

LIHEAP PERFORMANCE MANAGEMENT WEBSITE — GLOSSARY

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Administration and Planning

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The LIHEAP statute limits the amount that grantees obligate in planning and administration to 10 percent of the funds payable to the grantee. All amounts above 10 percent must come from non-federal funds--except that other federal funds may be used to pay the costs of planning and administering Assurance 16 activities without regard to the 10 percent limit. The cost of administering the grantee's LIHEAP weatherization assistance is to be included, as well as the cost of administering other LIHEAP activities.

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"

To learn more: [LIHEAP Clearinghouse Brief on Administrative Costs](#)

American Community Survey

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The American Community Survey (ACS) is an annual survey conducted by the U.S. Census Bureau. Since federal fiscal year 2006, ACS survey data has been used to calculate state-level estimates of the number of income-eligible households for LIHEAP (prior to federal fiscal year 2006, the [Current Population Survey Annual Social and Economic Supplement](#) was used). ACS data is also used in conjunction with household recipient data from the LIHEAP Household Report to develop targeting indices for states.

Exploring the Data: Guided Search --> Any Report --> "Who is eligible for assistance"
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population"
Advanced Data & Analytics --> "Percent Served by LIHEAP"

To learn more: [Methodology and Sourced Used to Develop LIHEAP Income Eligible Population Estimates](#)
[Home Energy Notebooks](#)

Any Type of Assistance

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Refers to a household that receives assistance from any component of a LIHEAP program, which could include heating, cooling, crisis, furnace replacement, and/or weatherization.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Toal (Any Type of Assistance)"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> "Total (Any Type of Assistance)"

To learn more: [LIHEAP Clearinghouse—Explanation of LIHEAP Program Components](#)

Assurance 16

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Grantees have the option to use up to 5 percent of their LIHEAP funds to provide services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance. This may include needs assessments, counseling, and assistance with energy vendors. If grantees choose to allocate funds to Assurance 16, model plans will include a description of such activities, the number of households served, and the impact of activities in the previous federal fiscal year.

Related Reports: Grantee Survey

Exploring the Data: Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds"

To learn more: [LIHEAP Issue Brief on Assurance 16 Programs](#)
[State LIHEAP Grantee Assurance 16 Activities \(Clearinghouse Table\)](#)
[Evaluation of Assurance 16 Programs \[PowerPoint\]](#)

Average Benefits per Household

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This is the average benefit amount for households assisted during the fiscal year for each type of assistance. Average benefits are not requested for weatherization assistance because of the wide variety of allowable activities among grantees. The average household benefit takes into account all types of benefits under each type of assistance.

Related Reports: Grantee Survey

Exploring the Data: Advanced Data & Analytics --> "LIHEAP Average Benefits"

To learn more: [LIHEAP Clearinghouse—Explanation of LIHEAP Program Components](#)

Block Grant Allocation

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The Block Grant Allocation is the primary source of LIHEAP funding allocated to grantees each year. Other sources of LIHEAP funding include Emergency Contingency funds, REACH, and Leverage Incentive awards.

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How much funding from from each source"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Sources of Funds"

To learn more: [LIHEAP Clearinghouse: LIHEAP Funding \(Including Historic Tables\)](#)

Categorical Eligibility

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The LIHEAP statute establishes that LIHEAP grantees have the flexibility of defining households as categorically eligible for LIHEAP if they have at least one member who receives assistance under other federal programs, including Temporary Assistance for Needy Families (TANF), Supplemental Security Income (SSI), and the Supplemental Nutrition Assistance Program (SNAP), as determined by the grantee. Categorical eligibility differs from income eligibility, which the LIHEAP statute establishes as being households with an annual income that does not exceed a maximum income level determined by the grantee, which must be no lower than between 110% of HHS Poverty Guidelines and no higher than the federal maximum LIHEAP income standard, adjusted for household size. Estimates of the number of federally income-eligible households and state income-eligible households developed for the annual LIHEAP Report to Congress do not include households that have incomes greater than the statutory income standards but who are categorically eligible for LIHEAP. For more information, see [Income-Eligible Population](#) or [State Income-Eligible Households](#) or [Federally Income-Eligible Households](#).

To learn more: [FY 2016 LIHEAP Income Eligibility Criteria \(Office of Community Services\)](#)

Cooling Assistance

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LIHEAP funds used to provide cooling benefits to eligible clients. Grantees are not required to have a cooling component. If grantees offer a cooling component, there is no limit on the amount of funding that a grantee allocates towards cooling assistance.

Related Reports: Household Report, Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"

Advanced Data & Analytics --> "LIHEAP Recipients" --> "Cooling Assistance"

Advanced Data & Analytics --> "LIHEAP Average Benefits"

Advanced Data & Analytics --> "Percent Served by LIHEAP" --> "Cooling Assistance"

To learn more: [LIHEAP Clearinghouse—Explanation of LIHEAP Program Components](#)
[State Grantee Cooling Program Descriptions—LIHEAP Clearinghouse Table](#)

Crisis Assistance

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LIHEAP funds used to provide crisis benefits to eligible clients, within 48 hours or 18 hours if the crisis is life threatening.

Related Reports: Household Report, Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Winter or Year Round Crisis Assistance", "Summer Crisis Assistance", and "Other Crisis Assistance"
Advanced Data & Analytics --> "LIHEAP Average Benefits"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> "Crisis Assistance"

To learn more: [LIHEAP Clearinghouse Issue Brief: Crisis Programs](#)

Current Population Survey

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The Current Population Survey (CPS) is an annual survey conducted by the U.S. Census Bureau. For federal fiscal years 2001 through 2005, CPS Annual Social and Economic Supplement (ASEC) survey data has been used to calculate state-level estimates of the number of income-eligible households for LIHEAP (since federal fiscal year 2006, the [American Community Survey](#) has been used). CPS data is also used in conjunction with household recipient data from the LIHEAP Household Report to develop targeting indices for the nation and Census regions.

Exploring the Data: Guided Search --> Any Report --> "Who is eligible for assistance"
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population"

To learn more: [Methodology and Sourced Used to Develop LIHEAP Income Eligible Population Estimates](#)

Department of Health & Human Services (HHS)

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The U.S. Department of Health & Human Services (HHS) is the cabinet-level department of the federal government which oversees LIHEAP.

To learn more: [Department of Health & Human Services Website](#)

Disabled Households

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Households with at least one disabled member.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category

Elderly Households

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Households with at least one member age 60 years or older.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category

To learn more: [LIHEAP Clearinghouse Report: Elderly Household Targeting Index](#)

Emergency Contingency Funds

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In 1994, Congress provided permanent authorization of an emergency contingency fund of up to \$600 million (in addition to regular LIHEAP funding). The 1998 reauthorization of LIHEAP added a new section that specified additional conditions under which LIHEAP emergency funds may be released, to include: "a natural disaster, any other event meeting criteria the Secretary determines appropriate, or a significant increase in: (1) home energy supply shortages or disruptions; (2) the cost of home energy; (3) home energy disconnections; (4) participation in a public benefit program such as the food stamp program; or (5) a significant increase in unemployment or layoffs."

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How much funding comes from each source"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Sources of Funds"

To learn more: [LIHEAP ClearinghouseTable: History of Emergency Contingency Funds](#)

Energy Burden

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Energy burden is the share or percentage of annual household income that is used to pay annual energy bills. For example, a household with an annual income of \$40,000 and home energy costs of \$2,000 a year would have an energy burden of 5 percent [(\$2,000 divided by \$40,000) times 100]. The link between energy burden and LIHEAP is important. Section 2605(b)(5) of the Low Income Home Energy Assistance Act of 1981 (42 U.S. C. §8624(b)(5)) requires 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."

Related Reports: Performance Data Form

To learn more: [Targeting LIHEAP Benefits](#)

Federally Income-Eligible Households

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Households with annual household incomes that do not exceed the federal maximum LIHEAP income standard. Historically, the federal maximum LIHEAP income standard has been defined as the greater of 150 percent of the HHS Poverty Guidelines or 60 percent of State Median Income (SMI), adjusted for household size. However, for fiscal years 2009 and 2010, the Congress raised the federal maximum LIHEAP income standard to the greater of 150 percent of the HHS Poverty Guidelines and 75 percent of SMI. For consistency across fiscal years, estimates of the number of federally income-eligible households are based on the greater of 150 percent of the HHS Poverty Guidelines or 60 percent of SMI, adjusted for household size, used with Census data on the household population. For more information, see [Income-Eligible Population](#) or [State Income-Eligible Households](#) or [Categorical Eligibility](#).

Related Reports: LIHEAP Home Energy Notebook

Exploring the Data: Guided Search --> Any Report --> "Who is eligible for assistance"
Reports by Data Source --> "Eligible Population Data"
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> "Federal Guidelines"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category

To learn more: [FY 2016 LIHEAP Income Eligibility Criteria \(Office of Community Services\)](#)
[Methodology and Sourced Used to Develop LIHEAP Income Eligible Population Estimates](#)
[Home Energy Notebooks](#)

Fiscal Year (FY)

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The federal fiscal year for LIHEAP is October 1 - September 30. Grantees might implement their programs on a state fiscal year or other timeframe, but reporting by grantees on LIHEAP to the U.S. Department of Health & Human Services (HHS) occurs on a federal fiscal year basis.

Funds carriver over from previous year

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Grantees must obligate 90 percent of their payable funds in the fiscal year in which they are awarded (payable funds include regular block grant and, unless HHS authorizes an exception, any emergency contingency funds, reallocated funds, or oil overcharge funds received that same year). The maximum amount of carryover funds is 10 percent.

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How much funding comes from each source"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Sources of Funds "

To learn more: [LIHEAP Clearinghouse Issue Brief: Supplemental Funding \(including Carryover funds\)](#)

Home Energy Equipment Repair/Replacement

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Grantees may opt to use LIHEAP funds for home energy equipment repair or replacement assistance, including by fixing malfunctioning or broken heating equipment, installing new furnaces, or providing air conditioning services. Generally, there are three ways that grantees run their home energy equipment repair or replacement services: as part of their weatherization component; as part of their crisis component; or as a combination of their weatherization and crisis components.

Related Reports: Household Report

Exploring the Data: Advanced Data & Analytics --> "LIHEAP Recipients" --> "Home Energy Equipment Repair/Replacement"

To learn more: [LIHEAP Clearinghouse Issue Brief: Furnace Replacement Programs](#)

Heating Assistance

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LIHEAP funds used to provide heating benefits to eligible clients. There is no limit on the amount of funding that a grantee may allocate towards heating assistance.

Related Reports: Household Report, Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Heating Assistance"
Advanced Data & Analytics --> "LIHEAP Average Benefits"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> "Heating Assistance"

To learn more: [LIHEAP Clearinghouse Report—Explanation of LIHEAP Program Components](#)

HHS Poverty Guidelines

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The U.S. Department of Health & Human Services (HHS) issues Poverty Guidelines each year based on the federal poverty thresholds released annually by the U.S. Census Bureau. The HHS Poverty Guidelines are a simplified version of the federal poverty thresholds. They are updated based on the Consumer Price Index For All Urban Consumers (CPI-U) and are intended for administrative use in determining program eligibility. The HHS Poverty guidelines vary by family size, and three sets of estimates are produced: one set for the 48 contiguous states and the District of Columbia, one set for Alaska, and one set for Hawaii.

Exploring the Data: Guided Search --> Any Report --> "Who is eligible for assistance"
Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category (except "Total (Any Type of Assistance)")
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category (except "Total (Any Type of Assistance)")

To learn more: [HHS Poverty Guidelines and Threshold Explanation \(ASPE\)](#)

Households – <75% Poverty

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Households with income less than 75 percent of the HHS Poverty Guidelines.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category (except "Total (Any Type of Assistance)")
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category (except "Total (Any Type of Assistance)")

Households – 75%-100% Poverty

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Households with income between 75 percent and 100 percent of the HHS Poverty Guidelines.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category (except "Total (Any Type of Assistance)")
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category (except "Total (Any Type of Assistance)")

Households – 101%-125% Poverty

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Households with income between 101 percent and 125 percent of the HHS Poverty Guidelines.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category (except "Total (Any Type of Assistance)")
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category (except "Total (Any Type of Assistance)")

Households – 126%-150% Poverty

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Households with income between 126 percent and 150 percent of the HHS Poverty Guidelines.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category (except "Total (Any Type of Assistance)")
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category (except "Total (Any Type of Assistance)")

Households – >150% Poverty

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Households with income greater than 150 percent of the HHS Poverty Guidelines.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category (except "Total (Any Type of Assistance)")
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category (except "Total (Any Type of Assistance)")

Income-Eligible Population

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The LIHEAP statute establishes that households are income-eligible for LIHEAP if annual household income does not exceed a maximum income level determined by the grantee, which must be no lower than 110 percent of the HHS Poverty Guidelines and no higher than the federal maximum LIHEAP income standard, adjusted for household size. Income eligibility differs from categorical eligibility, in which the LIHEAP statute allows grantees to define a household as eligible for LIHEAP because at least one member receives assistance under other federal programs, including Temporary Assistance for Needy Families (TANF), Supplemental Security Income (SSI), and the Supplemental Nutrition Assistance Program (SNAP), as determined by the grantee. For more information, see [State Income-Eligible Households](#) or [Federally Income-Eligible Households](#) or [Categorical Eligibility](#).

Related Reports: LIHEAP Home Energy Notebook

Exploring the Data: Guided Search --> Any Report --> "Who is eligible for assistance"
Reports by Data Source --> "Eligible Population Data"
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category

To learn more: [FY 2016 LIHEAP Income Eligibility Criteria \(Office of Community Services\)](#)
[Methodology and Sourced Used to Develop LIHEAP Income Eligible Population Estimates](#)
[Home Energy Notebooks](#)

Leveraging Activity Identification and Demonstration Funds

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Leveraging Activity Identification and Demonstration Funds are used by LIHEAP grantees that have been rewarded a Leveraging Incentive Award through the LIHEAP leveraging incentive program for acquiring non-federal home energy resources for low-income households. To receive a Leveraging Incentive Award, a grantee must submit a LIHEAP Leveraging Report that describes and quantifies the leveraging activities carried out during the previous fiscal year. HHS determines whether the reported activities are countable under the requirements of the LIHEAP statute and regulations. Leveraging Incentive Awards may be carried over into the following fiscal year, and do not count against a grantee's 10 percent carryover limit. Leveraging Activity Identification and Demonstration Funds are only used when grantees are rewarded Leveraging Incentive Awards.

Related Reports: Grantee Survey

Exploring the Data: Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds"

To learn more: [LIHEAP Clearinghouse Issue Brief: Leveraging and LIHEAP](#)

Leveraging Incentive Award

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The LIHEAP leveraging incentive program rewards LIHEAP grantees that have acquired non-federal home energy resources for low-income households. To receive Leveraging Incentive Awards, grantees must submit a LIHEAP Leveraging Report that describes and quantifies the leveraging activities they carried out during the previous fiscal year. HHS determines whether the reported activities are countable under the requirements of the LIHEAP statute and regulations. Leveraging Incentive Awards may be carried over into the following fiscal year, and do not count against a grantee's 10 percent carryover limit. Leveraging Incentive Awards are not available every year.

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How much funding comes from each source"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Sources of Funds"

To learn more: [LIHEAP Clearinghouse: State Leveraging Examples, Tables](#)
[LIHEAP Clearinghouse Issue Brief: Leveraging and LIHEAP](#)

LIHEAP (Model) State Plan

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LIHEAP Statute Sections 2605(a)(1) and (c)(1) require every grantee to submit an annual LIHEAP Plan in order to receive LIHEAP funds. The purpose of the plan is to provide information to the federal government and the public regarding the grantee's LIHEAP program. The Plan is due September 1, and any revisions or missing information must be submitted by December 15 to complete the Plan. In the LIHEAP Plan, grantees must describe how they will carry out each of the 16 LIHEAP assurances.

To learn more: [LIHEAP Clearinghouse Issue Brief: Reporting Requirements](#)
[LIHEAP Clearinghouse: State Plans and Manuals](#)

LIHEAP Grantee

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LIHEAP grantees are recipients of federal LIHEAP block grant allocations. Grantees include all 50 states, the District of Columbia, U.S. territories, and Indian tribes and tribal organizations. "State grantees" refers to the 50 states and the District of Columbia.

To learn more: [LIHEAP State and Territory Grantee Directory](#)
[LIHEAP Tribal Grantee Directory](#)

LIHEAP Grantee Survey

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LIHEAP grantees are required to submit a Grantee Survey (now Section I of the Performance Data Form) no later than January 30 each year. The purpose of this report is to furnish data on grantee sources and uses of available LIHEAP funds during the previous fiscal year. This also includes average benefits for heating assistance, cooling assistance, and crisis assistance, as well as the maximum income level for a four-person household that receives each type of assistance (including weatherization assistance).

Related Reports: Grantee Survey

Exploring the Data: Reports by Data Source --> "Grantee Survey Data"

To learn more: [LIHEAP Clearinghouse Issue Brief: Reporting Requirements](#)

LIHEAP Home Energy Notebook

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The LIHEAP Home Energy Notebook provides detailed national and regional data on home energy consumption, energy expenditures, energy burden, low-income home energy trends, and information on the LIHEAP performance measurement system. The report is prepared each year by the U.S. Department of Health & Human Services (HHS) and is intended to complement the annual LIHEAP Report to Congress.

To learn more: [Home Energy Notebooks](#)

LIHEAP Household Report

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All grantees are required to submit an annual Household Report in compliance with LIHEAP Statute Sections 2605 (c)(1)(G) and 2610(b). The purpose of this report is to furnish data on households that received LIHEAP assistance in the most recent fiscal year. This includes household income levels and vulnerable population status for households receiving each type of assistance. Final household reports are due December 15 each year.

Related Reports: Household Report

Exploring the Data: Reports by Data Source --> "Household Report Data"

To learn more: [LIHEAP Clearinghouse Issue Brief: Reporting Requirements](#)
[Completing the Household Report](#)

LIHEAP Performance Data Form

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Grantees must submit the Performance Data Form no later than January 30 each year. The Performance Data Form has two required sections (Grantee Survey and LIHEAP Performance Measures)--as well as a section for grantees to report on Optional Performance Measures. In the Grantee Survey section, state grantees report on the estimated sources and uses of LIHEAP funds for the previous fiscal year. In the Performance Measures section, state grantees must report data related to energy burden targeting, restoration of home energy service, and prevention of loss of home energy service.

Related Reports: Performance Data Form

To learn more: [LIHEAP Clearinghouse Issue Brief: Reporting Requirements](#)
[Completing the Performance Data Form](#)

LIHEAP Report to Congress

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The annual LIHEAP Report to Congress provides detailed information about home energy consumption, energy prices, the LIHEAP eligible population, LIHEAP recipients, as well as the sources and uses of LIHEAP funds. The report is prepared each year and submitted to Congress by the U.S. Department of Health & Human Services (HHS).

Related Reports: Report to Congress

Exploring the Data: Report to Congress Tab --> Recent Reports

To learn more: [LIHEAP Reports to Congress](#)

Office of Community Services (OCS)

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The Office of Community Services (OCS) administers LIHEAP and distributes LIHEAP funding to state, territorial, and tribal grantees. OCS is an office of the Administration of Children & Families, a division of the U.S. Department of Health & Human Services.

To learn more: [Office of Community Services LIHEAP Overview](#)

Oil Overcharge Funds

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The Secretary of Energy distributed these funds in the 1980s as "Warner amendment," Exxon, and Stripper Well funds or other oil overcharge distributions such as Diamond Shamrock or AMOCO. Such funds are considered to be federal LIHEAP funds once designated by a grantee for LIHEAP.

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How much funding comes from each source"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Sources of Funds"

To learn more: [LIHEAP Clearinghouse Issue Brief: Leveraging and LIHEAP](#)

Other Crisis

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In addition to bill payment assistance, some grantees provide "other" types of crisis assistance. This includes, but is not limited to heating or cooling equipment repair and replacement.

Related Reports: Household Report, Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Other Crisis Assistance"

To learn more: [LIHEAP Clearinghouse Issue Brief: Crisis Programs](#)

Performance Management

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LIHEAP Performance Management is the process of **using** data (information) to make decisions about LIHEAP program delivery or administration.

Related Reports: Performance Data Form

To learn more: [LIHEAP Clearinghouse Report: LIHEAP Performance Measurement](#)

Performance Measurement

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LIHEAP Performance Measurement is the collection and reporting of data to measure outputs, outcomes, and impacts associated with LIHEAP funding.

Related Reports: Performance Data Form

To learn more: [LIHEAP Clearinghouse Report: LIHEAP Performance Measurement](#)

REACH funds

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The LIHEAP Statute authorizes supplemental LIHEAP funding for grantees to receive competitive grants for innovative plans to help LIHEAP eligible households reduce their energy vulnerability. Grantees that qualify can use the REACH funds to: "minimize the health and safety risks that result from high energy burdens on low-income Americans, prevent homelessness as a result of inability to pay energy bills, increase the efficiency of energy usage by low-income families, and target energy assistance to individuals who are most in need."

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How much funding comes from each source"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Sources of Funds"

To learn more: [LIHEAP Clearinghouse Report: REACH](#)
[LIHEAP Clearinghouse: REACH Funding](#)

Reallotment Funds

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Grantees must obligate 90 percent of their payable funds in the fiscal year in which they are awarded (payable funds include regular block grant and, unless HHS authorizes an exception, any emergency contingency funds, reallotted funds, or oil overcharge funds received that same year). The maximum amount of carryover funds is 10 percent. If more than 10 percent of a grantee's funds are unobligated at the end of the federal fiscal year (September 30), the grantee must return the excess funds to OCS. These funds may be re-allotted to all grantees the following fiscal year.

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How much funding comes from each source"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Sources of Funds"

To learn more: [LIHEAP Issue Brief: Supplemental Funding \(including Re-Allotted Funds\)](#)

State Income-Eligible Households

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Households with annual household incomes that do not exceed a maximum income level determined by the grantee, which must be no lower than 110 percent of the HHS Poverty Guidelines and no higher than the federal maximum LIHEAP income standard for that fiscal year, adjusted for household size. The income-eligibility guidelines established by each grantee can vary from year-to-year and may include special provisions for vulnerable households or households of different sizes. Estimates of the number of state income-eligible households are based on the income guidelines established by each grantee for that fiscal year, used with Census data on the household population. For more information, see [Income-Eligible Population](#) or [Federally Income-Eligible Households](#) or [Categorical Eligibility](#).

Related Reports: [LIHEAP Home Energy Notebook](#)

Exploring the Data: [Guided Search --> Any Report --> "Who is eligible for assistance"](#)
[Reports by Data Source --> "Eligible Population Data"](#)
[Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> "State Guidelines"](#)

To learn more: [FY 2016 LIHEAP Income Eligibility Criteria \(Office of Community Services\)](#)
[Methodology and Sourced Used to Develop LIHEAP Income Eligible Population Estimates](#)
[Home Energy Notebooks](#)

State Maximum Income for a 4-Person Household

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The State Maximum Income for a 4-Person Household is 150 percent of the HHS Poverty Guidelines (FPG) or, if greater, 60 percent of State Median Income (SMI). In 2016, the Maximum Annual Poverty Cutoff for a 4-Person Household (using 150 percent of the HHS Poverty Guidelines) was \$36,450 for the 48 contiguous states and the District of Columbia.

Related Reports: [Grantee Survey, LIHEAP Report to Congress](#)

Exploring the Data: [Guided Search --> Any Report --> "Who is eligible for assistance"](#)
[Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> "State Guidelines"](#)

To learn more: [FY 2016 LIHEAP Income Eligibility Criteria \(Office of Community Services\)](#)
[LIHEAP Reports to Congress](#)

State Median Income

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State Median Income (SMI) is the median family income in the past 12 months (in inflation-adjusted dollars) for a 4-person family. Each year, the U.S. Census Bureau releases SMI estimates derived from the [American Community Survey](#). The U.S. Department of Health and Human Services (HHS) uses these estimates to calculate income-eligibility limits based on 60 percent of SMI for the 50 states, the District of Columbia, and Puerto Rico. HHS calculates estimates of 60 percent of SMI for different household sizes using methodology specified in 45 C.F.R 96.85, and publishes these estimates because LIHEAP grantees may set the income eligibility criteria for their programs anywhere between the minimum of 110 percent of HHS Poverty Guidelines and the maximum of 60 percent of State Median Income (except where 150 percent of the HHS Poverty Guidelines is higher).

To learn more: [State Median Income Estimates for Optional Use in FFY 2016 and Mandatory Use in FFY 2017](#)

Summer Crisis Assistance

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LIHEAP funds used to provide summer crisis benefits to eligible households, within 48 hours or 18 hours if the crisis is life threatening. Some grantees may provide cooling system repair or replacement in addition to bill payment assistance benefits. In some cases, summer crisis may be a fast-tracked benefit through the regular cooling program. There is no limit on the amount of funding that a grantee allocates towards summer crisis assistance.

Related Reports: Household Report, Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Summer Crisis Assistance"
Advanced Data & Analytics --> "LIHEAP Average Benefits"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> "Crisis Assistance"

To learn more: [LIHEAP Clearinghouse Issue Brief: Crisis Programs](#)

Suppressed Data

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If a grantee reports missing or unreliable data in any required report, their data is suppressed in the annual [LIHEAP Report to Congress](#). Suppressed data is generally denoted with "NA" or an asterisk (*).

Related Reports: Report to Congress

Unduplicated Households

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Many grantees allow households to access LIHEAP more than one time during the federal fiscal year (October 1-September 30). Some LIHEAP reports require grantees to provide an "unduplicated" count of households receiving any type of LIHEAP service. This means that even if a household was assisted with LIHEAP multiple times during the reporting period, they are only counted once. Grantees were not required to provide HHS with unduplicated household counts until FY 2011.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Total (Any Type of Assistance)"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> " Total (Any Type of Assistance)"

To learn more: [LIHEAP Clearinghouse Brief: Checking LIHEAP Data across Multiple Reports](#)

Unobligated Emergency Contingency Funds

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Sometimes, emergency contingency funds are released very late in the fiscal year. In rare cases, the Office of Community Services will allow an exception that allows grantees to carry these funds into the following fiscal year without counting against the grantee's 10 percent carryover limit.

Related Reports: Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How much funding comes from each source"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Source of Funds"

To learn more: [LIHEAP Issue Brief: Supplemental Funding \(including Emergency Contingency funds\)](#)

Vulnerable Households

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Households with at least one vulnerable member. This includes households with at least one member that is 60 years or older, disabled, or under the age of 6.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> Any Data Category

Weatherization

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The LIHEAP statute under Section 2605(b)(1)(C) allows funds to be used to "provide low-cost residential weatherization and other cost-effective energy-related home repair." Grantees may allocate up to 15 percent (or 25 percent with a waiver from HHS) of their funds to weatherization. In cases where LIHEAP funds are allocated to weatherization benefits, grantees can develop their own weatherization rules, follow the rules of the Department of Energy's Weatherization Assistance Program (WAP), or use a combination of LIHEAP and WAP rules.

Related Reports: Household Report, Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Weatherization"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> "Weatherization"

To learn more: [LIHEAP Clearinghouse Report: Weatherization](#)

Winter Crisis

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LIHEAP funds used to provide winter crisis benefits to eligible households, within 48 hours or 18 hours if the crisis is life threatening. Some grantees may provide heating system repair or replacement in addition to bill payment assistance benefits. In some cases, winter crisis may be a fast tracked benefit through the regular heating program. There is no limit on the amount of funding that a grantee allocates towards winter crisis assistance.

Related Reports: Household Report, Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Winter or Year Round Crisis Assistance"
Advanced Data & Analytics --> "LIHEAP Average Benefits"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> "Crisis Assistance"

To learn more: [LIHEAP Clearinghouse Issue Brief: Crisis Programs](#)

Year Round Crisis

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LIHEAP funds used to provide year round crisis benefits to eligible households, within 48 hours or 18 hours if the crisis is life threatening. Some grantees may provide heating or cooling system repair or replacement in addition to bill payment assistance benefits. In some cases, year round crisis may be a fast tracked benefit through the regular heating or cooling component or a separate program. There is no limit on the amount of funding that a grantee allocates towards year round crisis assistance.

Related Reports: Household Report, Grantee Survey

Exploring the Data: Guided Search --> Any Report --> "How funds are used"
Advanced Data & Analytics --> "LIHEAP Funding" --> "Uses of Funds" and "Allocation of Total Funds"
Advanced Data & Analytics --> "LIHEAP Recipients" --> "Winter or Year Round Crisis Assistance"
Advanced Data & Analytics --> "LIHEAP Average Benefits"
Advanced Data & Analytics --> "Percent Served by LIHEAP" --> "Crisis Assistance"

To learn more: [LIHEAP Clearinghouse Issue Brief: Crisis Programs](#)

Young Child Households (Age 5 and Under)

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Households with at least one child age 5 or under.

Related Reports: Household Report

Exploring the Data: Guided Search --> Any Report --> "Who is assisted"
Advanced Data & Analytics --> "LIHEAP Recipients" --> Any Data Category
Advanced Data & Analytics --> "LIHEAP Income-Eligible Population" --> Any Data Category
Advanced Data & Analytics "Percent Served by LIHEAP" --> Any Data Category