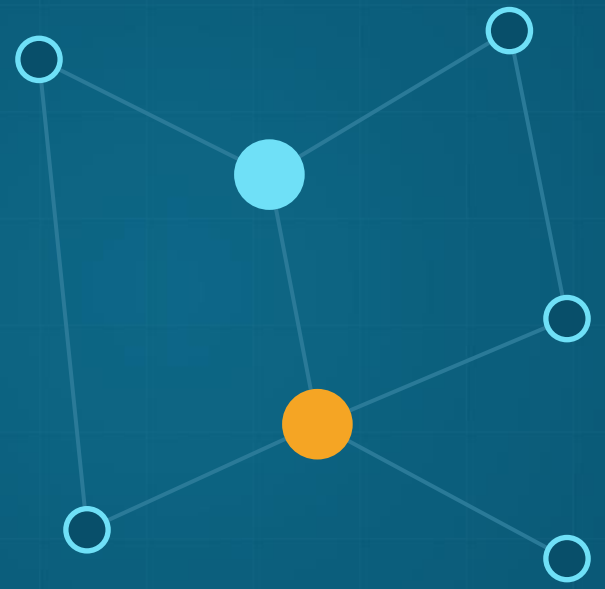
Insights from the IT Solutions Survey



How LIHEAP State Grant Recipients Use Technology for Program Management

November 10, 2026 · Kathleen Gillen, LIHEAP Program Manager · Office of Community Services, ACF

// WELCOME

Today's presenters



Leah Richards

NEW HAMPSHIRE



Maria Hopps

COLORADO



Richard Giddings

VERMONT



Monica Popescu

CALIFORNIA

// BEFORE WE START

A few quick notes



The slides and survey instrument are already posted on the Performance Management Website (PMW) and can be downloaded from this webinar



This webinar is being recorded, and we'll post the recording to the PMW as well afterward



Put your questions in the chat at any time. We've saved the last 15 minutes for Q&A.

The Moment it Clicked

Leah Richards, New Hampshire



//THE MOMENT IT CLICKED

The Performance Management Implementation Work Group



- The presenters here today are all part of the PMIWG
- We worked with APPRISE to develop the survey and discuss the results
- We met in Philadelphia a few months ago where we had the chance to look at the full results—and it was amazing!

Program intake and applications



Some grant recipients have developed IT Solutions that reduce the burden on program applicants and increase the quality of the data furnished.

Please select a topic or activity below to explore IT Solutions.

Number of States with Each IT Solution

IT Solution Topic	# of States
Auto-enrollment	12
Online application	38
Joint Application	25
Mobile app	8
Downloadable PDF Application	36
Caseworker access to prior year LIHEAP data	39
Caseworker access to current year public assistance program data	33
Virtual application via video conference software	8
Processing paper applications	8
Online appointment scheduling	11
Obtaining vendor account data	45

We Are Always Looking to Improve

45 / 48

states said they are looking to adopt or improve an IT solution.

> This isn't a room of people who are finished.

// AGENDA

What we'll cover today

01 **Background:** How the survey came about, what we asked, and who responded

02 **The big picture:** Landscape of LIHEAP IT systems

03 **A closer look:** A deep dive on survey results for five program functions

04 **OCS T&TA needs:** Where states want to go next

05 **Next steps:** Accessing the data and connecting with other grant recipients

06 **Q&A**

Every solution serves some combination of four goals



Decrease client burden



Decrease staff burden



Improve program integrity



Improve data collection and performance management

// SECTION 01

Survey Background

How we got here · Purpose of the survey · Who responded

Maria Hopps, Colorado



// HOW WE GOT HERE

This survey builds on about ten years of work

2014

National Energy Assistance Directors Association (NEADA) IT Capacity Survey

A baseline of state IT capacity

2021

Government Accountability Office (GAO) report GAO-21-183

Recommended a review of data sources

2023

Application Streamline and Electronic Verification (ASEV) Workgroup

Eight data sources for verifying income

2025

The LIHEAP IT Solutions Survey

The most complete picture to date

A simple task, two goals served

- **The simple task:** Document which IT solutions grant recipients use for each part of running the program, from outreach and intake to eligibility, verification, payments and reporting



Goal 1: Help OCS plan training and technical assistance around what states actually need



Goal 2: Let grant recipients see what's out there and connect with the states that are already doing it

// WHAT WE ASKED

How the survey worked

- **9 business requirements:** Program functions, like intake or vendor payments, not technologies.
- **Mostly yes or no,** with a few follow-ups, like which programs a joint application covers.
- **No technical details** like software or system design. The best source is the state that built it.
- **An IT solution performs a function automatically.** A shared drive or spreadsheet doesn't count.
- **Where it sits:** The state office, with subrecipients, or both.
- **For each activity:** Do you recommend your solution, are you implementing one, or do you need one?

Who responded

48 of 51 state grant recipients responded

~2 hrs

Average time to complete the survey

States only

Including the District of Columbia. A version for tribes and territories is in progress.

// BACKGROUND

Things to keep in mind

01

State office, fully automated

Today counts only fully automated state office solutions

02

Systems change fast

Some of what you'll see has already advanced

03

Results, not rankings

Whether a solution exists, not how well it works

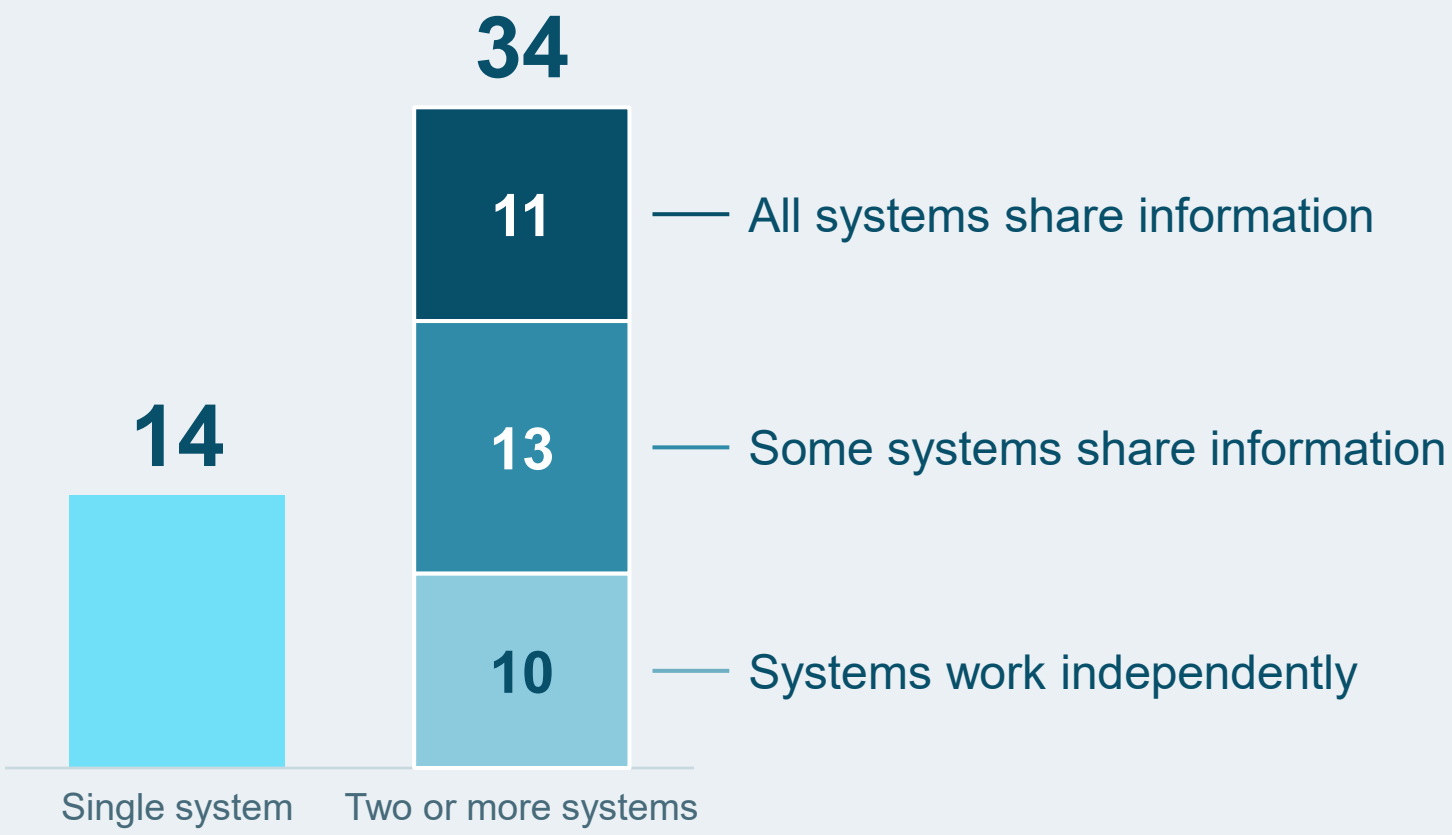
// SECTION 02

The Systems Behind the Results

Maria Hopps, Colorado



How many systems do states use to run LIHEAP?

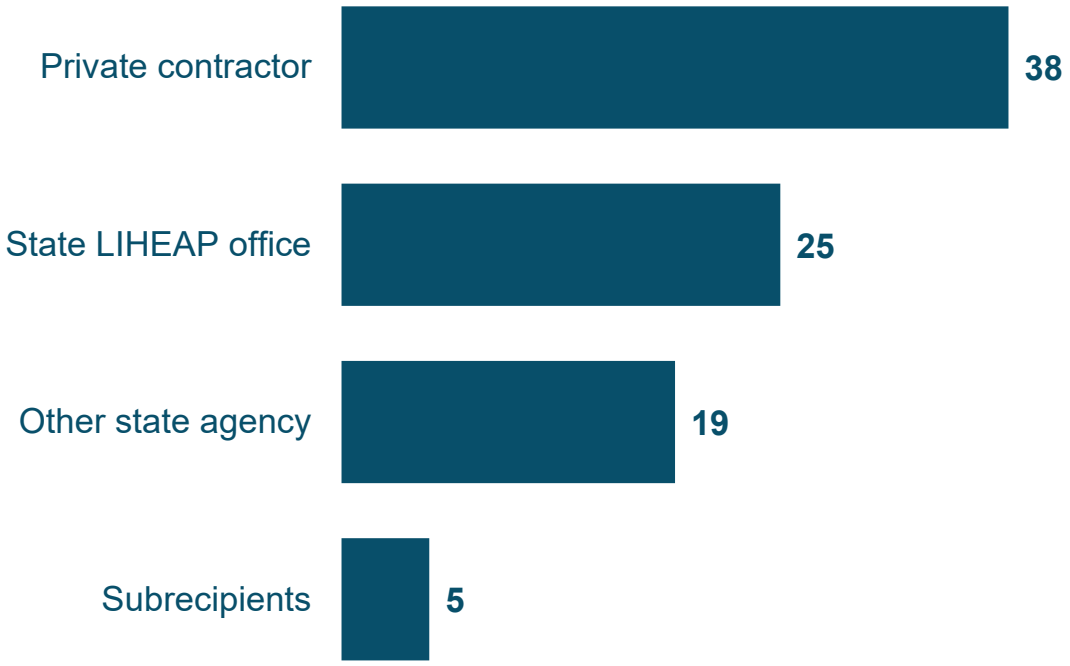


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states use at least one LIHEAP system for other programs too, such as SNAP, TANF or Medicaid

Building a system is usually a partnership

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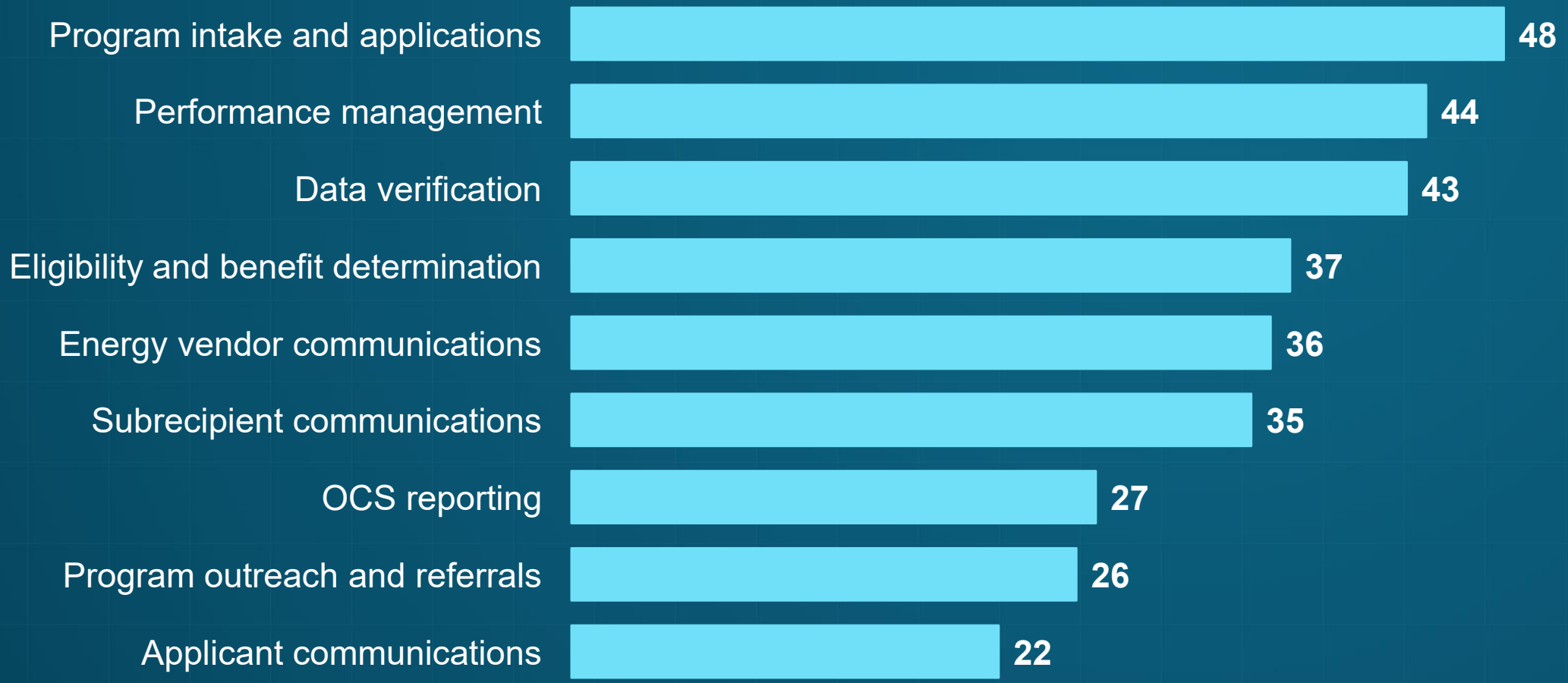


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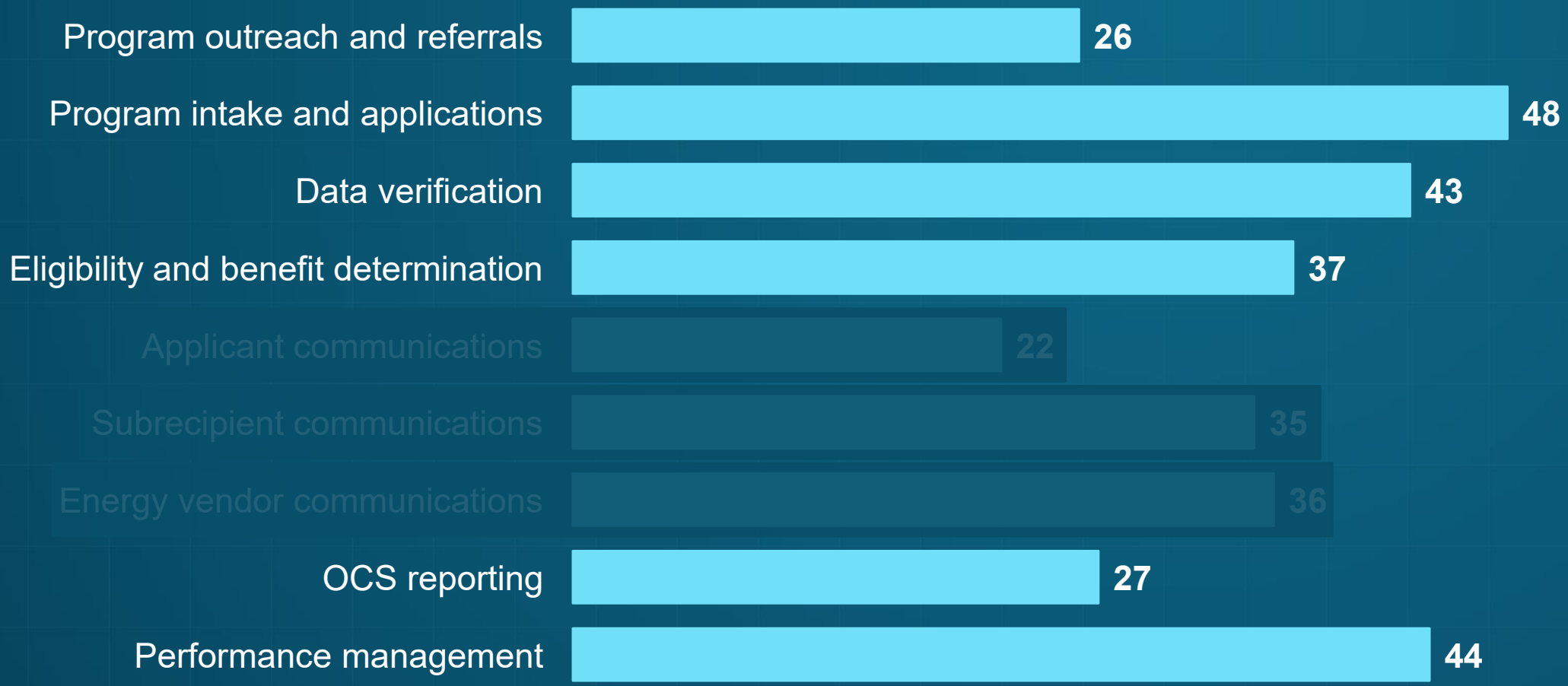


38 states have a system or central database that subrecipients and partner agencies can access

States with at least one IT solution, by program function



States with at least one IT solution, by program function



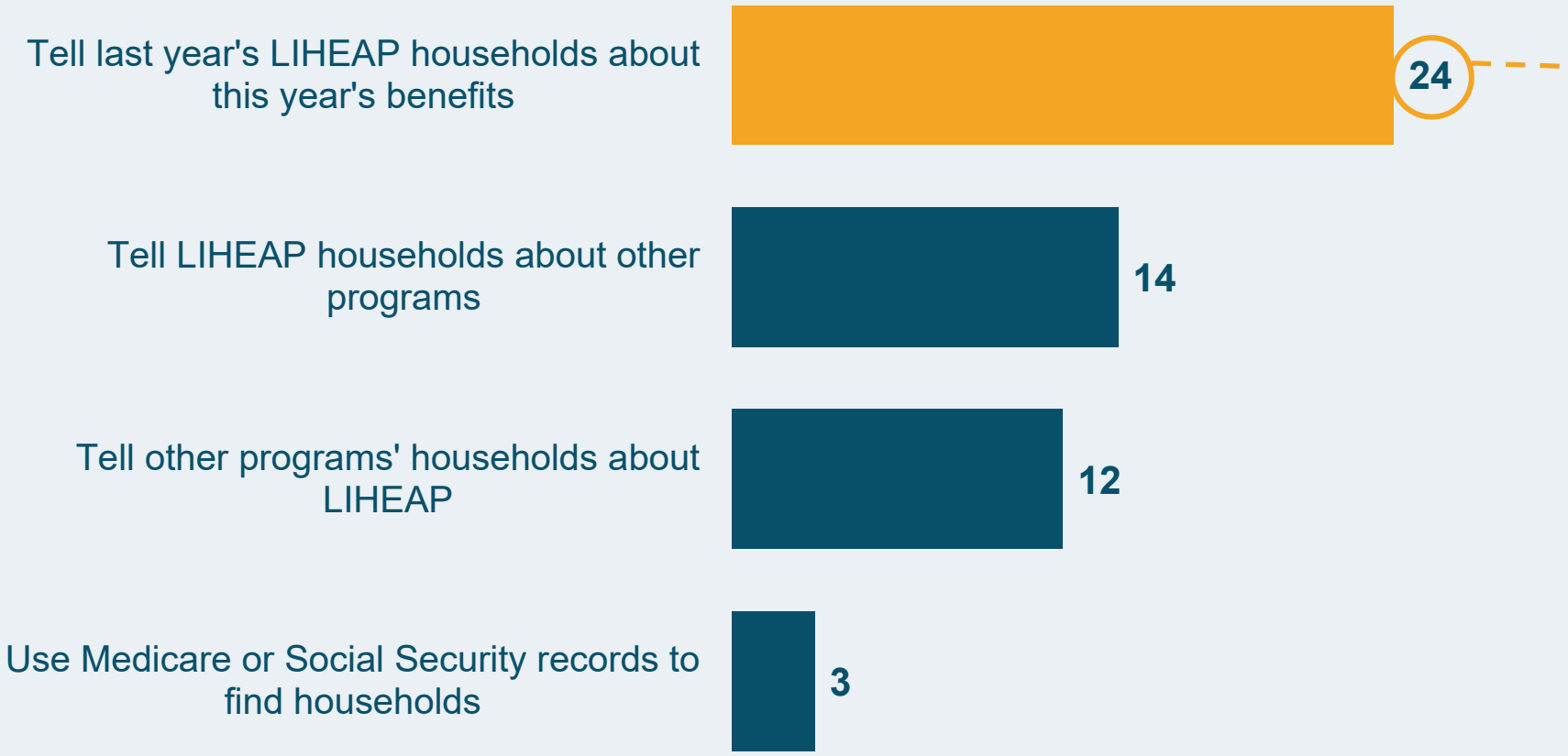
// DEEP DIVE 1 OF 5

Program Outreach and Referrals

Richard Giddings, Vermont



States with an IT solution for each outreach activity

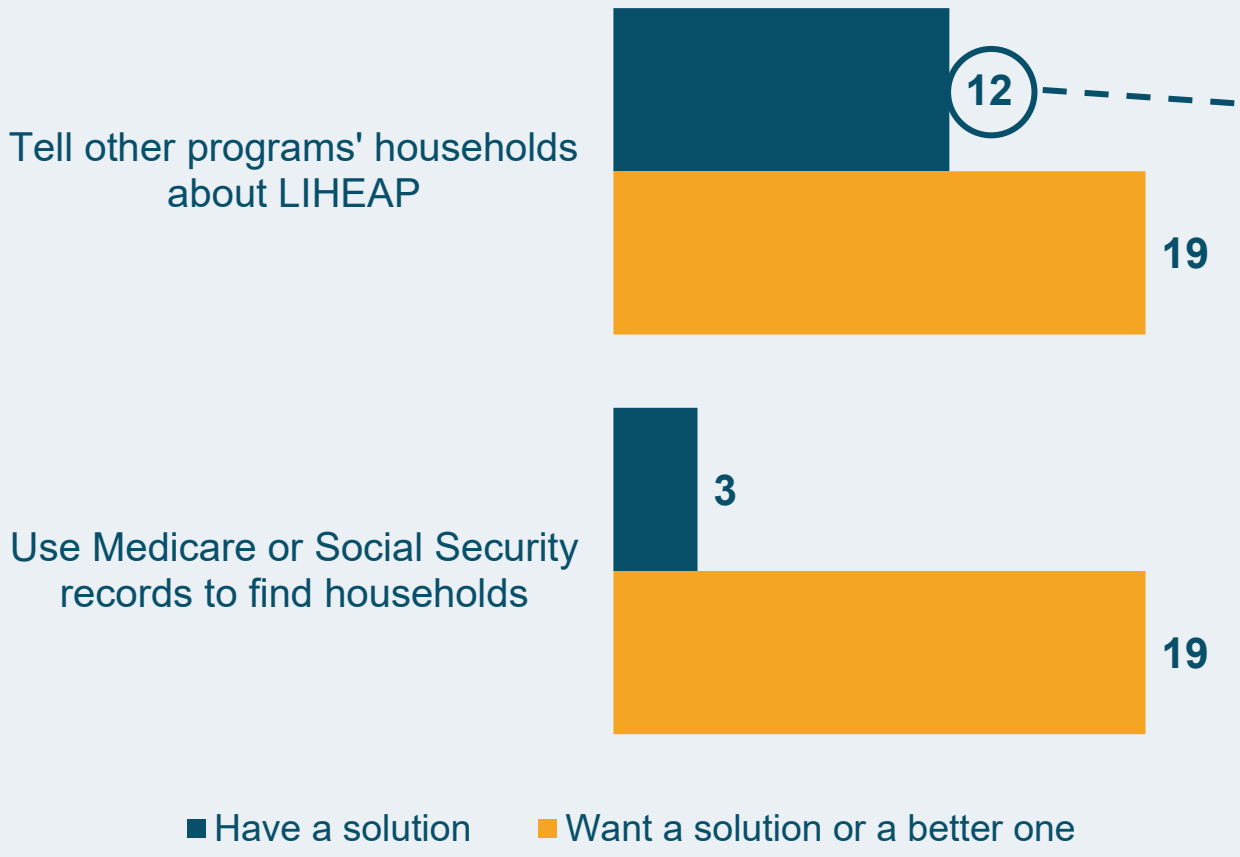


EXAMPLES

Telling last year's households about this year's benefits

- Mailing an application with their information already filled in
- Sending a link to a pre-filled online application

Many states want these solutions; few have them



DID YOU KNOW?

- **All 12 states** that tell other programs' households about LIHEAP can access those programs' records
- **32 states** can access other programs' records for verification
- **20 states** already have that access but aren't using it for outreach

If you already use other programs' records to verify data, could you use that same access for outreach?

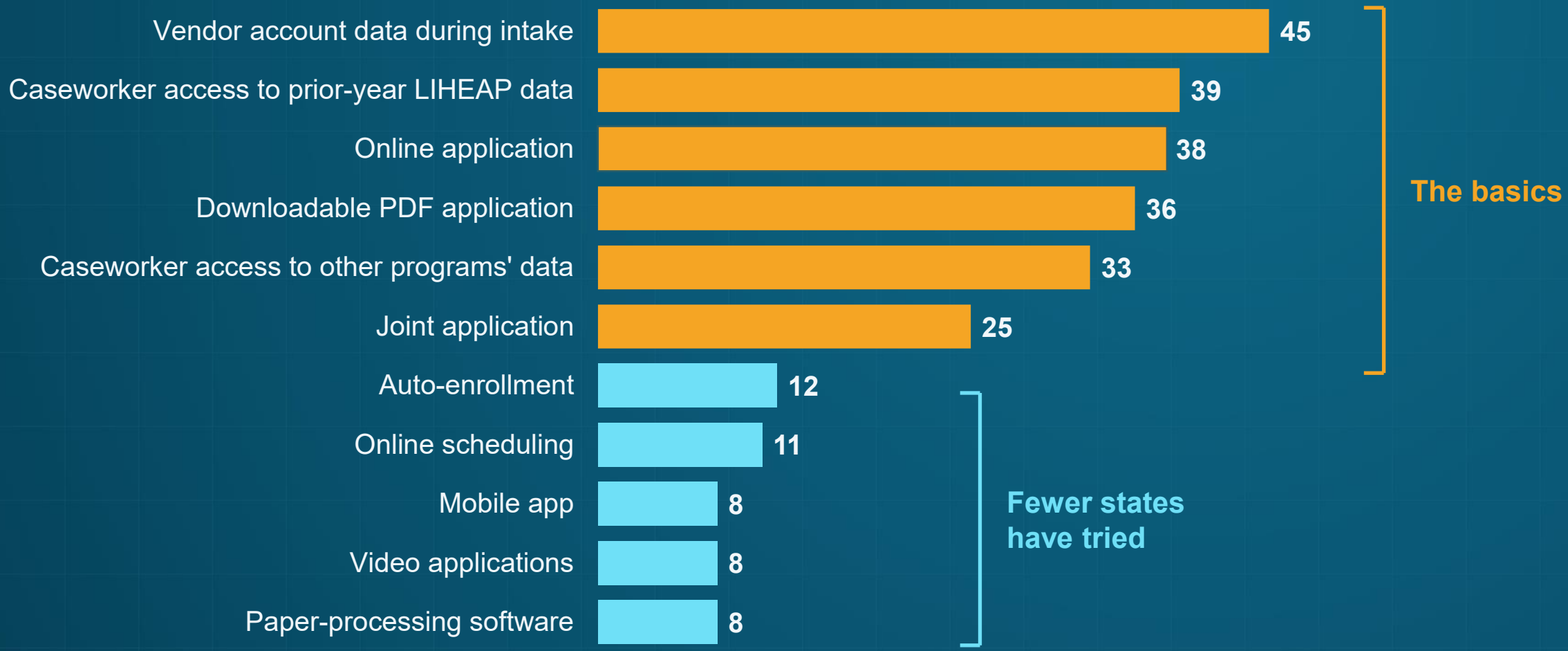
// DEEP DIVE 2 OF 5

Intake and Applications

Richard Giddings, Vermont



States with each intake solution



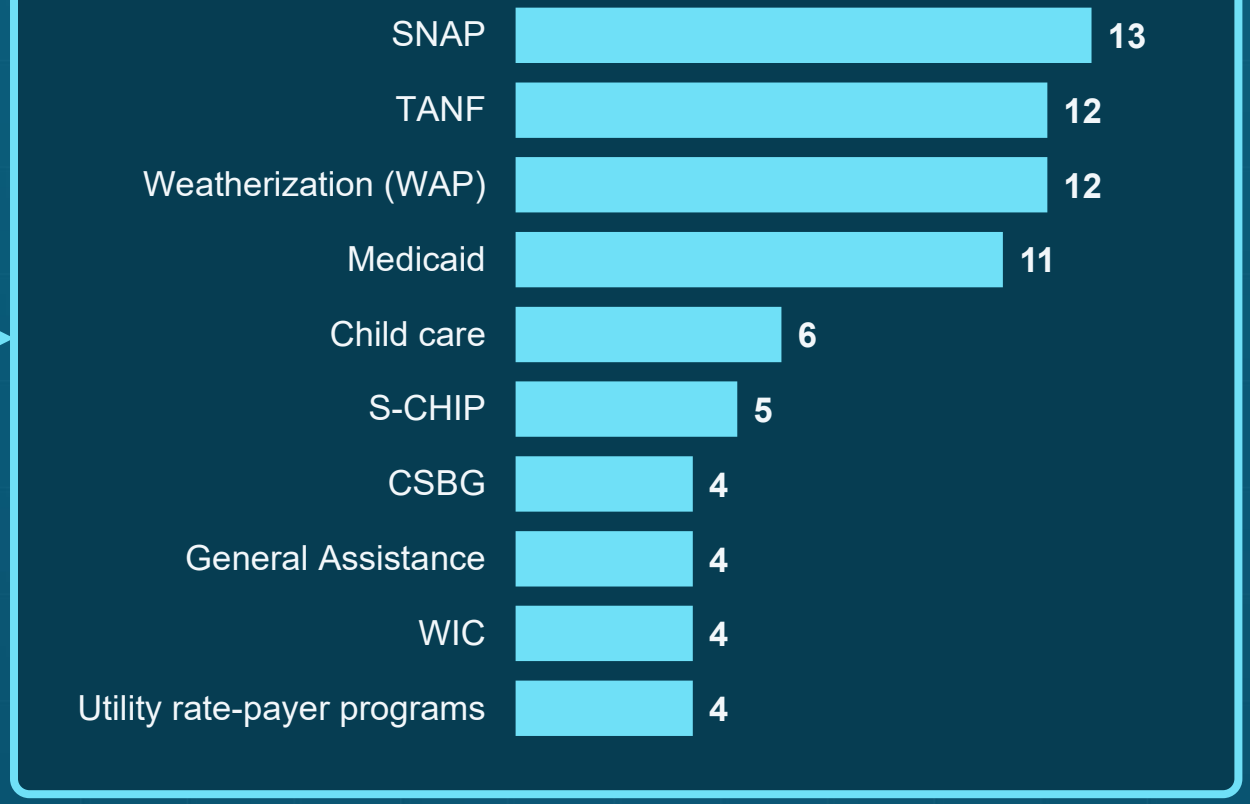
A closer look at online applications

25 **states have a joint application**
Apply for LIHEAP and other programs at the same time

18 **states pre-fill their online application**
Returning households update only what's changed

27 **states have a fully mobile-friendly application**
Works well on a smartphone or tablet

MOST COMMON PROGRAMS IN 25 JOINT APPLICATIONS



Having a solution vs. using it

- 38 states have a statewide online application, but in 21 of them, < 25% of households actually apply online
- Paper and in-person applications are still the main way many households apply
- States with a **mobile-friendly application** see more households apply online:
  - About half have > 25% applying online, compared with 1 of 8 states without one
  - Pre-filled and joint applications didn't show the same link

KEY TAKEAWAYS



Even with an online application, you still need traditional ways to apply



Households may be more likely to use an online application if it's mobile friendly

Where states want more

Vendor account data: the most common intake solution, with 45 states. Yet 18 states want a better one.

Paper processing: software that scans the form and pulls the information into the system. Only 8 states have it, and 14 more want it.

KEY TAKEAWAYS

There's always room for improvement, even with the most common solutions

A solution only a few states have can still be one that many states want

// DEEP DIVE 3 OF 5

Data Verification

Monica Popescu, California



Five ways to verify applicant information

- **Social Security data exchanges:** databases operated through SSA
- **Other state databases:** e.g., unemployment, child support, and quarterly wage records
- **Other public assistance programs' records:** e.g., SNAP, TANF, and Medicaid
- **Commercial databases:** private services that compile income or employment data
- **Data sharing with energy vendors:** e.g., confirming a household's account number

43 of 48 states verify applicant information electronically



8 states use all five methods

A closer look at Social Security data exchange systems

- **23 states** use at least one Social Security data exchange system*, and 8 more are working on getting access
- **More than one way in:** 12 states have their own agreement with SSA, and 14 are part of a broader state agreement covering several agencies
- **Most common uses:** confirming Social Security benefit amounts (23 states) and Social Security numbers (22 states)
- **States also** confirm names, dates of birth and death, other income amounts, and addresses

*SSA's explanation of each exchange: https://www.ssa.gov/dataexchange/applications.html

Other programs' records are the most common method



DID YOU KNOW?

Some states told us their SNAP or human services agency already has an agreement with SSA, and their LIHEAP office gets Social Security data through that agency.

If your state's SNAP agency has access, it's worth asking whether LIHEAP can use it too.

Can’t get Social Security data yet? Other programs’ records can verify income and more.

// DEEP DIVE 4 OF 5

Eligibility and Benefit Determination

Monica Popescu, California



Most states have automated these determinations

30

states have a solution for determining eligibility

The system uses information entered by workers to determine whether a household is eligible, based on state criteria

36

states have a solution for determining benefits

The system uses income, household size, fuel type and other information to calculate each household's benefit

Only 5 states want a new or better solution here

Some states determine eligibility in local systems

- The numbers so far count **only** IT solutions in systems the state administers
- **In some states,** subrecipients determine eligibility and benefits using their own local systems
- **In those states, the state usually requires** minimum data collection standards and specific eligibility and benefit procedures
- That keeps every system aligned with **federal LIHEAP requirements, the model plan and state guidelines**

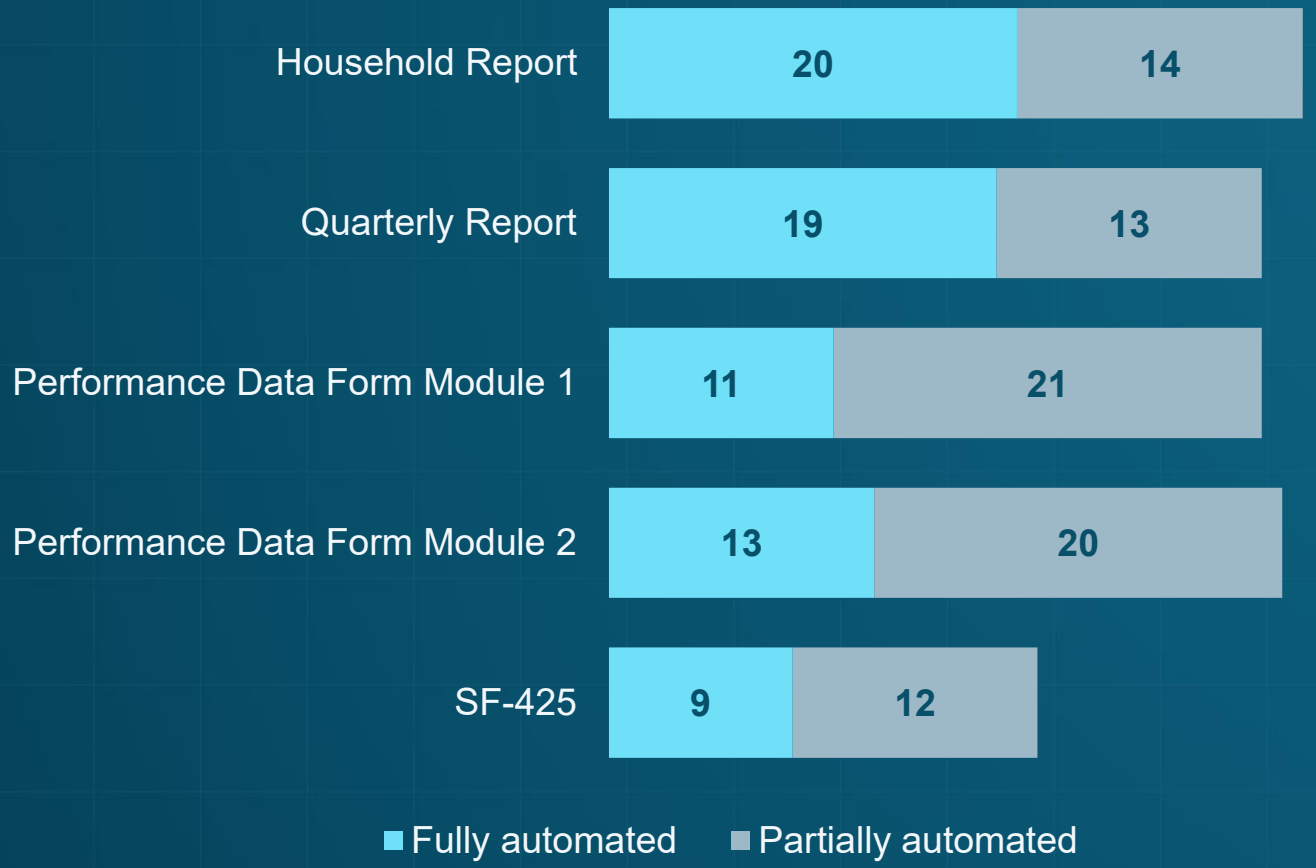
// DEEP DIVE 5 OF 5

OCS Reporting and Performance Management



Monica Popescu, California

States with solutions for each report



Something to Keep In Mind

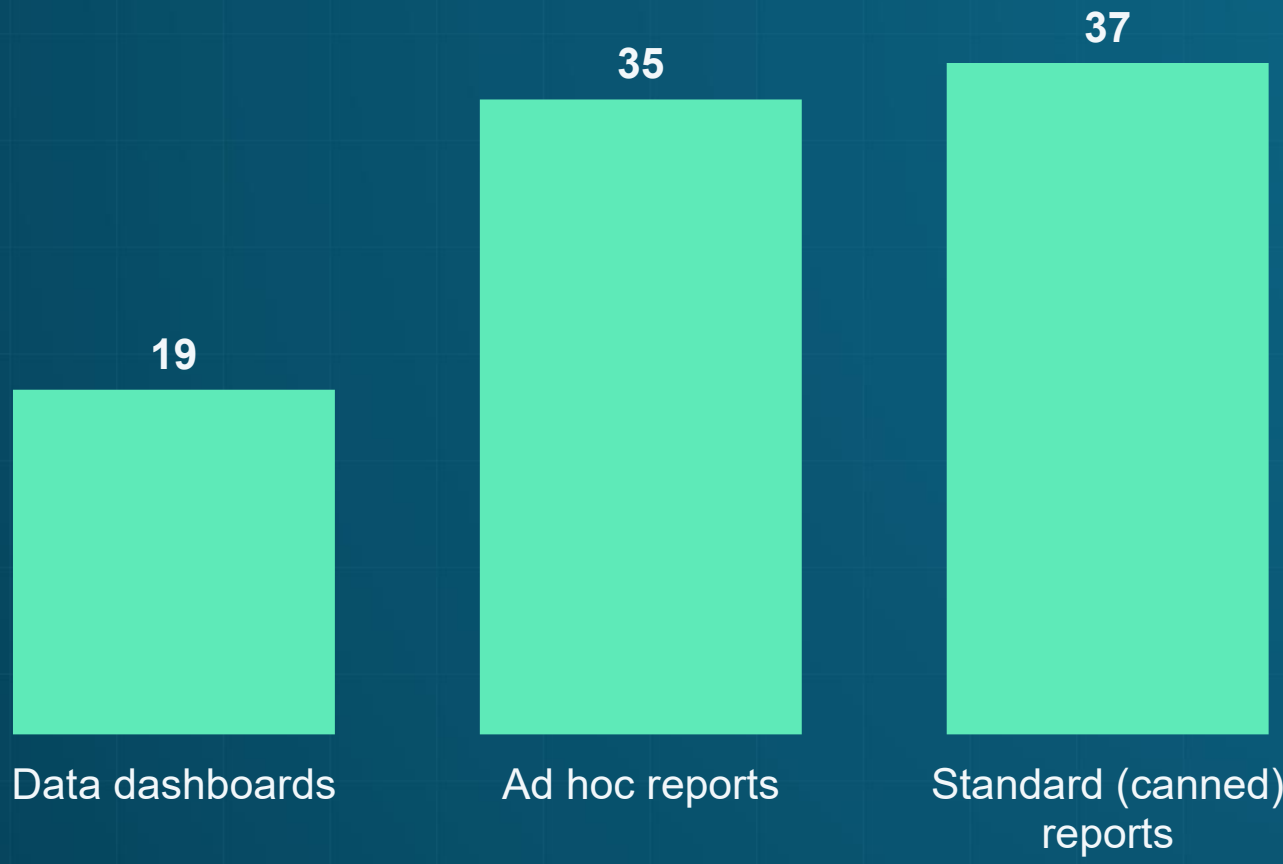
In many cases, the number of states **recommending** their reporting IT solution is **higher** than the number with fully automated reports.

This suggests some states find the approach of a "partial IT solution" to work best for them.

The Performance Data Form

- **Nearly half of states** want a new or better solution for automating the Performance Data Form
- **Module I (Grant Recipient Survey):** how funding was obligated in the previous fiscal year
  - 20 states want a new or better solution
  - Only 11 states fully automate it, but 20 automatically track obligated funds
  - One IT solution could serve both budgeting and annual reporting
- **Module II (Performance Measures):** combines energy vendor billing data with LIHEAP household data
  - 19 states want a new or better solution
  - Combining data from multiple sources is a challenge

41 states use LIHEAP data beyond required reports



STATES USE DATA TO:

- Make decisions
- Monitor sub-grant recipients
- Evaluate their program
- Tell others about LIHEAP in their state

// WHERE STATES WANT TO GO NEXT

OCS Training & Technical Assistance Needs

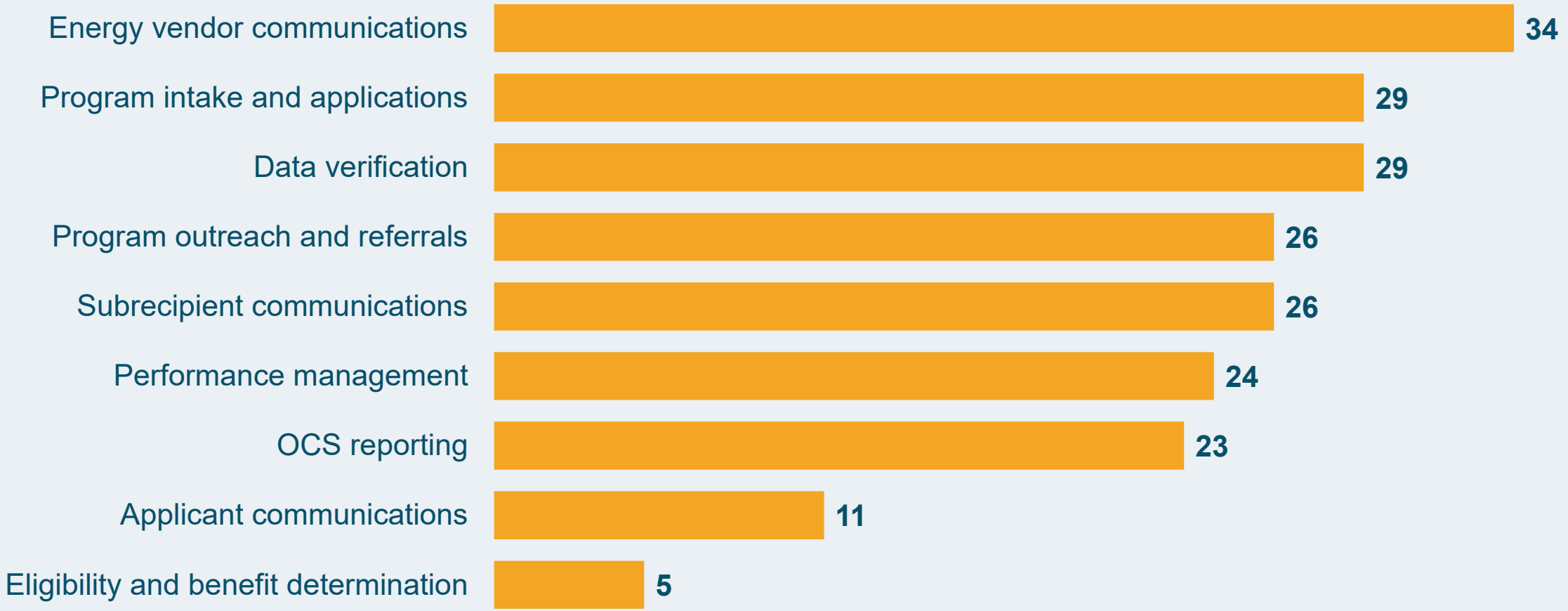


Leah Richards, New Hampshire

By program function

By specific solution

T&TA Needs by Program Function



T&TA Needs: The ten solutions states want most

SOLUTION	PROGRAM FUNCTION	STATES
Accessing other state databases	Data verification	**21**
Validating energy vendor authenticity	Energy vendor communications	**21**
Training intake staff	Subrecipient communications	**20**
Preparing Performance Data Form Module 1	Reporting to OCS	**20**
Telling other programs' households about LIHEAP	Outreach	**19**
Using Medicare or Social Security records to find households	Outreach	**19**
Verifying through other programs' records	Data verification	**19**
Sharing data with energy vendors to verify accounts	Data verification	**19**
Preparing Performance Data Form Module 2	Reporting to OCS	**19**
Vendor account data at intake; **Social Security data exchanges**; **vendors applying the correct benefit**; **refund information from vendors**; sharing performance data	Several	**18 each**

WHAT STANDS OUT

Half are about tapping into information other agencies already have

Five involve energy vendors

// SECTION 04

Next Steps

Leah Richards, New Hampshire



What's coming



An app to explore the survey data yourself: see which states have each solution, what their solutions look like, and who to contact. It will live on the PMW, starting early 2027.



A full report: detailed results for every solution in the survey, including the ones we didn't cover today, plus partial solutions, solutions run by subrecipients and other key findings.



Follow-up interviews: asking states in-depth questions about specific solutions.



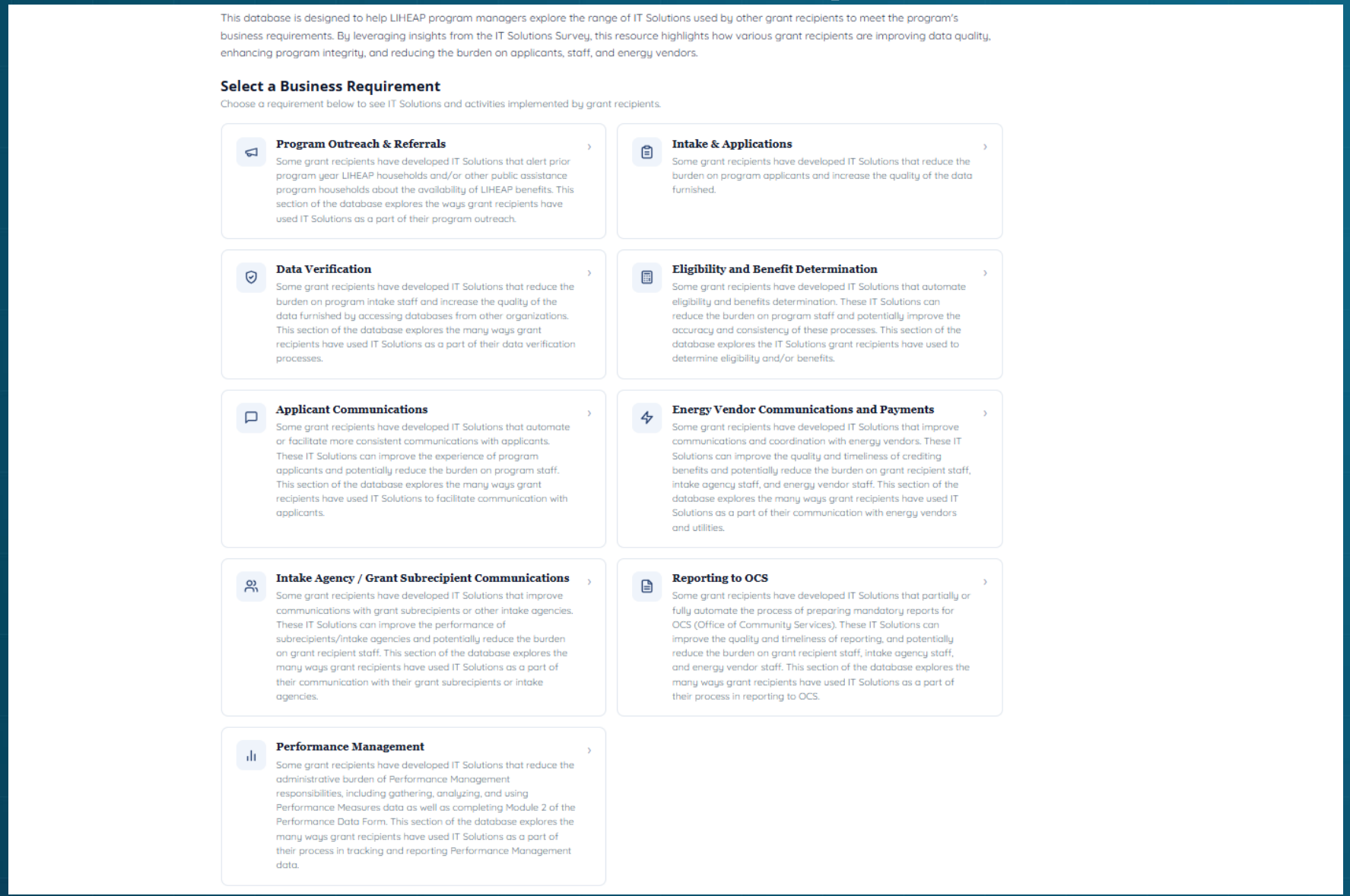
A survey for tribes and territories: a look at the technology they use to run LIHEAP, as well as their broader workflows.

// A SNEAK PEEK

IT Solutions Survey Database Application Demo



Screen 1 – Select a Business Requirement



// APP DEMO

Screen 2 – Number of States with Each IT Solution

← Back to all requirements

Program Outreach & Referrals

Some grant recipients have developed IT Solutions that alert prior program year LIHEAP households and/or other public assistance program households about the availability of LIHEAP benefits. This section of the database explores the ways grant recipients have used IT Solutions as a part of their program outreach.

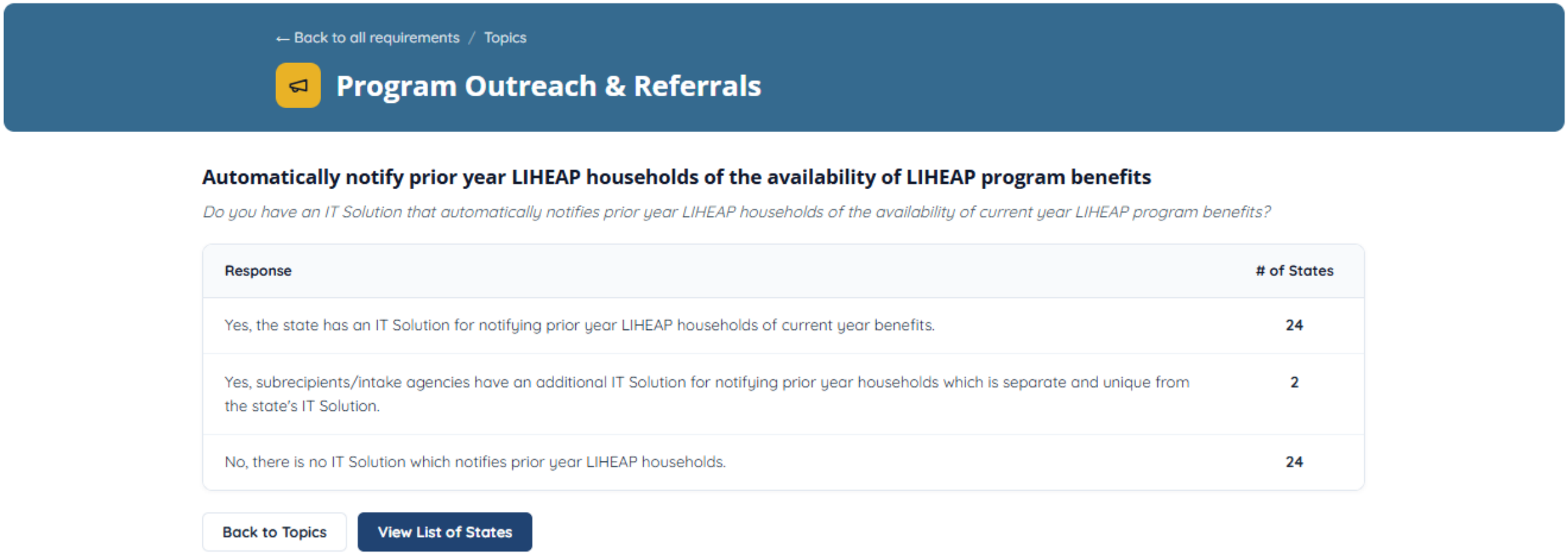
Please select a topic or activity below to explore IT Solutions.

Number of States with Each IT Solution

IT Solution Topic	# of States
Automatically notify prior year LIHEAP households of the availability of LIHEAP program benefits	24
Automatically alert current year households participating in other public assistance programs (e.g., SNAP, TANF, WIC) about the availability of LIHEAP program benefits	12
Use other information sources (e.g., Medicare, Social Security Administration) to alert households about the availability of LIHEAP program benefits	3
Automatically alert LIHEAP households about the availability of other program benefits	14

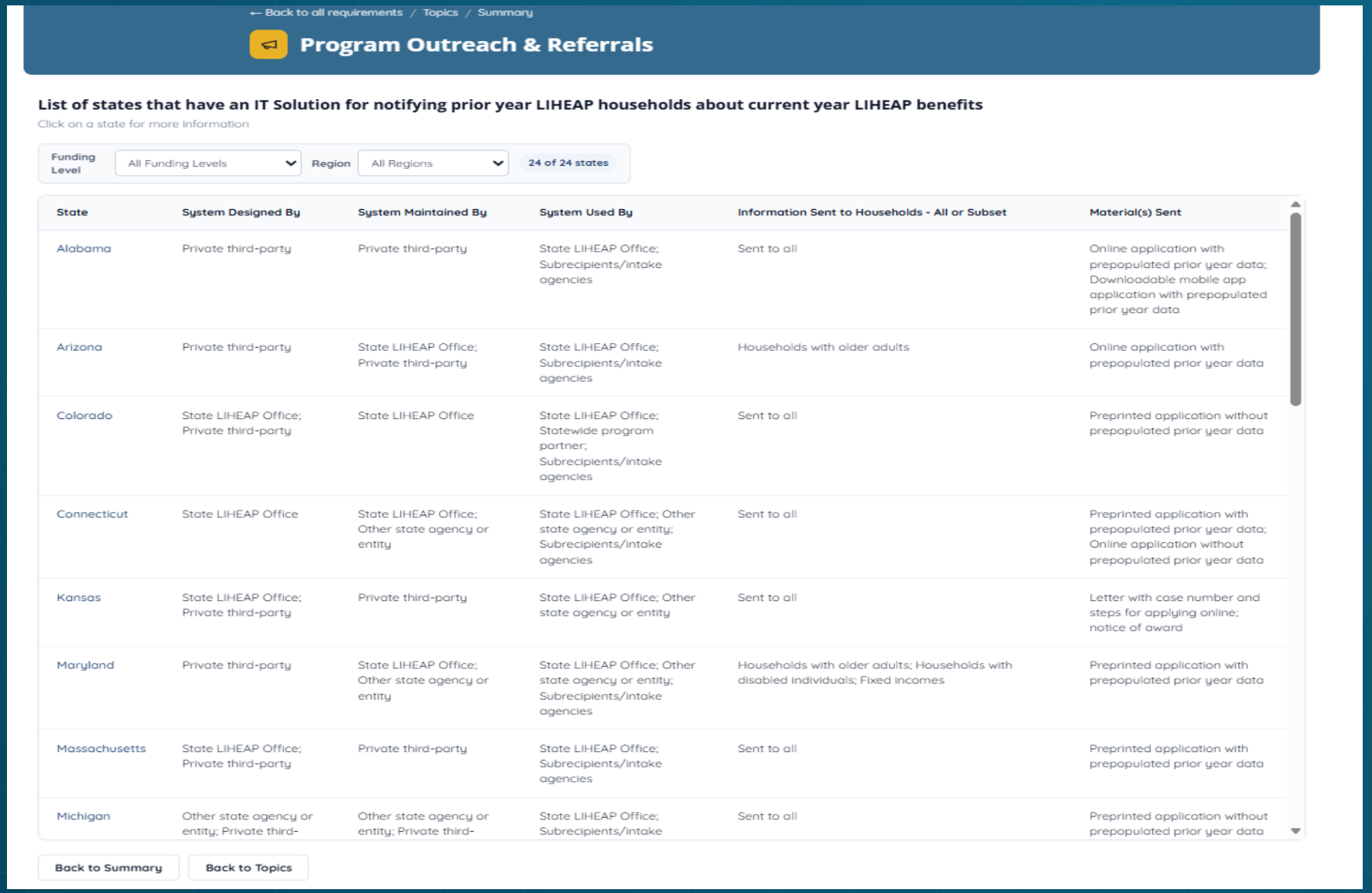
// APP DEMO

Screen 3 - Selecting specific solution



// APP DEMO

Screen 4 – List of states that have an IT Solution for selected topic



← Back to all requirements / Topics / Summary

Program Outreach & Referrals

List of states that have an IT Solution for notifying prior year LIHEAP households about current year LIHEAP benefits

Click on a state for more information

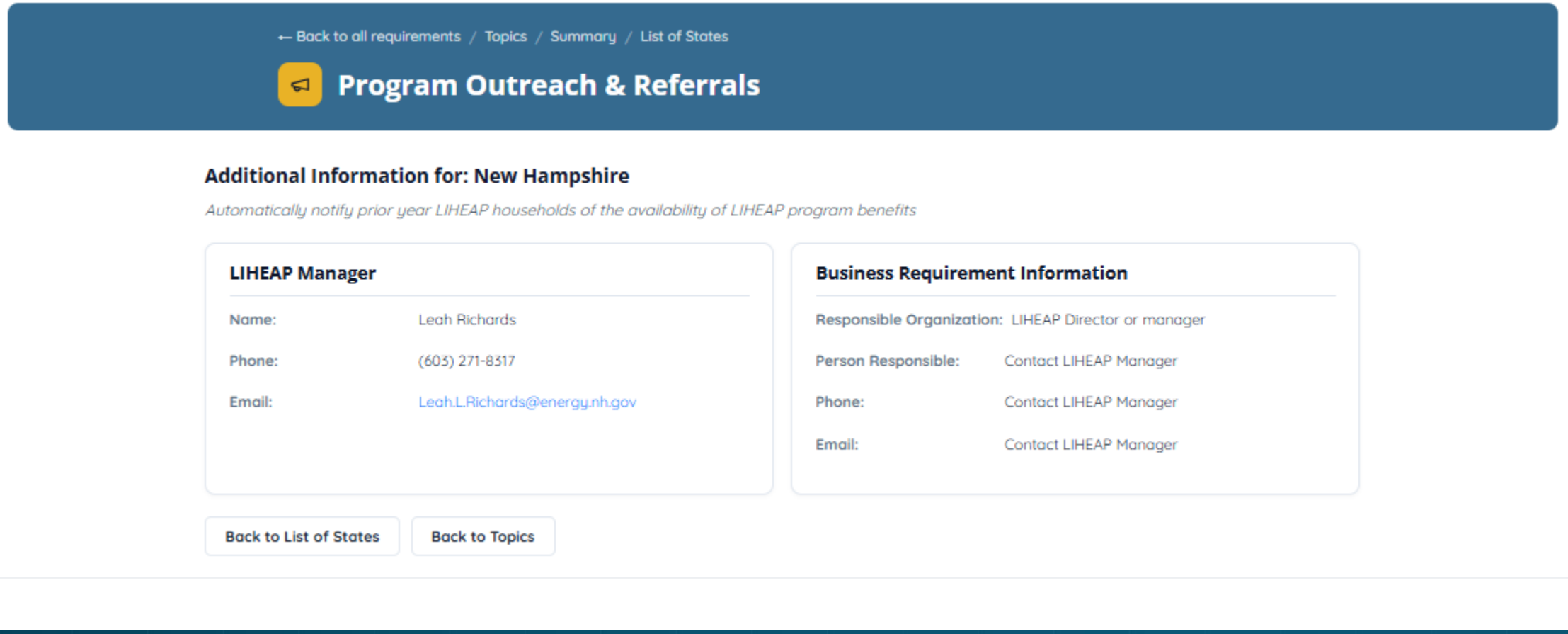
Funding Level: All Funding Levels | Region: All Regions | 24 of 24 states

State	System Designed By	System Maintained By	System Used By	Information Sent to Households - All or Subset	Material(s) Sent
Alabama	Private third-party	Private third-party	State LIHEAP Office; Subrecipients/intake agencies	Sent to all	Online application with prepopulated prior year data; Downloadable mobile app application with prepopulated prior year data
Arizona	Private third-party	State LIHEAP Office; Private third-party	State LIHEAP Office; Subrecipients/intake agencies	Households with older adults	Online application with prepopulated prior year data
Colorado	State LIHEAP Office; Private third-party	State LIHEAP Office	State LIHEAP Office; Statewide program partner; Subrecipients/intake agencies	Sent to all	Preprinted application without prepopulated prior year data
Connecticut	State LIHEAP Office	State LIHEAP Office; Other state agency or entity	State LIHEAP Office; Other state agency or entity; Subrecipients/intake agencies	Sent to all	Preprinted application with prepopulated prior year data; Online application without prepopulated prior year data
Kansas	State LIHEAP Office; Private third-party	Private third-party	State LIHEAP Office; Other state agency or entity	Sent to all	Letter with case number and steps for applying online; notice of award
Maryland	Private third-party	State LIHEAP Office; Other state agency or entity	State LIHEAP Office; Other state agency or entity; Subrecipients/intake agencies	Households with older adults; Households with disabled individuals; Fixed incomes	Preprinted application with prepopulated prior year data
Massachusetts	State LIHEAP Office; Private third-party	Private third-party	State LIHEAP Office; Subrecipients/intake agencies	Sent to all	Preprinted application with prepopulated prior year data
Michigan	Other state agency or entity; Private third-	Other state agency or entity; Private third-	State LIHEAP Office; Subrecipients/intake	Sent to all	Preprinted application without prepopulated prior year data

Back to Summary | Back to Topics

// APP DEMO

Screen 5 – Additional Information for Selected State



The real results are the friends you make along the way

The survey tells you what a state has. Your peers can tell you the story behind it: what it took, and what they learned along the way. A few questions worth asking:

- What problem were you trying to solve, and has the solution solved it?
- How did you get households and staff to actually use it?
- What would you do differently if you were starting over?
- What did it take to set up and maintain, in time, cost and staff?

Contact Information

- **IT Solutions Survey mailbox (APPRISE):** IT-Solutions@appriseinc.org
- **Requestion PMW Account:** https://liheappm.acf.gov/user/register/

- **Leah Richards (NH):** leah.l.richards@energy.nh.gov
- **Maria Hopps (CO):** maria.hopps@state.co.us
- **Richard Giddings (VT):** richard.giddings@vermont.gov
- **Monica Popescu (CA):** monica.popescu@csd.ca.gov
- **Kathleen Gillen (OCS):** Kathleen.Gillen@acf.hhs.gov
- **Kevin Schwartzbach (APPRISE):** kevin-schwartzbach@appriseinc.org
- **Jason Casado (APPRISE):** Jason-Casado@appriseinc.org



Additional resources

- **GAO Report:** gao.gov/products/gao-21-183
- **ASEV Workgroup report:** https://acf.gov/sites/default/files/documents/ocs/TTA_LIHEAP_ASEV%20Work%20Group%20Learnings%20Document_FY2023.pdf
- **Social Security Data Exchange Systems:** https://www.ssa.gov/dataexchange/applications.html
- **LIHEAP Performance Management Website (PMW):** liheappm.acf.gov
- **LIHEAP Clearinghouse:** liheapch.acf.gov
- **Today's slides:** posted on the PMW and downloadable from this webinar

Questions?

Put your questions in the chat

