



Understanding LIHEAP Performance Measurement Policy

NEUAC 2018

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Spire Energy

Understanding LIHEAP Performance Measurement Policy

Session Overview

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- **LIHEAP Performance Measures Background**
 - ∅ The importance of LIHEAP Performance Measurement
 - ∅ LIHEAP Performance Measure development and implementation
 - ∅ Data access and transparency
- **LIHEAP Performance Measures: Nuts and Bolts**
 - ∅ Overview of measures (including a walkthrough of state example)
 - ∅ Data resources for grantees, subgrantees, vendors, and LIHEAP partners
- **The Missouri State Experience**
 - ∅ Data collection and reporting
 - ∅ Sharing data with partners—lessons learned
- **The Missouri Utility Experience**
 - ∅ Data collection
 - ∅ Using data for collaboration, program improvement

Presenter:
David Carroll

Understanding LIHEAP Performance Measurement Policy
LIHEAP Performance Measures: Background

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LIHEAP Performance Measures: *Background*

Holly Ravesloot
HHS, Office of Community Services

Presenter:
Holly Ravesloot

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Importance of Performance Measures to LIHEAP Program

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LIHEAP Performance Measures were developed in response to:

- *Section 2605(b) of the Low Income Home Energy Assistance Act of 1981 (42 U.S.C. §8624(b)) as amended by Sec. 311(b) of the Human Services Amendments of 1994 (Public Law 103-252) requiring HHS to develop, in consultation with LIHEAP grantees, model performance goals that measure the success of each State's LIHEAP activities.*
- *Section 2610(b)(2) of the Low Income Home Energy Assistance Act of 1981 (42 U.S.C. §8629(b)(2)) requiring that HHS annually report to Congress on the impact LIHEAP is making on recipient and income eligible households.*
- *Section 2605(b)(5) of the Low Income Home Energy Assistance Act of 1981 (42 U.S. C. §8624(b)(5)) requiring LIHEAP grantees to 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.*

Presenter:
Holly Ravesloot

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OCS and LIHEAP Grantee Partnership

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- 2008-10:** Performance Management Work Group (PMWG) develops Performance Measurement Recommendations.
- 2010-12:** Performance Management Implementation Work Group (PMIWG) transforms PMWG recommendations into concrete Performance Measures.
- 2012-14:** OCS and APPRISE work with grantees to develop the Performance Measurement Website.
- 2014-16:** OMB approves PMIWG recommendations, making new Performance Measures required reporting beginning in FY 2016. PMIWG members work with OCS and APPRISE Team to develop guidance and support for grantees as they update systems to collect and report new data.
- 2016-18:** PMIWG members work with OCS and APPRISE Team to develop guidance and support for grantees as they analyze and use their data.

Presenter:
Holly Raveslout

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OCS and LIHEAP Grantee Partnership

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Performance Management Implementation Work Group

Current Members

Charles Anderson	Connecticut
Laura Betzinger	Indiana
Jane Blank	Wisconsin
Debra Brown	California
Andrew Bryk	New York
Cecil Daniels	Washington
Lisa Goben	Oregon
Heather Jones	Missouri
Susan Marshall	Alaska
Lorraine Portis	Mississippi
Paula Reynolds	Maryland
Michael Schmitz	Minnesota
Sheri Shepard	Montana
Jenni Sullivan	Montana

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Access to and Transparency of LIHEAP Performance Data

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Summer 2013	Performance Management Website Published for Grantees
Fall 2014	OMB Approval of LIHEAP Performance Measures
Summer 2015	PMIWG Launches LIHEAP Virtual Library and Data Warehouse Advanced Search Initiatives
Winter 2016	Publication of LIHEAP Virtual Library and Data Warehouse Advanced Search Capabilities
Spring 2016	Regional Training on Performance Management Techniques
Summer 2016	NEUAC Presentation on FY 2015 Performance Measures Reports
Winter 2017	Performance Management Website Goes Public
Spring 2017-18	T&TA Related to Using LIHEAP Performance Management Data Reported by Grantees
FY 2018	Addition of Performance Measure Data to Performance Management Website

Presenter:
Holly Ravesloot

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LIHEAP Performance Data: Nuts and Bolts

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LIHEAP Performance Data: *Nuts and Bolts*

Melissa Torgerson
VERVE Associates LLC

Presenter:
Melissa Torgerson

Understanding LIHEAP Performance Measurement Policy Available “Suite” of Performance Management Data

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For many years, LIHEAP Grantees have had a suite of data and information available to inform program evaluation and planning.

Required LIHEAP Reports

- LIHEAP Model Plan
- LIHEAP Household Report
- LIHEAP Performance Data Form - Section I. Grantee Survey

Other Data Sources

- LIHEAP Home Energy Notebook
- American Community Survey (Census)
- Residential Energy Consumption Survey (RECS)

New Performance Measure data provides LIHEAP grantees with important additions to their collection of Performance Management tools.

Presenter:
Melissa Torgerson

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Energy Burden Measures

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Energy Burden Measures

- What is the average energy burden of LIHEAP households, and how does LIHEAP lower that burden?
- **[Benefit Targeting Index]** Does LIHEAP furnish higher benefits to higher burden households?
- **[Burden Reduction Targeting Index]** Does LIHEAP pay a larger share of the home energy bill for 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.”

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Energy Burden Measures

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What is the average energy burden of LIHEAP households, and how does LIHEAP lower that burden?

Energy Burden Data

- Average annual income by household fuel type
- Average annual main heating fuel costs by household fuel type
- Average annual electric costs by household fuel type
- Average annual LIHEAP benefit by household fuel type

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

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



\$1,164
Average
Energy
Bill

\$356
Average
Annual
LIHEAP
Benefit

LIHEAP paid **30.6%**
of the energy bill for
average households.

$$\text{\$356 Benefit} / \text{\$1,164 Bill} = 30.6\%$$

\$12,351
Average
Income

ENERGY BURDEN BEFORE LIHEAP

$$\frac{\text{\$1,164 Annual Energy Bill}}{\text{\$12,351 Annual Income}} = \mathbf{9.4\%}$$

ENERGY BURDEN AFTER LIHEAP

$$\frac{\text{\$1,164 Bill} - \text{\$356 LIHEAP}}{\text{\$12,351 Annual Income}} = \mathbf{6.5\%}$$

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Energy Burden Measures

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Does LIHEAP furnish higher benefits to higher burden households?

All Households



High Burden Households



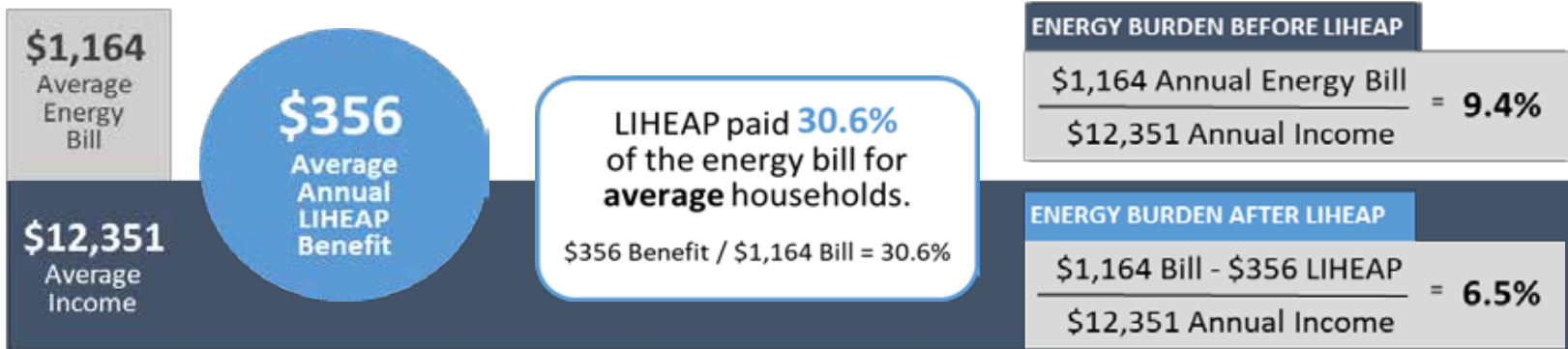
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Energy Burden Measures

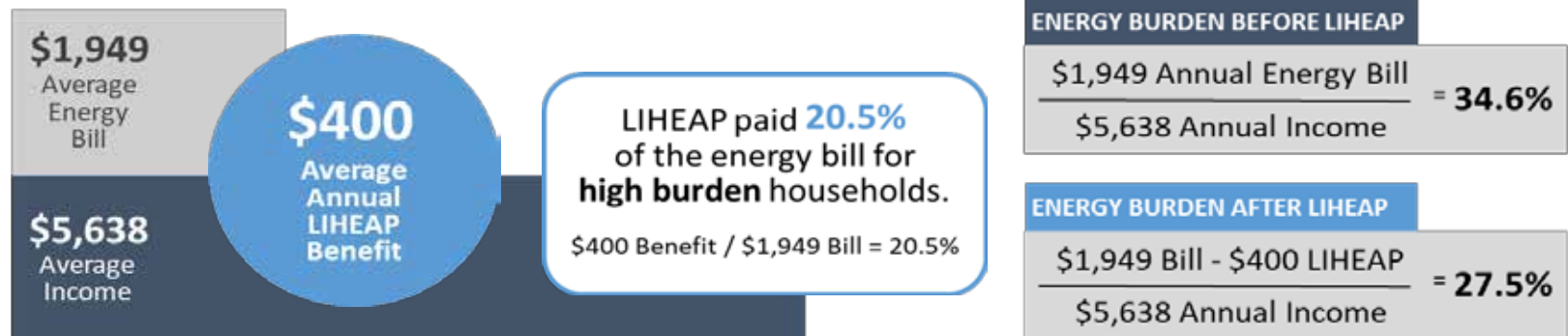
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Does LIHEAP pay a larger share of the home energy bill for high burden households?

All Households



High Burden Households



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Prevention and Restoration Measures

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Restoration and Prevention Measures

- How many times did a LIHEAP benefit prevent loss of home energy service for households at imminent risk?
- How many times did a LIHEAP benefit restore home energy service for households who were disconnected, out of fuel, or who had inoperable equipment?

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.

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Prevention and Restoration Measures

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How many times did a LIHEAP benefit prevent loss of home energy service for households at imminent risk?

- *“Imminent Risk” = pending disconnection, nearly out of fuel, or equipment deemed at risk of failure*

Bill Payment Assistance

Prevention
2569 Occurrences

Energy Equipment Repair/Replacement

Prevention
2 Occurrences

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Prevention and Restoration Measures

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How many times did a LIHEAP benefit restore home energy service?

- *Already disconnected, out of fuel, or inoperable equipment*

Bill Payment Assistance

Prevention (44%)
2569 Occurrences

Restoration (56%)
3302 Occurrences

Energy Equipment Repair/Replacement

Prevention (5%)
2 Occurrences

Restoration (95%)
35 Occurrences

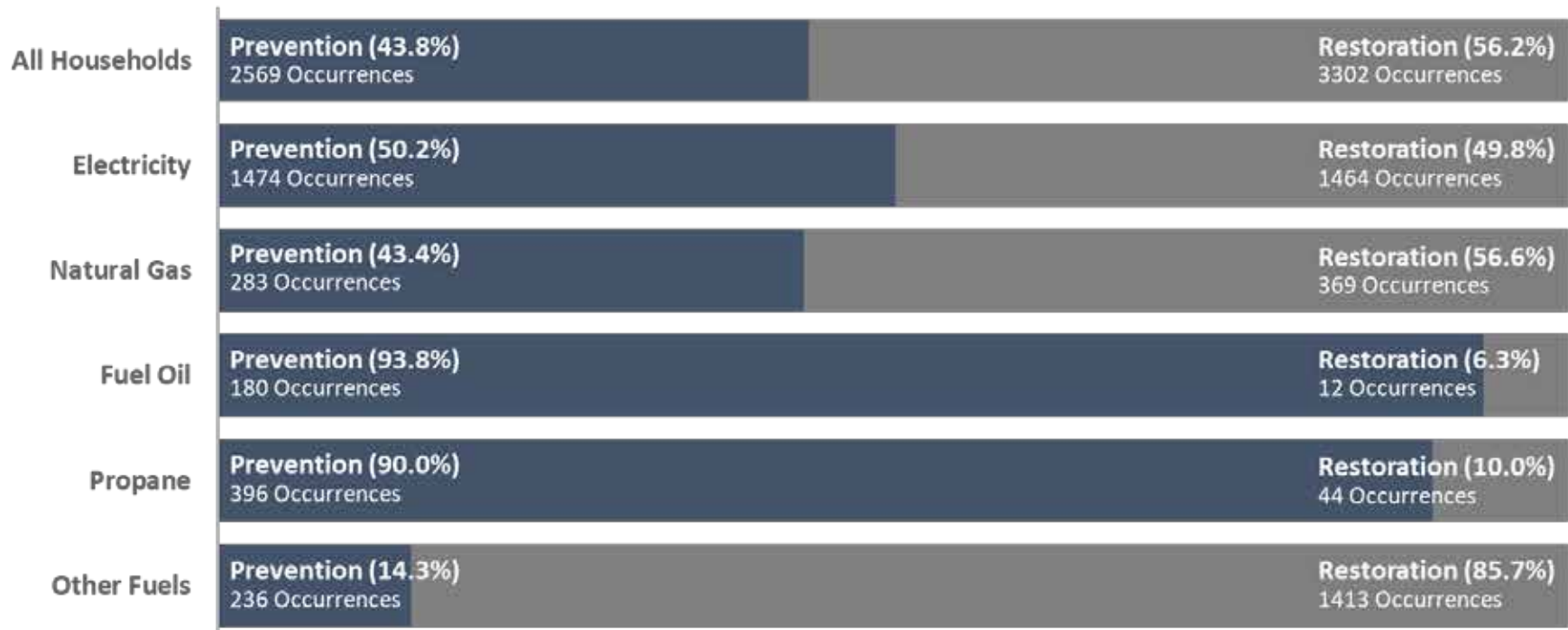
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Prevention and Restoration Measures

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Prevention and Restoration of Home Energy Service Loss

As a Result of *Bill Payment Assistance*



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Summary of “New” Performance Measure Data

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- **Household characteristics to inform program planning**
 - ü Average annual income by household fuel type
 - ü Average annual energy costs by household fuel type
 - ü Average annual LIHEAP benefit by household fuel type
- **Indicators to evaluate impact of LIHEAP on households**
 - ü Average pre-LIHEAP Energy Burden by fuel type
 - ü Average post-LIHEAP Energy Burden by fuel type
 - ü Average energy burden reduction as a result of LIHEAP by fuel type
 - ü Instances of Home Energy Loss Prevention v. Restoration of Home Energy Service
- **Targeting Indices to evaluate effectiveness of program (compliance with statute)**
 - ü Benefit Targeting Index
 - ü Burden Reduction Targeting Index

Presenter:
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Performance Management Collaboration

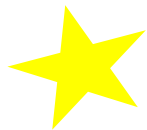
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- **NEUAC Session 6C**

“How Performance Management can Improve LIHEAP.”

- **LIHEAP Performance Management Website**

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



Kiosk at 2018 NEUAC conference!

- Ø Guided search and ad hoc reporting tools
- Ø LIHEAP Performance Management resources

Presenter:
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Contact Information

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LIHEAP Performance Measures: *The Missouri Experience*

Heather Jones

LIHEAP Program Manager
Missouri Department of Social Services

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Missouri LIHEAP Program Performance Management Background

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Missouri LIHEAP Data Collection

- Missouri Low Income Home Energy Assistance Program (LIHEAP) has two components:
 - ∅ Energy Assistance (EA)
 - ∅ Energy Crisis Intervention Program (ECIP)
- Missouri has a central data system used for Energy Assistance (EA) that determines eligibility for all LIHEAP applications.
- A Management Information System (MIS) is used at the subgrantee level to process crisis payments (ECIP).

Presenter:
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Missouri LIHEAP Program Performance Management Background

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Missouri LIHEAP Data Reporting

- In addition to meeting federal reporting requirements, EA and ECIP system reports are used to manage and improve program performance.
- Since 2009, the state of Missouri has shared the following program (EA and ECIP) statistics during manager and utility meetings:
 - ∅ Number of households served
 - ∅ LIHEAP recipient income (percentage of poverty)
 - ∅ Number of households with one or more vulnerable members
 - ∅ Average LIHEAP benefit by fuel type

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Missouri LIHEAP Program Performance Management Background

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Energy Cost Data (for new Performance Measures)

- The State of Missouri has been collecting usage and consumption data for over 20 years *for the fuel type where the household benefit is applied (main heating fuel).*
 - ◊ *Missouri's LIHEAP application included the collection of electric vendor and account information (when electricity was not the main heating source)--however it was not a mandatory field in the LIHEAP system.*
- Missouri reported performance measures for FFY 2016. However, these measures did not include “secondary” electric data.

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Performance Measure Data Sharing: Concerns

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Concerns:

- Data was not fully validated.
- Data did not include “secondary” electric in the total residential energy cost (in cases where electric was not the main fuel source).

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Heather Jones

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Performance Measure Data Sharing: Rationale

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Reasons to Share Data Anyway:

- Needed assistance from local subgrantees and vendors to gather “secondary” electric data.
- Energy vendors and subgrantees worked hard to gather data for Performance Measures—so it is appropriate to share how their data is used in state reports.
- Sharing data increases transparency, builds trust, and fosters collaboration.

Presenter:
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Missouri Experience in Sharing Performance Measure Data

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- **LIHEAP Manager Meeting with subgrantees (local agencies)**
August 16, 2017
- **Energy Supplier/Vendor Webinar**
August 30, 2017

Ø **LESSONS LEARNED**

- **Kansas City Metro Meeting**
September 9, 2017
- **LIHEAP Manager Meeting with Subgrantees**
June 12, 2018

Presenter:
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Missouri Conclusion

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What We've Learned:

- Share data with LIHEAP stakeholders and work together to gain understanding of data (and what it is telling you).
- Assist partners in understanding why performance management data is important.
- Start discussion (and thinking) about how to use performance data for LIHEAP process improvement.

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The Missouri Experience

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Connie Sánchez

Community Services Department

June 26, 2018



Agenda

- Introduction
- State/Agency/Vendor Communication
- Types of LIHEAP Performance Data Utilized in MO to Improve LIHEAP Agency Performance
- Types of LIHEAP Performance Data Utilized by Spire to Improve LIHEAP Outreach & Education
- Spire Outreach Review Results
- Questions & Feedback



Introduction

- MSW
- Worked 15 years in the non-profit sector
 - 9 years in Community Development
 - 6 years as the LIHEAP Director for St. Louis City
 - high-volume, urban area
- Started at Spire in August 2017
 - Natural gas company serving 1.7 million customers in MO, AL and MS



State/Agency/Vendor Communication

- State
 - Metro Meetings
 - Webinars
 - FSD Staff/Email

- Spire
 - Intern Program
 - Staff Support
 - Website Training
 - Agency Meetings/Presentations
 - Agency Appreciation Luncheon



Types of LIHEAP Performance Data Utilized in MO to Improve LIHEAP Performance

- Registered vs. Pending Applications
 - Utilized by State/Agency to Monitor Processing
 - Tool to Safeguard Agency
- Weekly Comparative Analysis
 - Trend Data (are applications up/down from the previous year)
- EA Assisted Households/ECIP Assisted Households
 - Trend Data (are EA/ECIP benefits up/down from the previous year)
 - Budget Monitoring
- Average Monthly Income/Usage Data/Average EA Benefit Amount
 - Trend Data
 - Are current income guidelines still relevant?
 - Are guidelines meeting the needs of the low-income?
 - Are guidelines excluding any low-income populations?
 - Analyzing Energy Burden
 - Are LIHEAP benefits addressing the energy burden for low-income households?
 - Do current EA benefit amounts need to be increased?



Types of LIHEAP Performance Data Utilized in MO to Improve LIHEAP Performance

- Fuel Types Used/Total EA Payments
 - Use data to start discussion with vendors to support LIHEAP.
 - Staffing for LIHEAP Outreach/Education
 - Utilize Vendor Communications Staff to Create Marketing Fliers/Templates
 - In-Kind Donations
 - Copies
 - Supplies
 - Postage
- Percentage of Food Stamp Recipients
 - Use data to simplify income qualifying applicants and contract with other state departments (70-75% in MO)
- Number of Vulnerable Households Served (60+, Disabled, Young Children)
 - Is outreach effectively reaching vulnerable households?



Types of LIHEAP Performance Data Utilized by Spire to Improve LIHEAP Outreach & Education

- Spire tracks EA eligible recipients on a weekly basis throughout the winter (December – May) to monitor for disconnection notices.
 - Information forwarded to CAA
 - Winter ECIP
 - Spire Energy Assistance
- Spire tracks EA denials for accounts that were inactive and now active.
 - Information forwarded to CAA
- State Report – LIHEAP Applications by Zip Code
 - Identify areas of need for LIHEAP outreach and education.



Spire Outreach Review Results

- Applicants
 - fixed-income (social security/SSI)
 - health issues (reduced wages/unable to work; medical bills)
 - unforeseen tragedy
 - experienced a sudden/unexpected change in income status
- Breaking Through Obstacles
 - acquaint communities with LIHEAP and utilizing LIHEAP to leverage funds
 - transportation to CAA
 - unable to read/write
 - access to an application
 - stress
- Debunking Misconceptions About LIHEAP
 - LIHEAP only helps if you're in threat of disconnection.
 - LIHEAP only helps with electric bills.
 - I make too much money.
 - I would qualify, but my bills are current so I don't need help.



Questions & Feedback

Connie Sanchez

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