LIHEAP Performance Management:
Using Data to Inform Benefit Determination Procedures & Coordination with Other Assistance Programs

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

September 2, 2020

Welcome: Kate Thomas (OCS)

Lisa Goben (PMIWG, Oregon)
David Kaufman (Oregon)
Tracy Smetana (PMIWG, Minnesota)
Brian Whorl (PMIWG, Pennsylvania)
Brian Sarensen (PMIWG, Washington)
Kevin McGrath (APPRISE)

ADMINISTRATION FOR CHILDREN & FAMILIES

Webinar Overview

Purpose of This Webinar

This webinar will provide an example of how to use data to inform and update benefit determination procedures, and how to examine the potential impact of those changes in advance. The webinar will also present examples of the opportunities and challenges faced in coordinating LIHEAP programs with other energy assistance programs.

Audience for This Webinar

This webinar is intended for all LIHEAP state grantees and program staff.

Presenter(s):
Kate Thomas

Webinar Presenters

Part 1

David Kaufman, *Oregon Housing and Community Services*
Lisa Goben, *Oregon Housing and Community Services / PMIWG*
Kevin McGrath, *APPRISE*

Part 2

Tracy Smetana, *Minnesota Department of Commerce / PMIWG*
Brian Whorl, *Pennsylvania Department of Human Services / PMIWG*
Brian Sarensen, *Washington Department of Commerce / PMIWG*

Presenter(s):
Kate Thomas

Outline of Webinar

Presenter(s):
Kevin McGrath

Webinar Overview

Structure of The Webinar

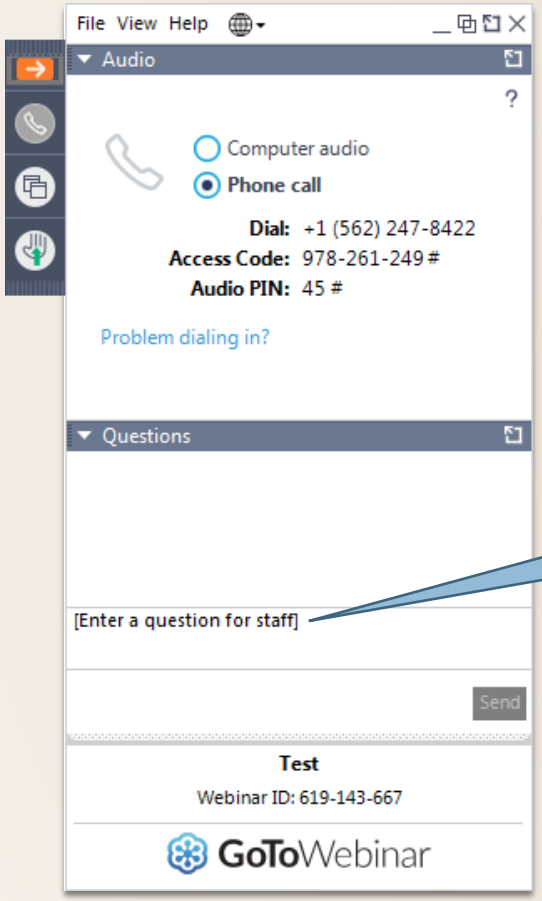
- 40 minutes to review Oregon data case study
- 10 minutes for Q & A
- 30 minutes to review challenges and opportunities for coordinating LIHEAP and other energy assistance programs
- 10 minutes for Q & A
- Slides available for download under “Handouts” in the GoToWebinar Sidebar.

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.

Presenter(s):
Kevin McGrath

GoToWebinar Question Box



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Presenter(s):
Kevin McGrath

Webinar Outline

- Part 1 – Oregon data case study
  - Overview of energy assistance in Oregon
  - Benefit determination procedures
  - Limitations of prior benefit matrix
  - Updates to benefit matrix
  - Simulation analysis
  - Recommendations, challenges, & next steps

- Part 2 – Challenges and opportunities for coordinating LIHEAP programs with other energy assistance programs
  - Minnesota
  - Pennsylvania
  - Washington

Presenter(s):
Kevin McGrath

Oregon Data Case Study

Presenter(s):
Kevin McGrath

Overview of Energy Assistance in Oregon

- LIHEAP administered by Oregon Housing and Community Services (OHCS) and implemented by local agencies
- OHCS also administers the Oregon Energy Assistance Program (OEAP), funded by investor-owned electric utilities in the state
  - OEAP has same income guidelines and uses same benefit structure as LIHEAP
  - OEAP funding only available to customers of the utilities that fund the program
- Gas investor-owned utilities have their own gas assistance programs (OLGA) and many community-owned utilities (municipals and cooperatives) have their own programs

Presenter(s): Lisa Goben, David Kaufman

Targeting LIHEAP Assistance

- The LIHEAP Statute requires states to assure 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)].

- To comply with this requirement, OHCS uses and energy assistance benefit matrix which accounts for income and average energy costs, among other factors.

Presenter(s): Lisa Goben, David Kaufman

Oregon's Benefit Determination Procedures Background

- Established around 2010
- Benefit matrix that utilizes multiple data sources to estimate energy expenditures:
  - Average energy usage by fuel type from EIA's Residential Energy Consumption Survey (RECS)
  - Average energy usage by household size from EIA's RECS
  - Fuel prices from EIA's State Energy Data System (SEDS)
- Benefit amount based on share of estimated bill; share paid varies by SMI category (income level x household size)

Presenter(s): Lisa Goben, David Kaufman

Benefit Determination Procedures
Detailed Steps

1. **Determine baseline fuel cost = average price * average usage * inflation factor**
   - Inflation factor to account for the delay between publication of fuel prices and the funding period
2. **Adjust for household size differentials in energy usage**
   - Assumes that larger households use more energy
   - Uses ratios of average usage for a given household size by average usage for all household sizes
3. **Adjust for climate region in energy usage**
   - Accounts for differences in energy usage and prices in coastal and inland climate regions

Estimated fuel cost = baseline fuel cost * household size factor * climate region factor

Presenter(s): Lisa Goben, David Kaufman

Benefit Determination Procedures
Detailed Steps (cont.)

4. Determine benefit amounts based on estimated fuel costs.

- Vary benefit amounts by state median income (SMI) category, which factors in household income relative to their household size. As SMI category increases, benefits decrease.

SMI category	Pay this share of the estimated fuel costs
0-15% SMI	35%
16-30% SMI	30%
31-45% SMI	25%
46-60% SMI	20%

Presenter(s): Lisa Goben, David Kaufman

Limitations of Prior Benefit Matrix (FY 2019)

- ***Outdated information –*** utilized data from 2009 RECS
- ***Geography –*** energy usage based on national averages
- ***Differential treatment of heating fuel types***
  - For non-electric heating fuels (natural gas, fuel oil, etc.), only factors in their heating fuel
  - For electric, estimates based on all households includes many who don't use electric as main heating fuel

Presenter(s):
Kevin McGrath

Updates to Benefit Matrix (FY 2020)

- Incremental approach
- ***Updated information*** – Use 2015 RECS and updated fuel prices from SEDS
- ***Align geography*** – Better match geography of estimates to Oregon (use West Census Region where available)
- ***Treat heating fuel types equitably***
  - Include electric usage for non-electric heating fuels
  - Base estimates on fuel usage of households using the fuel for primary heat

Presenter(s):
Kevin McGrath

Updates to Benefit Matrix – Average Energy Usage by Fuel Type

Fuel Type	FY 2019 Matrix (2009 RECS) (MMBtu)	FY 2020 Matrix (2015 RECS)	
		Main Heat (MMBtu)	Electric (MMBtu)
Electricity	38.6	37.9	0.0
Heating Oil*	76.4	76.2	30.2
Liquid Gas	42.5	41.4	28.7
Natural Gas	67.8	47.0	25.6
Wood/Pellets**	38.4	38.4	28.7

*National average usage for heating oil rather than Census Region estimate due to small sample in 2015 RECS

**Continued used of 2009 RECS for wood/pellets because not included in 2015 RECS

Presenter(s):
Kevin McGrath

Updates to Benefit Matrix – Household Size Energy Usage Multiplier

Household Count	FY 2019 Matrix (2009 RECS)		FY 2020 Matrix (2015 RECS)	
	MMBtus	Multiplier	MMBtus	Multiplier
1 member	65.80	0.73	45.70	0.76
2 members	90.73	1.01	58.50	0.98
3 members	98.40	1.10	58.90	0.98
4 members	106.41	1.19	68.10	1.14
5 members	110.85	1.24	76.10	1.27
6+ members	113.65	1.27	85.40	1.43
Average	89.60	N/A	59.90	N/A

Presenter(s):
Kevin McGrath

Benefit Simulation Analysis

- A simulation analysis can enable programs to examine potential outcomes prior to program implementation and allow them to course correct or make further adjustments prior to the next fiscal year.
- For example, OHCS started the process to update the benefit matrix in April 2019 and implemented the matrix for the start of the FY 2020 program year (October 2019).
- Data on clients served in FY 2020 won't be available to OHCS until early 2021.
- Rather than waiting two years from the time the process started, OHCS could use a simulation analysis and currently available program data to examine impacts of the changes to the benefit matrix.

Presenter(s):
Kevin McGrath

Benefit Simulation Analysis (cont.)

- Using the FY 2019 program data and energy bill data collected for the Performance Measures report, assigned each client the benefit they would receive (based on household size, income, heating fuel type, and climate region) using the FY 2020 benefit matrix and FY 2019 benefit matrix.

- Compared energy burden outcomes from the simulated FY 2020 benefit, simulated FY 2019 benefit, and FY 2019 actual total benefit. This included analysis of outcomes for groups of clients and individual clients.

- Based on findings from the simulations, additional adjustments made to the FY 2020 benefit matrix values and simulated those outcomes for further comparison and consideration in the FY 2021 program.

Presenter(s):
Kevin McGrath

Benefit Simulation Analysis – Example

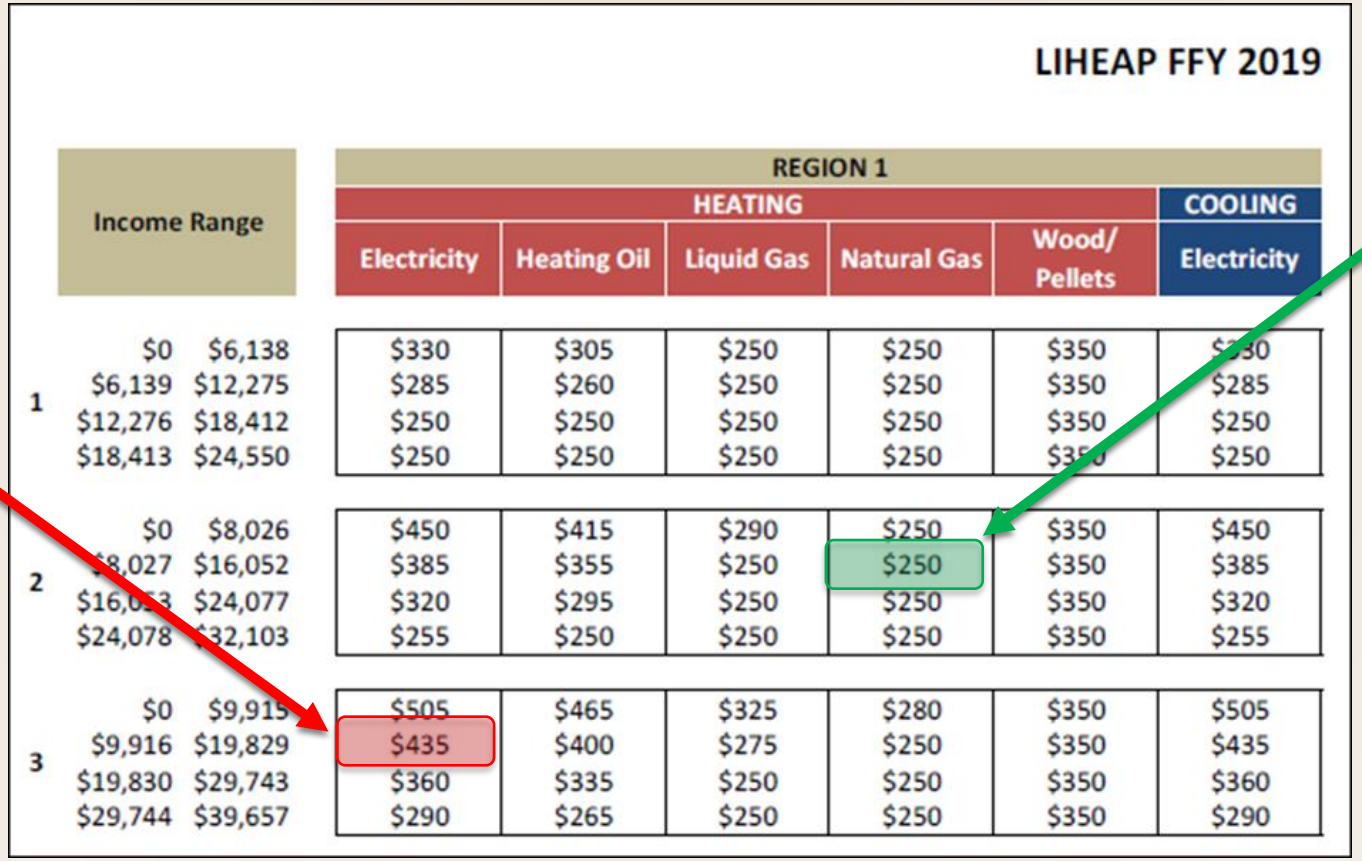
- **Client A** has the following characteristics:
  - Electric main heat
  - 3 household members
  - $15,000 income (16-30% SMI category)
  - Climate region 1

- **Client B** has the following characteristics:
  - Natural gas main heat
  - 2 household members
  - $15,000 income (16-30% SMI category)
  - Climate region 1

Presenter(s):
Kevin McGrath

Benefit Simulation Analysis – Example (cont.)

Prior benefit matrix (FY 2019)



LIHEAP FFY 2019

	Income Range		REGION 1 HEATING Electricity	Heating Oil	Liquid Gas	Natural Gas	Wood/ Pellets	COOLING Electricity
1	$0	$6,138	$330	$305	$250	$250	$350	$330
	$6,139	$12,275	$285	$260	$250	$250	$350	$285
	$12,276	$18,412	$250	$250	$250	$250	$350	$250
	$18,413	$24,550	$250	$250	$250	$250	$350	$250
2	$0	$8,026	$450	$415	$290	$250	$350	$450
	$8,027	$16,052	$385	$355	$250	$250	$350	$385
	$16,053	$24,077	$320	$295	$250	$250	$350	$320
	$24,078	$32,103	$255	$250	$250	$250	$350	$255
3	$0	$9,915	$505	$465	$325	$280	$350	$505
	$9,916	$19,829	$435	$400	$275	$250	$350	$435
	$19,830	$29,743	$360	$335	$250	$250	$350	$360
	$29,744	$39,657	$290	$265	$250	$250	$350	$290

Client A

Client B

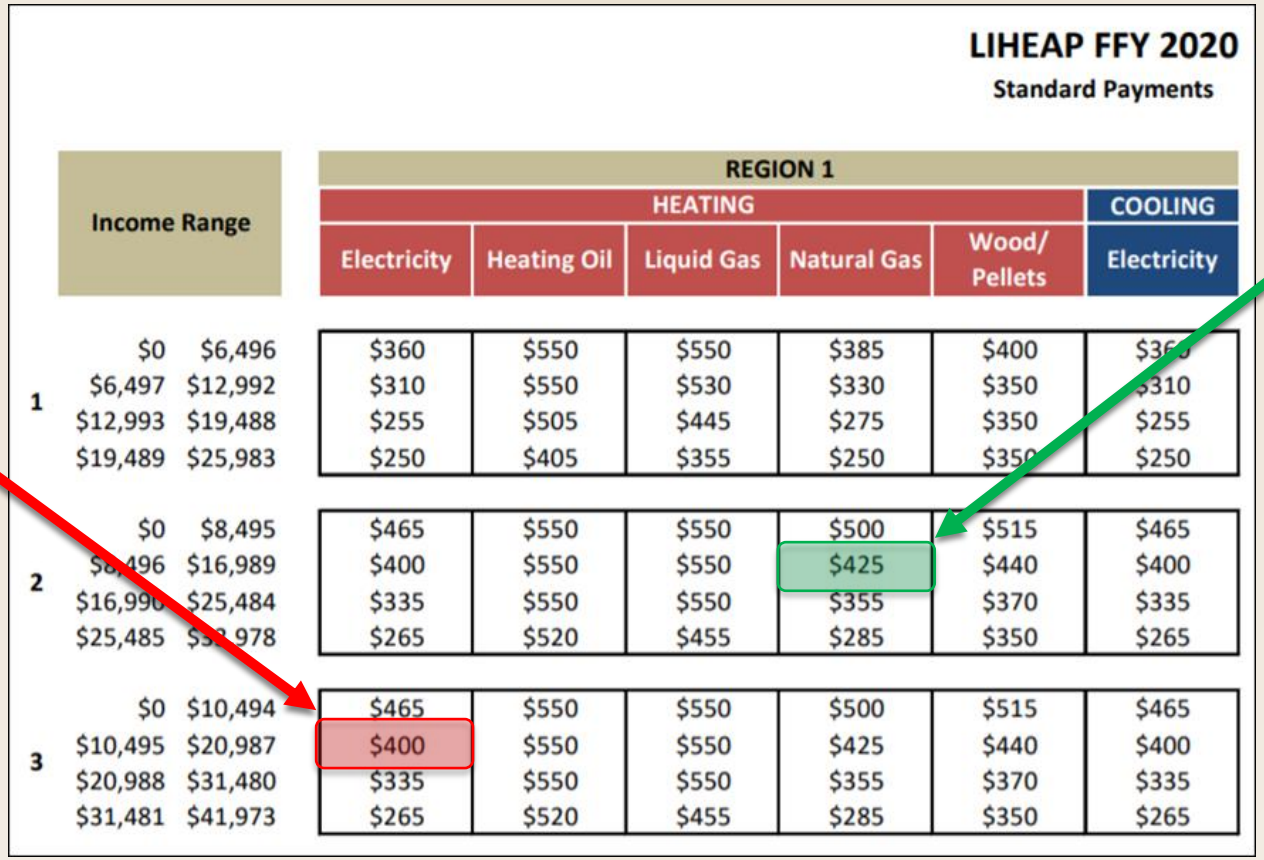
Presenter(s):
Kevin McGrath

Benefit Simulation Analysis – Example (cont.)

Updated benefit matrix (FY 2020)

Client A

Client B



LIHEAP FFY 2020

Standard Payments

	Income Range		REGION 1 HEATING Electricity	Heating Oil	Liquid Gas	Natural Gas	Wood/ Pellets	REGION 1 COOLING Electricity
1	$0	$6,496	$360	$550	$550	$385	$400	$360
	$6,497	$12,992	$310	$550	$530	$330	$350	$310
	$12,993	$19,488	$255	$505	$445	$275	$350	$255
	$19,489	$25,983	$250	$405	$355	$250	$350	$250
2	$0	$8,495	$465	$550	$550	$500	$515	$465
	$8,496	$16,989	$400	$550	$550	$425	$440	$400
	$16,990	$25,484	$335	$550	$550	$355	$370	$335
	$25,485	$33,978	$265	$520	$455	$285	$350	$265
3	$0	$10,494	$465	$550	$550	$500	$515	$465
	$10,495	$20,987	$400	$550	$550	$425	$440	$400
	$20,988	$31,480	$335	$550	$550	$355	$370	$335
	$31,481	$41,973	$265	$520	$455	$285	$350	$265

Presenter(s):
Kevin McGrath

Benefit Simulation Analysis – Example

	Client A		Client B	
	FY 2019 Matrix	FY 2020 Matrix	FY 2019 Matrix	FY 2020 Matrix
Income	$15,000		$15,000	
Total Energy Bill	$1,000		$1,150	
Gross Burden	6.7%		7.7%	
Simulated Benefit	$435	$400	$250	$425
Net Energy Bill	$565	$600	$900	$725
Net Energy Burden	3.8%	4.0%	6.0%	4.8%

Presenter(s):
Kevin McGrath

Benefit Simulation Results – All Clients Group Average Income, Energy Bills, Gross Burden

Main Heating Fuel	Mean Income	Mean Heating Bill	Mean Electric Bill	Mean Total Residential Energy Bill	Mean Gross Energy Burden
Electric	$15,735	$1,262	$0	$1,262	8.0%
Gas	$16,602	$527	$930	$1,457	8.8%
Fuel Oil*	$17,002	$606	$1,007	$1,613	9.5%
Propane*	$16,355	$910	$1,113	$2,023	12.4%
All Households	$15,802	$1,206	$71	$1,277	8.1%

*Small sample size

Presenter(s):
Kevin McGrath

Benefit Simulation Results – All Clients Group Average Simulated Benefits, Net Burden

Main Heating Fuel	Simulated FY 2019 Matrix		Simulated FY 2020 Matrix	
	Mean Benefit Amount	Mean Net Energy Burden	Mean Benefit Amount	Mean Net Energy Burden
Electric	$353	5.8%	$362	5.7%
Gas	$257	7.2%	$387	6.4%
Fuel Oil*	$294	7.8%	$518	6.4%
Propane*	$262	10.8%	$498	9.3%
All Households	$346	5.9%	$364	5.8%

*Small sample size

Presenter(s):
Kevin McGrath

Benefit Simulation Results – High Burden Clients Group Average Income, Energy Bills, Gross Burden

Main Heating Fuel	Mean Income	Mean Heating Bill	Mean Electric Bill	Mean Total Residential Energy Bill	Mean Gross Energy Burden
Electric	$6,894	$1,692	$0	$1,692	24.5%
Gas	$8,014	$612	$1,244	$1,855	23.2%
Fuel Oil*	$11,183	$766	$1,275	$2,042	18.3%
Propane*	$13,928	$1,102	$1,354	$2,456	17.6%
All Households	$6,998	$1,603	$103	$1,706	24.4%

*Small sample size

Presenter(s):
Kevin McGrath

Benefit Simulation Results – High Burden Clients Group Average Simulated Benefits, Net Burden

Main Heating Fuel	Simulated FY 2019 Matrix		Simulated FY 2020 Matrix	
	Mean Benefit Amount	Mean Net Energy Burden	Mean Benefit Amount	Mean Net Energy Burden
Electric	$416	18.5%	$423	18.4%
Gas	$267	19.8%	$445	17.6%
Fuel Oil*	$312	15.5%	$544	13.4%
Propane*	$274	15.7%	$537	13.8%
All Households	$404	18.6%	$425	18.3%

*Small sample size

Presenter(s):
Kevin McGrath

Benefit Simulation Results – Benefit & Burden Reduction Targeting Index Scores

Main Heating Fuel	Benefit Targeting Index for High Burden Households		Burden Reduction Targeting Index for High Burden Households	
	Simulated FY 2019 Matrix	Simulated FY 2020 Matrix	Simulated FY 2019 Matrix	Simulated FY 2020 Matrix
Electric	118	117	88	87
Gas	104	115	82	90
Fuel Oil*	106	105	84	83
Propane*	105	108	86	89
All Households	117	117	87	88

*Small sample size

Presenter(s):
Kevin McGrath

Benefit Simulation Results – Distributional Analysis
Gas Main Heat Clients

Group averages obscure differences among individual clients
Distributional analysis can help you understand individual clients and how the program addresses their needs

	Mean	Bottom 10%	Bottom 25%	Median	Top 25%	Top 10%
Income	$16,602	$6,132	$9,492	$14,730	$21,753	$29,714
Total Residential Energy Bill	$1,457	$806	$1,032	$1,315	$1,711	$2,249
Gross Energy Burden	15.6%	4.4%	6.0%	8.7%	13.5%	26.1%

Presenter(s):
Kevin McGrath

Benefit Simulation Results – Distributional Analysis
Gas Main Heat Clients (Cont.)

	Mean	Bottom 10%	Bottom 25%	Median	Top 25%	Top 10%
Simulated FY 2019 Benefit	$257	$250	$250	$250	$250	$280
Net Energy Burden (Sim. FY 2019 Benefit)	13.6%	3.3%	4.5%	6.8%	11.3%	21.5%
Simulated FY 2020 Benefit	$387	$285	$310	$370	$445	$550
Net Energy Burden (Sim. FY 2020 Benefit)	12.6%	2.7%	3.9%	6.0%	9.9%	18.9%

Presenter(s):
Kevin McGrath

Benefit Simulation Results – Net Energy Burden Outcomes
All Clients

Net Energy Burden Outcome	Simulated FY 2019 Matrix	Simulated FY 2020 Matrix
Bill credit (simulated benefit > total energy bill)	0.7%	0.9%
Affordable net burden (0-6% income)	55.1%	56.1%
Unaffordable net burden (>6-10% income)	20.7%	20.1%
Extremely unaffordable net burden (>10% income)	23.5%	22.9%

Presenter(s):
Kevin McGrath

Benefit Simulation Analysis – Further Adjustments

- Targeting achieved by the FY 2020 benefit matrix limited due to income differentials and minimum benefit ($250) maximum benefit ($550) levels
  - Benefit Targeting Index = 117 using FY19 matrix and 117 using FY20 matrix
  - Burden Reduction Targeting Index = 87 using FY19 matrix and 88 using FY20 matrix
- Individual outcomes similar using FY19 matrix and FY20 matrix
  - About 1/2 clients with affordable net energy burden, 2/5 with unaffordable net energy burden [Note: when considering LIHEAP benefits only]
- Considered two further adjustments for FY21 matrix to improve targeting
  - Option #1 = 10% increase in benefit to lowest income category / 10% decrease in benefits to highest income category / lower minimum benefit ($200) and raise maximum benefit ($600)
  - Option #2 = 25% increase in benefit to lowest income category / 25% decrease in benefits to highest income category / lower minimum benefit ($150) and raise maximum benefit ($650)

Presenter(s):
Kevin McGrath

Benefit Simulation Results – All Clients
Group Average Simulated Benefits, Net Burden

Main Heating Fuel	Option #1 ("10% Option")		Option 2 ("25% Option")	
	Mean Benefit Amount	Mean Net Energy Burden	Mean Benefit Amount	Mean Net Energy Burden
Electric	$366	5.7%	$370	5.7%
Gas	$390	6.4%	$392	6.4%
Fuel Oil*	$531	6.4%	$530	6.4%
Propane*	$508	9.3%	$508	9.3%
All Households	$368	5.8%	$372	5.7%

*Small sample size

Presenter(s):
Kevin McGrath

Benefit Simulation Results – High Burden Clients
Group Average Simulated Benefits, Net Burden

Main Heating Fuel	Option #1 ("10% Option")		Option 2 ("25% Option")	
	Mean Benefit Amount	Mean Net Energy Burden	Mean Benefit Amount	Mean Net Energy Burden
Electric	$453	18.0%	$488	17.5%
Gas	$470	17.3%	$501	16.9%
Fuel Oil*	$586	13.0%	$607	12.8%
Propane*	$567	13.6%	$589	13.4%
All Households	$454	17.9%	$490	17.4%

*Small sample size

Presenter(s):
Kevin McGrath

Benefit Simulation Results – Benefit & Burden Reduction Targeting Index Scores

Main Heating Fuel	Benefit Targeting Index for High Burden Households		Burden Reduction Targeting Index for High Burden Households	
	Option 1 ("10% Option)	Option 2 ("25% Option")	Option 1 ("10% Option)	Option 2 ("25% Option")
Electric	124	132	92	99
Gas	121	128	92	98
Fuel Oil*	110	114	95	100
Propane*	112	116	87	90
All Households	124	132	92	95

*Small sample size

Presenter(s):
Kevin McGrath

Benefit Simulation Results – Net Energy Burden Outcomes – All Clients

Net Energy Burden Outcome	Option 1 ("10% Option)	Option 2 ("25% Option")
Bill credit (simulated benefit > total energy bill)	1.1%	1.2%
Affordable net burden (0-6% income)	56.3%	56.3%
Unaffordable net burden (>6-10% income)	20.2%	20.5%
Extremely unaffordable net burden (>10% income)	22.5%	22.0%

Presenter(s):
Kevin McGrath

Recommendations, Challenges, & Next Steps

- Short-term focus on incremental adjustments and continuous improvement ("10% Option" for FY 2021)
- Long-term focus on transformational improvements by targeting individual energy burden
  - Use actual energy bill data
- Challenge of coordinating benefits
  - LIHEAP
  - OEAP
  - OLGA
- Opportunities for training and support
  - Currently, local agencies use discretion in coordinating multiple benefits
  - Opportunity to standardize procedures, provide guidance on high energy burden and coordinating benefits

Presenter(s): Lisa Goben, David Kaufman

Oregon Data Case Study: Questions

Questions

Presenter(s):
Jorge Mancilla

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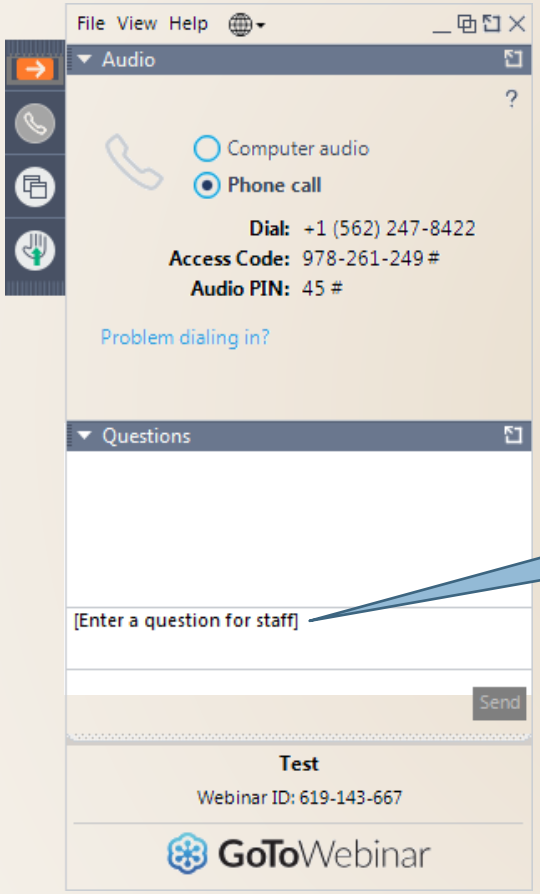

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Presenter(s):
Jorge Mancilla

Challenges and Opportunities for Coordinating LIHEAP Programs with Other Energy Assistance Programs
[Tracy Smetana, Brian Whorl, Brian Sarensen]

Presenter(s):
Kevin McGrath

Program Coordination: Minnesota

Coordinating with Other Energy Assistance Programs
Minnesota

Presenter(s):
Tracy Smetana

Program Coordination: Minnesota

Other Energy Assistance Programs: Utilities in Minnesota have energy assistance programs that are separate from LIHEAP.

- The PUC requires the natural gas investor-owned utilities and our largest electricity vendor to have their own energy assistance program.
- One other electric utility has its own voluntary program.
- These programs are structured as percent-of-income programs (PIPPs) and have an arrearage forgiveness component.

Presenter(s):
Tracy Smetana

Program Coordination: Minnesota (cont.)

Other Energy Assistance Programs: Energy assistance programs are run in a diverse number of ways.

- One program (Minnesota Power) is administered directly by the utility.
- Two programs (Great Plains Natural Gas and Minnesota Energy Resources) are administered by the Salvation Army.
- Four programs (CenterPoint Energy, Greater Minnesota Natural Gas, and Xcel Energy's Gas Affordability and POWER On programs) are administered by Energy Cents Coalition, a local energy advocacy nonprofit organization.

Presenter(s):
Tracy Smetana

Program Coordination: Minnesota (cont.)

Relationship to LIHEAP: While these programs are administered separately from LIHEAP, they do interact with LIHEAP.

- ***Eligibility determination*** – Households need to receive LIHEAP to be eligible for the utility programs.
- ***Benefit determination*** – Some of the utility programs consider the LIHEAP benefits when determining arrearage forgiveness and what is an affordable payment level.

Presenter(s):
Tracy Smetana

Program Coordination: Minnesota (cont.)

Coordination Challenges: These programs are administered separately from LIHEAP. This situation poses some interesting challenges.

- ***Data System*** – The data system is not shared between programs. As a result, despite having a very developed data system that allows for the creation of ad-hoc reports and analyses for LIHEAP, we are not able to measure client outcomes for the combined set programs.
- ***Decision Making*** – Both LIHEAP and the PUC make decisions about how to best assist households without having information about the interaction between LIHEAP and the utility programs.

Presenter(s):
Tracy Smetana

Program Coordination: Minnesota (cont.)

This energy program landscape does not typically influence the decisions that we make when we think about changing our benefit levels or the benefit matrix.

But we do consider the impact that changing eligibility guidelines would have on the utility programs since many are fully subscribed with waiting lists and increasing LIHEAP eligibility could further strain those programs.

Presenter(s):
Tracy Smetana

Program Coordination: Minnesota (cont.)

Going forward, there are a few things that we would like to do to improve coordination between LIHEAP and the other programs:

- Work with energy vendors to train service providers about the nuances of these programs and how to maximize impact for the clients.
- Establish an information pipeline to provide information to the PUC and keep them updated about LIHEAP.

Presenter(s):
Tracy Smetana

Program Coordination: Pennsylvania

Coordinating with Other Energy Assistance Programs
Pennsylvania

Presenter(s):
Brian Whorl

Program Coordination: Pennsylvania

Other Energy Assistance Programs: Utilities in Pennsylvania have energy assistance programs that are separate from LIHEAP.

- In Pennsylvania, the PUC requires each utility to operate a CAP (energy assistance program) and a LIURP (energy efficiency program).
- These programs are structured differently for each utility, and most have an arrearage forgiveness component.

Presenter(s):
Brian Whorl

Program Coordination: Pennsylvania (cont.)

Relationship to LIHEAP: These programs are administered separately from LIHEAP.

- ***Program Administration*** – Each utility manages their own program.
- ***Data System*** – Each utility has its own database that they use to maintain program records. We do not have access to these records.

Presenter(s):
Brian Whorl

Program Coordination: Pennsylvania (cont.)

Coordination Challenges: These programs are administered separately from LIHEAP. This situation poses the following challenges.

- ***Outcome Measurement*** – The data system is not shared between programs. As a result, we are not able to measure client outcomes for the combined set programs.
- ***Compounding Benefits*** – We have a small issue right now with credits, where a minority of customers who receive LIHEAP and CAP end up with a credit at the end of the year. This is a minor issue right now but could become larger if the PUC decides to lower their energy burden target.

  When a LIHEAP benefit is not fully utilized by a household, the utilities issue a reimbursement to our office. An increase in the number of credits could lead to increased administrative burden for our office.

Presenter(s):
Brian Whorl

Program Coordination: Pennsylvania (cont.)

In order to pre-empt any issues that may arise from modifications to any program in the state, our office has started conversations with stakeholders about the possibility of implementing some form of data sharing.

- Data sharing could allow utilities to use our LIHEAP lists to verify income-eligibility or to perform outreach to customer not on CAP. We will need to update the waivers in our application to do this.
- Data sharing would also allow our office to learn which clients get CAP so that we structure the benefit appropriately. The challenge with this is that we want to treat customers fairly, but we also want to avoid giving them credits.

Presenter(s):
Brian Whorl

Program Coordination: Washington

Coordinating with Other Energy Assistance Programs
Washington

Presenter(s):
Brian Sarensen

Program Coordination: Washington

Other Energy Assistance Programs: Utilities in Washington have energy assistance programs that are separate from LIHEAP.

- Puget Sound Energy's HELP program is administered by the utility and our community action agencies.
- Avista's LIRAP program is administered by the utility and our community action agencies.
- Cascade Natural Gas' WEAF program is administered by the utility.
- We have several additional programs from smaller utilities.

Presenter(s):
Brian Sarensen

Program Coordination: Washington (cont.)

Relationship to LIHEAP: While these programs are administered separately from LIHEAP, they do interact with LIHEAP.

- ***Eligibility determination*** – Households can only receive LIHEAP and LIRAP, but not both.
- ***Benefit determination*** – Households can receive LIHEAP and PSE HELP benefits, but the PSE benefit will get prorated because the LIHEAP benefit will be counted against the household's energy usage during benefit determination.

Presenter(s):
Brian Sarensen

Program Coordination: Washington (cont.)

Relationship to LIHEAP (Continued)

- ***Program Parameters*** – Our office provides adjustors and constants for the program formulas used by PSE.
- ***Advisory*** – I am in the advisory committee for all these programs and I get to provide input during the decision-making process for these programs.
- ***Program Intake*** – Households apply for LIHEAP at the local agencies, where they can also apply for other energy assistance programs that they might be eligible for.
- ***Data System*** – Puget Sound Energy (PSE) HELP program and Avista LIRAP program are fully integrated with the statewide LIHEAP database. Cascade NG program is not entered into the statewide database.

Presenter(s):
Brian Sarensen

Program Coordination: Washington (cont.)

Program Coordination: These programs are administered separately from LIHEAP but there are many areas where they are integrated to LIHEAP. This provides an opportunity to look at the combined impact of both programs on clients.

- ***Data System*** – The main reason why we can look at the impact of other programs in combination with LIHEAP is that program records are entered into our LIHEAP database.

Presenter(s):
Brian Sarensen

Program Coordination: Washington (cont.)

Coordination Challenges (Continued)

- ***Impact Analysis*** – One of the programs we can look at to analyze together with LIHEAP is PSE HELP. We have not done a systematic analysis yet. However, when I was a coordinator in one of the local agencies, I looked at this and saw that customers receiving both programs had a net energy burden of 1-2%, instead of 6% as seen among all clients.

Presenter(s):
Brian Sarensen

Program Coordination: Questions

Questions

Presenter(s):
Jorge Mancilla

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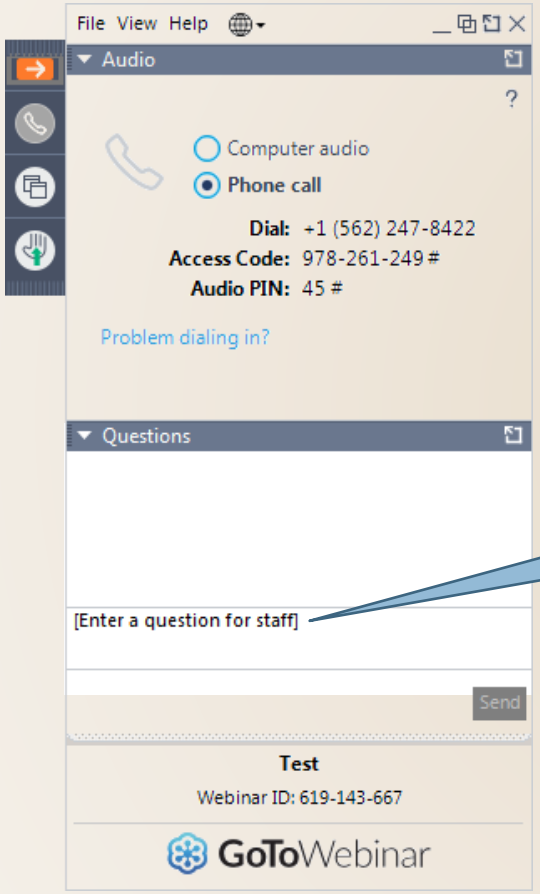

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Presenter(s):
Kevin McGrath

Summary

Presenter(s):
Kevin McGrath

Summary

- **Assess availability of data** – public data sources available to help you make informed decisions about your programs
- **Continuous improvement** – when making a change, examine its impact and determine if additional refinements are needed
- **Short- and long-term goals** – incorporate energy bill data into procedures
- **Nobody operates in a vacuum** – consider how your programs interact with other energy assistance or efficiency programs and consider what opportunities and challenges that presents for understanding your impact

Presenter(s):
Kevin McGrath

Data Case Studies: Questions

Questions

Presenter(s):
Jorge Mancilla

Q&A: GoToWebinar Question Box

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Presenter(s):
Jorge Mancilla

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Presenter(s):
Kevin McGrath

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Presenter(s):
Kevin McGrath

Questions & Answers

If we do not respond to your question during the webinar, we will follow-up via e-mail.

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Thank you for attending the webinar!

Presenter(s):
Kevin McGrath