

Step-By-Step Overview of the FY 2017 Performance Data Form Module 2 (Performance Measures) & Optional Module 3

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

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Introduction & Welcome

- Webinar Presenters
 - Reporting & Reminders
 - Leon Litow, OCS Staff
 - Kate Thomas, OCS Staff
 - Step-by-Step Overview
 - Melissa Torgerson, Verve Associates

What is the Performance Data Form?

- An annual report all state grantees and the District of Columbia are required to submit.
- The Performance Data Form collects LIHEAP fiscal information and Performance Measures data.
- The Performance Data Form consists of three LIHEAP data modules:
 - Module 1 (Grantee Survey)
 - Module 2 (LIHEAP Performance Measures)
 - Module 3 (Optional Performance Measures)
- Data are...
 - Published in the annual *LIHEAP Report to Congress*
 - Published in the [LIHEAP Data Warehouse](#)
 - Used to respond to Congressional and White House inquiries.

Update on the Performance Data Form Action Transmittal and Due Date

- The Performance Data Form is currently in review by the Office of Management and Budget (OMB).
- Upon approval by OMB, HHS will publish an Action Transmittal with the final due date and instructions for accessing and submitting the form in OLDC.
- Although grantees cannot currently certify or submit their FY 2017 report in OLDC, grantees are encouraged to prepare information needed for their report.
- **There are no changes to the reporting items from the FY 2016 Performance Data Form.**

Liaison Welcome

- All grantees have a liaison to assist them.
- Liaisons assist with guidance on...
 - Program operations
 - Resources
 - HHS requirements
 - OLDC Access
- Liaison Contact Information:
<https://www.acf.hhs.gov/ocs/resource/division-of-energy-assistance-federal-staff>

Webinar Overview

- This webinar is focused on **Module 2 (Performance Measures)**.
- Step-by-Step Guidance for Module 2 Reporting
- Additional information on optional Module 3 will be provided.
- Q&A after each Section
- Webinar Topics:
 - Overview of Module 2 (Performance Measures)
 - Overview of each section of the report
 - Overview of common reporting questions/issues
 - Overview of Optional Module 3
 - Additional resources

Presenter(s):
Melissa Torgerson

Overview of Module 2 (Performance Measures)



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What is *Module 2* (*Performance Measures*)?

- Module 2 asks grantees to report on the following LIHEAP outcomes:
 - Reduction of Home Energy Burden
 - Restoration of Home Energy Service
 - Prevention of Loss of Energy Service
- Accordingly, Module 2 (Performance Measures) consists of three sections:
 - Section V – Energy Burden Targeting
 - Section VI – Restoration of Home Energy Service
 - Section VII – Prevention of Loss of Energy Service
- Grantees must complete the information in Sections V, VI, and VII of Module 2.

Overview of Module 2

Rules for Reporting

- This Webinar will provide an in-depth discussion of reporting rules to follow when completing Module 2 of the Performance Data Form.
- These reporting rules exist for several reasons:
 - LIHEAP provides a block grant to each grantee
 - Each grantee has the freedom to design its program to fit its climate and clients, as well as meet other unique needs
 - But, OCS has to report consistent information to Congress, even though each grantee can have a unique program
 - These rules for reporting allow OCS to report in such a way that programs can be compared and uniform information is presented across grantees.
- There are no changes to the reporting items from the FY 2016 Performance Data Form.

Presenter(s):
Melissa Torgerson

Overview of Module 2

What is the reporting period?

- Report information on households receiving LIHEAP benefits during the **federal fiscal year** (October 1, 2016 –September 30, 2017).
- Grantees may operate their programs on a different program year (e.g., starting January 1 or July 1), but the data used to complete Module 2 (Performance Measures) should be data for the households that received assistance in the federal fiscal year.

Section V: Energy Burden Targeting



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Overview of Section V

V. ENERGY BURDEN TARGETING						
	Bill Payment- Assisted Household Main Heating Fuel					
	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households	164,731	17,412	89,855	43,122	3,883	10,459
B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
2. Average Annual Household Income	\$23,022.00	\$20,430.00	\$22,252.00	\$24,977.00	\$22,780.00	\$20,881.00
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	\$672.00	\$589.00	\$602.00	\$771.00	\$787.00	\$801.00
4. Average Annual Main Heating Fuel Bill	\$1,479.00	\$1,689.00	\$1,141.00	\$1,836.00	\$1,763.00	\$1,348.00
5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00	\$363.00	\$487.00
6. Average Annual Total Residential Energy Bill	\$1,962.00	\$1,689.00	\$1,681.00	\$2,407.00	\$2,126.00	\$1,835.00
7. Average Annual Burden Before Receiving LIHEAP	8.52%	8.27%	7.55%	9.64%	9.33%	8.79%
8. Average Annual Burden After Receiving LIHEAP	5.60%	5.38%	4.85%	6.55%	5.88%	4.95%
9. Average Percentage Point Change in Energy Burden	2.92%	2.88%	2.71%	3.09%	3.45%	3.84%
10. Average Percentage Reduction in Energy Burden	34.25%	34.87%	35.81%	32.03%	37.02%	43.65%
C. High Burden Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						

Overview of Section V

Key Concept Cheat Sheet

- **Energy Burden**
 - The percentage of annual household income spent on annual home energy costs.
 - *For details, see Slide 15.*
- **Bill Payment-Assisted Households**
 - Households that were provided with a LIHEAP benefit used to pay a share of a household's energy bills and utility deposits.
 - *For details, see Slide 22.*
- **Annual Total Residential Energy Bill**
 - The dollar amount that a household spent on home energy costs in one year.
 - This equals the annual Main Heating Bill + the annual Electricity Bill
 - *For details, see Slide 47.*
- **High Burden Households**
 - *The top 25 percent with the highest energy burden of all Bill Payment-Assisted household with available data.*
 - *For details, see Slides 50 to 53.*

Overview of Section V

Why “Energy Burden Targeting”?

- Per the LIHEAP Statute...
 - LIHEAP provides grants to states *“to assist low-income households, particularly those with the lowest incomes, that pay a high proportion of household income for home energy, primarily in meeting their immediate home energy needs.”* – Section 2602(b)
 - *“The State agrees to...provide, in a timely manner, 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)

Key Concept: Energy Burden

- What is Energy Burden?
 - **Energy Burden** is the percentage of annual household income spent on annual home energy costs.
 - Energy Burden is calculated as follows:

$$\frac{\textit{Household's Total Annual Residential Energy Bill}}{\textit{Household's Annual Income}} * 100$$

- Energy Burden can vary greatly for LIHEAP households depending on income and energy bills.
- Examples will be shown on Slide 53.

Overview of Section V

What is “Energy Burden Targeting”?

- The *goal* of Section V is to understand how LIHEAP benefits impact the **energy burden** of recipient households.
 1. **Change in Energy Burden** – How much is energy burden reduced as a result of receiving LIHEAP bill-payment assistance?
 2. **Benefit Targeting Index** – Are high burden households receiving LIHEAP benefits that are higher, lower, or about the same as all households that received bill-payment assistance?
 3. **Burden Reduction Targeting Index** – Do high burden households experience higher, lower, or equal reduction in their energy burden as a result of receiving LIHEAP bill-payment assistance than all households that received bill-payment assistance?

Overview of Section V

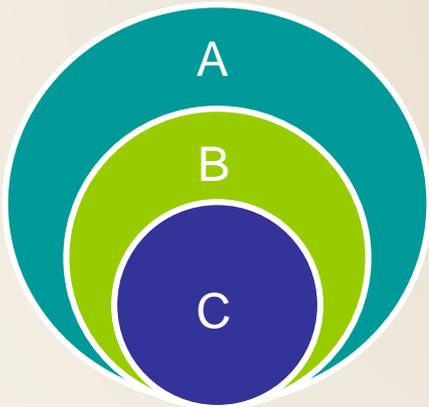
What is “Energy Burden Targeting”?

- **Energy Burden Targeting** – A measure of how well LIHEAP benefits are targeted to households with higher energy burdens.
 - **Benefit Targeting Index**
 - **Burden Reduction Targeting Index**
- Evaluating *energy burden targeting* requires a comparison between high burden households and the average LIHEAP recipient households.

Overview of Section V

What is “Energy Burden Targeting”?

- Section V categorizes LIHEAP assisted households into three groups:
 - A. All LIHEAP bill payment-assisted households
 - B. LIHEAP bill payment-assisted households *with available bill data*
 - C. *High burden* LIHEAP bill payment-assisted households with available bill data



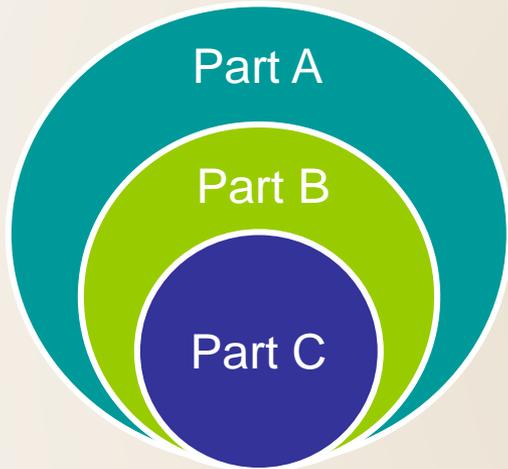
- Households in group B are a subset of the households in group A.
- Households in group C are a subset of the households in group B.

- The purpose is to compare results for households in group B to group C.

Overview of Section V

Section Outline

- Accordingly, Section V is divided into three parts:



- Part A – LIHEAP bill payment-assisted households
 - Part B – LIHEAP bill payment-assisted households *with available bill data*
 - Part C – *High burden* LIHEAP bill payment-assisted households with available bill data
- Grantees report the statistics for each group of households in the part of Section V that corresponds to that group.
 - Again, the purpose is to compare B and C (high burden households to households with data). The comparisons give us measures of **Energy Burden Targeting**.

Presenter(s):
Melissa Torgerson

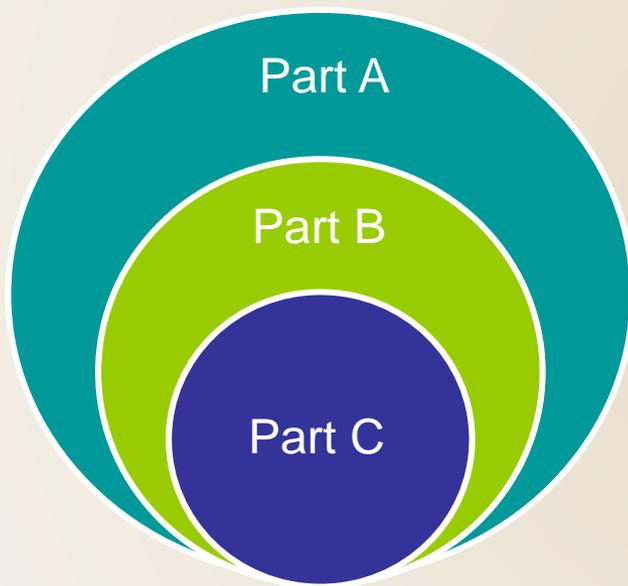
Part A: All LIHEAP Bill Payment-Assisted Households



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Section V – Part A

Bill Payment-Assisted Households



- Part A – LIHEAP bill payment-assisted households
- Part B – LIHEAP bill payment-assisted households *with available bill data*
- Part C – *High burden* LIHEAP bill payment-assisted households with available bill data

Key Concept:

Bill Payment-Assisted Households

- **LIHEAP Bill Payment-Assisted Households** – Any household provided with a LIHEAP benefit used to pay a share of a household's energy bills and utility deposits.
 - *This should include:*
 - Households receiving heating, cooling, and crisis assistance benefits to pay a share of a household's energy bills or utility deposits.
 - Households receiving Heat-in-Rent payments.
 - *This should exclude:*
 - Households receiving only LIHEAP weatherization assistance or energy-related equipment repair or replacement services.
 - SNAP households that only received a nominal LIHEAP benefit (if applicable).
- Same definition as in the Household Report.

Section V – Part A

Unduplicated Number of Bill Payment-Assisted Households

- Report on all households that received LIHEAP Bill Payment Assistance during the fiscal year, by main heating fuel type.
- Households that received Bill Payment Assistance, but have an unknown main heating fuel type should go in the “Other Fuels” column.

V. ENERGY BURDEN TARGETING						
	Bill Payment-Assisted Household Main Fuel					
	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households	390,708	83,916	212,925	77,472	11,822	4,573

Note: Report households only in the individual fuel type columns. The “All Households” field in Part A is **auto-calculated** from the counts reported for each main heating fuel type and “locked” from editing.

Section V – Part A

Unduplicated Number of Bill Payment-Assisted Households

Note: The “All Households” field should match the Bill Payment Assistance households count reported in grantees’ LIHEAP Household Report, Line 6.

Household Report

I. Number of Assisted Households

Number of assisted households			
Type of LIHEAP assistance	A. Select if estimated data	B. Total Number of Households	
5. Any type of LIHEAP assistance	<input type="checkbox"/>	390,708	
6. Bill Payment Assistance	<input type="checkbox"/>	390,708	
7. Nominal Payments	<input type="checkbox"/>		

Section V – Part A

V. BURDEN TARGETING						
Bill Payment- Assisted Household Main Heating Fuel						
	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households	390,708	83,916	212,925	77,472	11,822	4,573

Section V – Part A

What if households received multiple benefits?

- How should a household be reported if it received multiple heating benefits during the fiscal year?
 - Report an unduplicated count of households that received Bill Payment Assistance.
- **Definition:** Unduplicated Count – an item, such as a household, is counted only once for a specific data element.
- Example on next slide

Section V – Part A

Unduplicated Count Example

Household Scenarios	Number of Assisted Households by Type of LIHEAP Assistance						Bill Payment Assistance
	Heating	Cooling	Year Round Crisis	Winter Crisis	Summer Crisis	Wxz.	
Household A receives three heating assistance benefits and one year round crisis assistance benefit.	3	0	1	0	0	0	1
Household B receives a heating assistance benefit, a cooling assistance benefit, and weatherization assistance.	1	1	0	0	0	1	1
Household C receives weatherization assistance.	0	0	0	0	0	1	0
Household D receives an “expedited” or “fast tracked” heating assistance benefit to avoid a utility shutoff.	1	0	0	1	0	0	1

- Number of bill payment assistance households to report in Part A = **3**

Part B:

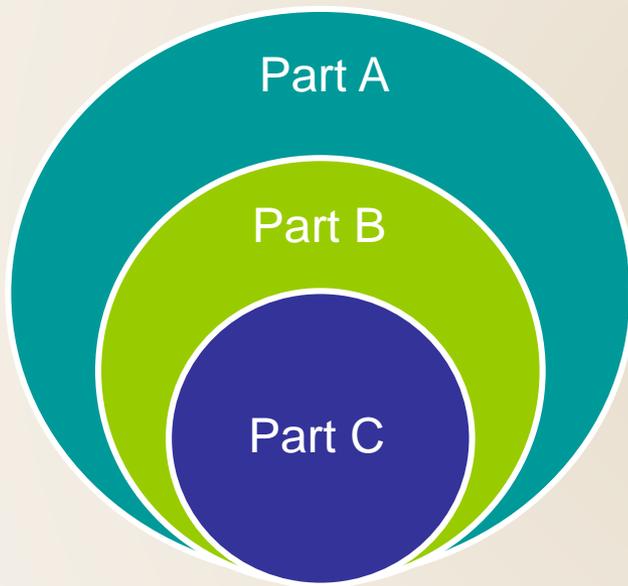
LIHEAP Bill Payment-Assisted Households *with Available Data*



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Section V – Part B

Bill Payment-Assisted Households with Available Bill Data



- Part A – LIHEAP bill payment-assisted households
- Part B – LIHEAP bill payment-assisted households *with available bill data*
- Part C – *High burden* LIHEAP bill payment-assisted households with available bill data

Section V – Part B

Who is included in Part B?

- For a household to be included in Part B, you must have the following information for that household:
 1. Annual Household Income
 2. Annual Total LIHEAP Bill-Payment Assistance Benefits
 3. **The total annual main heating fuel bill**
 4. **The total annual electricity bill (if electricity is not the main heating source)**
- Where does the information come from?
 - Item 1 should be collected on your client application.
 - Item 2 should be documented in your program records.
 - ***Items 3 and 4 must be collected from energy vendors.***

Section V – Part B

Who is included in Part B?

- The households included in Part B are the subset of households from Part A for which you successfully collected energy bill data.
 - Grantees are required to collect data from the largest energy vendors only, not from all energy vendors.
 - For more information, see the [LIHEAP Performance Measures Data Collection Guide - Vendor Selection Supplement](#).
- Bill Payment-Assisted Households *with Available Bill Data* are those Households for which annual energy bill data was successfully obtained.
- To be included in Part B...
 - Electricity main-heat households need only the total annual electricity bill amount from energy vendors.
 - Households that use another main heating source (not electricity) need both the total main heating fuel annual bill amount AND the total electricity annual bill amount.
- Households without complete energy bill data as described above are excluded from Parts B and C.

Presenter(s):
Melissa Torgerson

Section V – Part B

Who is included in Part B?

- Does the annual energy bill period need to match the fiscal year period (October 1 to September 30)?
 - No, the 12-month period does not need to correspond to the Federal Fiscal Year.
 - But, the annual energy bill amount must be for a recent consecutive 12-month period.
- Energy vendors vary in how they provide the data.
 - Some vendors may provide one annual total amount for each client.
 - Some vendors may provide 12 monthly bill amounts that should be summed.

Example: Bill Payment-Assisted Households *with Available Bill Data*

- LIHEAP Bill Payment-Assisted Households with Available Bill Data – Example:

Household ID	Main Heating Fuel	Consecutive Months of Heating Data	Consecutive Months of Electricity Data	
Household 1	Natural Gas	12	12	 Include
Household 2	Natural Gas	12	0	 Exclude
Household 3	Electricity	12	***	 Include
Household 4	Natural Gas	12	8	 Exclude
Household 5	Natural Gas	6	12	 Exclude

- Household 1 has complete annual energy bill data.
- Household 2 does not have electricity bill data.
- Household 3 has complete annual energy bill data.
- Household 4 has incomplete electricity bill data.
- Household 5 has incomplete main heating bill data.

Presenter(s):
Melissa Torgerson

Section V – Part B

Line 1 – Unduplicated Count of Households with 12 Months of Bill Data

- Report an unduplicated count of all LIHEAP bill payment-assisted households *with available data*, by main heating fuel type.
- Report households only in the fuel type columns. The “All Households” field in Line 1 is **auto-calculated** from the counts reported for each main heating fuel type and “locked” from editing.

Auto-calculated

Report Here

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
2. Average Annual Household Income	\$23,022.00	\$20,430.00	\$22,252.00	\$24,977.00	\$22,780.00	\$20,881.00
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	\$672.00	\$589.00	\$602.00	\$771.00	\$787.00	\$801.00
4. Average Annual Main Heating Fuel Bill	\$1,479.00	\$1,689.00	\$1,141.00	\$1,836.00	\$1,763.00	\$1,348.00
5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00		

Presenter(s):
Melissa Torgerson

Section V – Part B

Line 1 – Unduplicated Count of Households with 12 Months of Bill Data

- The households in Part B are a subset of households from Part A.
 - Part B should include the same or a lower number households than Section A.
- Example:

V. ENERGY BURDEN TARGETING						
	<i>All Households</i>	Bill Payment-Assisted Household Main Fuel				
		Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households	107,970	20,520	72,000	5,325	6,075	4,050
B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	82,000	15,000	60,000	2,500	2,500	2,000
Percent of Households in Part A also in Part B	76%	73%	83%	47%	41%	49%

Section V – Part B

Line 2 – Average Annual Household Income

- Report the average annual household income for households in Part B by main heating fuel type and for all households.
 - All households reported in line 1 should be used in this calculation, including households with very low or zero income.
 - Prior to calculating the average across all clients, verify that each client has an annual income amount.
 - If you have monthly income data for some households, multiply those values by 12 to obtain the annual income amount.
 - Report the *gross* household income.

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
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5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00	\$363.00	\$487.00

Section V – Part B

Line 3 – Average Annual Total LIHEAP Benefit per Household

- Report the average annual total LIHEAP benefit per household for households in Part B by main heating fuel type and for all households.

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
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5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00	\$363.00	\$487.00

Section V – Part B

Line 3 – Average Annual Total LIHEAP Benefit per Household

- **Average Annual Total LIHEAP Benefit per Household**

- *This should include:*

- Any bill payment assistance benefit received by the household during the reporting period.
- Heating, cooling, or crisis benefits that went to pay energy bills or utility deposits.

- *This should exclude:*

- Any non-bill payment assistance benefit received by the household, (e.g. as equipment repair/replacement, nominal benefits, Wx)

- In some states, households may receive multiple bill payment assistance benefits during the program year (e.g. regular heating and crisis).
 - In these cases, *grantees first need to add together the bill payment assistance benefits each household received*, and then calculate the average total LIHEAP benefit per household.

Section V – Part B

Line 3 – Average Annual Total LIHEAP Benefit per Household

- **Average Annual Total LIHEAP Benefit per Household – Example:**

Benefits	Household 1	Household 2	
Heating Assistance	\$100	\$100	→ Include
Cooling Assistance	\$100	\$0	→ Include
Crisis Assistance	\$200	\$0	→ Include
Emergency Furnace Repair/Replacement	\$0	\$1,500	→ Exclude; Not Bill Payment Assistance
Total Bill Payment Assistance Benefit	\$400	\$100	
Avg. Bill Payment Assistance Benefit	\$250		

Section V – Part B

Line 4 – Average Annual Main Heating Fuel Bill

- Report the average annual main heating fuel bill for households in Part B by main heating fuel type and for all households.
 - For electricity main-heat households, the electricity bill *is* the main heating fuel bill, and should be reported in this line (line 4).

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
2. Average Annual Household Income	\$23,022.00	\$20,430.00	\$22,252.00	\$24,977.00	\$22,780.00	\$20,881.00
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5. Average Annual Electricity Bill	\$483.00	\$0.00	\$540.00	\$571.00	\$363.00	\$487.00

Section V – Part B

Line 4 – Average Annual Main Heating Fuel Bill

- **Average annual main heating fuel bill**

- *This should include:*

- All required customer payments, such as monthly service charge, usage charge and taxes.

- *This should exclude:*

- Optional charges such as appliance repair contracts, equipment purchases and other special services.

- Grantees may select to obtain energy bill data for any recent 12-month period, as long as the grantee collects energy bill data for a consecutive 12-month period.
 - See slide 31 for more information.

Section V – Part B

Line 5 – Average Annual Electricity Bill

- Report the average annual electricity bill for households in Part B by main heating fuel type and for all households.
 - For electricity main-heat households, the electricity bill *is* the main heating fuel bill, which was already reported in Line 4.
 - As a result, the amount in Line 5 should be \$0 for the electricity column to avoid double-counting and to accurately estimate statistics for all households in Part B.

B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	76,742	8,673	36,205	27,804	2,484	1,576
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Section V – Part B

Line 5 – Average Annual Electricity Bill

- The specifications on which charges to include in this row and which to exclude are the a same as those for Line 4.
 - See Slide 40 for more information.

Section V – Part B

“All Households” Column

- Because the number of households with each main fuel type is different, you cannot calculate the “All Households” column values by doing a simple average of the five main heating columns.
- Instead, Grantees can use three approaches to calculate the averages in the “All Households” column.
 1. Calculate the averages directly from the household-level data in the grantee’s database.
 2. Use the Excel form that automatically calculates the “All Household” column based on the information entered for each heating fuel type.
 3. Calculate *weighted* averages based on the values reported in the individual fuel type columns of the grantee’s report.

Section V – Part B

“All Households” Column – Approach 1

- **Approach 1:** Calculate the averages directly from the household-level data in the grantee’s database.
 - Use all households included in Part B to calculate the averages.
 - Grantees can contact APPRISE for assistance with calculating the “All Households” averages directly from their household-level data.

Section V – Part B

“All Households” Column – Approach 2

- **Approach 2:** Use the Excel form that automatically calculates the “All Household” column based on the information entered for each heating fuel type.
- An [Excel workbook](#) of the Performance Data Form will auto-calculate the “All Households” column for you once you enter data into the main heat fuel columns.
- If approach 1 or 3 are used, we recommend that you use this spreadsheet to double-check that your database calculated these values correctly.

Section V – Part B

“All Households” Column – Approach 3

- **Approach 3:** Calculate *weighted averages* based on the values reported in the individual fuel type columns of the grantee’s report.
 - *Weighted averages account for each fuel type column including a different number of households.*
 - *For more information on weighted averages, see the document on [Calculations for the Performance Measures](#).*
 - In addition, grantees can contact APPRISE for assistance with calculating weighted averages.

Section V – Part B

What about Lines 6 to 10?

- *Lines 6 to 10 are auto-calculated by the Form.*
- *These lines provide the results for all households in Part B.*
- **Key Concept: Annual Total Residential Energy Bill**
 - Defined as the dollar amount that a household spent on home energy costs in one year.
 - For Module 2, this equals the annual Main Heating Bill + the annual Electricity Bill
 - Note: Other additional bills for secondary, supplementary fuel are not included.
 - The form automatically calculates the average amount in line 6 of Part B.
 - Additional information on slide 51.

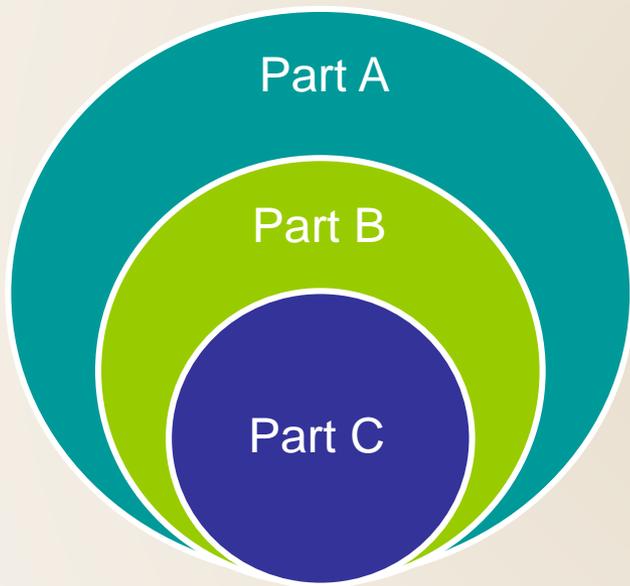
Part C:
High Burden LIHEAP Bill Payment-
Assisted Households with available data



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Section V – Part C

High Burden Households with Available Bill Data



- Part A – LIHEAP bill payment-assisted households
- Part B – LIHEAP bill payment-assisted households *with available bill data*
- Part C – *High burden* LIHEAP bill payment-assisted households with available bill data

Key Concept:

High Burden Households

- What are *High Burden* households?
 - For the Performance Data Form, *High Burden* has a specific definition:
 - High Burden = **The top 25 percent of households from Part B with the highest calculated energy burden.**
 - To review the definition of energy burden, please see Slide 15.
 - All Grantees must identify high burden households using this definition to ensure consistent reporting.

Section V – Part C

Identifying High Burden Households

- **Step 1:** For each household included in Part B, calculate the household's *annual total residential energy bill*.
 - Add the annual main heating bill and annual electricity bill together.
 - Verify that the electricity bill doesn't get double-counted when calculating the annual residential energy bill.

Household ID	Main Heating Fuel	Annual Main Heating Bill	Annual Electricity Bill	Annual Total Residential Energy Bill
Household 1	Propane	\$2,800	\$1,200	\$4,000
Household 2	Fuel Oil	\$1,500	\$1,500	\$3,000
Household 3	Electricity	\$1,200	\$0	\$1,200
Household 4	Natural Gas	\$1,000	\$800	\$1,800
Household 5	Electricity	\$1,000	\$0	\$1,000

Note:
Correct -
Electricity bill
was not double-
counted.

Presenter(s):
Melissa Torgerson

Section V – Part C

Identifying High Burden Households

- **Step 2:** Calculate *energy burden* for each of these households.

$$\frac{\text{Household's Total Annual Residential Energy Bill}}{\text{Household's Annual Income}} * 100$$

- **Step 3:** Assign a value of 100% energy burden to households with income equal to \$0 or with an *annual total residential energy bill* that is larger than the household's annual income.
- **Step 4:** Sort the combined set of ALL households from highest to lowest energy burden.
- **Step 5:** Draw the top 25% of households with the highest energy burden, *regardless of fuel type*.

Section V – Part C

Identifying High Burden Households

Household ID	Main Heating Fuel	Annual Income	Step 1: Annual Total Residential Energy Bill	Step 2: Energy Burden
Household 5	Electricity	\$0	\$1,000	100%
Household 2	Fuel Oil	\$10,000	\$3,000	30%
Household 1	Propane	\$20,000	\$4,000	25%
Household 8	Natural Gas	\$10,000	\$1,500	15%
Household 7	Fuel Oil	\$24,000	\$2,400	10%
Household 6	Electricity	\$10,000	\$800	8%
Household 3	Electricity	\$15,000	\$1,200	8%
Household 4	Natural Gas	\$30,000	\$1,800	6%

Step 5:
Top 25%
Selected

Step 3: Zero-
Income Household
was assigned 100%
energy burden

Step 4: Households
sorted by energy burden

Presenter(s):
Melissa Torgerson

Section V – Part C

Completing the Report

- Part C should be completed following the same instructions as Part B.
 - The only difference is the subset of households that is included in the calculations.
 - The calculations for Part B include all households with available data.
 - The calculations for Part C only include high burden households (the top 25% of households from Part B based on energy burden).

Part D:
***Benefit Targeting Index
for High Burden Households***



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Section V – Part D

The Benefit Targeting Index

- Section D is auto-calculated by the Form using the information in Sections B and C.
- The **benefit targeting index** for high burden households quantifies how LIHEAP benefits are targeted to high burden households compared to all households.

Score Results	Score Interpretation
Less than 100	The average benefit amount provided to High Burden households is less than the average benefit amount provided to all households.
100	The average benefit amount provided to High Burden households is equal to the average benefit amount provided to all households.
Greater than 100	The average benefit amount provided to High Burden households is greater than the average benefit amount provided to all households.

Part E:
***Burden Reduction Targeting Index
for High Burden Households***



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Section V – Part E

The Burden Reduction Targeting Index

- Section E is auto-calculated by the Form using the information in Sections B and C.
- The **burden reduction targeting index** for high burden households quantifies how energy burden is reduced for high energy burden households compared to all households.

Score Results	Score Interpretation
Less than 100	The average reduction in energy burden for High Burden households is less than the average reduction in energy burden for all households.
100	The average reduction in energy burden for High Burden households is equal to the average reduction in energy burden for all households.
Greater than 100	The average reduction in energy burden for High Burden households is greater than the average reduction in energy burden for all households.

Questions

Grantee Questions regarding Section V of
Module 2 (Performance Measures)?

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Section VI – Restoration of Home Energy Service



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Section VI – Restoration of Home Energy Service

What information should be reported?

- The data fields in Section VI require specific information on the number of **occurrences** in which LIHEAP assistance led to the restoration of a household's energy service during the fiscal year.
 - Energy Service Restored After Disconnection
 - Fuel Delivered to Home that Ran Out of Fuel
 - Repair/Replacement of Inoperable Home Energy Equipment
- Unlike Section V, this is not an unduplicated count of households. A household might have had energy service restored more than once in a year.

Section VI – Restoration of Home Energy Service

What information should be reported?

VI. RESTORATION OF HOME ENERGY SERVICE						
A. All Occurrences of LIHEAP Households that Had:	All Occurrences	Energy Source (where LIHEAP benefit was applied)				
		Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
1. Energy Service Restored After Disconnection	12,732	4,013	8,719			
2. Fuel Delivered to Home that Ran Out of Fuel	28,520			23,888	3,238	1,394
3. Repair/Replacement of Inoperable Home Energy Equipment	8,050	219	3,379	3,950	325	177

Auto-Calculated

Report Here

Section VI – Restoration of Home Energy Service

What households are included?

- Section VI should include ALL LIHEAP households for which LIHEAP assistance led to the **restoration** of a household's energy service during the fiscal year. This may differ from the sample used for the Energy Burden Section (Section V).
 - Energy Burden Measures (Section V) – Only included households who received Bill Payment Assistance
 - Restoration Measures (Section VI) – **Includes ALL LIHEAP households (Bill Payment Assistance + Weatherization + Equipment Repair/Replacement)**
 - Your restoration data may reflect both crisis assistance that restored energy service AND regular assistance that restored energy service.

Section VI – Restoration of Home Energy Service

Line 1 – Energy Service Restored after Disconnection

- Grantees should report on the number of **occurrences** during the fiscal year in which LIHEAP assistance led to the restoration of a household's energy service after a disconnection.
 - Report the number of occurrences based on the *fuel source where the LIHEAP benefit was applied*.
 - Households could have experienced multiple instances in which LIHEAP assistance was used to restore their energy service. Please include each occurrence separately.
 - **Include** electric pre-pay clients whose account ran out of funds, and who had their energy service restored with a LIHEAP benefit. If applicable, include a note.

Section VI – Restoration of Home Energy Service

Line 2 – Fuel Delivered to Home that Ran Out of Fuel

- Grantees should report on the number of **occurrences** during the fiscal year in which LIHEAP assistance resulted in the delivery of fuel after the household had run out of fuel.
 - Report the number of occurrences based on the *fuel source where the LIHEAP benefit was applied*.
 - Households could have experienced multiple instances in which LIHEAP assistance was used to restore their energy service. Please include each occurrence separately.

Section VI – Restoration of Home Energy Service

Line 3 – Repair/Replacement of Inoperable Home Energy Equipment

- Grantees should report on the number of **occurrences** during the fiscal year in which households had inoperable heating or cooling equipment repaired or replaced using LIHEAP funds.
 - Report the number of occurrences based on the *on the fuel source for the equipment that was repaired or replaced.*
 - Households could have experienced multiple instances in which LIHEAP assistance was used to restore/replace their *inoperable* energy equipment. Please include each occurrence separately.
 - **Include** repairs/replacements of red-tagged energy equipment.
 - Grantees with equipment repair/replacement programs that include repairing/replacing inoperable equipment should report information here.
 - *NOTE:* Obtaining this data may require coordination with your weatherization partners (where relevant).

Section VII – Prevention of Loss of Home Energy Service



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Section VII – Prevention of Loss of Home Energy Service

What information should be reported?

- The data fields in Section VII require specific information on the number of **occurrences** in which LIHEAP assistance prevented the loss of energy service for a household at risk of losing their home energy service during the fiscal year.
 - Households with a Utility Past Due or Disconnect Notice
 - Households with Limited Fuel
 - Households in Need of Equipment Repair/Replacement
- Grantees have flexibility in defining criteria for being “at risk” of losing home energy service.
- Unlike Section V, this is not an unduplicated count of households. A household might have had the loss of energy service prevented more than once in a year.

Presenter(s):
Melissa Torgerson

Section VII – Prevention of Loss of Home Energy Service

What information should be reported?

VII. PREVENTION OF LOSS OF HOME ENERGY SERVICE						
A. All Occurrences of LIHEAP Households that Had:	All Occurrences	Energy Source (where LIHEAP benefit was applied)				
		Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
1. Past Due Notice or Utility Disconnect Notice	73,140	27,167	45,973			
2. Imminent Risk of Running out of Fuel	53,124			44,404	6,490	2,230
3. Repair/Replacement of Operable Equipment to Prevent Imminent Home Energy Loss	0	0	0	0	0	0

Auto-Calculated

Report Here

Section VII – Prevention of Loss of Home Energy Service

What households are included?

- Section VII should include ALL LIHEAP households for which LIHEAP assistance prevented the loss of energy service for a household at risk of losing their home energy service, during the fiscal year. This may differ from the sample used for the Energy Burden Section (Section V).
 - Energy Burden Measures (Section V) – Only included households who received Bill Payment Assistance
 - Prevention Measures (Section VII) – **Includes ALL LIHEAP households (Bill Payment Assistance + Weatherization + Equipment Repair/Replacement)**
 - Your prevention data may reflect both crisis assistance that prevented the loss of energy service AND regular assistance that prevented the loss of energy service.

Presenter(s):
Melissa Torgerson

Section VII – Prevention of Loss of Home Energy Service

Line 1 – Past Due Notice or Utility Disconnect Notice

- Grantees should report on the number of occurrences in which households had a past due or disconnect notice at the time of application and receipt of LIHEAP assistance resulted in the continuance of home energy service.
 - Report the number of occurrences based on the *fuel source where the LIHEAP benefit was applied.*
 - Households could have experienced multiple instances in which LIHEAP assistance was used to prevent a household with a past due or disconnect notice from losing their home energy service during the fiscal year. Please include each occurrence separately.
 - **Exclude** households who had been disconnected by the time that they received the LIHEAP benefit.
 - **Include** electric pre-pay households whose accounts were low on funds and who received a LIHEAP benefit that prevented the loss of their energy service.

Presenter(s):
Melissa Torgerson

Section VII – Prevention of Loss of Home Energy Service

Line 2 – Imminent Risk of Running Out of Fuel

- Grantees should report on the number of occurrences in which households were at imminent risk of running out of fuel at the time of application and receipt of LIHEAP assistance resulted in the delivery of fuel.
 - Report the number of occurrences based on the *fuel source where the LIHEAP benefit was applied.*
 - Households could have experienced multiple instances in which LIHEAP assistance was used to deliver fuel to a household at risk of running out of fuel during the fiscal year. Please include each occurrence separately.
 - **Exclude** households who had run out of fuel by the time that they received the LIHEAP benefit.

Section VII – Prevention of Loss of Home Energy Service

Line 3 – Repair/Replacement of Operable Home Energy Equipment

- Grantees should report on the number of **occurrences** during the fiscal year in which households had operable, but failing heating or cooling equipment repaired or replaced using LIHEAP funds.
 - Report the number of occurrences based on the *on the fuel source for the equipment that was repaired or replaced*.
 - Households could have experienced multiple instances in which LIHEAP assistance was used to restore/replace their *operable* energy equipment. Please include each occurrence separately.
 - **Exclude** repairs/replacements of red-tagged energy equipment or inoperable energy equipment.
 - Grantees with equipment repair/replacement programs that include repairing/replacing operable, but failing equipment should report information here.
 - *NOTE:* Obtaining this data may require coordination with your weatherization partners (where relevant).

Questions

Grantee Questions regarding Sections VI or VII of
Module 2 (Performance Measures)?

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Overview of Optional Module 3 (Optional Performance Measures)



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What is *Module 3* (*Optional Performance Measures*)?

- Module 3 is an optional module that allows grantees to voluntarily report supplementary information that compliments the required performance measures data in Module 2.
- This optional Module is intended to assist grantees with analyzing and interpreting their Module 2 Performance Measures results and to provide more data to support LIHEAP program management.
- Module 3 allows grantees to report on the following LIHEAP outcomes:
 - Average Annual Energy Usage
 - Number of Households Using Supplemental Heating & Air Conditioning
 - Unduplicated count of Restorations of Energy Service
 - Unduplicated count of Prevention of Loss of Energy Service
- For FY 2016, 13 grantees voluntarily reported data in Module 3.
- For more information on Module 3, please consult the FY 2016 instructions found here:
https://www.acf.hhs.gov/sites/default/files/ocs/liheap_performance_data_form_instructions_for_fy2016_19dec2016_0.pdf

Final Reminders



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Final Reminders

Reporting Important Details/Clarifications

- Add notes that help to explain or clarify program features that are unique to your program.
 - Include the section number and the item number in your note.
- Adding notes will reduce follow-up from APPRISE.
- If uncertain, add a note!

NOTES: Include any notes below. Please indicate type of LIHEAP assistance and item being referenced.

Under section VII. Prevention of Loss of Home Energy Service, the numbers are relatively low because we only have one vendor who is currently capturing this data. The rest of our vendors do not currently track this data. Under section VI. Restoration of Home Energy Service, the numbers are also relatively low because we only had the one vendor that is currently capturing this data. For the question about the Repair/Replacement of Inoperable Home Energy Equipment and the restoration of home energy service, we do not have a way to capture that as the repair and replacement was completed by weatherization and they have their own system. The same for Repair/Replacement of Operable Equipment to Prevent Imminent Home Energy Loss, this is done through weatherization and they have a different system and we do not have access to it.

Final Reminders

Checking Your Report Prior to Submission

- Make use of the ***LIHEAP Module 2 Performance Measures “Check Before You Submit” Document***
 - Grantees should review all of the checks in the list, and if they can answer “Yes” to all of the questions in the list, they are ready to certify and submit Module 2 of the LIHEAP Performance Data Form.
 - Link to “Check Before You Submit” Document:
https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/LIHEAP-PDF-Section-V-Before-You-Submit-Document.pdf

Final Reminders

Reporting Deadlines

- Upon approval by OMB, HHS will publish an Action Transmittal with the final due date and instructions for accessing and submitting the form in OLDC.
- Remember that the Performance Data Form must be:
 - Entered in OLDC
 - Saved in OLDC
 - Certified by the appropriate person
 - Submitted by the appropriate person

Final Reminders

Grantee Survey Resources

- Performance Data Form Action Transmittal – Coming Soon
- Performance Data Form Instructions – Coming Soon
- “Check Before You Submit” Document:
[https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/PDF-Module-1-\(Grantee%20Survey\)-Check-Before-You%20Submit-Document.pdf](https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/PDF-Module-1-(Grantee%20Survey)-Check-Before-You%20Submit-Document.pdf)
- LIHEAP Performance Measures Data Collection Guide Documents: <https://liheappm.acf.hhs.gov/node/60>
- Find Performance Management Resources using the [LIHEAP Virtual Library](#)

Presenter(s):
Melissa Torgerson

Final Reminders

OLDC Resources

- OLDC is accessed through Grant Solutions.
- Log-in to Grant Solutions at <https://www.grantsolutions.gov/gs>
- Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
- If you need assistance, please contact Grants Center Of Excellence systems Help Desk:
 - (202) 401-5282 or (866) 577-0771
 - help@grantsolutions.gov

Final Reminders

Support Resources

- OCS liaisons
 - <http://www.acf.hhs.gov/programs/ocs/resource/division-of-energy-assistance-federal-staff>
- Grants Center Of Excellence systems Help Desk
 - help@grantsolutions.gov
 - (202) 401-5282 or (866) 577-0771
- APPRISE Team
 - Daniel Bausch, Daniel-Bausch@appraiseinc.org; 609-252-9050
 - Jorge Mancilla, Jorge-MancillaUribe@appraiseinc.org; 609-252-9009
 - Melissa Torgerson, melissa@verveassociates.net
 - Michelle Wadolowski, Michelle-Wadolowski@appraiseinc.org; 609-252-9057

Final Reminders

Performance Measures Webinar #2

- LIHEAP Performance Data Form, Module 2 (Performance Measures) & Optional Module 3 - Webinar #2
 - **Wednesday, January 31 at 3:00 pm EST**
- Discuss common reporting issues that are found when reviewing submitted data for Module 2.
- Provide a refresher of the main reporting requirements and nuances for Module 2.
- Review the new “Check Before You Submit” Document.

Grantee Questions?



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