

**LIHEAP PERFORMANCE MEASURES
WORK GROUP UPDATE**

**NEADA Winter Meeting
February, 2013**

OVERVIEW

- Work Group History
- Progress to Date
- Membership
- Required Performance Measures
- Timeline
- Questions

HISTORY

- **Need for LIHEAP Performance Measurement**--although LIHEAP utilizes target indexes, they are not adequate for performance measurement.
- **PMWG proposal for recommended measures**—in 2009, group of state coordinators recommended a set of “tiered” performance measures to HHS.
- **The Performance Measure Implementation Group** was initiated to help develop proposed measures and to assist grantees with implementation.

PMIWG PROGRESS TO DATE

- Developed and piloted a web-based data collection tool for LIHEAP performance measurement (ZOHO).
- Developed process guides for grantees to integrate performance measurement into everyday LIHEAP program activities (on Basecamp).
- Provided recommendations to HHS regarding ongoing LIHEAP Performance Measurement activities.

WORK GROUP UPDATE

- **Three state members moved on:**

Ralph Markus, Maryland

Janet Cessner, Ohio

Melissa Torgerson, Oregon

- **New members:**

Taura Edwards, Indiana

Kimberly Keilen Michigan

Amanda Baker, Michigan

Jenni Sullivan, Montana

- **Currently recruiting members—warm weather states needed.**

- **Telephone Conferences, Twice Annual Face-to-Face Meetings**

PMIWG TEAMS

Three Sub-Committees

- **Communications:** Facilitates all communication between subcommittees, work group and grantees. This includes presentations, newsletters, and solicitation of ideas or comments.
- **Training and Technical Assistance:** Responds to T/TA inquiries from grantees and works with APPRISE to develop tools to address them. Also assists with review and development of T/TA modules associated with Performance Measurement.
- **Development:** Facilitates testing and feedback on Data Warehouse and Content Management systems (under development by APPRISE team). This includes assuring that T/TA efforts integrate system elements as they are rolled out for production.

Each group includes a representative from APPRISE as well as HHS/OCS. APPRISE is also responsible for facilitation of group calls, coordination between teams and various meeting logistics.

WORK GROUP PROGRESS

- The Performance Measures Implementation Work Group has recommended to HHS that State LIHEAP grantees be required to report on three outcome measures. The work group worked over several months to develop and refine definitions for these measures.
- HHS has accepted this recommendation and is currently pursuing clearance from the Office of Management and Budget (OMB) to collect this information.
- Federal Register Notices will be issued, and states are encouraged to participate in the Public Comment Periods.

OUTCOME 1: INCREASED ENERGY AFFORDABILITY

- **Outcome:** LIHEAP increases energy affordability for low-income households and thereby improves financial, productivity, health and safety outcomes for clients.
- **Metric:** The average percentage point reduction in annual home energy burden for households receiving LIHEAP fuel assistance.
- **Data Collected:** Annual gross household income, annual LIHEAP fuel assistance benefit, primary heating fuel type, secondary heating fuel type, primary cooling equipment, annual heating fuel bill, annual electric bill, annual fuel consumption.

Note:

At the last work group meeting, members suggested that annual fuel consumption, in addition to dollars, be collected. This component was added because while households may reduce their energy usage, their bills may not be reduced due to increased costs of heating fuel and electric.

By collecting the consumption, along with the dollars, states will be able to use this data to show participating households are using less energy, to identify households that could benefit from weatherization, and to assist state directors with program evaluation, planning and changes they can make to ensure they are assisting the most vulnerable households needing the most assistance.

OUTCOME 2: CRISIS PREVENTION

- **Outcome:** LIHEAP prevents home energy crises among low-income households.
- **Metric:** The percent of recipient households (unduplicated) where LIHEAP prevented a home energy crisis.
- **Data Collected:** Number of households with a past-due notice at time of application, number of households with less than a 30-day supply of deliverable fuel at the time of application, and number of households that had operable heating or cooling equipment repaired or replaced using LIHEAP funds.

OUTCOME 3: HOME ENERGY RESTORATION

- **Outcome:** LIHEAP restores home energy among low-income households experiencing energy crises.
- **Metric:** The percent of households (unduplicated) where LIHEAP benefits restored the main home energy service (e.g., main heating or cooling system).
- **Data Collected:** Number of households that do not have utility service at the time of application, number of households that have run out of deliverable fuel at the time of application, and the number of households with inoperable heating or cooling equipment that was repaired or replaced with LIHEAP funds.

OUTCOMES TWO AND THREE

- *Outcome 2 and Outcome 3 will be tracked relationally.* if continuous home energy is a LIHEAP outcome, the goal over time should be to increase prevention of crises in relation to restoration of home energy.
- If prevention is the priority, and a household comes in more than once during the year, then the most severe household “status” should be counted toward the performance measure. In other words:
 - If HH status = “Restored” then “Restored”
 - If HH status = “Prevented” then “Prevented”
 - If HH status = “Prevented” and “Restored” then “Restored”
- Households should only be counted in performance measurement if LIHEAP funds are being used to assist the household. In other words, if a household would not be counted in the LIHEAP Household Report, it should not be counted in performance measure data.

TENTATIVE TIMELINE

- **Ongoing ZOHO Use.** Online tool will be updated as performance measure definitions become more solidified. States can access ZOHO to better understand upcoming LIHEAP data collection and outcomes. For more information, please contact LIHEAPHELP@gmail.com.
- **OMB Approval (Federal Register Notices, Public Comment).** OCS will send out information to LIHEAP Grantees once notices are posted.
- PMIWG members are working with NCAT to post all items regarding LIHEAP Performance Measurement onto the LIHEAP Clearinghouse. Links will sent out to grantees as soon as available.
- Questions?

FOR MORE INFORMATION

To learn more about LIHEAP Performance Measurement or to get in touch with members of the Work Group, please contact:

Melissa Torgerson

melissa@verveassociates.net

503-706-2647