

# Using LIHEAP Performance Data to Improve LIHEAP Benefit Determination Procedures

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

**May 17, 2017**

**Presenters:**

Sharnice Peters (OCS)  
David Carroll (APPRISE)



ADMINISTRATION FOR  
**CHILDREN & FAMILIES**

# Welcome

## Welcome and Introductions

- Sharnice Peters, OCS

## Webinar Speaker

- David Carroll, APPRISE

# Webinar Agenda

- Current Practice – Review the different ways that grantees determine client benefits
- Updating Benefit Matrix – Look at one example of how Performance Data can be used to improve a benefit matrix
- Using Client Energy Bills – Describe the steps for using client energy bills directly for benefit determination

# Topic #1 – What are some ways that LIHEAP grantees set client benefit levels?

Benefit Matrix Approach – Grantee develops a benefit matrix that is used to assign a benefit to the client.

- The steps in the process include:
  - Client completes application and reports information needed for eligibility determination and Benefit Matrix
  - Grantee uses Benefit Matrix to assign benefit to client
  - Grantee or subgrantee pays benefit to vendor
  - Vendor applies benefit toward client's bills and returns unused funds at the end of the year

# Topic #1 – What are some ways that LIHEAP grantees set client benefit levels?

Benefit Maximum Approach – Grantee develops a benefit matrix that is used to assign a maximum benefit to the client. Grantee pays bills presented by client.

- The steps in the process include:
    - Client completes application and reports information needed for eligibility determination and Benefit Matrix
    - Benefit Matrix is used to determine maximum benefit
    - Client presents energy bill for payment
    - Grantee makes payment to vendor
    - If benefit maximum has not been reached, client can present another energy bill for payment later in the year
- [Note: Sometimes a minimum benefit is established]

# Topic #1 – What are some ways that LIHEAP grantees set client benefit levels?

Individualized Payment Approach – Grantee develops a benefit determination procedure that takes into account the client's status (e.g., poverty level, vulnerable household) and the client's actual energy bills.

- The steps in the process include:
  - Client completes application and reports information needed for eligibility determination and Benefit Matrix
  - Grantee obtains client energy bills from vendor
  - Grantee uses client characteristics and energy bills to assign benefit amount
  - Grantee or subgrantee pays benefit to vendor
  - Vendor applies benefit towards clients' bills and returns unused funds at the end of the year

[Note: These grantees develop a “back-up” matrix to assign benefits when the client's energy bills are not available.]

# Topic #1 – What are some ways that LIHEAP grantees set client benefit levels?

- NCAT Publication – “State Strategies Based on Household Income, Energy Burden, and Heating Costs” March 2010
  - <https://liheapch.acf.hhs.gov/pubs/510targ.htm>
- NCAT Publication update targeted for completion in June 2017

## Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Generic Example

- Look at “Average Annual Total Residential Energy Bill” by main heating fuel [Line B6 of PDF]
- Look at “Average Annual Total LIHEAP Benefit per Household” by main heating fuel [Line B3 of PDF]
- Ask yourself ... does it look like the differences in benefits by main heating fuel are consistent with the differences in energy bills by main heating fuel?



# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Generic Example

## V. ENERGY BURDEN TARGETING

	<i>All Households</i>	Bill Payment-Assisted Household Main Fuel				
		Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
<b>A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households</b>	24,000	6,000	12,000	0	6,000	0
<b>B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)</b>						
1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)	24,000	6,000	12,000	0	6,000	0
2. Average Annual Household Income	\$0	\$0	\$0	\$0	\$0	\$0
3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)	\$600	\$300	\$600	\$0	\$900	\$0
4. Average Annual Main Heating Fuel Bill	\$1,100	\$1,000	\$800	\$0	\$1,800	\$0
5. Average Annual Electricity Bill	\$900	\$0	\$1,200	\$0	\$1,200	\$0
6. Average Annual Total Residential Energy Bill	\$2,000	\$1,000	\$2,000	\$0	\$3,000	\$0

## Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Generic Example

This Example slide shows one reasonable approach to benefit assignment

- Electric Main Heat – Benefit is 30% of Total Expenditures (\$300 / \$1,000)
- Natural Gas Main Heat – Benefit is 30% of Total Expenditures (\$600 / \$2,000)
- Propane Main Heat – Benefit is 30% of Total Expenditures (\$900 / \$3,000)

This is NOT the only way to think about benefits. But, it is one way.

## Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

- Look at “Average Annual Total Residential Energy Bill” by main heating fuel [Line B6 of PDF]
- Look at “Average Annual Total LIHEAP Benefit per Household” by main heating fuel [Line B3 of PDF]
- Ask yourself ... does it look like the differences in benefits by main heating fuel are consistent with the differences in energy bills by main heating fuel?

# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

V. ENERGY BURDEN TARGETING						
	Bill Payment- Assisted Household Main Heating Fuel					
	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
<b>A. Unduplicated Number of LIHEAP Bill Payment-Assisted Households</b>	80,346	15,573	57,073	282	6,998	420
<b>B. All Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)</b>						
<b>1. Unduplicated Number of Households with 12 Consecutive Months of Bill Data (Main Fuel and Electric)</b>	42,547	9,416	32,761	0	370	0
<b>2. Average Annual Household Income</b>	\$15,621.00	\$13,118.00	\$16,328.00	\$0.00	\$16,692.00	\$0.00
<b>3. Average Annual Total LIHEAP Benefit per Household (including Heating, Cooling, Crisis, Supplemental Benefits)</b>	\$452.00	\$403.00	\$465.00	\$0.00	\$538.00	\$0.00
<b>4. Average Annual Main Heating Fuel Bill</b>	\$686.00	\$1,194.00	\$538.00	\$0.00	\$857.00	\$0.00
<b>5. Average Annual Electricity Bill</b>	\$915.00	\$0.00	\$1,173.00	\$0.00	\$1,324.00	\$0.00
<b>6. Average Annual Total Residential Energy Bill</b>	\$1,601.00	\$1,194.00	\$1,711.00	\$0.00	\$2,181.00	\$0.00

## Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

Example slide shows one that Iowa may have some issues with their benefit matrix

- Electric Main Heat – Benefit is 34% of Total Expenditures (\$403 / \$1,194)
- Natural Gas Main Heat – Benefit is 27% of Total Expenditures (\$465 / \$1,711)
- Propane Main Heat – Benefit is 25% of Total Expenditures (\$538 / \$2,181)

This is NOT the only way to think about benefits. But, it is one way.

# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

STATE OF IOWA - LIHEAP PROCEDURES MANUAL

FY 2017

SUBJECT: FY 2017 LIHEAP PAYMENT MATRIX

Page 22

## 1. INCOME ELIGIBILITY

<u>POVERTY LEVEL</u>	<u>POINTS</u>
0 - 75%	8
76 - 100%	6
101 - 125%	5
126 - 175%	4
Over 175%	Ineligible

## 2. TARGETING FACTORS

Fixed Income Only	1
Elderly	1
Disabled	1
Children under age 6 in household	1
Detached Dwelling	1
Subsidized Housing	-3
5-Plexes or More	-1
Heat Included in Rent	-4
Over \$15,000 in Savings	-4

## 3. FUEL TYPE

Natural Gas	4
Electric	4
Liquid Petroleum	5
Fuel Oil	5
Wood/Coal/Corn	2

## AWARD CALCULATION

\$\_\_\_ per point determined by total funding and expected # of participating households

The minimum benefit for liquid propane and fuel oil customers is \$500.

## Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

- Factors in Iowa Benefit Matrix
  - Poverty Level
  - Fuel Type
  - Targeting Factors

# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

## Iowa Example Calculation

- Households with Poverty Level = 80% ----- 6 points
- Household Elderly = Yes ----- 1 point
- Main Heating Fuel = Natural Gas ----- 4 points
- TOTAL POINTS = 11
- Benefit = 11 points \* \$40 per point = \$440 Benefit



# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

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## AWARD CALCULATION

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The minimum benefit for liquid propane and fuel oil customers is \$500.

## Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

### Sample Calculation by Main Heating Fuel

- Electric – 80% Poverty Level (6) + Electric Main Heat (4) = 10 points / \$400 Benefit
- Natural Gas = 80% Poverty Level (6) + Natural Gas Main Heat (4) = 10 points / \$400 Benefit
- Propane = 80% Poverty Level (6) + Propane Main Heat (5) = 11 points / \$440 Benefit

# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

V. ENERGY BURDEN TARGETING						
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	All Households	Electricity	Natural Gas	Fuel Oil	Propane	Other Fuels
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# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

## Alternative Benefit Matrix Procedure

- Step #1 - Compute Ratio of Energy Expenditures by Main Heating Fuel
  - Natural Gas is 1.4 times Electric ( $\$1,711 / \$1,194$ )
  - Propane is 1.8 times Electric ( $\$2,181 / \$1,194$ )
- Step #2 – Assign Benefit using Poverty Level and Targeting Factors
  - Household #1 – 50% of Poverty (8) + Elderly (1) + Detached Dwelling (1) = 10 points / \$400 Benefit
  - Household #2 – 110% of Poverty (5) + Young Child (1) + Disabled (1) = 7 points / \$280 Benefit

# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

## Alternative Benefit Matrix Procedure

- Step #3 – Apply Main Heating Fuel Ratio
  - Household #1
    - Electric Main Heat: Benefit = \$400
    - Natural Gas Main Heat: Benefit =  $\$400 * 1.4 = \$560$
    - Propane Main Heat: Benefit =  $\$400 * 1.8 = \$720$
  - Household #2
    - Electric Main Heat: Benefit = \$280
    - Natural Gas Main Heat: Benefit =  $\$280 * 1.4 = \$392$
    - Propane Main Heat: Benefit =  $\$280 * 1.8 = \$504$

## Topic #2 – How can Performance Data help me to update my Benefit Matrix?

Questions?

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## Topic #3 – Using Client Energy Bills for Benefit Determination – Introduction

- Some states have been using client energy bills to set benefit levels for many years
- Most states are now collecting energy bills for clients to meet the LIHEAP Performance Measures reporting requirements
- States can improve benefit targeting by making use of client energy bills to set benefits



# Topic #3 – Using Client Energy Bills for Benefit Determination – Basic Example

## FY 2018 Benefit Calculation

- Step 1 – Collect Annual Expenditures for Clients' Main Heating Fuel for FY 2017
- Step 2 – Decide Share of Bill Used for Heating
  - Special Note: APPRISE has prepared Census Region estimates from RECS
  - Example: In the Northeast, for households with electric main heat, EIA estimates that 35% of electric is used for space heat.
- Step 3 – Develop a data table that has the client and their FY 2017 heating bill
- Step 4 – Decide what share of the heating bill you can afford to pay on average by looking at the “All Households” column of your Performance Data Form
- Step 5 – Decide whether you want to pay a larger share of the heating bill for lower income households. For example, if you can pay 50% on average, you might want to pay 75% for households with income below 75% of Poverty and 25% for households with income above 125% of Poverty
- Step 6 – When a FY 2017 client applies for assistance in FY 2018, use their FY 2017 heating bill and the benefit determination formula to set a benefit level.

# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

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# Topic #2 – How can Performance Data help me to update my Benefit Matrix? – Iowa Example

## II. Number of Assisted Households by Poverty Interval

<u>Applicable HHS Poverty Guidelines, in effect at the beginning of FFY</u>					
<u>Type of LIHEAP assistance</u>	<b>A. Under 75% poverty</b>	<b>B. 75%-100% poverty</b>	<b>C. 101%-125% poverty</b>	<b>D. 126%-150% poverty</b>	<b>E. Over 150% poverty</b>
<b>1. Heating</b>	27,772	17,881	16,003	12,266	6,424
<b>2. Cooling</b>					
<b>3. Crisis</b>					
<b>a. Year Round</b>	2,079	748	536	404	241
<b>b. Winter</b>					
<b>c. Summer</b>					
<b>d. Emergency Furnace Repair &amp; Replacement</b>	251	169	154	139	78
<b>e.</b>					
<b>f.</b>					
<b>4. Weatherization</b>	446	284	190	445	98

# Topic #3 – Using Client Energy Bills for Benefit Determination – Basic Example

## Example #1 Calculation

- Step 1 – Client's Electric Bill for FY 2017 = \$1,240
- Step 2 – Check table and find 35% of Electric Bill is for Heat
  - Compute Heating Bill =  $35\% * \$1,240 = \$434$
- Step 3 – Record \$434 in Database
- Step 4 – Decide to pay, on average, 50% of Heating Bill
- Step 5 – Decide to pay, 75% of Bill for < 75% of Poverty; 50% of Bill for 75% to 100%; and 25% for 100%+
- Step 6 – Client is 90% of Poverty. Pay  $50% * \$434 = \$217$

# Topic #3 – Using Client Energy Bills for Benefit Determination – Basic Example

## Example #2 Calculation

- Step 1 – Client's Propane Bill for FY 2017 = \$1,380
- Step 2 – Check table and find 80% of Propane Bill is for Heat
  - Compute Heating Bill =  $80\% * \$1,380 = \$1,104$
- Step 3 – Record \$1,104 in Database
- Step 4 – Decide to pay, on average, 50% of Heating Bill
- Step 5 – Decide to pay, 75% of Bill for < 75% of Poverty; 50% of Bill for 75% to 100%; and 25% for 100%+
- Step 6 – Client is 50% of Poverty. Pay  $75% * \$1,104 = \$828$

# Topic #3 – Using Client Energy Bills for Benefit Determination – Enhanced Example

## FY 2018 Benefit Calculation

- Step 1 – Collect Annual Expenditures for Clients' Main Heating Fuel and Electric for FY 2017
- Step 2 – Decide Share of Bills used for Home Energy [Heating and Cooling]
  - Special Note: APPRISE has prepared Census Region estimates from RECS
  - Example: In the Midwest, for households with natural gas heat, EIA estimates that 40% of total expenditures are used for home energy.
- Step 3 – Develop a data table that has the client and their FY 2017 home energy bill
- Step 4 – Decide what share of the home energy bill you can afford to pay on average by looking at the “All Households” column of your Performance Data Form
- Step 5 – Decide whether you want to pay a larger share of the home energy bill for lower income households. For example, if you can pay 50% on average, you might want to pay 75% for households with income below 50% of Poverty and 25% for households with income above 125% of Poverty
- Step 6 – When a FY 2017 client applies for assistance in FY 2018, use their FY 2017 home energy bill and the benefit determination formula to set a benefit level.

# Topic #3 – Using Client Energy Bills for Benefit Determination – Basic Example

## Example #1 Calculation

- Step 1 – Client's Natural Gas and Electric Bill for FY 2017 = \$1,860
- Step 2 – Check Table and find 40% of Total Bill for Natural Gas Main Heat is for Home Energy
  - Calculate Home Energy Bill =  $40\% * \$1,860 = \$744$
- Step 3 – Record \$744 in Database
- Step 4 – Decide to pay, on average, 50% of Home Energy Bill
- Step 5 – Decide to pay, 75% of Bill for < 75% of Poverty; 50% of Bill for 75% to 100%; and 25% for 100%+
- Step 6 – Client is 90% of Poverty. Pay  $50% * \$744 = \$372$

# Topic #3 – Using Client Energy Bills for Benefit Determination – Basic Example

## Example #2 Calculation

- Step 1 – Client's Propane and Electric Bill for FY 2017 = \$2,640
- Step 2 – Check table and find 48% of Total Bill for Propane Main Heat is for Home Energy
  - Calculate Home Energy Bill =  $48\% * \$2,645 = \$1,270$
- Step 3 – Record \$1,270 in Database
- Step 4 – Decide to pay, on average, 50% of Home Energy Bill
- Step 5 – Decide to pay, 75% of Bill for < 75% of Poverty; 50% of Bill for 75% to 100%; and 25% for 100%+
- Step 6 – Client is 110% of Poverty. Pay  $25% * \$1,270 = \$318$



# Topic #3 – Using Client Energy Bills for Benefit Determination – Principles, Resources, and Issues

- Principle #1 – The share of an energy bill that is used for Home Heating or Home Energy is different for each type of fuel. If you are going to use energy bills to set benefits, you need to have a procedure for estimating the share of the bill that is used for the targeted purpose.
  - Resource #1 – APPRISE is developing Census Region estimates of the share of each fuel used for Heating and Home Energy
  - Resource #2 – Some states choose to use other procedures to estimate heating costs. For example, some states just look at winter bills.
  - Issue #1 – Sometimes grantees are concerned about encouraging clients to “waste” energy and set limits on the amount of the bill that will be paid. [Example: Set a maximum for bills of 50% greater than the average bill.]
  - Issue #2 – Sometimes grantees are concerned about penalizing clients who are “careful” with energy and set a minimum benefit for those households, even if their benefit calculation would be lower using the formula.
  - Issue #3 – Last year’s bills may not be for “normal” winter. Was last winter warmer than normal and this year’s bills will be higher? Did we have a propane crisis last year and so this year’s bills will be lower?

# Topic #3 – Using Client Energy Bills for Benefit Determination – Principles, Resources, and Issues

- Principle #2 – Some clients with expensive delivered fuels (i.e., fuel oil and propane) may use a substantial amount of electricity for supplemental heat. If you set benefits using Total Energy Bills (Electric and Delivered Fuel) for those households, the computed benefit might exceed the annual bill for the delivered fuel. You might want to develop a procedure to make payments to electric vendors for such households.
- Principle #3 – There are many different targeting factors that grantees may want to apply to benefit determination procedures. Those will need to be factored into the benefit determination formula. For example, add 5% to the payment percentage for vulnerable households.
- Principle #4 – Even when you develop a procedure to use client energy bills, there will be some clients for whom you do not have FY 2017 data. For those clients, you will still need to develop a “backup” Benefit Matrix.

# Topic #3 – Using Client Energy Bills for Benefit Determination

**Questions?**

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# Performance Management Resources for LIHEAP Grantees

## LIHEAP Performance Management Website:

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

## Data Warehouse - Resources and Tutorial Tab:

[https://liheappm.acf.hhs.gov/data\\_warehouse/index.php?report=homepage](https://liheappm.acf.hhs.gov/data_warehouse/index.php?report=homepage)

▶ **Advanced Data & Analytics**

▶ **Reports by Data Source**

▼ **Resources and Tutorial**

Access resources explaining how to use the Data Warehouse and providing background information on LIHEAP data collection and reporting.

**LIHEAP Glossary** - PDF Document

The LIHEAP Glossary includes detailed definitions of LIHEAP terms, as well as references to key reports and resources for further information.

**Background on LIHEAP Data Collection and Reporting**

Explore a variety of resources related to how LIHEAP data is collected, reported, and used.

**Methodology and Sources Used to Develop LIHEAP Income Eligible Population Estimates**

Learn about how the LIHEAP Income Eligible Population statistics are estimated using Census information.

**Data Warehouse Tutorial**

This tutorial will provide an overview and step-by-step guidance for using the Data Warehouse to find, build, and customize reports according to your needs.

# *Performance Management Resources for LIHEAP Grantees*

## **LIHEAP Virtual Library:**

<https://liheappm.acf.hhs.gov/assessment/#nbb>

## **LIHEAP Clearinghouse:**

<https://liheapch.acf.hhs.gov/stateplans.htm>

## **ACF Training Resources Website:**

<https://www.acf.hhs.gov/ocs/resource/liheap-trainings>

# *Performance Management Resources for LIHEAP Grantees*

**For more information, please contact:**

**Melissa Torgerson**

[Melissa@verveassociates.net](mailto:Melissa@verveassociates.net)

503-706-2647

**Dan Bausch**

[Daniel-Bausch@appraiseinc.org](mailto:Daniel-Bausch@appraiseinc.org)

609-252-9050

**Kevin McGrath**

[Kevin-McGrath@appraiseinc.org](mailto:Kevin-McGrath@appraiseinc.org)

609-252-2081