

LIHEAP Performance Data Form

Section V (Energy Burden Targeting):

List of Checks to Complete Before Submission

This document provides a list of items to check in Section V (Energy Burden Targeting) of the Performance Measures portion (Module 2) of your annual *LIHEAP Performance Data Form*. If you can answer “yes” to all of the following questions, then you are ready to certify and submit Section V (Energy Burden Targeting).

<u>General Checks</u>			
1.	<p>Did you make sure that the data you used represents <u>annual</u> amounts?</p> <p>The data you used should be data that corresponds to one year (12 months). The amounts reported for average annual household income, average annual total LIHEAP benefit per household, average annual main heating fuel bill, and average annual electricity bill should be reasonable amounts for a full year. Very low amounts could indicate that a portion of the data you used was monthly or quarterly data, rather than annual data.</p>	YES	NO
2.	<p>Have you included any important information for understanding or interpreting your data in the “Notes”?</p> <p>The “Notes” portion of the form should contain your responses to any warning messages you received when submitting your report, as well as descriptions of any data anomalies or important program changes or characteristics relevant to the data.</p>	YES	NO

<u>Part A: Unduplicated Number of Bill Payment Assisted Households</u>			
3.	<p>Did you check that the total unduplicated number of households that received Bill Payment Assistance matches the total reported in your <i>LIHEAP Household Report</i>?</p> <p>In Part A, the “All Households” column will be auto-calculated by adding the number of bill payment-assisted households with each main heating fuel type. You should confirm that the number of households in the “All Households” column of Part A is equal to the number of households reported in Section I, line 6 of your <i>LIHEAP Household Report</i>.</p>	YES	NO

<u>Part B: All Households with 12 Consecutive Months of Bill Data</u> <u>(Main Fuel and Electric)</u>			
4.	<p>Are each of the statistics you reported in Part B calculated using only information for households from Part A for which you collected main heat bill data AND annual electricity bill data?</p> <p>Part B should only include the data for those households for which you collected annual bill data for the main heating fuel and for electricity (if electricity is not the main heating fuel). Households missing the annual main heating fuel bill amount or the annual electricity bill amount should be excluded. For each main heating fuel type, the number of households reported in line 1 of Part B should be less than or equal to the number of households reported in Part A. As with Part A, only households that received bill payment assistance are included.</p>	YES	NO
5.	<p>For all the statistics you reported in lines 2 to 5, did you include the same exact households when calculating those statistics?</p> <p>The number of households you used to calculate the average statistics you report in lines 2-5 for each main heating fuel type should be equal to the number of households you reported for each main heating fuel type in line 1 of Part B. Households missing any of the data needed to be included in the calculations for lines 2 to 5 should be excluded from all calculations so that the same households are used in each calculation.</p>	YES	NO
6.	<p>For households with electricity as their main heating fuel, did you report the average annual main heating fuel bill in line 4 (average annual main heating fuel bill), rather than in line 5 (average annual electricity bill)?</p> <p>For households with electricity as their main heating fuel, you should report the average annual main heating fuel bill in line 4 of Part B. This allows the auto-calculations for “All Households” to more accurately present the average costs for heating across all fuel types.</p>	YES	NO
7.	<p>Did you report the average annual electricity bill for households whose main heating fuel type is <u>not</u> electricity?</p> <p>The average annual electricity bill should be calculated and reported in line 5 of Part B for the non-electricity main heating fuel types (e.g. Natural Gas, Fuel Oil, Propane, and Other Fuels).</p>	YES	NO

8.	Did you enter \$0.00 for the average annual electricity bill for electric main heat households in line 5?	YES	NO
	The dollar amount entered in line 5 of Part B for households with a main heating fuel type of Electricity should be \$0.00. This allows the auto-calculations for “All Households” to more accurately present the average costs for non-heating electricity use across fuel types.		

Part C : High Burden Households with 12 Consecutive Months of Bill Data
(Main Fuel and Electric)

9.	Are the statistics you reported in Part C calculated for only the top 25% of households from Part B with the highest energy burdens?	YES	NO
	The “All Households” number reported in line 1 of Part C should be equal to 25% of the “All Households” number reported in line 1 of Part B. You should select the top 25% of households by first calculating the energy burden for each household in Part B, then sorting the households from the highest to lowest calculated energy burden, and then selecting the 25% of households with the highest burden. You should not select the top 25% by main heating type, but across all households. Further information on calculating energy burden is below.		
10.	When you calculated each household’s energy burden, if a household’s annual income was \$0 or if a household’s energy burden was greater than 100%, did you record the household’s energy burden as 100%?	YES	NO
	Energy burden should be calculated as follows: [(annual main heating fuel bill + annual electricity bill) / annual household income] * 100. If a household’s income is \$0, that household’s energy burden should be recorded as 100%. A household’s energy burden should also not be greater than 100%, so if a household’s calculated energy burden is greater than 100% because the household’s energy expenses are greater than its income, that household’s energy burden should be recorded as 100%.		
11.	For all the statistics you reported in lines 2 to 5, did you include the same exact households when calculating those statistics?	YES	NO
	The number of households you used to calculate the average statistics you report in lines 2-5 for each main heating fuel type should be equal to the number of households you reported for each main heating fuel type in line 1 of Part C. Households missing any of the data needed to be included in the calculations for lines 2 to 5 should be excluded from all calculations so that the same households are used in each calculation.		

12.	<p>For households with electricity as their main heating fuel, did you report the average annual main heating fuel bill in line 4 (average annual main heating fuel bill), rather than in line 5 (average annual electricity bill)?</p> <p>For households with electricity as their main heating fuel, you should report the average annual main heating fuel bill in line 4 of Part C. This allows the auto-calculations for “All Households” to more accurately present the average costs for heating across all fuel types.</p>	YES	NO
13.	<p>Did you report the average annual electricity bill for households whose main heating fuel type is <u>not</u> electricity?</p> <p>The average annual electricity bill should be calculated and reported in line 5 of Part B for the non-electricity main heating fuel types (e.g. Natural Gas, Fuel Oil, Propane, and Other Fuels).</p>	YES	NO
14.	<p>Did you enter \$0.00 for the average annual electricity bill for electric main heat households in line 5?</p> <p>The dollar amount entered in line 5 of Part C for households with a main heating fuel type of Electricity should be \$0.00. This allows the auto-calculations for “All Households” to more accurately present the average costs for non-heating electricity use across fuel types.</p>	YES	NO
15.	<p>Is the average annual income lower for the high burden households in Part C than for all households included in Part B?</p> <p>The average annual income of high burden households reported in line 2 of Part C for each main heating fuel type should generally be less than the average annual income of households reported in line 2 of Part B, although there can be some exceptions.</p>	YES	NO
16.	<p>Is the average annual burden before receiving LIHEAP greater for the high burden households in Part C than for all households included in Part B?</p> <p>As a check to confirm high burden households were selected correctly, you should confirm that the auto-calculated averages in line 7 of Part C for each fuel type is greater than the auto-calculated averages in line 7 of Part B.</p>	YES	NO