

Understanding LIHEAP Performance Measures

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

April 12, 2018

Welcome:

Patrice West (OCS Staff)

Presenters:

Melissa Torgerson (Verve Associates)
Heather Jones (Missouri)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Introduction & Welcome

- Welcome & Update
 - Patrice West, OCS Staff
- Presentation Speakers
 - Melissa Torgerson, Verve Associates
 - Heather Jones, Missouri LIHEAP Manager

Update on the Performance Data Form

- OCS is happy to announce that OMB recently re-approved the Performance Data Form (expiration date 3/31/2021).
- Grantees are encouraged to submit their final report as soon as possible.
- OCS is awaiting approval to issue an AT with the due date for the FY 2017 PDF. **The expected due date to submit the form in OLDC is April 30, 2018.**
- There are no changes in reporting items from the FY 2016 Performance Data Form.

Reminders of Performance Measures Resources

- There are many resources available as grantees continue to improve upon data collection and reporting, including:
 - OCS liaisons:
 - <https://www.acf.hhs.gov/ocs/resource/division-of-energy-assistance-federal-staff>
 - LIHEAP Virtual Library:
 - <https://liheappm.acf.hhs.gov/assessment/#nbb>
 - APPRISE Webinars:
 - <https://liheappm.acf.hhs.gov/pm-webinars>
- OCS encourages grantees to work with liaisons, peers, and APPRISE as they move forward into interpreting and using their data for Performance Management.

Understanding LIHEAP Performance Measures

Webinar Objectives

By the end of this webinar, participants should:

- Understand how to use the *LIHEAP Performance Management State Snapshot* to identify four primary LIHEAP Performance outcomes in their own state.
- Feel more comfortable using the *LIHEAP Performance Management State Snapshot* to identify patterns in their data where additional attention or evaluation is needed.
- Know where to find additional grantee LIHEAP Performance Management resources.

Understanding LIHEAP Performance Measures

Webinar Overview

- **Part I:** APPRISE will demonstrate how grantees can use the *LIHEAP Performance Management State Snapshot* to identify key “take-aways” from FY 2016 LIHEAP performance measure data.
- **Part II:** Heather Jones (Missouri) will use the *LIHEAP Performance Management State Snapshot* to interpret her own state’s FY 2017 LIHEAP performance measure data.
- **Part III:** We will review existing and new LIHEAP Performance Management resources available to grantees.

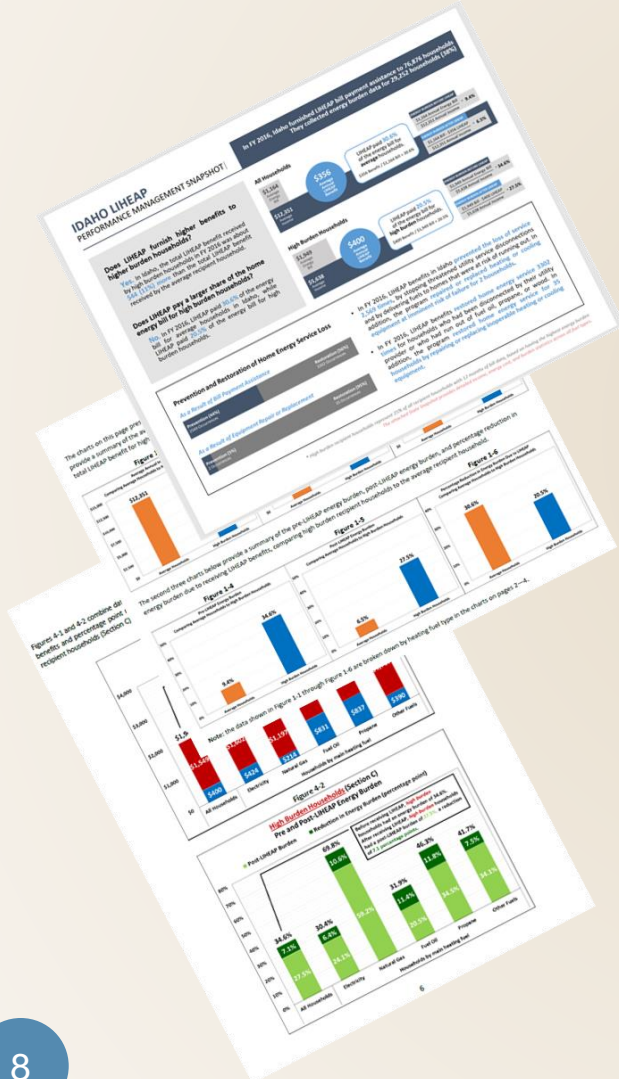
**Part I - Using the LIHEAP Performance
Management State Snapshot:
*Idaho FY 2016 Performance Measure Data***



ADMINISTRATION FOR
CHILDREN & FAMILIES

Understanding LIHEAP Performance Measures

The LIHEAP Performance Management State Snapshot



- The **LIHEAP Performance Management State Snapshot** was designed by the Performance Management 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.

Presenter(s):
Melissa Torgerson

Understanding LIHEAP Performance Measures

State Snapshot—Executive Summary

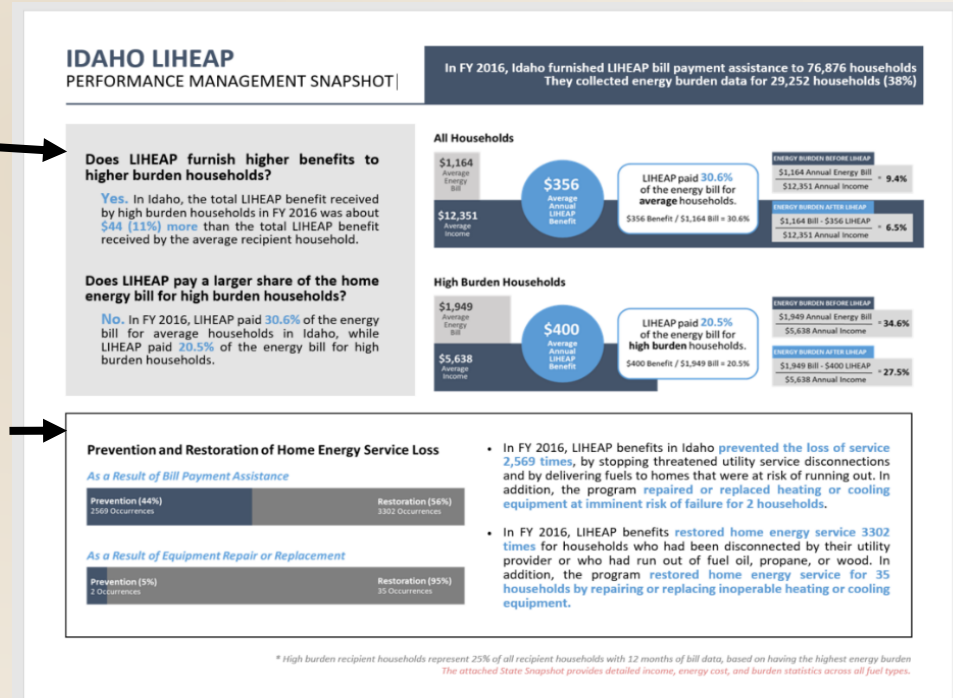
The **Snapshot Executive Summary** is a new addition to the *LIHEAP Performance Management State Snapshot*. It focuses on the four primary Performance Measures.

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



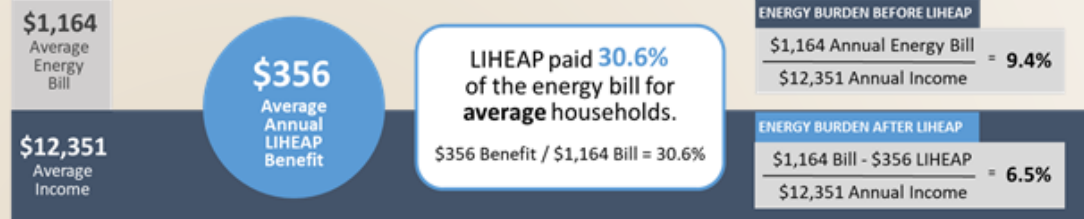
Understanding LIHEAP Performance Measures

IDAHO State Snapshot (Executive Summary—Energy Burden Measures)

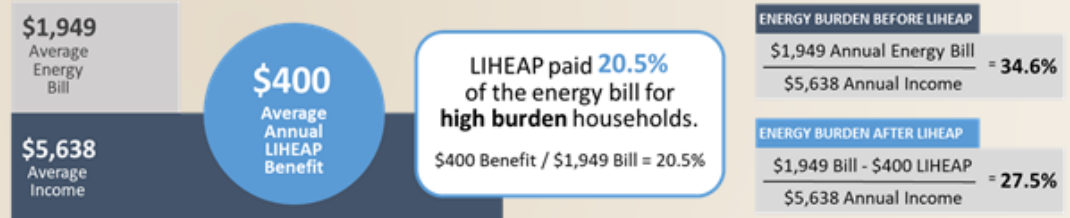
Does LIHEAP furnish higher benefits to higher burden households?

Yes. In Idaho, the total LIHEAP benefit received by high burden households in FY 2016 was about **\$44 (11%) more** than the total LIHEAP benefit received by the average recipient household.

All Households



High Burden Households



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.”

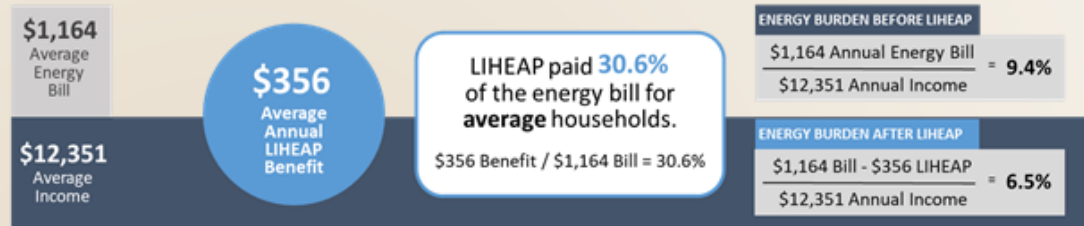
Understanding LIHEAP Performance Measures

IDAHO State Snapshot (Executive Summary—Energy Burden Measures)

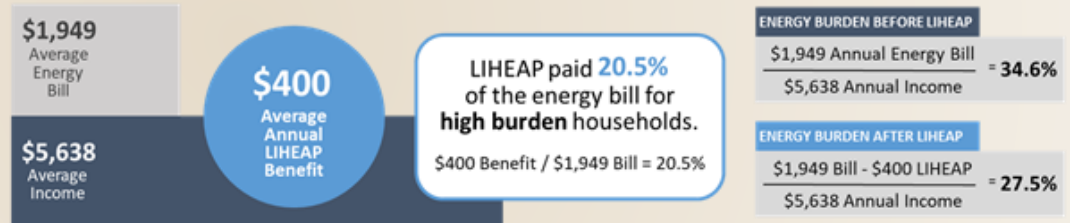
Does LIHEAP pay a larger share of the home energy bill for high burden households?

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.

All Households



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

Prevention (44%)
2569 Occurrences

Restoration (56%)
3302 Occurrences

As a Result of Equipment Repair or Replacement

Prevention (5%)
2 Occurrences

Restoration (95%)
35 Occurrences

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 3302 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

IDAHO State Snapshot



The first set of tables in the *LIHEAP Performance Management 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
- Annual Total LIHEAP Benefit
- Energy Burden Before LIHEAP
- Energy Burden After LIHEAP
- Percentage of Energy Bill Paid

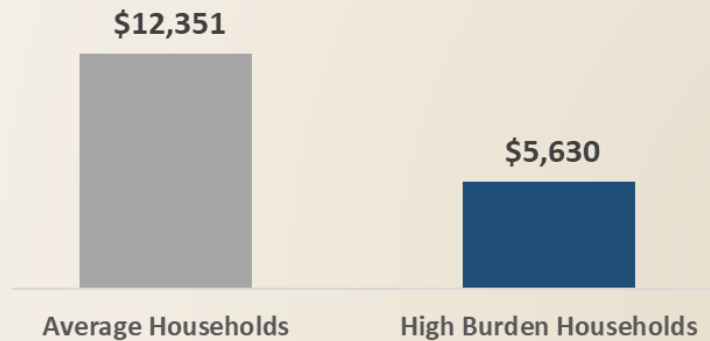
Understanding LIHEAP Performance Measures

IDAHO State Snapshot

Fig 1.1: Average Annual Income

Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 2



Annual Income

High burden households have an average annual income that is **\$6721 or 54% less** than average households.

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

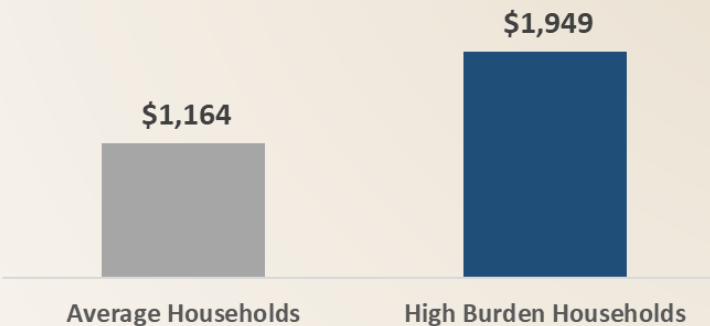
$$\frac{\text{Energy Bill}}{\text{Income}} = \text{Energy Burden}$$

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

LIHEAP Perf Data Form, Part V, Sections B and C, Line 6



Annual Energy Bill

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

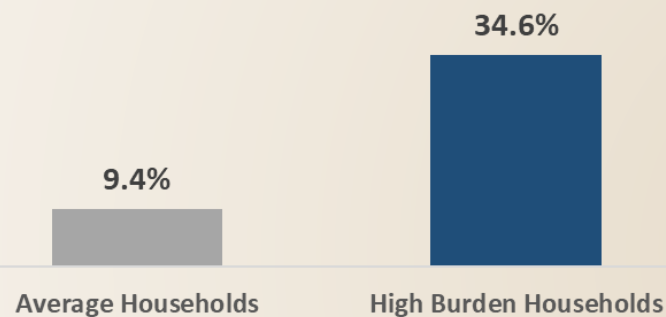
In Idaho, the difference in energy burden between average and high burden households is a product of **both** lower income and higher energy costs.

Understanding LIHEAP Performance Measures

IDAHO State Snapshot

Fig 1.4: Average Energy Burden Before LIHEAP
Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 7



Energy Burden before LIHEAP

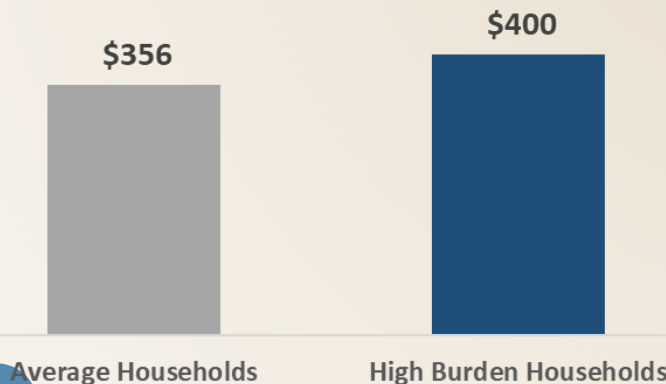
Before LIHEAP, high burden households are paying **3.7 times** as much of their income toward energy costs than average households.

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:

Fig 1.3: Average Annual Total LIHEAP Benefit
Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 3



Annual LIHEAP Benefit

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

Although high burden households in Idaho are paying **3.7 times** as much of their income toward energy bills, they are only receiving a LIHEAP benefit that is **12% higher** than average households.

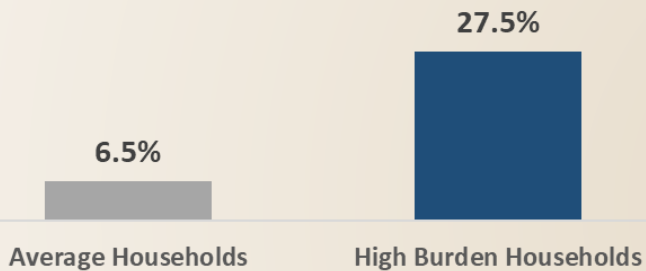
Understanding LIHEAP Performance Measures

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



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.

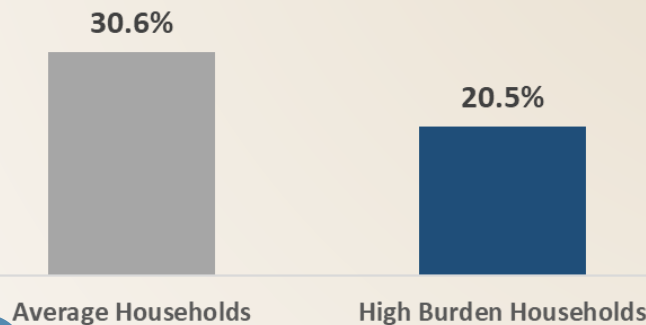
Figures 1.5 and 1.6 of the Snapshot allow grantees to compare outcomes against overarching program goals.

- Some grantees have a goal of bringing all LIHEAP households to a “maximum” or “manageable” energy burden level (Figure 1.5).

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



Percentage of Bill Paid

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

- 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

IDAHO State Snapshot



The remainder of the *LIHEAP Performance Management State Snapshot* provides grantees with detailed statistics **broken out by fuel type**.

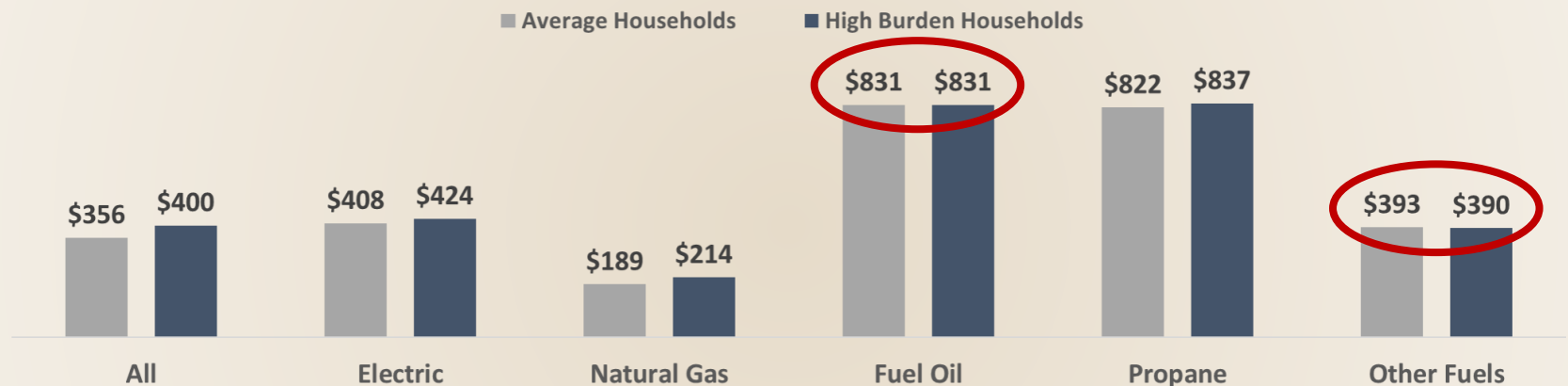
Understanding LIHEAP Performance Measures

IDAHO State Snapshot

Fig 2.3: Average Annual Total LIHEAP Benefit

Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 3



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.

Understanding LIHEAP Performance Measures

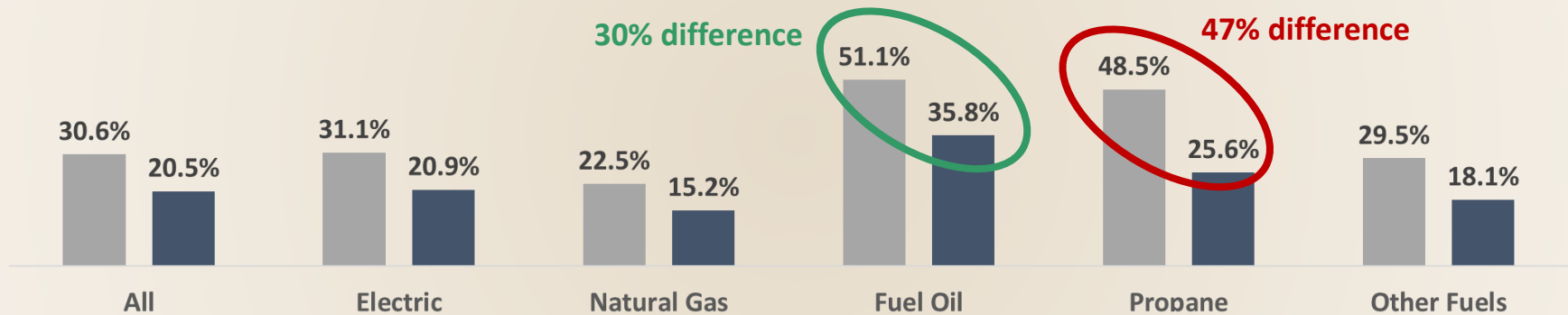
IDAHO State Snapshot

Fig 2.6: Percentage of Bill Paid

Comparing Average Households to High Burden Households

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

■ Average Households ■ High Burden 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.

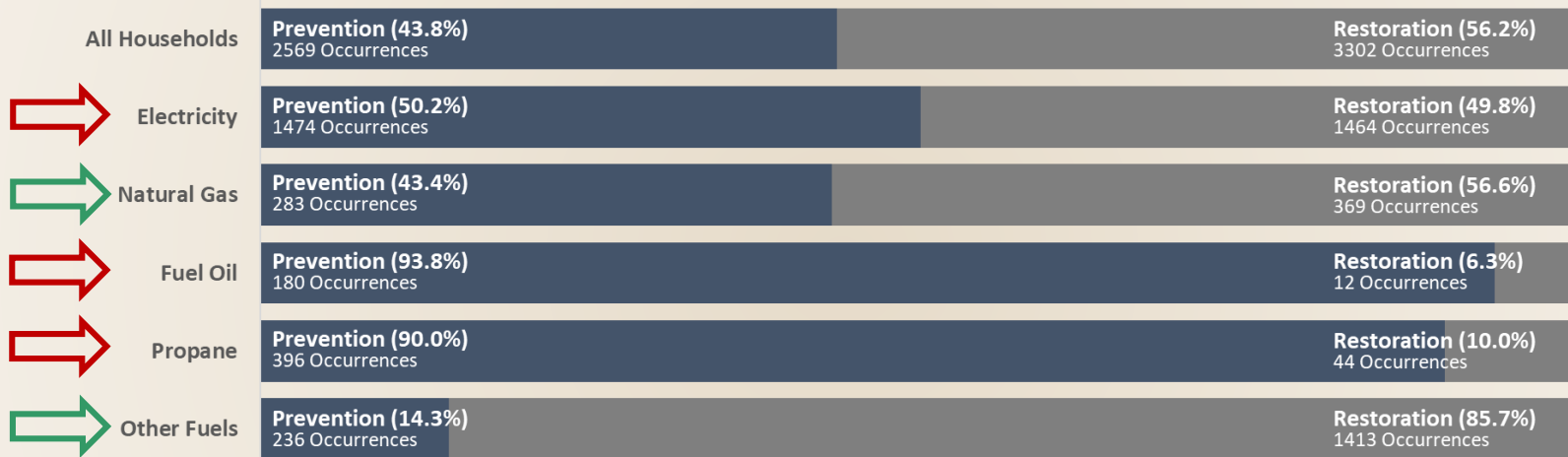
Understanding LIHEAP Performance Measures

IDAHO State Snapshot

Fig 5.1: Prevention and Restoration of Home Energy Service Loss

As a Result of BILL PAYMENT ASSISTANCE

LIHEAP Perf Data Form, Parts VI and VII, Section A, Lines 1-2



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

Key Findings

In FY 2016, high burden households in Idaho paid **3.7 times** as much of their income toward energy costs as average households. However, high burden households only received an **11% higher** LIHEAP benefit than average households.

High burden and average **fuel oil** households received **equal** benefits in FY 2016. High burden **“other fuels”** households received a **lower** benefit than average “other fuels” households.

Possible Next Questions

- How is our current matrix designed to target higher benefits to higher burden households? Is our matrix yielding expected results? If not, why?
- Does our current benefit matrix accurately reflect income and energy cost differences among deliverable fuel households?
- Are there specific benefit determination or payment processes related to deliverable fuels that impact the way our matrix works?

Understanding LIHEAP Performance Measures

IDAHO State Snapshot—Summary of Key Findings

Key Findings	Possible Next Questions
<p>For all households (both average and high burden), the percentage of bill paid with LIHEAP varies considerably between fuel types.</p>	<ul style="list-style-type: none">• 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?
<p>Compared to average households, high burden households <i>across all fuel types</i> have a lesser share of their energy bill paid with LIHEAP. The extent of this difference varies by fuel type.</p>	<ul style="list-style-type: none">• 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?
<p>In FY 2016, bill payment assistance used to pay natural gas and “other fuel” benefits resulted in more occurrences of restoration (relative to prevention).</p>	<ul style="list-style-type: none">• 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?

**Part II - Using the LIHEAP Performance
Management State Snapshot:
*Missouri FY 2017 Performance Measure Data***



ADMINISTRATION FOR
CHILDREN & FAMILIES

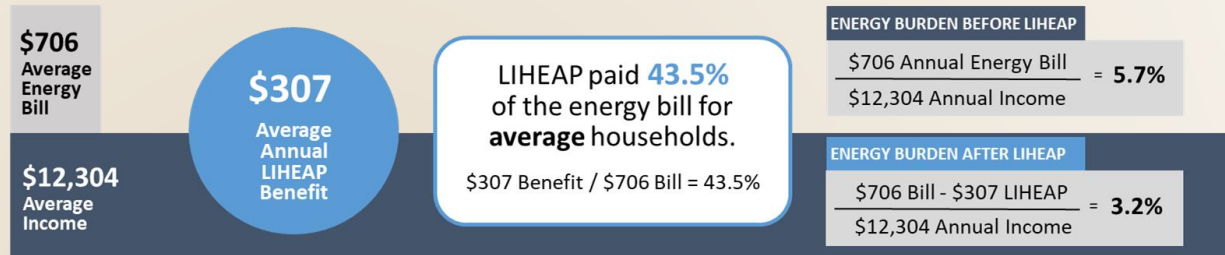
Understanding LIHEAP Performance Measures

Missouri State Snapshot (Executive Summary—Energy Burden Measures)

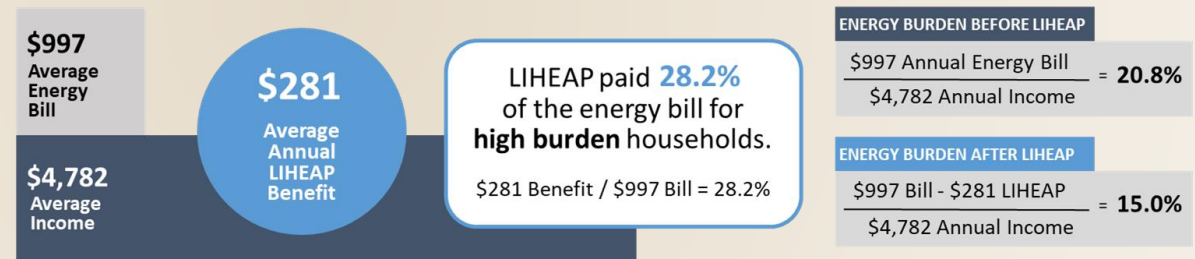
Does LIHEAP furnish higher benefits to higher burden households?

No. In Missouri, the total LIHEAP benefit received by high burden households in FY 2017 was about **\$26 (8.4%) less** than the total LIHEAP benefit received by the average recipient household.

All Households



High Burden Households



Does LIHEAP pay a larger share of the home energy bill for high burden households?

No. In FY 2017, LIHEAP paid **45.3%** of the energy bill for average households in Missouri, while LIHEAP paid **28.2%** of the energy bill for high burden households.

Understanding LIHEAP Performance Measures

MISSOURI State Snapshot (Executive Summary—Prevention and Restoration Measures)

Prevention and Restoration of Home Energy Service Loss

As a Result of Bill Payment Assistance



As a Result of Equipment Repair or Replacement



Prevention of Home Energy Loss

- In FY 2017, LIHEAP benefits in Missouri **prevented the loss of service 85,294 times**, by stopping threatened utility service disconnections and by delivering fuels to homes that were at risk of running out.
- The program also **repaired or replaced heating or cooling equipment at imminent risk of failure for 65 households**.

Restoration of Home Energy Service

In FY 2017, LIHEAP benefits **restored home energy service 15,794 times** for households who had been disconnected by their utility provider or who had run out of fuel oil, propane, or wood. The program also **restored home energy service for 90 households by repairing or replacing inoperable heating or cooling equipment**.

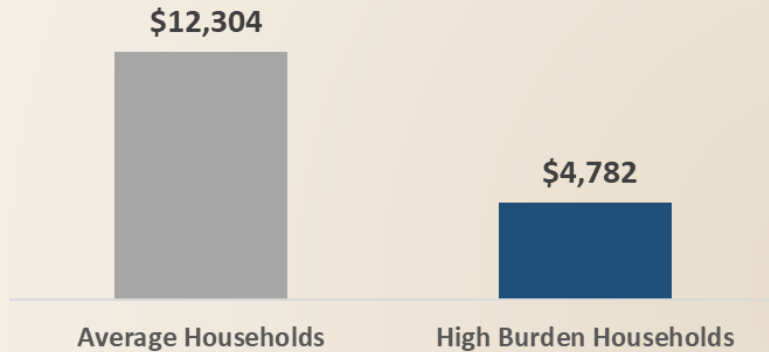
Understanding LIHEAP Performance Measures

MISSOURI State Snapshot

Fig 1.1: Average Annual Income

Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 2



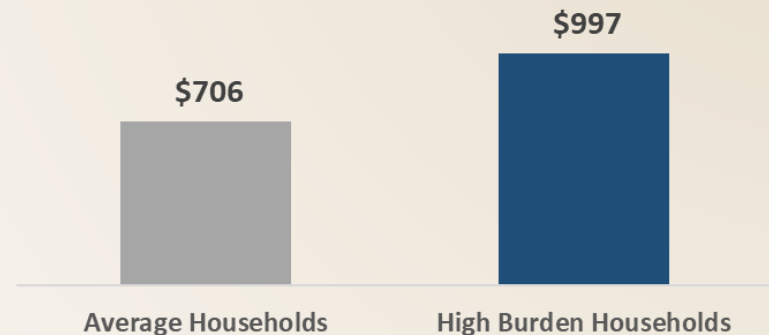
Annual Income

High burden households have an average annual income that is **\$7,522 or 61% less** than average households.

Fig 1.2: Average Annual Total Residential Energy Bill

Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 6



Annual Energy Bill

High burden households have an average energy bill that is **\$291 or 41% greater** than average households.

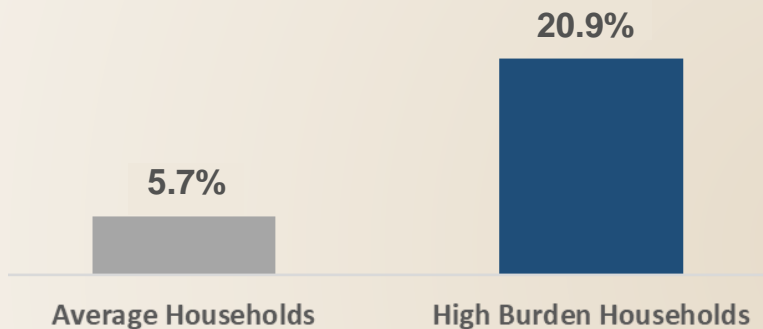
Understanding LIHEAP Performance Measures

MISSOURI State Snapshot

Fig 1.4: Average Energy Burden Before LIHEAP

Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 7



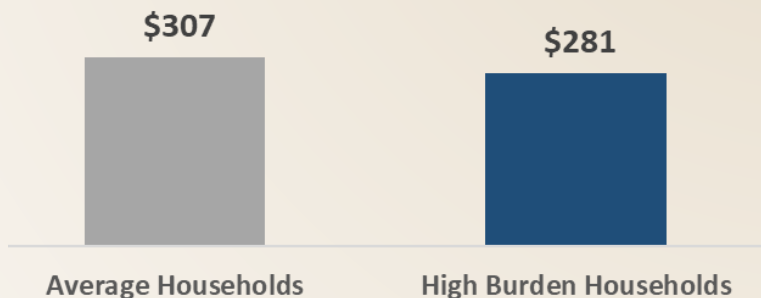
Energy Burden before LIHEAP

Before LIHEAP, high burden households are paying **3.6 times** as much of their income toward energy costs than average households.

Fig 1.3: Average Annual Total LIHEAP Benefit

Comparing Average Households to High Burden Households

LIHEAP Perf Data Form, Part V, Sections B and C, Line 3



Annual LIHEAP Benefit

High burden households receive an average annual LIHEAP benefit that is **\$26 or 8.3% less** than average households.

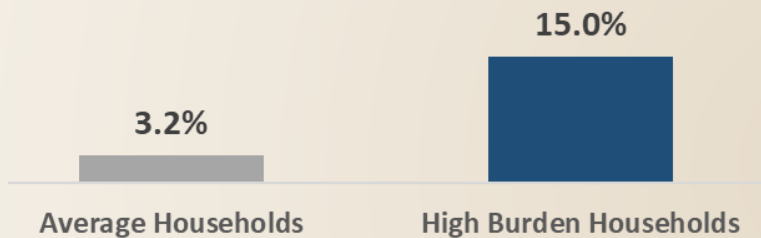
Understanding LIHEAP Performance Measures

MISSOURI 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



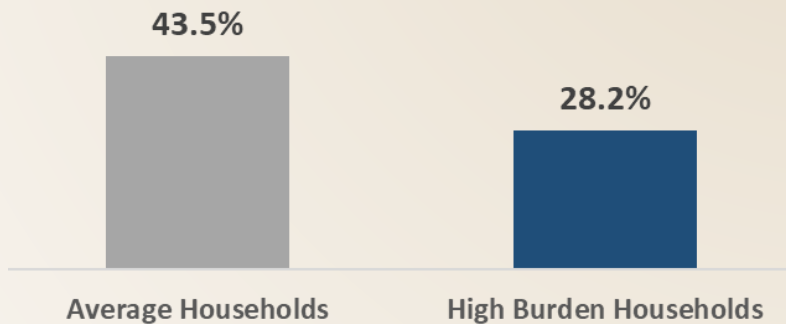
Energy Burden after LIHEAP

After LIHEAP, high burden households are paying **4.6 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



Percentage of Bill Paid

On average, high burden households have **35% less** of their energy bill paid with LIHEAP than average households.

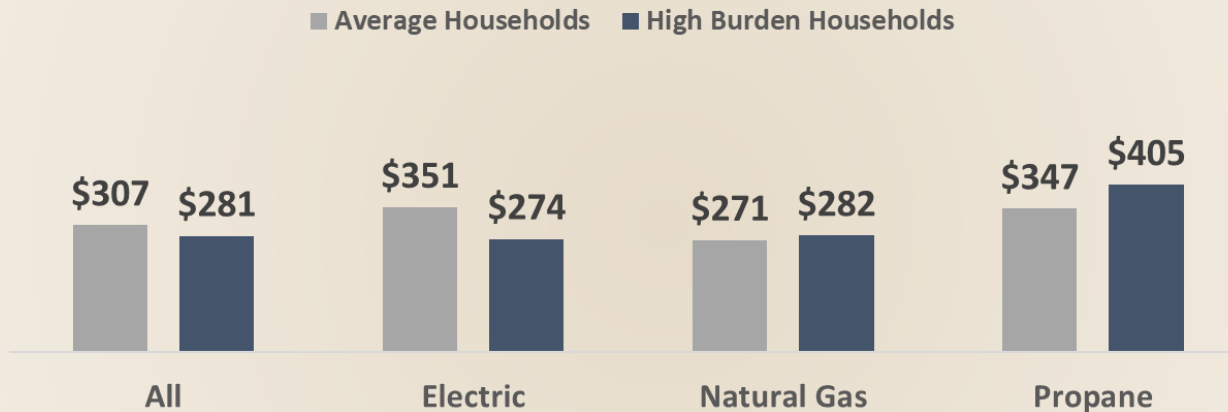
Understanding LIHEAP Performance Measures

MISSOURI State Snapshot

Fig 5.1: Average Annual Total LIHEAP Benefit

Comparing Average Households to High Burden Households by Fuel Type

LIHEAP Perf Data Form, Part V, Sections B and C, Line 3



Does LIHEAP furnish higher benefits to higher burden households across all fuel types?

No. In FY 2017, high burden natural gas households received **\$11 (4%) greater** benefits than average natural gas households. Similarly, high burden propane households received **\$58 (17%) greater** benefits than average propane households. However, electric high burden households received **\$71 (22%) less** than average electric households.

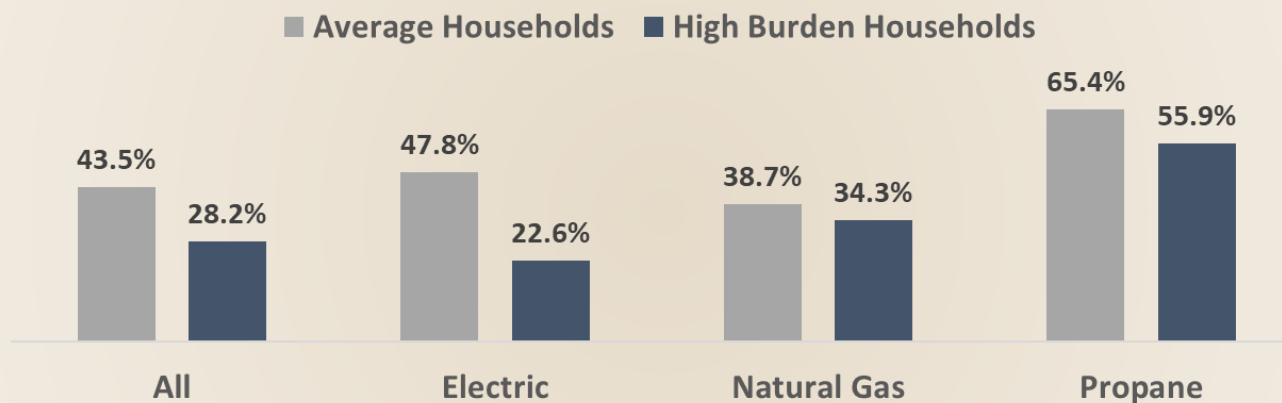
Understanding LIHEAP Performance Measures

MISSOURI State Snapshot

Fig 2.6: Percentage of Energy Bill Paid by LIHEAP

Comparing Average Households to High Burden Households by Fuel Type

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



Does LIHEAP pay more of the energy bill for high burden households across all fuel types?

No. In FY 2017, high burden households in Missouri 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. For example, there is a 52% difference in the share of bill paid between **electric** high burden and average households. However, this difference is only 11% between **natural gas** high burden and average households.

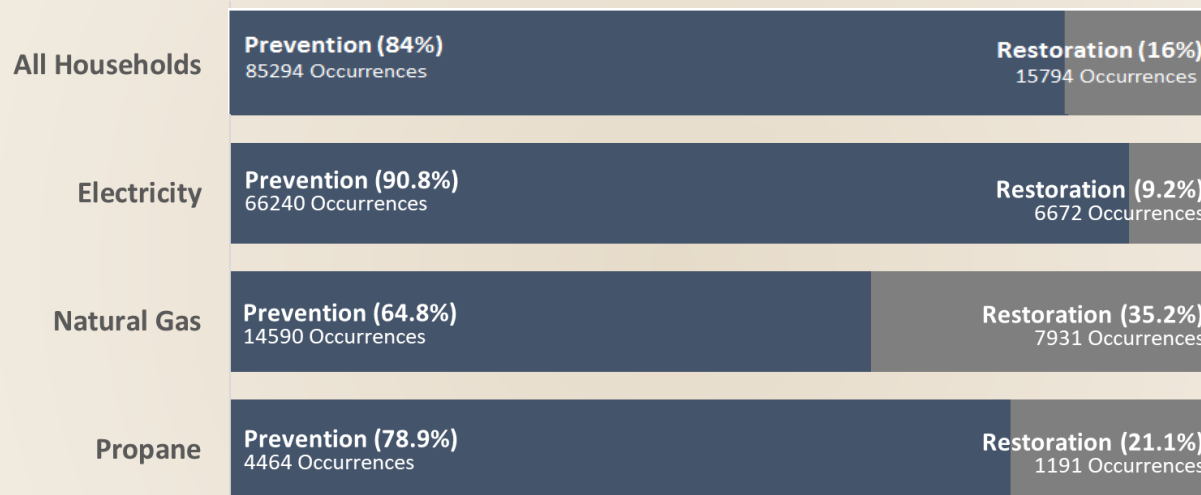
Understanding LIHEAP Performance Measures

MISSOURI State Snapshot

Fig 5.1: Prevention and Restoration of Home Energy Service Loss

As a Result of BILL PAYMENT ASSISTANCE

LIHEAP Perf Data Form, Parts VI and VII, Section A, Lines 1-2



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 2017, Missouri LIHEAP bill payment assistance resulted in higher rates of prevention (relative to restoration) ***across all fuel types***. However, the data shows a higher proportion of restoration (relative to prevention) for **natural gas** payments compared to electric and propane.

Part III - LIHEAP Performance Management Grantee Resources



ADMINISTRATION FOR
CHILDREN & FAMILIES

Understanding LIHEAP Performance Measures

The Performance Management Communications Guide

- Members of the PMIWG have been working on a ***LIHEAP Performance Management Communications Guide*** for grantees. The purpose of this resource is to help grantees interpret and share LIHEAP performance management data with various partners and stakeholders.
- The ***LIHEAP Performance Management Communications Guide*** contains the following items:
 - ✓ The *LIHEAP Performance Management State Snapshot* (incl. Executive Summary)
 - ✓ An example letter to home energy vendors
 - ✓ An example letter to subgrantees
 - ✓ An example letter to legislators/leaders
 - ✓ A slide deck for training/presentations
- The ***LIHEAP Performance Management Communications Guide*** will be available to grantees on the Performance Management tab of the LIHEAP Performance Management website [link here].

Understanding LIHEAP Performance Measures

LIHEAP Performance Management Resources for Grantees

- **LIHEAP Performance Management Website/Data Warehouse**

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

Over the past year, APPRISE and the PMIWG have been working on placing grantee Performance Measure data into the LIHEAP Performance Management Website. Many of the tables in the snapshot will also soon be accessible online through the Data Warehouse.

- **Upcoming Training**

During the upcoming national training conference in May, APPRISE will be building upon this webinar (and previous training) in an effort to assist grantees with understanding and using data for Performance Management. This includes utilizing new reports from the LIHEAP data warehouse (Performance Management website).

- **Technical Assistance**

While today's webinar focused on understanding your data—there are some grantees who are still working on collecting data and reporting LIHEAP Performance Measures. Grantees are encouraged to visit the Performance Management website and the LIHEAP Virtual Library (<https://liheappm.acf.hhs.gov/>) to access resources, or contact APPRISE for one-on-one assistance.

Understanding LIHEAP Performance Measures

LIHEAP Performance Management Resources for Grantees

For more information, please contact:

Melissa Torgerson

Melissa@verevassociates.net

503-706-2647

Kevin McGrath

Kevin-McGrath@appraiseinc.org

609-252-2081

Dan Bausch

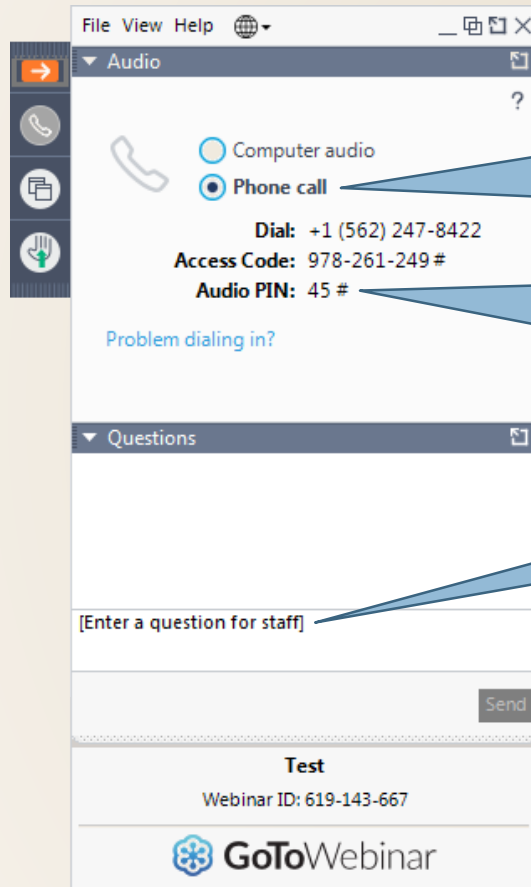
Daniel-Bausch@appraiseinc.org

609-252-9050

Grantee Questions

Questions?

GoToWebinar – Asking a Question



Click Here to choose how you listen to the webinar:

- Computer Audio
- Phone Call

Make sure you enter your audio pin if you would like to ask a question over the phone.

Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.

Click this button to raise your hand.



If you wish to call in and ask a question, you **MUST** call in by phone rather than connect your audio through your computer