



LIHEAP Performance Measures – What Tribal Program Managers Need to Know

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LIHEAP Performance Measurement Tribal Reporting Requirements

There are no plans to require Tribal Grantees to report on LIHEAP Performance Measures!!!

LIHEAP Performance Measurement Information System: *Background*

Potential Uses of LIHEAP Funds by State Grantees

- **Heating Assistance** – *Direct assistance with home heating bills.*
- **Cooling Assistance** – *Direct assistance with home cooling bills.*
- **Crisis Assistance** – *Emergency assistance with home energy bills.*
- **Equipment** – *Repair or replacement heating or cooling equipment.*
- **Assurance 16** – *Delivery of services to foster energy self-sufficiency.*
- **Weatherization** – *Delivery of energy efficiency to households.*
- **Nominal Benefits** – *Special purpose benefit.*

Performance Reports Filed by State Grantees:

- **Household Report** – *Documents the number of households served with each type of program, including the number of vulnerable households and the number of households by poverty level. Furnishes an unduplicated count of households served by bill assistance and weatherization programs.*
- **Performance Data Form / Module I** – *Documents the sources and uses of funds, as well as the average benefits for each type of assistance.*

Performance Reports Filed by State Grantees:

- **Performance Data Form / Module II** – *Reports average income, expenditures, and benefits by main heating fuel for average households and high burden households. Calculates the energy burden targeting indexes. Reports the number of households where energy services were restored and the number where service loss was prevented.*
- **MAJOR CHALLENGES** – *Integrating records from multiple programs to develop statistics for an unduplicated count. Collecting data from energy vendors. Working with subgrantees to get good data on prevention and restoration.*

Evolution of State LIHEAP Information Technology:

- **Phase I / Centralized Processing Option** – *All information sent to state data center for processing and payment.*
- **Phase I / Decentralized Processing Option** – *All information processed at local agency with summary reports sent to state office.*
- *Note: A few states are still using the “Decentralized Processing Option.” A few states still have **some** of their program components using that option.*

Evolution of State LIHEAP Information Technology:

- **Phase II / State and Agency Network** – *As on-line capabilities became available, states implemented systems where local agencies had have direct access to state database. This was accelerated by the introduction of requirements for an **unduplicated count** of recipients.*
- **Phase III / Integration with Energy Vendors** – *Some grantees decided to use **actual** energy bills to set benefits. They developed systems that automated information exchange with energy vendors of all types. This was accelerated by the introduction of requirements for **LIHEAP performance measures**.*

LIHEAP Performance Measurement Information: *Purposes*

LIHEAP Performance Measures: Tribal Program Managers

LIHEAP Performance Measurement System: Purposes

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Improved Benefit Assignment Procedures:

- **Bills Credits / Payment Problems** – *Some households end the year with bill credits while others still have serious payment problems. The new performance data helps grantees address those problems.*
- **Statutory Requirements** – *Grantees are required to give the highest benefits to those households with the greatest needs. The new performance data helps grantees to ensure that they are meeting this statutory requirement.*

Presenter:
David Carroll

LIHEAP Performance Measures: Tribal Program Managers

LIHEAP Performance Measurement System: Purposes

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Improved Weatherization Targeting:

- **High Usage = High Savings** – *Research demonstrates that targeting weatherization to high usage households furnishes the best value per dollar in terms of both energy savings and non-energy benefits.*
- **High Savings = Energy Sustainability** – *Better targeting can yield energy savings of 25% or more and contribute to long-term energy solutions for low-income households.*

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LIHEAP Performance Measures: Tribal Program Managers

LIHEAP Performance Measurement System: Purposes

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Improved Energy Case Management:

- **Better Benefit Targeting** – *When bill payment problems are caused by high energy burden, start by giving the client an adequate benefit, and then counsel the client on how to pay their energy bill.*
- **High Usage Households** – *When bill payment problems are caused by high usage, start by working toward reducing an usage, and then counsel the client on how to pay the new “affordable” bills.*

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LIHEAP Performance Measurement Information: *So What?*

LIHEAP Performance Measures: Tribal Program Managers

LIHEAP Performance Measurement System: So What?

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Ideas:

- **State Information Technology** – *States have invested a lot in improving their information technology. Is there are way for them to make those resources accessible to you? Would that have value for your program?*
- **Vendor Information Exchange** – *States and energy vendors have invested a lot in developing information exchanges. Is there are way for them to make those resources accessible to you? Would have value for your program.*

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LIHEAP Performance Measures: Tribal Program Managers

LIHEAP Performance Measurement System: So What?

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Ideas:

- **Benefit Determination Procedures** – *States are working to improve their benefit determination procedures. Are you interested in learning how that changes the effectiveness of their programs?*
- **Weatherization Targeting** – *States are working to improve their weatherization targeting. Are those of you who operate weatherization programs interested in learning how that changes the effectiveness of their programs.*

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How Performance Management Can Improve LIHEAP

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Questions / Discussions

LIHEAP Performance Measurement Information: Wyoming Experience

Sitting Down and Working Together:

- **State / Tribal Agreement** – *Updated state-tribal agreement to find ways to make it work better for both parties.*
- **Client Service Issues** – *Working together to ensure that all income-eligible households have access to benefits.*
- **Next Steps** – *Working together on energy vendor issues, information technology issues, and other ways to improve programs.*

How Performance Management Can Improve LIHEAP

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Questions / Discussions

Understanding LIHEAP Performance Measures

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