

# PMIWG Report

NEADA Winter Meeting  
March 13, 2025

# Agenda

## **During this presentation, we will:**

1. Review the background of the PMIWG
2. Provide an update on PMIWG membership
3. Provide an update from the PMIWG Teams on recent accomplishments, current projects, and future plans
4. Answer any question

# PMIWG Background

- The **LIHEAP Performance Management Implementation Work Group (PMIWG)** launched in 2010 to help grant recipients improve data collection, reporting, and program procedures.
- Helped design and implement the LIHEAP Performance Management Website (PMW).
- Activities include but are not limited to:
  - Educating grant recipients on LIHEAP Performance Measures and Management (PM).
  - Developing data collection templates, guidance tools, and other resources for facilitating PM activities.
  - Assessing grant recipients' data collection capacity.
  - Advising on reporting and data use for program administration.



# Three PMIWG Teams

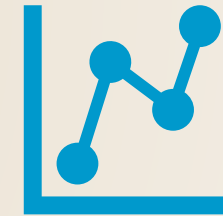
## Performance Management Integration (PMI)

- Helps grant recipient understand LIHEAP program management and Performance Measures.
- Creates and organizes tools and resources that help with Performance Management implementation.



## Data Case Studies

- Helps grant recipients understand and use their Performance Management data.



## Data Reliability

- Researches concerns about data collection and quality.
- Empowers grant recipients to use their data to make informed decisions.

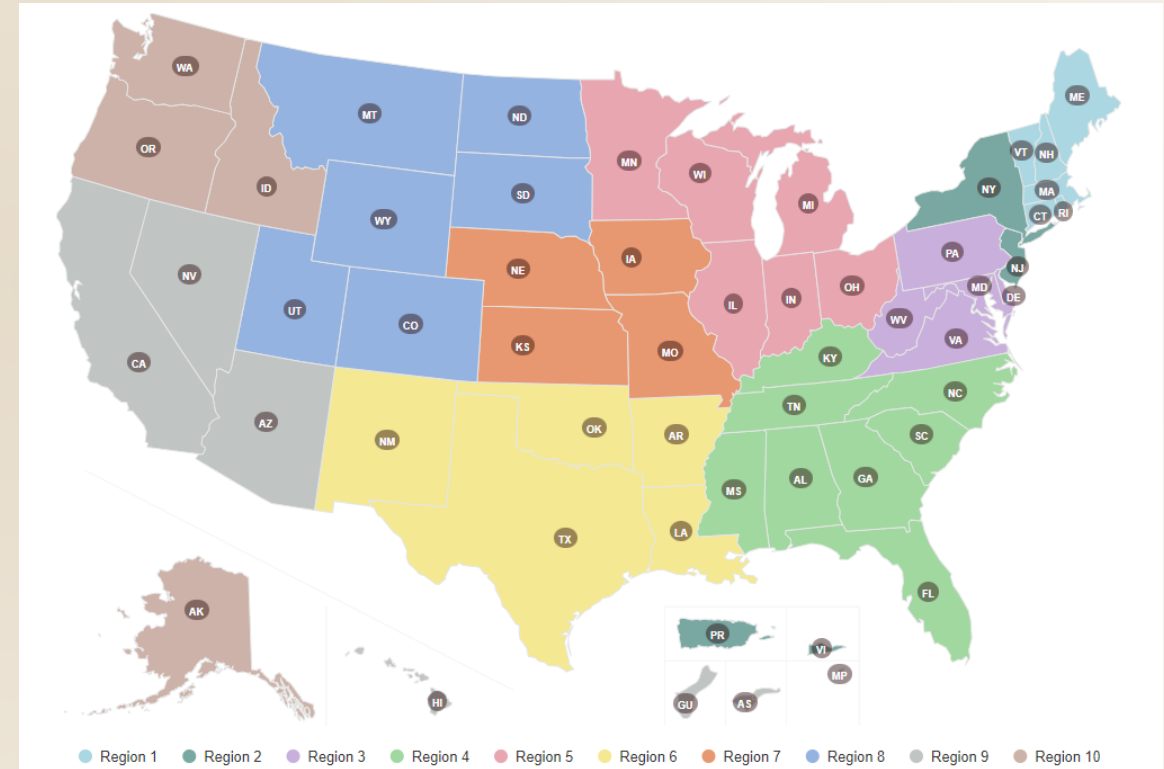


# PMIWG Membership

## PMIWG Members

### ➤ States, Tribes, and Territories

- Region 1 – VT
- Region 2 – NY, PR
- Region 3 – PA
- Region 4 – GA, MS
- Region 5 - WI, MN
- Region 6 – AR, OK
- Region 7 – IA
- Region 8 – CO, Rosebud Sioux
- Region 9 – CA, American Samoa
- Region 10 – WA, OR



# PMIWG Membership Types

## LIHEAP Director

- CO, GA, NY, PA, PR, RI, VT, WA

## Other Titles

- LIHEAP Coordinator
- Section Chief
- Primary Program Analyst
- Program and Policy Analyst
- Compliance Officer
- Program Field Representative
- WAP Director (previous LIHEAP Director)
- Manager of IT Services
- Intake Specialist



# Performance Management Integration Team

**Presenter: Michelle Gillham (AR)**

## **Project Team Members:**

Sisavai'i Tuala-Tamaalelagi (AS)

Johana Hernandez (PR)

Cynthia Bryant (GA)

Lisa Goben (OR)

Bobbi Davis (WI)

Michelle Gillham (AR)

Jane Blank (WI)

Heather Jones (OCS)

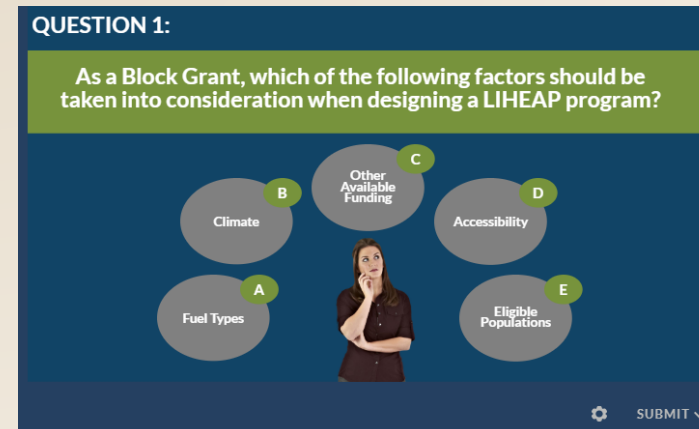
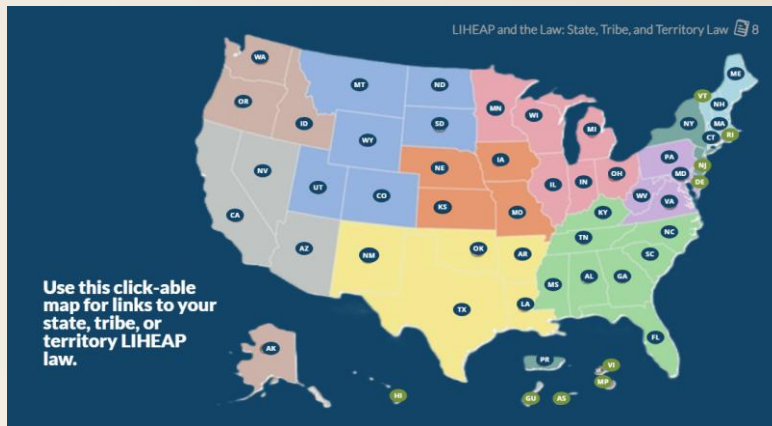
# PMIWG Project Team Updates

## Performance Management Integration (PMI) Team

### Current Projects

#### Training Tool for LIHEAP Grant Recipients

- “On-demand” training resource for new (and experienced) LIHEAP administrators.
- Features interactive learning tools, activities, and assessments (e.g., quizzes).
  - Module 1: Who’s Who in LIHEAP?
  - Module 2: LIHEAP Resources
  - Module 3: Getting Situated Checklist
  - Module 4: LIHEAP and the Law





# PMIWG Project Team Updates

## Performance Management Integration (PMI) Team

### Current Projects

#### Performance Measures “Next Steps Tool”

- Online application designed to help grant recipients understand their performance measure data.
  - Part 1 presents current year data, trends over time, and regional/national comparisons.
  - Part 2 takes a deeper dive to help grant recipients use data to assess program impacts and goals.

The screenshot shows a web application interface. At the top, there are two dropdown menus: 'Select a State' and 'Choose a Year'. Below these, the main heading is 'Part II: Understanding My Program Impacts'. Underneath the heading, a paragraph reads: 'Let's take a deeper dive into what exactly your LIHEAP Performance Measures are telling you.' To the right of this text is a light blue box with the title 'This section uses my most recent available LIHEAP performance data to:' followed by a bulleted list: 'Highlight characteristics of the people we serve', 'Demonstrate our program impacts', 'Help us assess and/or set our program goals', and 'Pinpoint overarching elements of our benefit matrix that may need further evaluation'. At the bottom left of the interface is a 'Next' button.

# PMIWG Project Team Updates

## Performance Management Integration (PMI) Team

### Highlighted Project Accomplishments: Training Tool for LIHEAP Grant Recipients

- **Module 4: LIHEAP and the Law** – Reviewed by the team and nearly ready for publication to the full Work Group.
- **Module 5: LIHEAP Policy: Model Plan and Policy Manuals** – Outlined in detail and currently being drafted for team review.

**LIHEAP Statute: The Sixteen Assurances**

Click the tabs on the left for a brief overview of each assurance.

Note: This resource provides a high level overview of LIHEAP Assurances. Future courses/lessons will provide a "deeper dive" into each assurance.

**Where Do I Go First?**

The amount of LIHEAP information online can feel overwhelming, and grant recipients will often find what they are looking for in more than one place. While there is not a "best" LIHEAP website, many grant recipients develop a favorite "go-to" over time.

Click on the photos below to learn from others in the LIHEAP network.

Jane Blank Wisconsin, Lisa Goben Oregon, Michelle Gillham Arkansas, Heather Jones HHS/OCS, Kate Thomas HHS/OCS

HHS/ACF Website, NCAT LIHEAP Clearinghouse, LIHEAP Performance Management Website

# ***PMIWG Project Team Updates***

## **Performance Management Integration (PMI) Team**

### **Project Timelines**

#### **Training Tool for LIHEAP Grant Recipients**

- **Spring** – Publish Module 4 to the Work Group
- **Spring** – Draft Module 5 and conduct PMI Team Review

#### **Performance Measures “Next Steps Tool” (Part 2)**

- **Spring/Summer** – APPRISE to collaborate with contractors to update the app based on PMI team feedback

# Data Case Studies Team

**Presenter: Brian Whorl (PA)**

**Project Team Members:**

Malelega Tuiolosega (AS)

Monica Popescu (CA)

Theresa Kullen (CO)

Christine Taylor (IA)

Ian Villa-Watt (MN)

Brian Whorl (PA)

Brian Sarensen (WA)

Sharnice Mitchell (OCS)

# PMIWG Project Team Updates

## Data Case Studies Team

### Current Projects – Data Analyst Virtual Brownbags

- Purpose: Bring together LIHEAP “data people” to informally learn about and share ideas in a conversation led and conducted by grant recipients.
- Frequency: Complete one per quarter.
- Impact: 20-40 program staff from non-workgroup states/tribes/territories attend. They share comments, ask questions, and exchange info.
- Past Topics: Tools for working with vendor data, benefit determination approaches, using data to determine subrecipient allocations, and how to share or visualize LIHEAP data.

#### State #1: Iowa Subrecipient Basics

- Network of 16 CAAs
- Coverage aligns with counties
- Roles of CAAs:
  - Outreach
  - Intake & Eligibility Determination
  - Application Processing
  - Benefit Payments
  - Client Services



Speaker:  
Christine Taylor

#### Minnesota Dashboard

**PURPOSE** = Provide interactive real-time insight into energy assistance.

**INTENDED AUDIENCE** = General Public, Media, Legislators, and Community Advocates.

#### Energy Assistance Program Dashboard

10/1/23-11/4/2024 (Updated Weekly)

**\$95,339,211**

AWARDED TO HOUSEHOLDS

**\$736**

AVERAGE HOUSEHOLD BENEFIT

How does Energy Assistance award benefits?

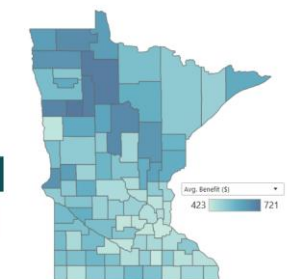
Energy Assistance has helped **129,542** households this program year.

43% have a person over 60

39% have a disabled member

18% have a child under 6

**Benefits by County**  
Mouse over a county for more information.



# *PMIWG Project Team Updates*

## Data Case Studies Team

### Current Projects – Data Analyst Virtual Brownbags

- *Next Brownbag Topics:*
  - Crisis Timelines and Crisis Data Results (Spring)
  - Using LIHEAP Demographic Data (Summer)
  - Assessing Outreach Approaches (Fall)
  - Assurance 16 (Winter)



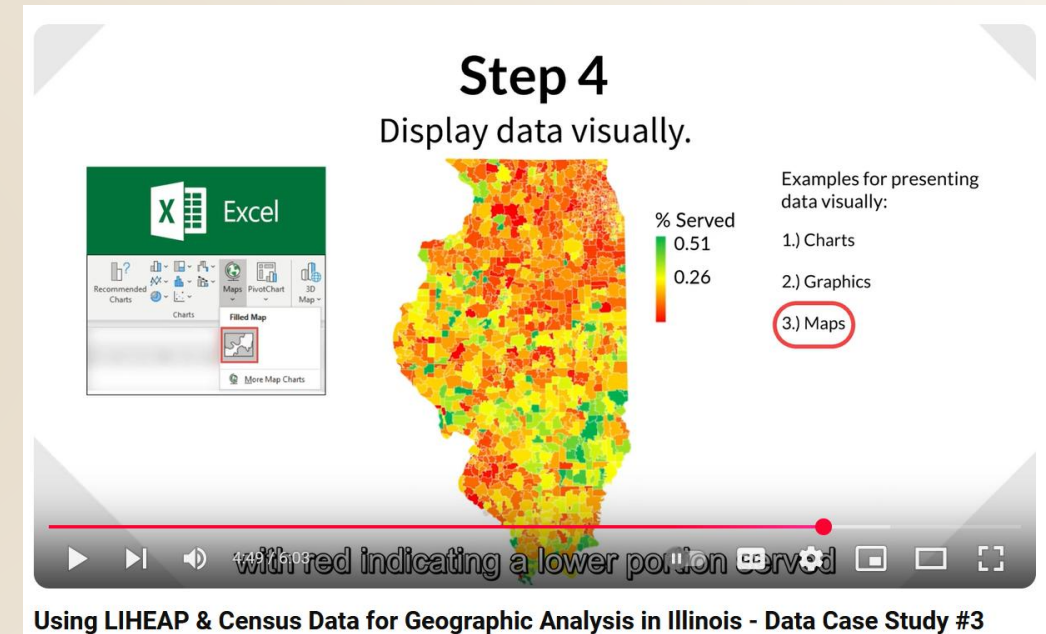


# PMIWG Project Team Updates

## Data Case Studies Team

### Current Projects – Data Case Studies

- Application Processing and Automation (DONE) – The team presented Kansas DCF's work to automate LIEAP application registration and processing.
- LIHEAP Targeting and Ratepayer Assistance Programs – The team plans to investigate Performance Measures results in states with and without a ratepayer assistance program.
- LIHEAP Demographic Data Analysis – The team plans to highlight how new demographic data can provide valuable information to understand program participation and inform outreach.

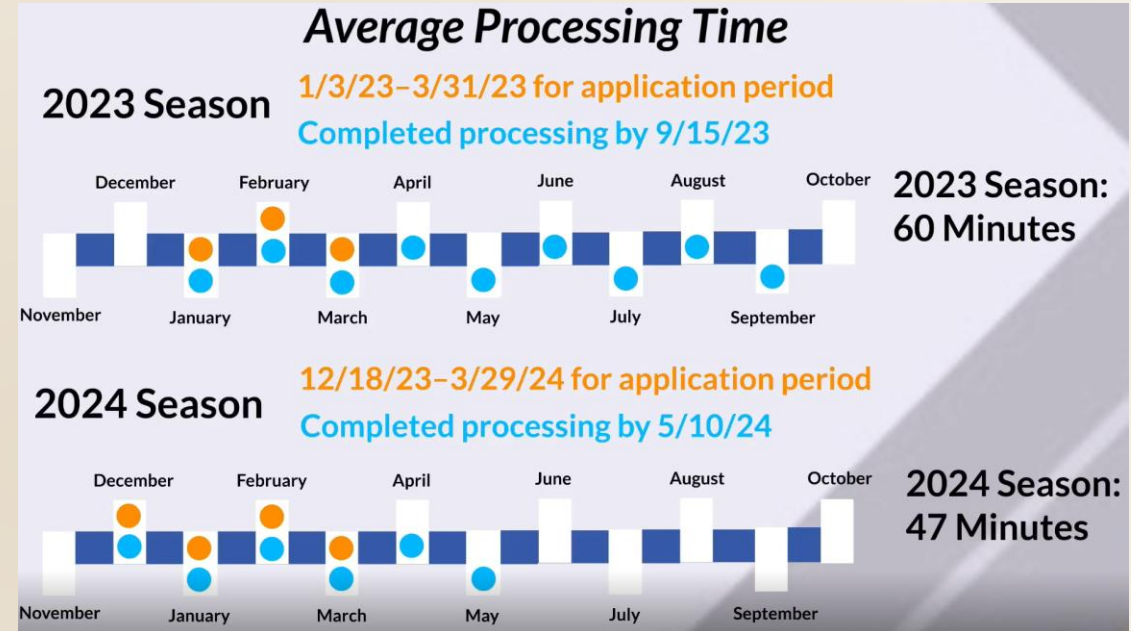


# PMIWG Project Team Updates

## Data Case Studies Team

### Highlighted Project Accomplishment – Kansas Vignette on Improving LIHEAP Application Processing

- Completed short vignette video on Kansas' use of software automation to improve LIHEAP application processing.
- The video is planned to be posted on the ACF YouTube Channel and LIHEAP PMW. Team members expect to share the vignette with non-workgroup members in their regions.



Whole Season		
Program Year	2023	2024
Total Applications Received	47,732	46,982
Total Applications Processed	49.3%	100%



# ***PMIWG Project Team Updates***

## **Data Case Studies Team**

### **Project Timelines -**

### **Data Analyst Virtual Brownbags**

- **March** – Host brownbag on “Crisis Timelines and Crisis Data Results ”.
- **Summer** – Host brownbag on “Using LIHEAP Demographic Data ”.

### **Data Case Studies**

- **Spring** – Conduct analysis / Outline studies.
- **Summer** – Complete studies and post to LIHEAP PMW.

# Data Reliability Team

**Presenter: Richard Giddings (VT)**

## **Project Team Members:**

Deeannah Loia (AS)

Casey Killion-Letran (OK)

Verkista White (MS)

Keri Stark (NY)

Lori Walking Eagle (RST)

Richard Giddings (VT)

Peter Edelman (OCS)

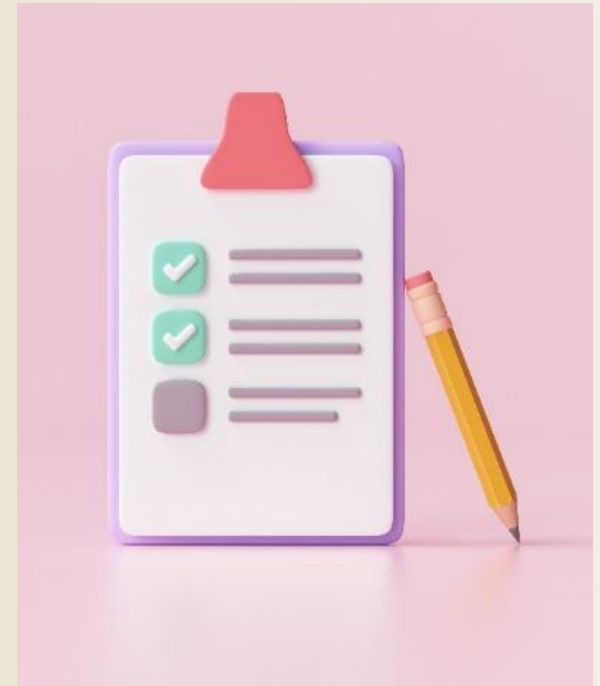
# PMIWG Project Team Updates

## Data Reliability Team

### Current Projects

#### IT Solutions Survey

- **Purpose:** Survey will document whether each grant recipient has an IT Solution for a given program requirement (e.g.: outreach, intake), and identify which have IT solutions they would recommend to others.
- **Goals:**
  - OCS T&TA Planning: Document needs for planning efforts.
  - Peer-to-Peer Network: Publish results to facilitate peer-to-peer exchange.
- **Two Versions:**
  - States – Pre-tests complete; currently under OMB PRA review
  - Tribes & territories – Currently being developed



## ***PMIWG Project Team Updates*** **Data Reliability Team**

## Highlighted Project Accomplishments:

# IT Solutions Survey for States: Microsoft Access Database Prototype

- Allows grant recipients to explore survey results in a structured format, including:
  - The most-used and recommended IT solutions.
  - List of states that recommend their solution.
  - State-specific details for additional context.
  - Contact information for program managers and personnel responsible for business requirement.
- General structure/workflow of database:
  - Screen 1: Select business requirement
  - Screen 2: Select IT solution/activity
  - Screen 3: Summary stats for solution/activity
  - Screen 4: List of states with recommended solution
  - Screen 5: Detailed information for selected state

**List of States that have Implemented an IT Solution for this Activity**

Business Requirement Reporting to OCS

Topic or Activity: Preparing Household Report

State -	Recommends Solution? -	Has Subrecipients/Intake Agencies -	Number of IT Systems -	Funding Level -	Region -
Kansas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	\$25 to \$50 million	7
Mississippi	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	\$25 to \$50 million	4
Oklahoma	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	\$25 to \$50 million	6
Pennsylvania	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	More than \$100 million	3
Washington	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	\$25 to \$50 million	10
Wisconsin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	More than \$100 million	5

[Back to IT Solution Breakdown](#)
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# PMIWG Project Team Updates

## Data Reliability Team

### Highlighted Project Accomplishments:

### IT Solutions Survey for States: Microsoft Access Database Prototype

Data Reliability Team recommendations:

- Tailoring state-specific data based on the IT solution in question.
- Adding pop-up boxes with definitions or explanations of certain IT solutions.
  - Example: Defining SSA Data Exchange Systems used for data verification.
- Updating database annually: add a question to Q4 Quarterly Report asking whether any significant upgrades were made to IT system(s) in the past year.

**List of States that have Implemented an IT Solution for this Activity**

Business Requirement: Reporting to OCS

Topic or Activity: Preparing Household Report

State	Recommends Solution?	Has Subrecipients/Intake Agencies	Number of IT Systems	Funding Level	Region
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Pennsylvania	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	More than \$100 million	3
Washington	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	\$25 to \$50 million	10
Wisconsin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	More than \$100 million	5

**Additional Information for: Kansas**

Business Requirement: Reporting to OCS

Topic or Activity: Preparing Household Report

**LIHEAP Manager**

Name: Ms. Shannon Connell

Phone: (785) 296-0147

Email: Shannon.Connell@ks.gov

**Business Requirement Information**

Responsible Entity: State LIHEAP Office

Person Responsible for Business Requirement: Dorothy Gale

Phone: (556) 556-5555

Email: Dorothy.Gale@ks.gov

# PMIWG Project Team Updates

## Data Reliability Team

### Highlighted Project Accomplishments:

#### IT Solutions Survey for Tribes and Territories: Preliminary Interviews

- APPRISE completed preliminary interviews with seven tribes and one territory.
- Key findings:
  - IT capabilities varied widely from only using Excel to fairly sophisticated systems that cover most business requirements.
  - Five of eight respondents primarily rely on Excel.
  - Significant interest in upgrading IT systems—but also significant interest in T&TA for Excel (either training or LIHEAP-specific templates).
  - Biggest barrier to implementing a more advanced system: **Budget**
  - Other barriers include:
    - Lack of decision-making power over IT system
    - Intake office staff lack technical knowledge



# ***PMIWG Project Team Updates***

## **Data Reliability Team**

### **Project Timelines**

#### **IT Solutions Survey for States**

- **March** – OMB PRA approval to administer survey.
- **April & May** – Administer survey to remaining states.
- **Next Steps** – Develop database application and create recommendations for OCS T&TA planning.

#### **IT Solutions Survey for Tribes and Territories**

- **March** – Develop survey instrument.
- **April** – Test with nine or fewer tribes and territories and update survey based on feedback.
- **Next Steps** – Administer survey to remaining tribes and territories.

# Questions and Discussions

