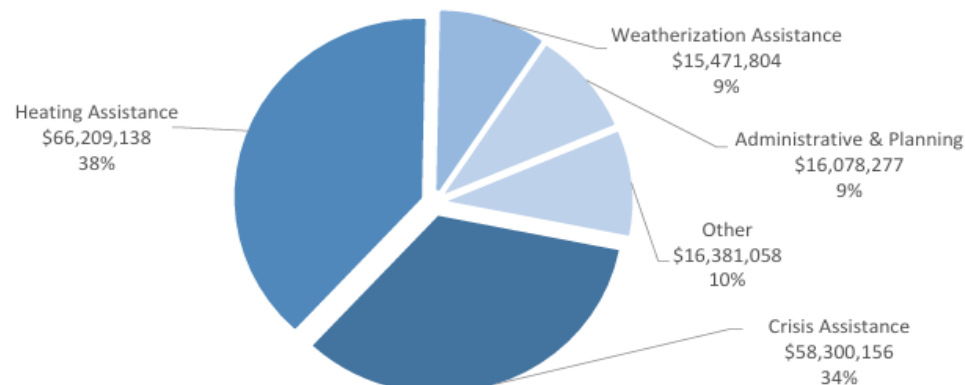
587,165

Annual Funds, 2019-2023
(\$ millions)



42

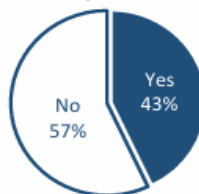
Uses of Funds



The Other category consists of:
Carryover to FY2024 (\$12,525,512)
Assurance 16 Activities (\$3,855,546)

Vulnerable Recipient Households

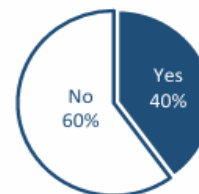
Households with Elderly Member



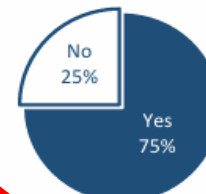
Households with Young Child



Households with Disabled Member



Households with Any Vulnerable Member



Types of Assistance

Heating Assistance served 133,000 households with reported average benefits of \$495.

Winter Crisis Assistance served 46,996 households with reported average benefits of \$1,032.

Weatherization Assistance served 2,757 households with a calculated average benefit of \$5,612.

Presenter:

Katrina Metzler

For more information



ADMINISTRATION FOR
CHILDREN & FAMILIES

LIHEAP Data Warehouse

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MOST COMMON LINKS

[Required Reports](#)[Performance Measures Data
Collection Guide](#)

Presenter:
Katrina Metzler

Standard Reports

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This section of the Data Warehouse contains reports and charts that are helpful for understanding LIHEAP data. The following reports are available: single state reports, state comparison reports, and national LIHEAP program statistics.

Single State Program Reports

State Comparison Reports


National LIHEAP Program Statistics


[Back to start](#)


Single State Reports

[LIHEAP Glossary](#) [Reports Help](#) [Site Feedback](#)


1 Start: Topics 2 States 3 Years 4 Results

 Who is income-eligible for LIHEAP

 How much funding does LIHEAP receive

 How are funds used

 Who is assisted


 Energy Burden

 LIHEAP Targeting Indexes

 Service Loss Restoration

[Back to standard reports](#)


[Back to start](#)


 Who is assisted


 Households with Members 60 or Over Receiving LIHEAP Heating Assistance


 Households Members with Disabilities Receiving LIHEAP Heating Assistance


 Households with Children 5 or Under Receiving LIHEAP Heating Assistance

 Households Receiving Heating Assistance by Vulnerability

 Percent of Federally Income-Eligible Households Receiving LIHEAP Heating Assistance by Vulnerable Group

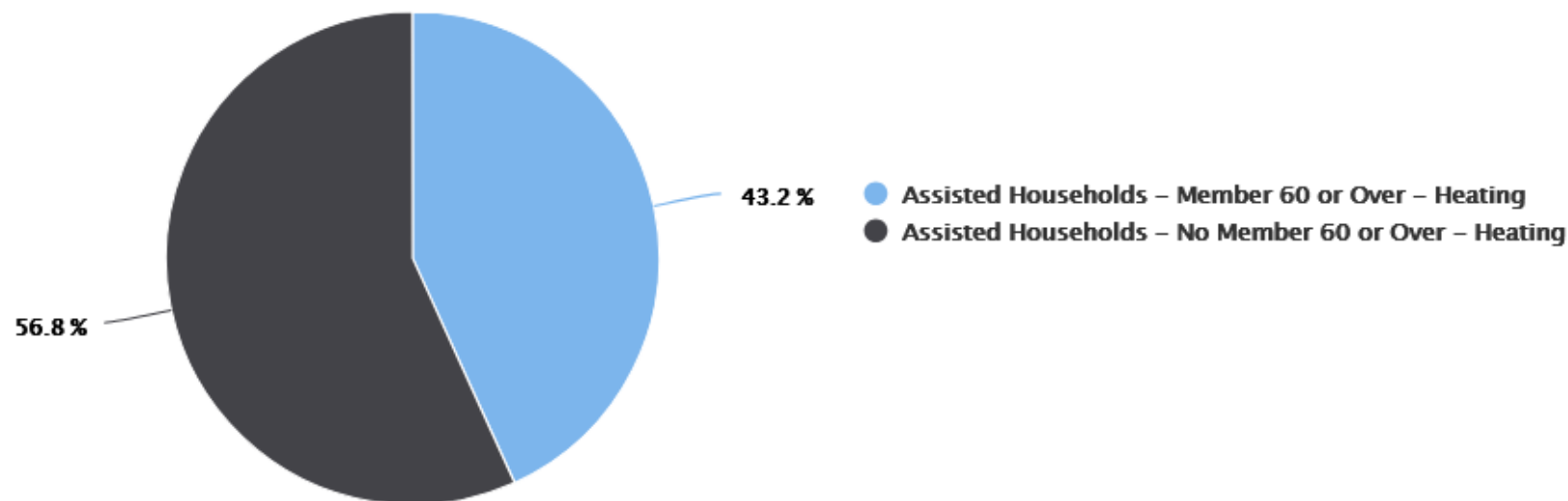
 Household Receiving Heating Assistance by Percent of HHS Poverty Guideline - Latest Year Available

 Household Receiving Heating Assistance by Percent of HHS Poverty Guideline - Over Time

 Percent of Federally Income-Eligible Households Receiving LIHEAP Heating Assistance by Percent of HHS Poverty Guidelines

[Customize report](#) | [Back to report selection](#)

Households with Elderly Members Receiving LIHEAP Heating Assistance – Minnesota



Final Reminders

Melissa Torgerson (VERVE)



Future Improvements to the Performance Management Website



- Adding tribal and territorial data to the Data Warehouse
- Tribal Grant Recipient Profiles
- American Rescue Plan Act (ARPA) Grant Recipient Profiles
- Additional Standard Reports in the Data Warehouse

Final Reminders

Additional Technical Assistance

Help Page

- Need additional tips finding resources or using tools? Please visit the LIHEAP Help Page for additional guidance:

<https://liheappm.acf.hhs.gov/help>

Help [LIHEAP Glossary](#) [Site Feedback](#)

Help Desk

- Please visit the Help Desk to request one-on-one assistance. APPRISE staff are available to answer questions and help you locate or use resources:

<https://liheappm.acf.hhs.gov/help-desk>

The **LIHEAP Performance Management Help Desk** is available to help LIHEAP grant recipients access all the resources and tools hosted on the LIHEAP Performance Management Website (PMW). APPRISE manages the Help Desk and is available to furnish the following types of personalized one-on-one technical assistance:

- Training and demonstrations on how to use the Data Warehouse
- Providing statistics and reports available through the Data Warehouse
- Assistance with understanding Performance Measures data and how it can be used to inform program planning

The Help Desk will be available on weekdays from 9:00 AM to 4:00 PM ET. APPRISE staff are generally available to respond to requests. We encourage you to contact the Help Desk with any requests or questions.

To contact the Help Desk, please email or call us: Dan Bausch: Daniel-Bausch@appriseinc.org / 609-252-9050 Kevin Schwartzbach: kevin-schwartzbach@appriseinc.org / 609-252-9031 Nicolas Mititelu: Nicolas-Mititelu@appriseinc.org / 646-854-4982

Presenter:
Melissa Torgerson

Final Reminders

Support Resources

HHS/ACF/OCS Performance Management Website DEA Contact

- Sharnice Mitchell, sharnice.mitchell@acf.hhs.gov, 202-401-4046

NCAT & APPRISE Team

- Systems Administrator – John English, john@ncat.org, 406-494-8679
- LIHEAP Reports – Dan Bausch, daniel-bausch@appraiseinc.org, 609-252-9050
- Support – Nicolas Mititelu, nicolas-mititelu@appraiseinc.org, 646-854-4982
- Communications – Kevin Schwartzbach, kevin-schwartzbach@appraiseinc.org, 609-252-9031

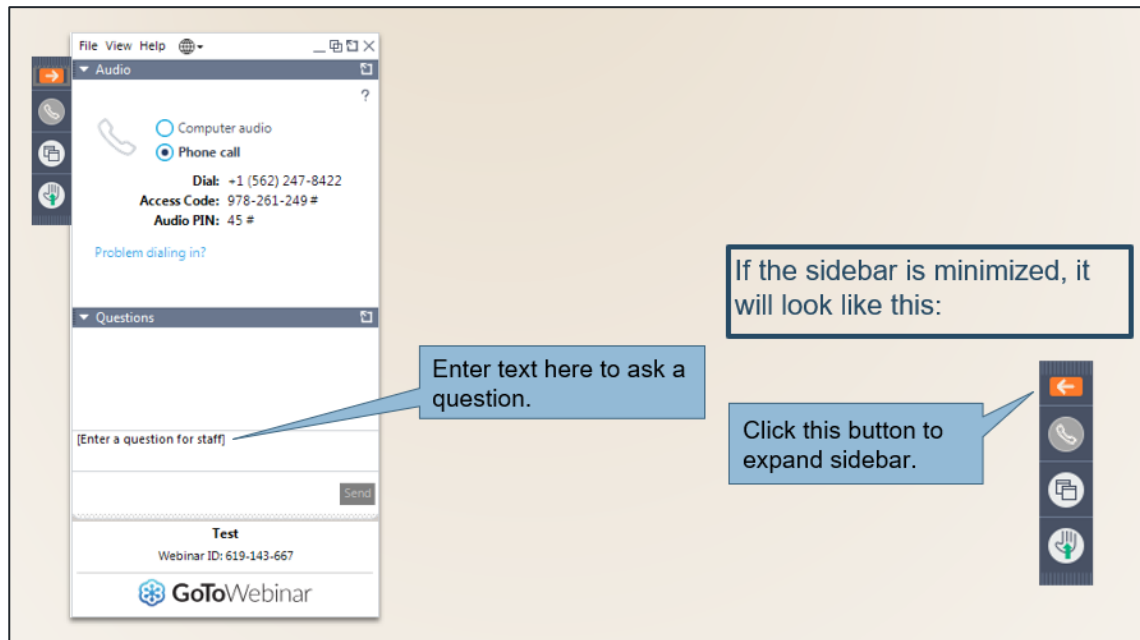
Presenters' Contact Information

- Melissa Torgerson, VERVE Associates, melissa@verveassociates.net, 503-706-2647
- Michelle Gillham, Arkansas Energy & Environment, michelle.gillham@arkansas.gov, 501-682-0816
- Richard Giddings, Department for Children & Families, richard.giddings@vermont.gov, 802-786-5986
- Lisa Goben-Toninato, Oregon Housing & Community Services, lisa.goben@hcs.oregon.gov, 503-986-2094
- Katrina Metzler, NEUAC, kmetzler@neuac.org, 202-838-8375

GoTo Webinar Question Box

Have a question?

- You are encouraged to ask questions as you have them by typing them into the GoTo Webinar “Question” box.
- 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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