LIHEAP Performance Data Case Study

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

May 3, 2018

Moderator:
Peter Edelman (OCS Staff)

Presenters:
Laura Betzinger (Indiana)
Melissa Torgerson (Verve Associates)

ADMINISTRATION FOR
CHILDREN & FAMILIES

Introduction & Welcome

- Welcome & Overview

  - Peter Edelman, OCS

- Presentation Speakers

  - Laura Betzinger, Indiana Housing and Community Development Authority
  - Melissa Torgerson, Principal, Verve Associates

- Facilitators

  - Grantees and OCS Staff

Presenter(s):
Peter Edelman

OCS Objectives for Session

- Importance of Performance Measures to LIHEAP Program

- Access to and Transparency of LIHEAP Performance Statistics

- Understanding that all Grantee Reports are part of the LIHEAP Performance Management System

Presenter(s):
Peter Edelman

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Session Overview

- Introduction to the PMIWG Data Case Study Team
  - Laura Betzinger, Indiana Community Programs Manager

- Presentation of the Case Study Example for Indiana
  - Melissa Torgerson, Verve Associates

- Hands-On Session with Facilitators (30 minutes)

- Report From Each Team to OCS

Presenter(s):
Peter Edelman

PMIWG Data Case Study Team

- The PMIWG is working with APPRISE and OCS to make LIHEAP Performance Measures both accessible and meaningful to grantees.

- The Data Case Study Team includes LIHEAP Data Experts and LIHEAP Data Users.

  - Data Experts – Michael Schmitz (MN) and Kevin McGrath (APPRISE)
  - Data Users – Laura Betzinger (IN) and Debra Brown (CA)

- The Data Users have questions and the Data Experts provide answers.

- The goal of the team is to look for common program issues and identify performance data that helps to inform those issues.

Presenter(s):
Laura Betzinger

Program Participation Case Study

- Case Study Process:

  - MN – Michael Schmitz had noticed changes in LIHEAP participation and had prepared statistics to share with his agencies for discussion at their annual meeting.

  - IN and CA – Debra and I had seen that same general trends for our programs and had Kevin McGrath walk us through the process for using the Data Warehouse to develop the same statistics.

  - Case Study #1 – The team members thought it would be valuable to publish the Case Study since we each had observed the problem, but each found that the details were a little different.

  - Next Steps - We are now working to identify other common issues that can be examined using the Performance Management information system that is available to us through the Data Warehouse.

Presenter(s):
Laura Betzinger

LIHEAP Performance Data Case Study
How this Session Fits

APPRISE will be presenting three training sessions during this conference. *Each focuses on a different approach* LIHEAP grantees can take to understand and use data for Performance Management.

- **Understanding LIHEAP Performance Measures**—will demonstrate how grantees can quickly identify key "take-aways" from their LIHEAP Performance Measure data.

→ **LIHEAP Performance Data Case Study**—will demonstrate how grantees can use LIHEAP data to answer specific questions about their program.

- **Strategies for Enhancing LIHEAP Performance**—will demonstrate how grantees can use LIHEAP Performance Measure data to consider and inform new program strategies (e.g., updating benefit matrix).

Presenter(s): Melissa Torgerson

Performance Data Case Study

Common LIHEAP Issue – Some grantees are seeing declining enrollments in the programs

- How many of you saw a year over year decrease in enrollments between 2017 and 2018?

- How many saw year over year increases in the demand for LIHEAP between 2017 and 2018?

- Why do you think this is happening?

Presenter(s):
Melissa Torgerson

Performance Data Case Study – Indiana's Experience

- To better understand the decline in enrollments, we will begin by looking at the following data for Indiana:

  - The number of clients served with heating assistance between 2012 and 2016.

  - The amount of heating assistance funding available between 2012 and 2016.

  - The average heating assistance benefit between 2012 and 2016.

Presenter(s):
Melissa Torgerson

Indiana – Households Receiving Heating Assistance

Number of Households Receiving Heating Assistance in Indiana

- 2012: 134,165
- 2013: 133,484
- 2014: 130,404
- 2015: 117,758
- 2016: 103,159
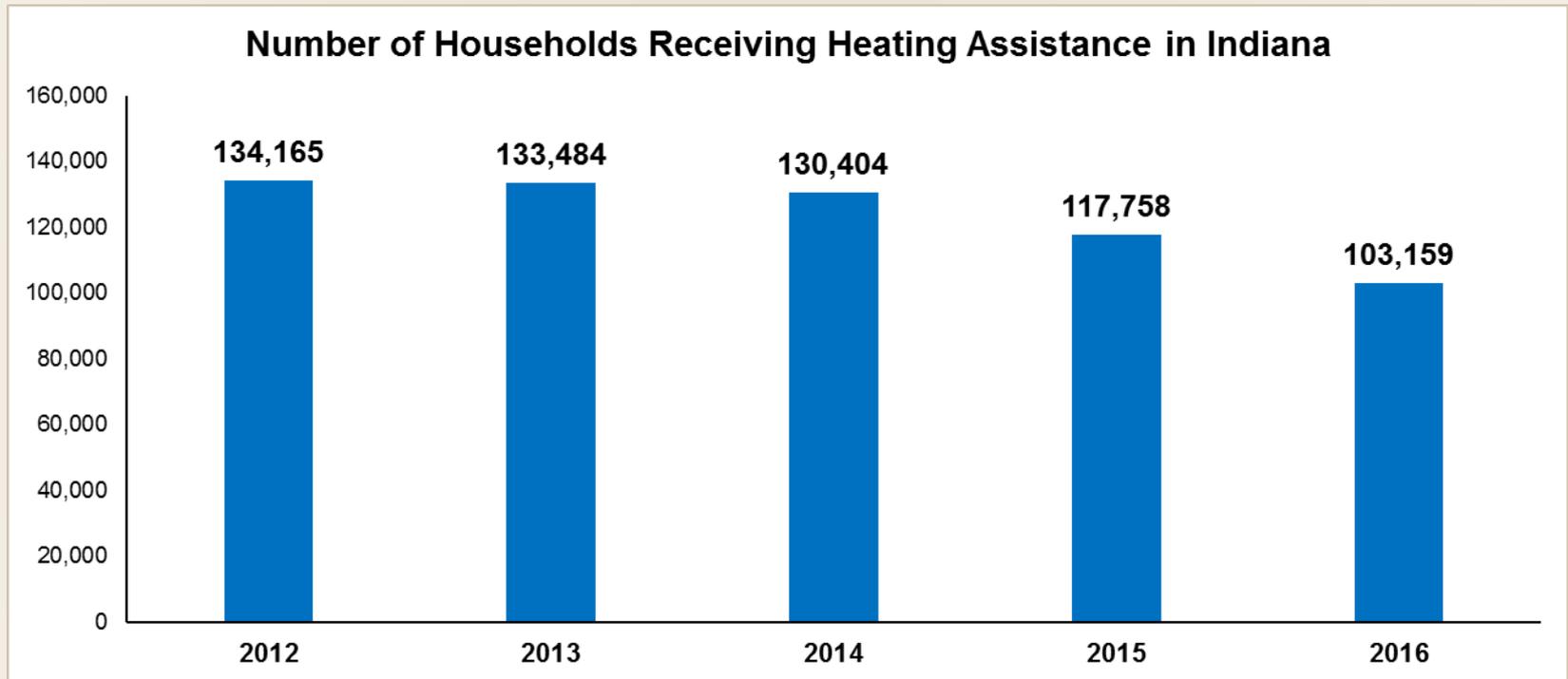
Has the number of clients served decreased?

Yes. Between 2012 and 2016, Indiana saw a <u>23 percent decrease</u> in the number of households that received heating assistance.

Is this a result of decreases in the funding available or increase in benefit amount?

Indiana – Total Funding for Heating Assistance

Total Funding for Heating Assistance in Indiana

Year	Amount
2012	$31,532,289
2013	$39,246,187
2014	$42,960,819
2015	$34,064,608
2016	$45,623,721
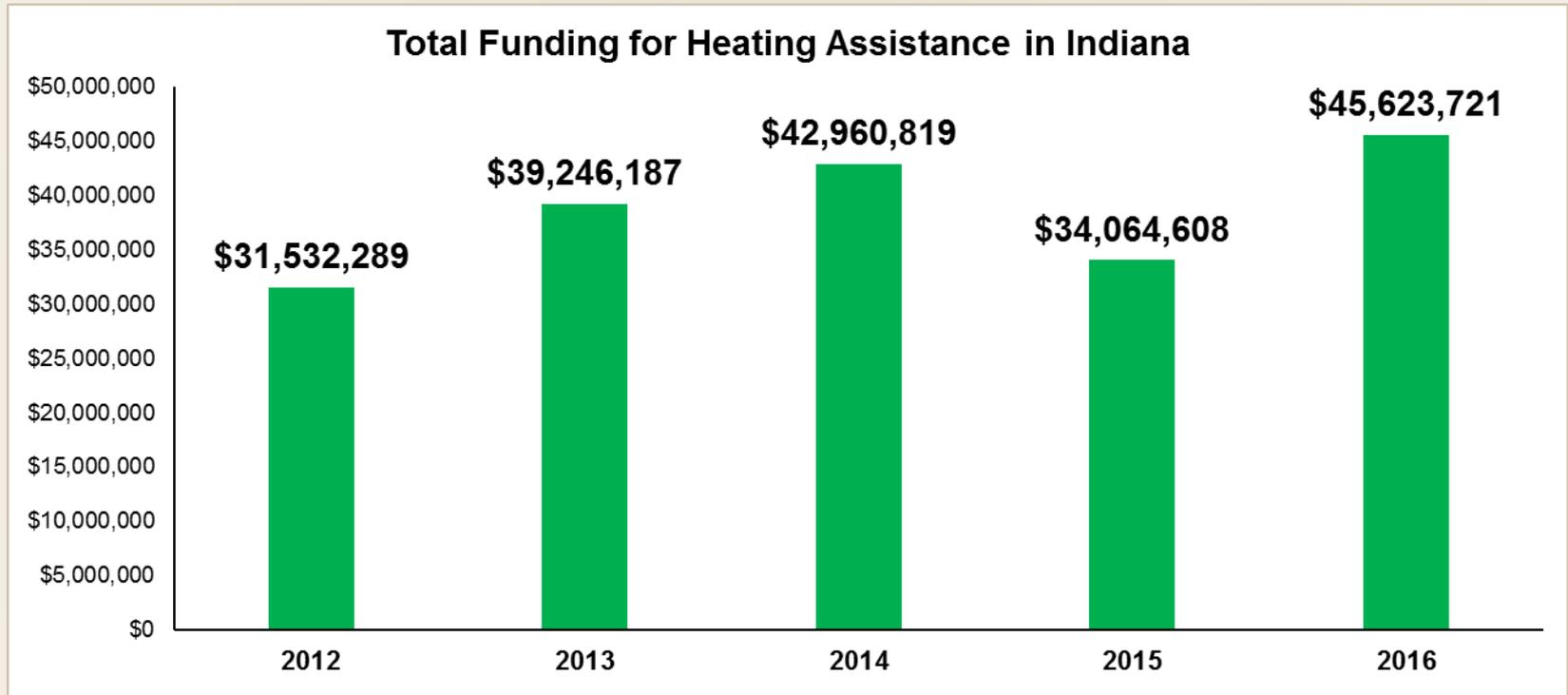
Did the amount of heating assistance funding decrease as well?

No. Between 2012 and 2016 in Indiana, the total amount of heating assistance funding available actually increased by 45 percent.

Indiana – Average Heating Assistance Benefit

Reported Average Heating Assistance Benefit in Indiana
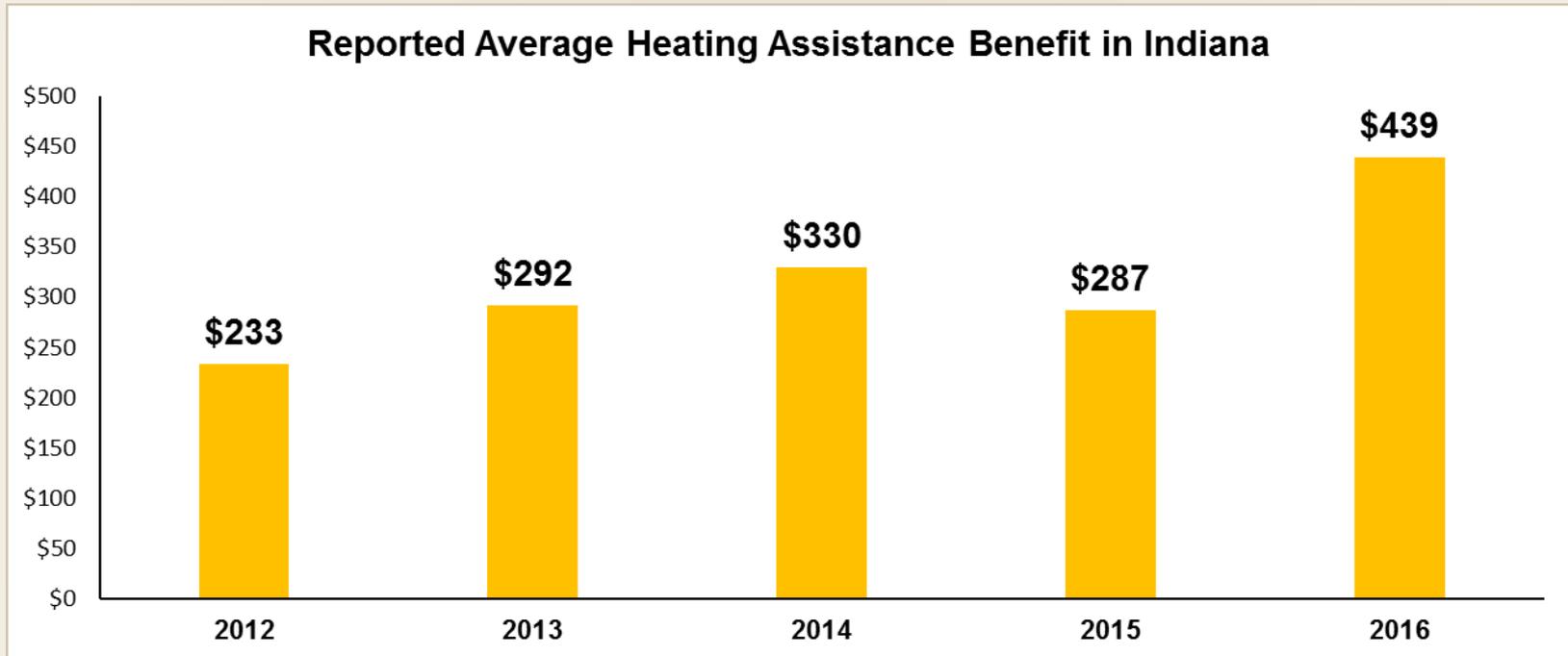
Did the average heating assistance benefit change?

Yes. Between 2012 and 2016 in Indiana, the average heating assistance benefit <u>increased by 88 percent.</u>

Performance Management Website Data Warehouse

Grantees have access to all of this data, but where can they find it?

The LIHEAP Data Warehouse!

Presenter(s):
Melissa Torgerson

LIHEAP Performance Data Case Study
Accessing the Data in the Data Warehouse

Performance Data Case Study – Indiana's Experience

Even though Indiana's available funding **increased** during 2012 and 2016, Indiana, the number of households that received heating assistance **decreased** during that same period. One good outcome is that they have been able to increase the average benefit. But, they have to ask whether they are missing households who need assistance.

Why might this be happening?
- An improving economy may reduce the income-eligible population?
- Falling energy prices for some fuels may reduce demand?

What can we look at to better understand Indiana's overall LIHEAP program performance?

- The number of income-eligible households.
- The percent of income-eligible households served.
- How that varies by the different population segments.

Indiana – Number of Income-Eligible Households

Number of Federally Income-Eligible Households in Indiana
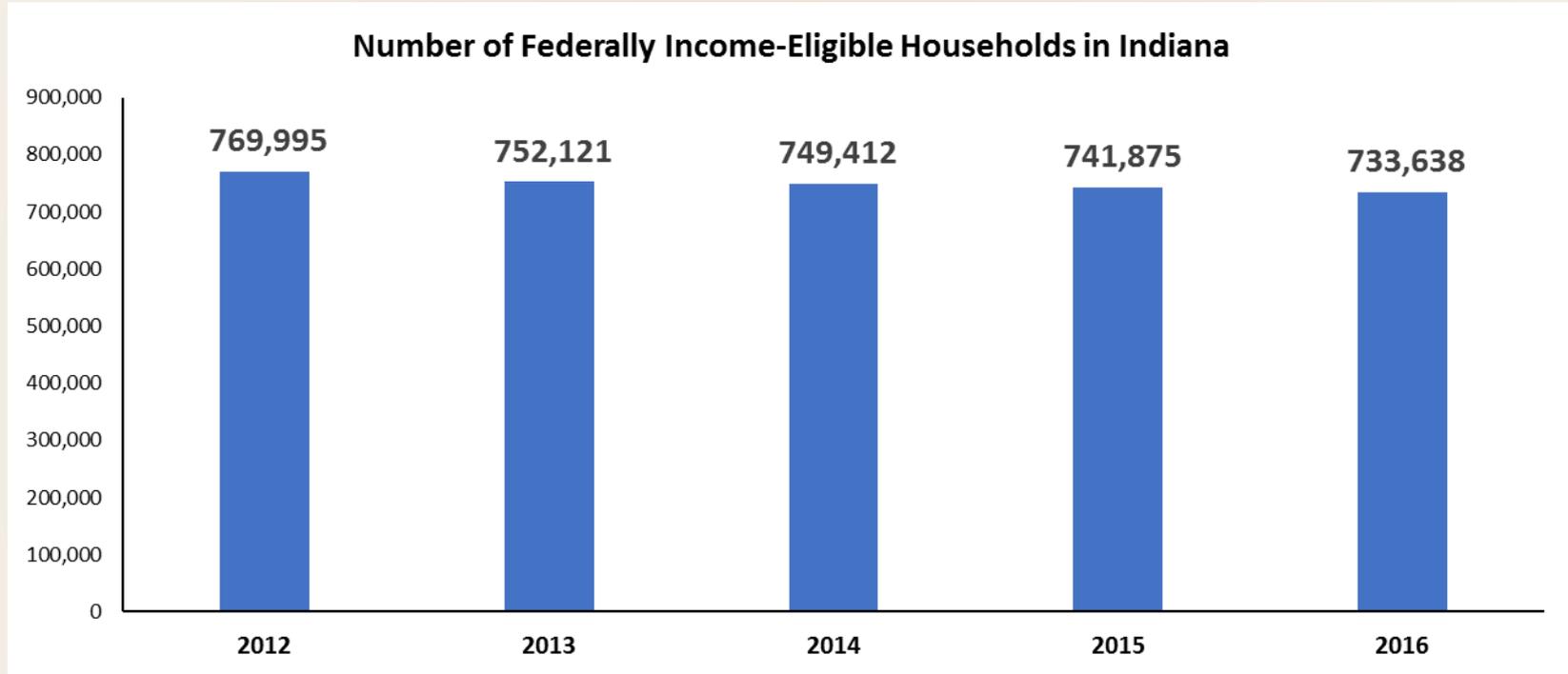
What happened to the total number of income-eligible households?

Between 2012 and 2016, Indiana saw a 5 percent decrease in the total number of income-eligible households.

Indiana – Percent of Income-Eligible Households Served

Percent of Income-Eligible Households Served in Indiana

Year	Percent
2012	17.42%
2013	17.75%
2014	17.40%
2015	15.87%
2016	14.06%
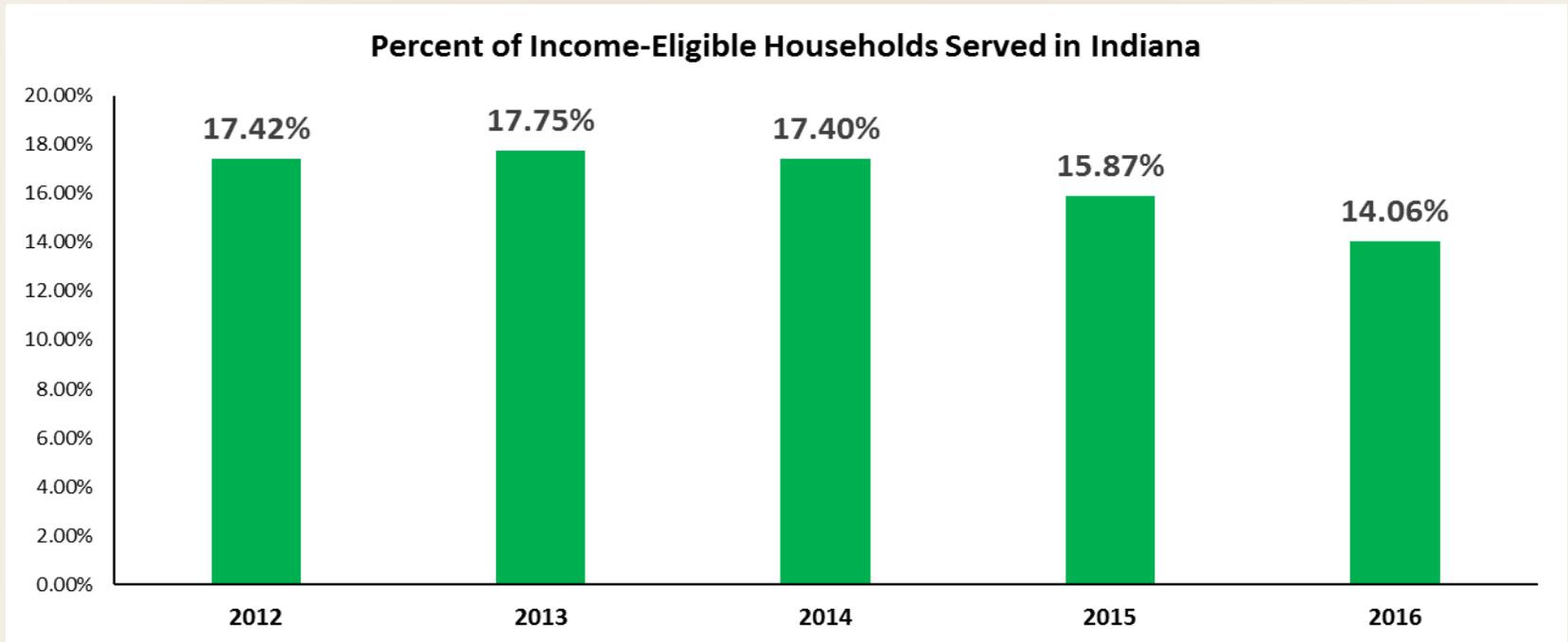
Does the percent of income-eligible households served decrease?

Yes. Between 2012 and 2016, Indiana saw a <u>19 percent decrease</u> in the percent of income-eligible households served

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LIHEAP Performance Data Case Study
Accessing the Data in the Data Warehouse

Summary of Overall Changes in Indiana's LIHEAP Program

Fiscal Year	Federally Income-Eligible Households	Households Receiving Heating Assistance	Percent of Income-Eligible Households Served	Total Funding for Heating Assistance	Reported Average Heating Assistance Benefit
2012	769,995	134,165	17.42%	$31,532,289	$233
2013	752,121	133,484	17.75%	$39,246,187	$292
2014	749,412	130,404	17.40%	$42,960,819	$330
2015	741,875	117,758	15.87%	$34,064,608	$287
2016	733,638	103,159	14.06%	$45,623,721	$439

Summary of Overall Changes in Indiana's LIHEAP Program

What changes do we see in Indiana's overall LIHEAP program?

- The number of federally-income eligible households has **decreased by 5 percent** (769,995 to 733,638).

- The number of households receiving heating assistance **decreased by 23 percent** (134,165 to 103,159).

- The percent of income-eligible households served **decreased by about 3.4 percentage points** (17.42% to 14.06%).

- The total heating assistance funding available **increased by 45 percent** ($31,532,289 to $45,623,721).

- The average heating assistance benefit **increased by 88 percent** ($233 to $439).

Presenter(s):
Melissa Torgerson

Changes in Indiana's Low-Income Vulnerable Population

We see a general decline in the number of households receiving assistance in Indiana. To further explore this decline in Indiana, we will focus on the low-income vulnerable population.

What is happening to low-income vulnerable households in Indiana? Are these trends the same for those groups?

- Specifically, we will look at:
  - Households with an adult 60 years old or over.
  - Households with a disabled member.
  - Households with a child 5 years old or younger.

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Presenter(s):
Melissa Torgerson

Indiana – Number of Households Served by Vulnerability

We saw that the overall number of households served by LIHEAP heating assistance in Indiana decreased by 23 percent.

What changes do we see in the number of low-income vulnerable households served?

- The number of elderly low-income households served **decreased by 6 percent** (38,100 to 35,640).

- The number of disabled low-income households served **decreased by 13 percent** (49,962 to 43,562).

- The number of young child low-income households served **decreased by 39 percent** (30,203 to 18,307)!!!

The decrease in young child low-income households served is much larger compared to the decrease in elderly and disabled low-income households served.

LIHEAP Performance Data Case Study
Accessing the Data in the Data Warehouse

Indiana – Number of Income-Eligible Households by Vulnerability

We saw that the number of overall low-income households in Indiana decreased by 5 percent.

What changes do we see in the number of income-eligible vulnerable households?

- The number of low-income households with an elderly member **remained about the same** (around 260,000).

- The number of low-income households with a disabled member **remained about the same** (around 290,000).

- The number of low-income households with young children has **decreased by 12 percent** (156,972 to 137,620).

LIHEAP Performance Data Case Study
Accessing the Data in the Data Warehouse

Changes in Indiana's Low-Income Vulnerable Population

By looking at the number of low-income vulnerable households served and the number of income-eligible vulnerable households in Indiana, we learn two things:

- Finding #1 – ***Across all vulnerable population groups, the decline in the number of households served is <u>greater</u> than the decline in the number of income-eligible households.***

- Finding #2 – ***We see the greatest level of comparative change for <u>low-income households with young children</u>.***

Presenter(s):
Melissa Torgerson

Indiana – Percent of Income-Eligible Population Served by Vulnerability

We saw that the share (or percent) of overall low-income households served decreased by 19 percent.

What changes do we see in the share of low-income vulnerable households served?

- The share of low-income households with an elderly member served **decreased by 7 percent**.

- The share of low-income households with a disabled member served **decreased by 14 percent**.

- The share of low-income households with young children served **decreased by 31 percent**.

Presenter(s):
Melissa Torgerson

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Accessing the Data in the Data Warehouse

Next Steps

Does Indiana need to increase the marketing of its LIHEAP program?

- This would lead to an increase in households that are served.

- However, this could also result in a lower average benefit for each household served.

Does Indiana need to increase marketing to certain groups?

- States are more likely to see changes in the young children population than in the disabled or elderly populations because young children can age out of their vulnerability status.

- Is the reduction in percent of low-income households with young children served due to limited program marketing?

Presenter(s):
Melissa Torgerson

Grantee Questions

Questions?

Presenter(s):
Melissa Torgerson

Understanding LIHEAP Performance Measures
LIHEAP Performance Management Resources for Grantees

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Presenter(s):
Melissa Torgerson

Training Exercise

You will now do the same process for your own state!

1. Record the changes in clients served.

2. Record the changes in the size of the income-eligible population.

3. Furnish your own interpretation of the data.