

Low Income Household Water Assistance Program & Low Income Home Energy Assistance Program

National Energy Assistance Directors Association - Fall Meeting

September 17, 2024

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ADMINISTRATION FOR
CHILDREN & FAMILIES

Office of Community Services | 330 C Street, S.W., Washington, DC 20201
www.acf.hhs.gov/ocs



Low Income Household Water Assistance Program



LIHWAP Updates

- [Home - LIHWAP Implementation and Impact Report](#)
- [LIHWAP Survey Report](#)
- [2024 World Water Week](#)
- [LIHWAP One-Page Overviews](#)
- Coming Soon: LIHWAP Implementation and Impact, Final Report

Low Income Household Water Assistance Program

IMPLEMENTATION AND IMPACT REPORT PART ONE

June 2023

ADMINISTRATION FOR CHILDREN & FAMILIES
Office of Community Services

LIHWAP
Low Income Household Water Assistance Program

Low Income Household Water Assistance Program
First-ever federal water bill assistance program

UNITED STATES National Snapshot

Number of state grant recipients: **50 States***
Number of territory grant recipients: **5 Territories**
Number of tribal grant recipients: **97 Tribal Organizations**

*Includes 49 states and the District of Columbia. North Dakota declined LIHWAP funding.

LIHWAP Funding Breakdown

Total funding received: **\$1,120,865,454**

Funding spent: **\$1,083,551,063**
As of July 2024

Percent spent: **97%**
As of July 2024

How has LIHWAP impacted households in need?

Total households served: 1,724,615	Disconnections prevented: 843,897
Water services restored: 139,875	Water bills reduced: 809,657

LIHWAP Water Utility Affordability Survey Report: 2022 United States Data

Average household water debt: \$285	Average percent of households in water debt: 20%	Average percent of households with water disconnect notice: 16%
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Survey context: The need for water assistance is pervasive across the U.S. In 2023, the Office of Community Services conducted a survey¹ of water and wastewater utilities to assess arrears (money owed to the utility by households), disconnections, fees, and rates. The report provides information for LIHWAP grant recipients, water and wastewater utilities, and water affordability stakeholders to understand the nuances in water affordability across utilities, improve engagement, and identify gaps in program design and future directions for water affordability research and program development.

www.acf.hhs.gov/ocs/programs/lihwap | waterhelp.info

¹Households served is a duplicated count because households may have been served in both federal fiscal years. Program data are collected annually in fiscal year reports and quarterly reports.

²LIHWAP Water Utility Affordability Survey: www.acf.hhs.gov/sites/default/files/documents/ocs/water-survey.pdf



Low Income Home Energy Assistance Program



LIHEAP Updates



- [FY25 Model Plan & Reporting Updates](#)
- [State-Tribe Agreements - Roles and Responsibilities, Next Steps](#)
- [Monitoring Updates](#)
- [Information Memorandum \(IM\) LIHEAP Obligations, Expenditures, and Refunds](#)
- Reporting Review and Expiring LIHEAP Forms
- [FY25 Training and Technical Assistance \(T/TA\) Planning](#)
- Reallotment

Model Plan Review



- **Action Transmittal Released April 4, 2024**
 - Included [LIHEAP Model Plan Reference Guide](#)
 - [LIHEAP Model Plan Template](#) (Word Document)
 - [Model Plan Webinar](#)
 - [Allowable Activities Webinar](#)
- **Status as of September 12, 2024**
 - 22 LIHEAP Model Plans Approved
 - 142 Under Review
 - 41 Received an extension or have not submitted

Model Plan Review

Completeness items:

Have 5 days to correct

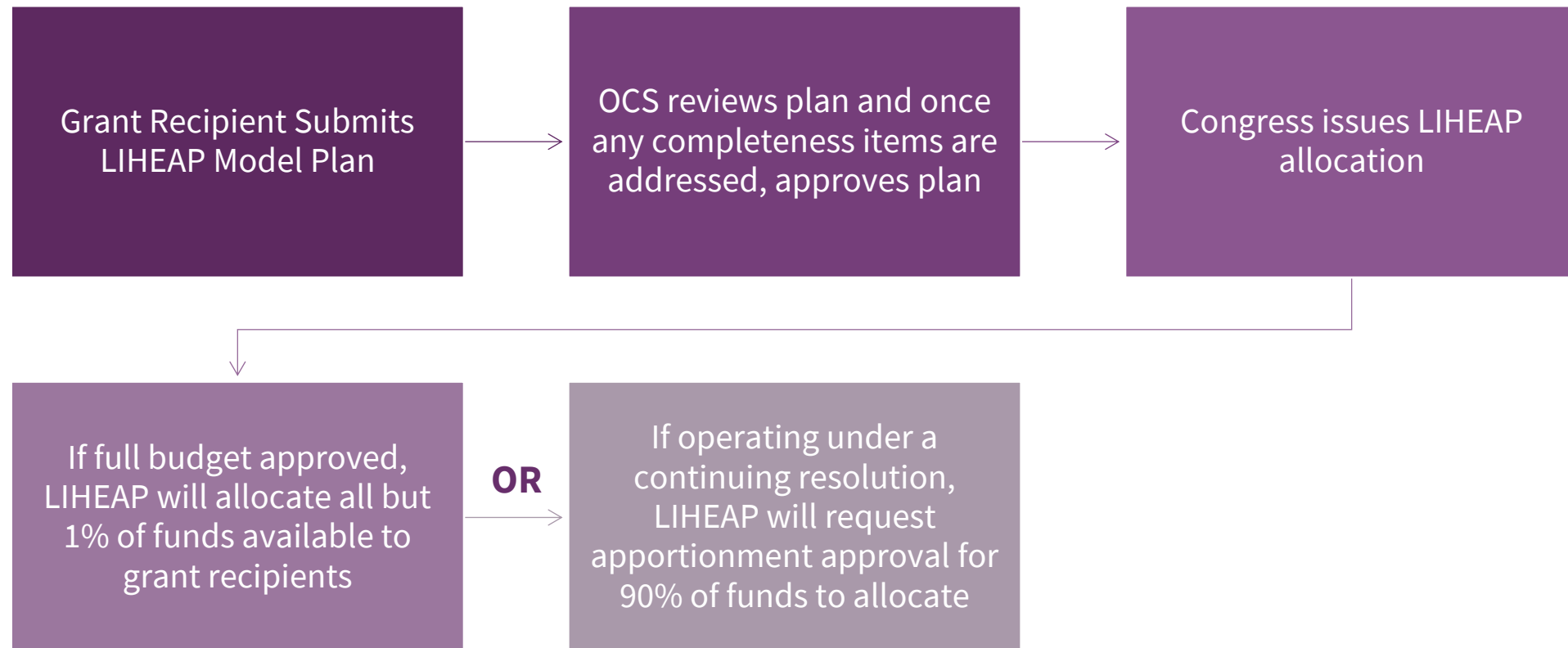
- Examples include:
 - Incorrect Delegation Letter
 - Unacceptable Benefit Matrix
 - Income Eligibility above the allowable limit.

Have 45 days to correct

- Examples include:
 - Fair Hearing/Appeal policy not including the ability to appeal if an application is not processed in a timely manner.
 - Unclear crisis response policy.

Compliance Items:

LIHEAP Model Plan and Funding Allocations



State and Tribe Agreements

- [Action Transmittal 2024-04 State Tribe Agreements](#)
 - LIHEAP directly funded federal, or state recognized tribes' allocation is determined either by utilizing the U.S. Census Bureau's American Community Survey data or determined by an agreement between the state and tribe.
 - The [LIHEAP Clearinghouse](#) provides the current tribal contracts on file with OCS
 - [Memorandum of Understanding Template](#)
 - [State-Tribe Agreement Presentation](#)

Public Law 102-477: Indian Employment, Training and Related Services

- [Public Law 102-477](#), known as the Indian Employment, Training and Related Services Demonstration Act, was established to enhance the ability of federally recognized tribes and Alaska Native entities to address their employment and training needs. The primary intent of the 477 Program is to streamline and consolidate various federal grant programs related to employment, training, and related services into a single, cohesive plan, budget, and reporting system. This integration is designed to align with tribal priorities, reduce administrative burdens, and enhance the efficiency and effectiveness of service delivery within tribal communities.
- 7 Tribes currently approved for 477-integration
- 8 Additional tribes pending integration approval
- Additional Resources:
 - [Administration for Children and Families Public Law 102-477](#)
 - [U.S. Department of Interior, Bureau of Indian Affairs](#)

Monitoring Update

- In federal fiscal year 2025 (FY25), OCS will employ a new monitoring software called TeamMate+.
- Targeting approximately eight states for monitoring based on our internal risk assessment.
- Some FY24 Monitoring Statistics:
 - Conducted 12 state monitoring visits.
 - 92% of those initial reports were issued within 45 calendar days.
 - 58% of those have been issued in final, with a goal of issuing 100% in final by November 15, 2024.
 - 25% of final reports have been closed out with no remaining unresolved findings.
 - All FY23 reports have been issued in final and only two remain open (unresolved findings).

Information Memorandum (IM) on LIHEAP Obligations, Expenditures, and Refunds

- **A collection of existing guidance based on monitoring trends with new examples.**
- **Refresher: Obligation Timelines**
 - It is the responsibility of grant recipient to obligate LIHEAP funding in accordance with the grant recipients' own rules, to the extent they do not conflict with federal rules.
 - At least 90 percent of any LIHEAP grant must be obligated in the same year it was awarded.
 - Up to 10 percent of the award may be carried over the obligation in the following year.
 - Funds not obligated in accordance with these requirements will be reallocated annually.

Information Memorandum (IM) on LIHEAP Obligations, Expenditures, and Refunds

■ Refresher: Expenditure Timelines

- Also known as a liquidation of obligations.
- It is the responsibility of grant recipient to expend LIHEAP funding in accordance with the grant recipients' own rules, to the extent they do not conflict with federal rules. This includes the amount of time a grant recipient is allowed to expend funds after an obligation is made.
- Grant recipient PMS accounts will be closed five years after the end of the period of availability which is five years following September 30 of the year of award. This does not mean grant recipients can spend money at any point in the five years after the year of award.
- If grant recipients do not liquidate obligations during the two-year LIHEAP period, they must ensure that active agreements with partnering agencies allow for an extended liquidation period.

Information Memorandum (IM) on LIHEAP Obligations, Expenditures, and Refunds

■ Refresher: Expenditure Timelines Continued

- The [LIHEAP Supplemental Terms and Conditions](#) require grant recipients to notify their Grants Management Officer (GMO) identified in the NOA if they require more than one year from the project period end date to liquidate allowable obligations.

Example of Allowable Application of Expenditure Guidance

- \$1 million FY 24 LIHEAP award with a period of performance from October 1, 2023 – September 30, 2025.
- On October 1, 2023, grant recipient enters a LIHEAP Weatherization contract or \$200,000 with a contract period from January 1, 2024 – September 30, 2026.
- Grant recipient may incur LIHEAP expenses through September 30, 2026.
- 14 ■ Grant recipient has up to five years from FY 24 to draw funds but must seek approval from GMO.

Information Memorandum (IM) on LIHEAP Obligations, Expenditures, and Refunds



Information Memorandum (IM) on LIHEAP Obligations, Expenditures, and Refunds

Example of Unallowable Application of Expenditure Guidance

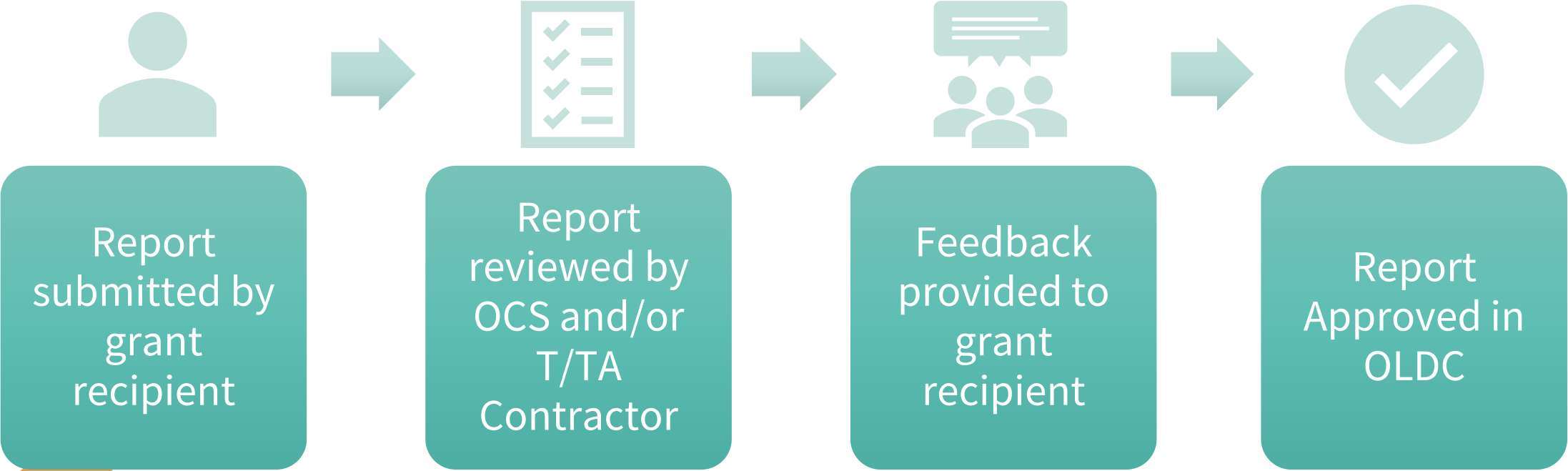
- \$1 million FY 24 LIHEAP award with a period of performance from October 1, 2023 – September 30, 2025.
- 100 percent of LIHEAP award is obligated via a subaward agreement with a local administering agency on October 1, 2023.
- Grant recipient has leftover funds in PMS from FY 2022 that it wants to spend, even though it obligated all its FY 2022 funding via a similar subaward agreement that ended on September 30, 2023.
- Grant recipient employs a first-in-first-out method of drawing funds to cover expenses incurred under the new October 1, 2023 subaward agreement. (Unspent funds rolled into new program period)
- This example is a clearly erroneous interpretation of federal guidance.

Information Memorandum (IM) on LIHEAP Obligations, Expenditures, and Refunds

■ Vendor Refunds

- **Example:** A utility vendor identifies unused LIHEAP funds that were applied to an inactive utility account (i.e., the customer moved or is deceased)
- **Required Action by Vendor:** The vendor must refund the unused benefit and indicate when the original payment occurred. Refunds are either: (1) returned directly to the grant recipient; or (2) returned to a partnering agency.
- **Required Action by Grant Recipient:** Grant recipients must ensure that benefits returned by a vendor are not re-issued outside of the project period, or if the refund occurs in the second year of a LIHEAP award and the grant recipient has already carried over the maximum amount (10 percent). Returned funds that are ineligible for re-obligation must be returned to HHS.

LIHEAP Report Review Process



LIHEAP Expiring Forms

All forms are subject to the Paperwork Reduction Act (PRA) process. The PRA process requires OCS to complete the following:

- Develop a justification package describing the need and collection procedures for the information including all forms and documents (i.e. instructions) that respondents will see
- Publish a Federal Register notice, allowing the public 60 days to submit comments
- Publish a second Federal Register notice, allowing the public 30 days to submit comments
- The Office of Management and Budget approves the final form, and the expiration date is updated.

Current LIHEAP Forms and Expiration Dates:

LIHEAP Performance Data Form	Quarterly Report	Household Report – Long and Short Form	Carryover and Reallotment Report	RECs Data Match
Expires 02/28/2025	Expires 10/31/2025	Expires 06/30/2025	Expires 06/30/2025	2022

Expires 02/28/2025



Extension Request to 06/30/2025 revised report effective 7/1/2025



October 2025, issue 60-day public comment period notice



January 2025, issue 30-day public comment period notice



May 2025, Finalize form, receive approval and issue approved form to grant recipients



January 2026, revised form due from grant recipients covering FY25 data

Expiring Forms

LIHEAP Performance Data Form

How to Avoid Reallotment

Benefits

- Increased benefit
- Supplemental benefits
- Crisis benefits, paying of past due balances

Program Year

- Extension of Application Deadlines
- Year-round Crisis Program

Program Components

- Cooling Assistance
- Equipment Repairs
- Weatherization waivers
- Increasing Assurance 16

Save the Date

The Office of Community Services will be hosting the following virtual training events for the Low Income Home Energy Assistance Program (LIHEAP).

- 10/31/2024 1:00pm-2:00pm EST Completing the Household Report Long Form
- 10/31/2024 2:30pm-3:30pm EST Completing the Household Report, Short Form
- 11/14/2024 2:00pm-3:30pm EST Completing the Carryover and Reallotment Report and the Federal Financial Report
- 11/19/2024 2:00pm-3:00pm EST Completing the Performance Data Form, Module 1
- 12/10/2024 2:00pm-3:00pm EST Completing the Performance Data Form, Module 2
- 12/17/2024 2:00pm-3:00pm EST Completing Quarterly Reports
- 1/16/2024 2:00pm-3:00pm EST LIHEAP Monitoring, How to Prepare for a Monitoring Visit

Registration information will be sent closer to the event date. We look forward to seeing you!

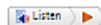


OCS
Office of Community Services



LIHEAP
Low Income Home Energy Assistance Program

LIHEAP Tools Training Resources



Publication Date: October 14, 2022 Current as of: August 9, 2024



- LIHEAP Use of Funds: Allowable Activities and Flexibilities [PowerPoint \(PDF\)](#), June 26, 2024
- 2D: LIHEAP State-Tribe Agreements [PowerPoint \(PDF\)](#), June 2024
- LIHEAP 102: Delivering Benefits that Match Clients' Needs [PowerPoint \(PDF\)](#), June 2024
- LIHEAP 101: Serving Clients & Empowering Staff [PowerPoint \(PDF\)](#), June 2024
- Using the LIHEAP Data Warehouse [PowerPoint \(PDF\)](#), May 7, 2024
- Vendor Refunds Webinar [PowerPoint \(PDF\)](#), (Vendor Refunds TA Guide) [PowerPoint \(PDF\)](#), January 31, 2023
- LIHEAP Subgrantee Fiscal Monitoring [PowerPoint \(PDF\)](#), September 29, 2022
- LIHEAP 101 - Basics of Operating a LIHEAP Program [PowerPoint \(PDF\)](#), August 31, 2022
- Case Management Approaches in LIHEAP and Use of Assurance 16 Funds [PowerPoint \(PDF\)](#), March 9, 2022
- Preventing Improper Payments: Fraud, Waste and Abuse [PowerPoint \(PDF\)](#), (TA Guide) [PowerPoint \(PDF\)](#), (Self-Assessment Checklist) [PowerPoint \(PDF\)](#), March 2, 2022
- LIHEAP/LIHWAP/ERA Coordination with Utility Providers [PowerPoint \(PDF\)](#), January 31, 2022
- LIHEAP/ERA Coordination for Tribes Webinar, [PowerPoint \(PDF\)](#), December 15, 2021
- LIHEAP/ERA Coordination for States and Territories [PowerPoint \(PDF\)](#), December 13, 2021
- All State and Tribal LIHEAP Policy Webinar [PowerPoint \(PDF\)](#), July 26, 2021



- LIHEAP Performance Management: Data Informed Program Decisions [PowerPoint \(PDF\)](#), December 2, 2021
- Introducing a New Tool for Interpreting LIHEAP Energy Burden Targeting Data [PowerPoint \(PDF\)](#), October 27, 2021
- New Updates and Improvements to the LIHEAP Performance Management Website [PowerPoint \(PDF\)](#), May 25, 2021
- LIHEAP Performance Management - Electric Baseload Expenditures Data Reliability Tool [PowerPoint \(PDF\)](#), April 28, 2021

LIHEAP Conferences and Regional Meetings

You can access recordings of live sessions presented at LIHEAP National Conferences and Regional Meetings [here](#).

[Archive Training Material](#)



- Updates to the LIHEAP Model Plan form for FY 2025 [PowerPoint \(PDF\)](#), April 23, 2024
- Completing the LIHEAP Quarterly Reports for FY 2024 [PowerPoint \(PDF\)](#), February 13, 2024
- Completing the FY 2023 LIHEAP Household Report - Short Form [PowerPoint \(PDF\)](#), December 5, 2023
- Completing the FY 2023 Performance Data Form - Module 2 (Performance Measures) [PowerPoint \(PDF\)](#), November 16, 2023
- Completing the FY 2023 Performance Data Form - Module 1 (Grantee Survey) [PowerPoint \(PDF\)](#), November 14, 2023
- Completing the Household Report-Long Form [PowerPoint \(PDF\)](#), October 25, 2023
- FY 2023 LIHEAP Funding and Reporting Requirements [PowerPoint \(PDF\)](#), [FAQ \(PDF\)](#), April 4, 2023
- LIHEAP Quarterly Report TTA Q&As [PowerPoint \(PDF\)](#), January 18, 2023
- LIHEAP FY 2022 Carryover & Reallocation Report: Overview & Reminders Webinar [PowerPoint \(PDF\)](#), November 8, 2022



- Utilizing Community Solar for LIHEAP Income Qualified Households [PowerPoint \(PDF\)](#), October 26, 2023
- Safer, More Efficient Wood Stove Heating and LIHEAP [PowerPoint \(PDF\)](#), November 5, 2015
- LIHEAP Categorical Eligibility [PowerPoint \(PDF\)](#), May 27, 2015



- Using Data to Develop Outreach Strategies [PowerPoint \(PDF\)](#), June 2024
- Using LIHEAP and Census Data for Geographic Analysis in Illinois - Data Case Study #3 [PowerPoint \(PDF\)](#), April 7, 2023
- Using Geospatial Data for Targeting LIHEAP Assistance in Washington - Data Case Study #2 [PowerPoint \(PDF\)](#), June 17, 2022
- Targeting Energy Assistance to Vulnerable Populations - Data Case Study #1 [PowerPoint \(PDF\)](#), July 13, 2020

Tools & Training Resources

Low Income Home Energy Assistance - Federal Fiscal Year 2023 National Profile (All States)

Funding Available for States

\$6.2 Billion

\$3.9B Regular funds
 \$2B Emergency & Disaster funds
 \$98M IUA funds
 \$219M in prior FY 2022 funds
 (carried over to FY23 by states)

Total Households Served by State Programs

5,939,605

State Maximum Income Eligibility Requirements for Heating Assistance*

110% to 329%

of HHS Poverty Guidelines

% of Income-Eligible Population Served by State Programs

17%

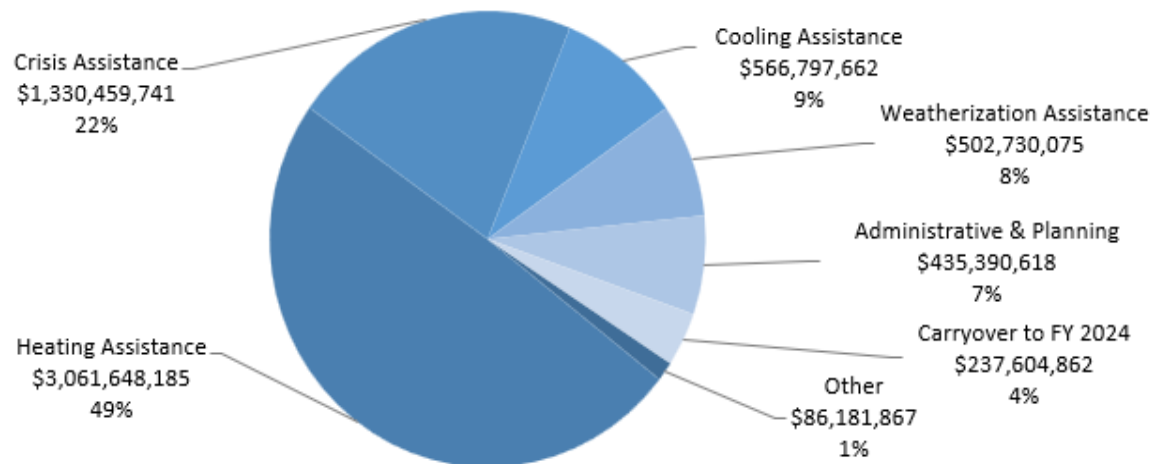
Income-Eligible Population

35.9 million

Funds Available to States (\$ billions, 2019-2023)

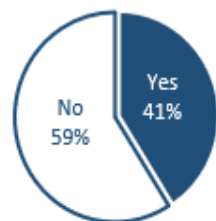


Uses of Funds

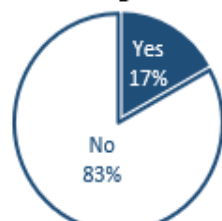


Vulnerable Recipient Households (reported by States)

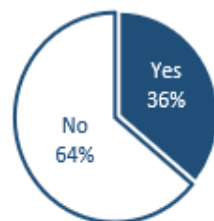
Households with Older Adult Member



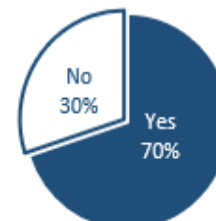
Households with Young Child



Households including Member with a Disability



Households with Any Vulnerable Member



Types of Assistance (reported by States)

- Heating Assistance** was provided by 51 states and served 5,053,596 households with estimated average benefits of \$606.
- Cooling Assistance** was provided by 25 states and served 927,209 households with estimated average benefits of \$611.
- Year-round Crisis Assistance** was provided by 27 states and served 694,212 households with estimated average benefits of \$957.
- Winter Crisis Assistance** was provided by 24 states and served 709,938 households with estimated average benefits of \$625.
- Summer Crisis Assistance** was provided by 6 states and served 157,976 households with estimated average benefits of \$183.
- Weatherization Assistance** was provided by 49 states and served 60,818 households.

LIHEAP National Profile (All States) FY23

*Grant recipients may set income-eligibility between 110% of Federal Poverty Guidelines (FPG) and the greater of 150% FPG or 60% of State Median Income (whichever is greater).

Excludes Tribal and Territory Grant Recipients; Data are current as of June 30, 2024. For more information, see <https://liheappm.acf.hhs.gov/>



LIHEAP Resources

- [Office of Community Services LIHEAP](#)
- [Contact Information](#)
- [Training Resources](#)
- [Energy Help](#)
- [LIHEAP Data Dashboard](#)
- [LIHEAP Extreme Heat](#)
- [OCS Disaster Flexibilities Hub](#)



Thank you

[LIHEAP Contacts](#)

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