Introduction & Welcome

- Welcome & Overview
  - Holly Ravesloot, OCS

- Presentation Speaker
  - Melissa Torgerson, Verve Associates

- Facilitators
  - Grantees and OCS Staff

Presenter(s): Holly Ravesloot
OCS Objectives for Session

- Importance of Performance Measures to LIHEAP Program
- Access to and Transparency of LIHEAP Performance Statistics
- OCS and Grantee Investments in the LIHEAP Performance Measurement System

Presenter(s): Holly Ravesloot
Session Overview

- **Presentation (45 Minutes)**
  - Performance Data Review
    - Case Study Example: Idaho
    - PMIWG Analysis Tools: Executive Summary, State Snapshot
    - What do the data tell you?
  - Accessing the Performance Manage Website

- **Hands-On Session (75 Minutes)**
  - Exercises to practice accessing and using these resources
  - Instructions, computer, answer form

- **Highest Performing Tables and Teams Win Prizes!!**

**Presenter(s): Holly Ravesloot**
LIHEAP Performance Data Case Study
How this Session Fits

APPRISE will be presenting three training sessions during this conference. Each focuses on a different approach LIHEAP grantees can take to understand and use data for Performance Management.

Understanding LIHEAP Performance Measures—will demonstrate how grantees can quickly identify key “take-aways” from their LIHEAP Performance Measure data.

- LIHEAP Performance Data Case Study—will demonstrate how grantees can use LIHEAP data to answer specific questions about their program.

- Strategies for Enhancing LIHEAP Performance—will demonstrate how grantees can use LIHEAP Performance Measure data to consider and inform new program strategies (e.g., updating benefit matrix).

Presenter(s): Melissa Torgerson
By the end of this session, participants should:

• Understand how to use the *LIHEAP Performance Measures Executive Summary* to identify four primary LIHEAP Performance outcomes in their own state.

• Feel more comfortable using the *LIHEAP Performance Measures State Snapshot* to identify patterns in their data where additional attention or evaluation is needed.

• Know where to find the grantee LIHEAP Performance Management resources that will be referenced during the presentation.
Part I - Using the LIHEAP Performance Measures Executive Summary: *Idaho FY 2016 Performance Measures Data*
The LIHEAP Performance Measures State Snapshot was designed by the Performance Measures Implementation Work Group (PMIWG) and APPRISE.

The purpose of this tool is to make it easier for grantees to interpret, share, and use their LIHEAP Performance Measure data.
The **Snapshot Executive Summary** is a new addition to the *LIHEAP Performance Measures State Snapshot*. It focuses on the four primary Performance Measures.

**Energy Burden Measures**
1. Benefit Targeting
2. Burden Reduction Targeting

**Prevention and Restoration Measures**
1. Prevention of Home Energy Loss
2. Restoration of Home Energy
### Understanding LIHEAP Performance Measures

**IDAHO State Snapshot (Executive Summary—Energy Burden Measures)**

**Does LIHEAP furnish higher benefits to higher burden households?**

**Yes.** In Idaho, the total LIHEAP benefit received by high burden households in FY 2016 was about **$44 (12%) more** than the total LIHEAP benefit received by the average recipient household.

<table>
<thead>
<tr>
<th>All Households</th>
<th>High Burden Households</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Energy Bill</strong></td>
<td><strong>Average Energy Bill</strong></td>
</tr>
<tr>
<td>$1,164</td>
<td>$1,949</td>
</tr>
<tr>
<td><strong>Average Annual LIHEAP Benefit</strong></td>
<td><strong>Average Annual LIHEAP Benefit</strong></td>
</tr>
<tr>
<td>$356</td>
<td>$400</td>
</tr>
<tr>
<td><strong>LIHEAP paid</strong> 30.6% <strong>of the energy bill for average households.</strong></td>
<td><strong>LIHEAP paid</strong> 20.5% <strong>of the energy bill for high burden households.</strong></td>
</tr>
<tr>
<td>$356 Benefit / $1,164 Bill = 30.6%</td>
<td>$400 Benefit / $1,949 Bill = 20.5%</td>
</tr>
<tr>
<td><strong>Energy Burden Before LIHEAP</strong></td>
<td><strong>Energy Burden Before LIHEAP</strong></td>
</tr>
<tr>
<td>$1,164 Annual Energy Bill</td>
<td>$1,949 Annual Energy Bill</td>
</tr>
<tr>
<td>$12,351 Annual Income</td>
<td>$5,630 Annual Income</td>
</tr>
<tr>
<td><strong>Energy Burden After LIHEAP</strong></td>
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</tr>
<tr>
<td>$1,164 Bill - $356 LIHEAP</td>
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<td>$5,630 Annual Income</td>
</tr>
</tbody>
</table>

**Why is this important?**

*Section 2605(b)(5) of the Low Income Home Energy Assistance Act of 1981 (42 U.S. C. §8624(b)(5))* states that grantees “provide, in a timely manner, that the highest level of energy assistance will be furnished to those households that have the lowest incomes and the highest energy costs or needs in relation to income, taking into account family size.”
Does LIHEAP pay a larger share of the home energy bill for high burden households?

**No.** In FY 2016, LIHEAP paid **30.6%** of the energy bill for average households in Idaho, while LIHEAP paid **20.5%** of the energy bill for high burden households.

Why is this important?

It is important to understand the extent to which the LIHEAP benefit is reducing household energy burden. In Idaho, although high burden households are receiving a $44 higher LIHEAP benefit, they are having less of their bill paid than average households (and therefore, less of their energy burden reduced).
Understanding LIHEAP Performance Measures
IDAHO State Snapshot (Executive Summary—Prevention and Restoration Measures)

Prevention and Restoration of Home Energy Service Loss

As a Result of Bill Payment Assistance

<table>
<thead>
<tr>
<th>Prevention (44%)</th>
<th>Restoration (56%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2569 Occurrences</td>
<td>3302 Occurrences</td>
</tr>
</tbody>
</table>

As a Result of Equipment Repair or Replacement

<table>
<thead>
<tr>
<th>Prevention (5%)</th>
<th>Restoration (95%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Occurrences</td>
<td>35 Occurrences</td>
</tr>
</tbody>
</table>

Why is this important?

By increasing the number of households where loss is prevented (relative to those households where home energy is restored), LIHEAP is mitigating crises—including health risks and costly reconnection fees—associated with home energy loss.

• In FY 2016, LIHEAP benefits in Idaho prevented the loss of service 2,569 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 for 2 households.

• In FY 2016, LIHEAP benefits restored home energy service 3,302 times for households who had been disconnected by their utility provider or who had run out of fuel oil, propane, or wood. In addition, the program restored home energy service for 35 households by repairing or replacing inoperable heating or cooling equipment.
Understanding LIHEAP Performance Measures
Accessing the Executive Summary in the PM Website

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).

Create Reports and Analyze Data
The LIHEAP Data Warehouse contains data reported by grantees and developed by the Office of Community Services (OCS) since 2001. The Data Warehouse has four different options for accessing data:
- The Grantee Profiles (2014) tool allows you to access 1-page profiles for each LIHEAP state grantee, compiled using the Data that OCS published in the 2014 LIHEAP Report to Congress.
The remainder of the *LIHEAP Performance Measures State Snapshot* contains charts that compare the following statistics between *average* and *high burden* households, and *across fuel types*:

- Annual Income
- Annual Total Residential Energy Bill
- Energy Burden Before LIHEAP
- Annual Total LIHEAP Benefit
- Energy Burden After LIHEAP
- Percentage of Energy Bill Paid

Presenter(s): Melissa Torgerson
The first set of tables in the *LIHEAP Performance Measures State Snapshot* (Figures 1.1 through 1.6) compare the following statistics between average and high burden households:

- Annual Income
- Annual Total Residential Energy Bill
- Energy Burden Before LIHEAP
- Annual Total LIHEAP Benefit
- Energy Burden After LIHEAP
- Percentage of Energy Bill Paid
Understanding LIHEAP Performance Measures
IDAHO State Snapshot

**Fig 1.1: Average Annual Income**
Comparing Average Households to High Burden Households

<table>
<thead>
<tr>
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<tbody>
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<td>$5,630</td>
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</tbody>
</table>

High burden households have an average annual income that is $6,721 or 54% less than average households.

**Annual Income**

Energy Burden is the percentage of income a household pays toward energy bills:

\[
\frac{\text{Energy Bill}}{\text{Income}} = \text{Energy Burden}
\]

Understanding whether differences in household energy burden are a product of lower income or higher energy costs (or both) can help grantees hone in on particular areas of their benefit matrix to improve targeting.

**Fig 1.2: Average Annual Total Residential Energy Bill**
Comparing Average Households to High Burden Households

<table>
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</tr>
</tbody>
</table>

High burden households have an average energy bill that is $785 or 67% greater than average households.

**Annual Energy Bill**

In Idaho, the difference in energy burden between average and high burden households is a product of both lower income and higher energy costs.
Understanding LIHEAP Performance Measures
IDAHO State Snapshot

### Energy Burden before LIHEAP

Before LIHEAP, high burden households are paying \textbf{3.7 times} as much of their income toward energy costs than average households.

### Annual LIHEAP Benefit

High burden households receive an average annual LIHEAP benefit that is \textbf{$44$ or 12\% higher} than average households.

Comparing Figures 1.3 and 1.4 in the State Snapshot provides some initial insight into whether LIHEAP benefits are effectively targeting energy burden.

For example:

Although high burden households in Idaho are paying \textbf{3.7 times} as much of their income toward energy bills, they are only receiving a LIHEAP benefit that is \textbf{12\% higher} than average households.
Understanding LIHEAP Performance Measures
IDAHO State Snapshot

**Fig 1.5: Average Energy Burden After LIHEAP**
Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 8

![Bar chart showing energy burden](chart1)

<table>
<thead>
<tr>
<th></th>
<th>Average Households</th>
<th>High Burden Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Burden</td>
<td>6.5%</td>
<td>27.5%</td>
</tr>
</tbody>
</table>

**Energy Burden after LIHEAP**
After LIHEAP, high burden households are paying 4.2 times as much of their income toward energy costs than average households.

**Fig 1.6: Percentage of Energy Bill Paid by LIHEAP**
Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 10

![Bar chart showing bill paid](chart2)

<table>
<thead>
<tr>
<th></th>
<th>Average Households</th>
<th>High Burden Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>30.6%</td>
<td>20.5%</td>
</tr>
</tbody>
</table>

**Percentage of Bill Paid**
On average, high burden households have 33% less of their energy bill paid with LIHEAP than average households.

Figures 1.5 and 1.6 of the Snapshot allow grantees to compare outcomes against overarching program goals.

- Some grantees have a goal of bringing all LIHEAP households to a “maximum” or “manageable” energy burden level (Figure 1.5).
- Other grantees have a goal of paying a minimum or specific percentage of the bill for all LIHEAP households (Figure 1.6).
Understanding LIHEAP Performance Measures
Accessing the State Snapshot in the PM Website

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The remainder of the LIHEAP Performance Measures State Snapshot provides grantees with detailed statistics **broken out by fuel type.**
Does LIHEAP furnish higher benefits to higher burden households across all fuel types?

No. In FY 2016, high burden households in Idaho who used fuel oil for main heat received the same LIHEAP benefit as average fuel oil households. High burden households who used “other fuels” (e.g., wood) received a lower benefit than average “other fuel” households.
Does LIHEAP pay more of the energy bill for high burden households across all fuel types?

No. In FY 2016, high burden households in Idaho had less of their energy bill paid with LIHEAP than average households, regardless of fuel type. However, the extent of this difference varies by fuel type.
Are patterns of LIHEAP prevention and restoration of home energy service loss (as a result of bill payment assistance) consistent across all fuel types?

In FY 2016, bill payment assistance used to pay electric, fuel oil, and propane bills resulted in higher rates of prevention (relative to restoration) among Idaho LIHEAP households. Conversely, natural gas and “other fuel” benefits resulted in more occurrences of restoration (relative to prevention).
**Understanding LIHEAP Performance Measures**

**IDAHO State Snapshot—Summary of Key Findings**

<table>
<thead>
<tr>
<th><strong>Key Findings</strong></th>
<th><strong>Possible Next Questions</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>In FY 2016, high burden households in Idaho paid <strong>3.7 times</strong> as much of their income toward energy costs as average households. However, high burden households only received an <strong>11% higher</strong> LIHEAP benefit than average households.</td>
<td>• How is our current matrix designed to target higher benefits to higher burden households? Is our matrix yielding expected results? If not, why?</td>
</tr>
<tr>
<td>High burden and average <strong>fuel oil</strong> households received <strong>equal</strong> benefits in FY 2016. High burden <strong>“other fuels”</strong> households received a <strong>lower</strong> benefit than average <strong>“other fuels”</strong> households.</td>
<td>• Does our current benefit matrix accurately reflect income and energy cost differences among deliverable fuel households?</td>
</tr>
<tr>
<td></td>
<td>• Are there specific benefit determination or payment processes related to deliverable fuels that impact the way our matrix works?</td>
</tr>
</tbody>
</table>
### Understanding LIHEAP Performance Measures
IDAHO State Snapshot—Summary of Key Findings

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<th>Key Findings</th>
<th>Possible Next Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>For all households (both average and high burden), the percentage of bill paid with LIHEAP varies considerably between fuel types.</td>
<td>• Is it our intention to vary the percentage of bill we pay based on fuel type? Or is our goal to pay the same percentage of a household’s energy bill regardless of fuel type? Does our benefit matrix reflect our goal?</td>
</tr>
<tr>
<td>Compared to average households, high burden households <strong>across all fuel types</strong> have a lesser share of their energy bill paid with LIHEAP. The extent of this difference varies by fuel type.</td>
<td>• Is it our expectation that all households will have an equal share of their bill paid? Or that high burden households should have a higher share of their bill paid? Is our matrix designed to reflect our expectations?</td>
</tr>
<tr>
<td>In FY 2016, bill payment assistance used to pay natural gas and “other fuel” benefits resulted in more occurrences of restoration (relative to prevention).</td>
<td>• Why are more natural gas and “other fuel” households waiting until they are disconnected or out of fuel to access LIHEAP? How can we work with local partners and utilities to encourage households to apply sooner?</td>
</tr>
</tbody>
</table>
Understanding LIHEAP Performance Measures
Accessing the State Snapshot in the PM Website
Understanding LIHEAP Performance Measures
Accessing the State Snapshot Data in the Data Warehouse
Questions?
For more information, please contact:

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609-252-2081

Dan Bausch
Daniel-Bausch@appriseinc.org
609-252-9050
Now we are going to turn you over to your facilitators who will help you to walk through the training exercise.

1. You’ll be working in groups of three with the laptops at your table.

2. Your facilitator will hand out your team assignments and exercise materials.

3. You’ll work in your teams to complete the exercises and win prizes!!