

BENEFIT MATRIX – Factors

ASSURANCE 5: LIHEAP Statute Section 2605(b)(5): The grantee shall provide ... that the **highest level of assistance** will be furnished to **households** which have the **lowest incomes** and the **highest energy costs** or needs in relation to income, taking into account family size

Federal Poverty	75% FPL		100% FPL		125% FPL		150% FPL	
Household Size	8 points		7 points		6 points		5 points	
	Month	Year	Month	Year	Month	Year	Month	Year
1	\$743	\$8,910	\$990	\$11,880	\$1,238	\$14,850	\$1,485	\$17,820
2	\$1,001	\$12,015	\$1,335	\$16,020	\$1,669	\$20,025	\$2,003	\$24,030
3	\$1,260	\$15,120	\$1,680	\$20,160	\$2,100	\$25,200	\$2,520	\$30,240

- ✓ Household Size – grantee policies determine household members [see LH Statute Section 2603 (5)]
- ✓ Income – grantee policies determine types of income counted and FPL or SMI limits [see Statute Section 2505(b)(2)]
- ✓ A points-based matrix is based on *relative* costs for each factor, requiring the following:
 - Income calculation based on grantee policies and procedures
 - Utility cost calculation, including actual household bill(s), utility company provided averages, and performance report
 - Grantee decision on which categories and factors to use
 - Grantee determination of points assigned to each category factor
 - Grantee determination of dollar rate per point

<i>Energy-Related Categories</i>	<i>Indicators of Lowest Income and Highest Energy Cost or Need</i>	<i>Points Example</i>	<i>Lowest Income and Highest Need Equals the Highest Benefit Points</i>
CATEGORY	FACTORS	POINTS	NOTE
Income (from chart above)	< 75% FPL	8	- Higher benefit points to lower income households
	< 100% FPL	7	- Countable income per grantee definitions
	< 125% FPL	6	- Household size per grantee definition
	< 150% FPL	5	- May use FPL or SMI
Utility Type	Oil	6	- Higher benefit points for more costly fuel types - Requires periodic study of relative fuel costs - Performance report to include average costs on a limited sample of households (Electric, Natural Gas, Fuel Oil, Propane, and Other) - Bulk fuels factors are often combined on chart
	Kerosene	5	
	Propane	4	
	Firewood, Wood Pellets, Coal	3	
	Electricity	2	
	Natural Gas	1	
Climate/ Region Heating (Cooling) Degree Days	High	3	- Higher benefit for higher number of HDD - Requires one-time study of HDD
	Medium	2	
	Low	1	
Housing Type	Mobile Home	3	- Higher benefit points for higher utility cost per type of housing - Requires one-time study of variations - Some also consider age of housing
	Single, Site Built	2	
	Duplex or Greater	1	
Housing Status	Own/ Rent/ Utility	3	- Higher benefit points for households fully responsible for utilities - Allows non-direct utility payers to remain eligible but with reduced benefit points - Roomers/ Boarders, if not counted as household members
	Unsubsidized/ Utility Included	2	
	Roomers/ Boarders	1	
	Subsidized/ No Utility Allowance	1	
	Subsidized / Utility Allowance	0	
Priority Households	Elderly	3	- Higher benefit points according to grantee's priority households - May vary points or weigh all the same - May assign single point for any or point(s) for each factor present
	Disabled	2	
	Household Child <6	2	
Energy Burden Energy Cost / Income	25% and Above	6	- Higher benefit points for households expending higher percentage of income on energy - Energy cost/household income must be stated for the same time period
	18% to 24.9%	5	
	10% to 17.9%	4	
	9.9% and Less	3	

BENEFIT MATRIX – Example 1: Energy-Related and Other Categories (Points System)

Name of Head of Household: [Name]	Date of Application: [Date]
SSN or Case Number: [Number]	County: [Name]
Monthly Income: \$2,200	Monthly Energy Cost: N/A

Household Size	75% FPL		100% FPL		125% FPL		150% FPL	
	8 points		7 points		6 points		5 points	
	Month	Year	Month	Year	Month	Year	Month	Year
1	\$743	\$8,910	\$990	\$11,880	\$1,238	\$14,850	\$1,485	\$17,820
2	\$1,001	\$12,015	\$1,335	\$16,020	\$1,669	\$20,025	\$2,003	\$24,030
3	\$1,260	\$15,120	\$1,680	\$20,160	\$2,100	\$25,200	\$2,520	\$30,240
4	\$1,519	\$18,225	\$2,025	\$24,300	\$2,531	\$30,375	\$3,038	\$36,450
5	\$1,778	\$21,330	\$2,370	\$28,440	\$2,963	\$35,550	\$3,555	\$42,660
6	\$2,036	\$24,435	\$2,715	\$32,580	\$3,394	\$40,725	\$4,073	\$48,870
7	\$2,296	\$27,548	\$3,061	\$36,730	\$3,826	\$45,913	\$4,591	\$55,095
8	\$2,556	\$30,668	\$3,408	\$40,890	\$4,259	\$51,113	\$5,111	\$61,335
Additional Members	\$260	\$3,120	\$347	4,160	\$433	\$5,200	\$520	\$6,240

CATEGORY	FACTORS	POINTS / FACTOR	POINTS AWARDED
Income (from chart above)	< 75% FPL	8	7
	100% - 124% FPL	7	
	125% - 149% FPL	6	
	150% FPL	5	
Utility Type	Oil	6	6
	Kerosene	5	
	Propane	4	
	Firewood, Wood Pellets, Coal	3	
	Electricity	2	
	Natural Gas	1	
Housing Status	Own/ Rent/ Utility	3	3
	Unsubsidized/ Utility Included	2	
	Roomers/ Boarders	1	
	Subsidized/ No Utility Allowance	1	
	Subsidized / Utility Allowance	0	
Priority Households	Elderly	3	2
	Disabled	2	
	Household Child <6	2	

Notes & Comments:	Total Points:	18 points
	X \$25 dollar amount per point =	\$450
	+ Base Benefit Amount:	\$200
	+ Secondary Needed Utility:	\$50
	= Subtotal Non-Crisis Benefit:	\$700
	+ Crisis Benefit:	\$200
Intake Worker: [Name]	Date: --/--/---	= TOTAL BENEFIT \$900

BENEFIT MATRIX – Example 2: Energy Need (Points System)

Name of Head of Household: [Name]	Date of Application: [Date]
SSN or Case Number: [Number]	County: [Name]

Period Heating Cost /	\$245		
Period Income	\$1,290		
= Energy Burden	19%		
CATEGORY	FACTORS	POINTS / FACTOR	POINTS AWARDED
Energy Burden	25% and Above	15	13
	18% to 24.9%	13	
	10% to 17.9%	11	
	9.9% and Less	9	
Priority Households	Elderly	3	4
	Disabled	2	
	Household Child <6	2	
Housing Status	Own/ Rent/ Utility	3	3
	Unsubsidized/ Utility Included	2	
	Roomers/ Boarders	1	
	Subsidized/ No Utility Allowance	1	
	Subsidized / Utility Allowance	0	

Notes & Comments:	Total Points:	20 points
	X \$25 dollar amount per point =	\$500
	+ Base Benefit Amount:	\$200
	+ Secondary Needed Utility:	\$50
	= Subtotal Non-Crisis Benefit:	\$750
	+ Crisis Benefit:	\$200
Intake Worker: [Name]	Date: --/--/---	= TOTAL BENEFIT
		\$950

BENEFIT MATRIX – Example 3: Monetary Value System

Name of Head of Household: [Name]	Date of Application: [Date]
SSN or Case Number: [Number]	County: [Name]

Annualized Heating Cost /	\$2,950	\$245.83 per month	
Annualized Income	\$15,480	\$1,290 per month	
= Energy Burden	19.1%	Heating/ Income = Energy Burden	
Energy Burden Multiplier	.15	Energy Burden Range	MULTIPLIER
		25% and Above	.20
		18% to 24.9%	.15
		10% to 17.9%	.10
9.9% and Less	.05		
Energy Burden Benefit	\$443	Multiplier X Heating Cost = Energy Burden Benefit	
Priority Household Benefit	\$50	<i>Add for:</i> <input checked="" type="checkbox"/> \$50 Elderly <input type="checkbox"/> \$50 Disabled <input type="checkbox"/> \$10 per Child <6	
Housing Status Benefit	\$50	<i>Add for:</i> <input checked="" type="checkbox"/> \$50 Owner/ Renter/ Utility <input type="checkbox"/> \$25 Unsubsidized/ Utility Included <input type="checkbox"/> \$10 Roomers/ Boarders <input type="checkbox"/> \$5 Subsidized/ No Utility Allowance <input type="checkbox"/> \$0 Subsidized / Utility Allowance	
Base Benefit	\$200	Minimum benefit all households	
Needed Secondary Utility	\$50	<input checked="" type="checkbox"/> \$50 if required to operate heat source	
Subtotal Non-Crisis Benefit	\$793	Total of the four heating benefits	
Crisis Benefit	\$200	If applicable add Crisis benefit as defined	
TOTAL BENEFIT	\$993	Add Non-Crisis and Crisis	

Notes & Comments:

Intake Worker: [Name]	Date: --/--/---
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