

FY2025 Beaver County CDBG Project Application

LOW MOD AREA BY FAMILY INCOME SURVEY NATIONAL OBJECTIVE COMPLIANCE

Applicant Name: _____ Use the same name as in Part 1 Project Information

Project Name: _____ Use the same name as in Part 1 Project Information

Contact Person: _____

a. Daytime Phone Number: _____

b. Email Address: _____

Brief Project Description. Copy and paste project description from Part 1 Project Information Form _____

The project meets a National Objective if the benefits of it are available to all the residents in an area where 51% of the families are low or moderate income. All the families living in the area MUST be surveyed. **The nature and scope of the activity must be considered when determining the service area.**

This section and the completed surveys are due with the final application.

If the most recent survey of the households in the project area was done more than 2 years ago, then a new survey must be done. Any project applications submitted without required surveys will not be funded.

ALL addresses of the residences in the area that will primarily benefit from the project must be surveyed. Each and every address must be listed or the project will not qualify. Include each apartment number for multi-unit residences. Do not include commercial buildings or vacant land. If a residence is vacant, note that on the survey for that address. Google maps will be consulted to ensure that each address is accounted for. If the Community Development Program cannot determine that all residences are listed, then the project will not be funded.

List all addresses in the area to be surveyed:

Attach a satellite map with each address labeled.

Attach all original completed surveys.

Impact Statement. Please provide justification for the survey area by explaining how the people surveyed will be the primary beneficiaries of the project. For example: A water line is to be installed that will serve only the residents of 4th

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and 5th Streets between Walnut Street and Oak Street. Explain how the project will primarily benefit all of the residents identified above. Describe how the proposed project makes a difference in the lives of these people, their community, and their environment that you listed. _____

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CDBG PROGRAM FAMILY INCOME SURVEY INSTRUCTIONS

Please follow the interview procedures below:

1. The Survey Form consists of 2 pages: The survey form and the cover page. Each Survey Form must be assigned a unique survey respondent number.
2. The cover page should have the name, address, and signature of the respondent as well as a unique survey respondent number which matches the survey respondent number on the survey page.
3. The survey page should NOT have a name, address or signature. It should only have a survey respondent number to identify the survey.
4. Interviewer must obtain the following information:
 - a. House number and street address of resident (apartment number if applicable).
 - b. Total number of persons living in the household. If more than one family lives in a household, count each family separately.
 - c. The range within which the total family income falls. Total family income is income from all sources for all persons 18 years of age or older. This includes income as reported on the latest federal tax return plus any form of tax-exempt income such as social security, retirement, unemployment, etc.
 - d. Before completing the survey, refer to the attached "Definitions and Examples" for a definition of family and some examples to guide the income determination.
5. The interviewer must survey ALL families in the survey area. At least 51% of all persons in the service area must be low to moderate income for the project to qualify.
6. If local officials wish to survey an entire municipality, please contact the Community Development Program office for detailed instructions and approval.

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7. The survey cover page must be signed by the respondent if the survey is conducted in person or completed by the telephone interviewer if the survey is conducted by telephone.
8. The interviewer should use the attached interview script, or one that is comparable, when interviewing residents. All comparable interview scripts must be approved by the CDP.
9. If the house or apartment is vacant, write "VACANT" after the address.

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INTERVIEWER SOFT SKILLS PAMPHLET

This pamphlet should be given to each interviewer to read and follow

It is important that the interviewer commands the attention of the respondent, reads the question as written, and writes down the responses as given.

It is important that interviewers have all of the materials they need to complete the interview. Usually, you will want to assemble an interviewer kit that can be easily carried and includes all of the important materials such as:

- A 'professional-looking' 3-ring notebook (this may even have the logo of the organization conducting the survey)
- Map of the service area
- Sufficient copies of the survey instrument
- Official identification (preferably a picture ID)
- A cover letter from the sponsor of the survey
- A phone number the respondent can call to verify the interviewer's authenticity.

Initially, the interviewer should make contact with the head of the family or someone who is qualified to speak for the family and has knowledge about the family income. After making contact, the interviewer should introduce him/herself, state the purpose of the survey and solicit the participation of the respondent. If the interview is being conducted face-to-face, the interviewer should find the card for the family size of the respondent, hand it to the respondent, and then ask the questions and record the answers. If the interview is being conducted by telephone, a card cannot be used; therefore, the interviewer should make reference to the income level that is the threshold for a family of the size of that of the respondent. For example, if there are three persons in the respondent's family you might ask, "is the current combined income for your family during the past twelve months, less than or more than \$25,450?"

Second, bear in mind that questions about income are rather personal. Some respondents may be suspicious or reluctant to answer questions about their incomes—especially if they do not see the reason for the question. A good way to handle this problem is usually to put questions about income at the end of a somewhat longer questionnaire on other community development matters. In this instance, a local agency can use this questionnaire to gather some information on what the neighborhood sees as important needs or to gather feedback on a proposed policy or project. At the end of such a questionnaire, it is usually possible to ask questions on income more discretely. If this option is chosen, the interviewer should be cautioned that a lengthy questionnaire might cause respondents to lose interest before completing the survey. The ideal length here would probably be less than ten minutes, although certainly you could develop an even longer or shorter questionnaire as necessary.

Interviewers should plan to contact respondents at a time when they are most likely to get a high rate of response. Telephone interviews are usually conducted early in the evening when most people are home. Door-to-door interviews also may be conducted early in the evening (especially before dark) or on weekends. Interviewers should try again, at a different time to reach anyone in the initial sample who is missed by the initial effort.

The interviewer should read the script that is included in this section.

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The Interview

Every interview includes some common components. There is the introduction where the interviewer is invited into the home and establishes a rapport that facilitates the process of asking questions. The first thing the interviewer must do is gain entry and several factors can enhance this.

Probably the most important factor is the interviewer's initial appearance. The interviewer needs to dress professionally and in a manner that will be comfortable to the respondent. The initial appearance of the interviewer to the respondent sends simple messages—the interviewer is trustworthy, honest, and non-threatening.

The interviewer is standing at the doorstep and someone has opened the door, even if only halfway. The interviewer needs to smile and be brief. State why (s)he is there for and suggest what (s)he would like the respondent to do. For example, instead of saying "May I come in to do an interview?" the interviewer might try a more imperative approach like "I'd like to take a few minutes of your time to interview you for a very important study."

Without waiting for the respondent to ask questions, introduce yourself. The interviewer should have this part of the process memorized so (s)he can deliver the essential information in 20-30 seconds at most. The interviewer should state his (or her) name and the name of the organization (s)he represents; and show his or her identification badge. If the interviewer has a three-ring binder or clipboard with the logo of the organization or sponsor, (s)he should have it out and visible. The interviewer should assume that the respondent will be interested in participating in the study—assume that (s)he will be doing an interview here.

If the respondent indicates that the interview should go ahead immediately, the interviewer needs an opening sentence that describes the study. Keep it short and simple. Use the questionnaire carefully, but informally. Interviewers should read the questions exactly as they are written. If the respondent does not understand the question or gives an unresponsive answer, it usually is best for the interviewer to just repeat the question. Do not attempt to guide the respondent to give particular responses. Questions should be read in the order in which they are written. The respondents' answers should be recorded neatly, accurately, and immediately as they are provided. At the end of the interview, and before proceeding to the next interview, the interviewer should always do a quick edit of the questionnaire to be sure that they have completed every answer correctly. This simple check helps to avoid the frustrating mistake of having taken the time and expense of conducting the interview, but without getting the information sought.

If other questions are included in the questionnaire and the questions on income are placed at the end, it is possible that a willing respondent may end the interview before getting to the critical questions on income. If it appears that the respondent is about to terminate the interview, it is recommended that the interviewer immediately tries to get an answer to the critical income question(s).

Editing

Interviewers should turn their completed surveys over to the municipal or agency staff person in charge of the survey. The staff person should review each survey to ensure that it is complete and that each question is answered only once and in a way that is clear and unambiguous. Questions or errors that are found should be referred to the interviewer for clarification. It also may be desirable to call the respondent, if necessary, to clarify incomplete or ambiguous responses. If a question or an error cannot be resolved, a replacement should be added and the new respondent contacted. Note that editing is an

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ongoing process because the expert may still discern errors that need correction during data tabulation and analysis.

CDBG PROGRAM FAMILY INCOME SURVEY

Survey Respondent #: _____

Name of Respondent: _____ **Date:** _____

Address: _____

Signed: _____

Respondent (Not applicable if telephone survey)

“Any false statements made knowingly and willfully may subject the signer penalties under Section 1010 of Title 18 of the United States Code.”

TELEPHONE SURVEY ONLY			
Name of Interviewer:			
Date of Call	Time	Result *	Comments

*C=Completed Survey *B=Busy *R=Refused to Answer Survey *NA=No Answer

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Survey Respondent #: _____

For the purpose of determining eligibility for proposed Community Development projects to be funded by the Federal Community Development Block Grant Program, the following information is necessary: Race (Please indicate number of people in each category), Hispanic (Please indicate number of people who are Hispanic)

Race	His-panic	Race	His-panic
White		Asian & White	
Black/African American		Black/African American & White	
Asian		American Indian/Alaskan Native & Black/African Amer.	
American India/Alaskan Native		Asian Pacific Islander	
Native Hawaiian/Other Pacific Islander		Other Multi-Racial	
American Indian/Alaskan Native & White			

Indicate the number of persons living in the family and whether total family income exceeds or falls below the listed figure for the appropriate family size.

- _____ 1 Person - Total Income is ___ above or ___ below \$56,700
- _____ 2 Persons - Total Income is ___ above or ___ below \$64,800
- _____ 3 Persons - Total Income is ___ above or ___ below \$72,900
- _____ 4 Persons - Total Income is ___ above or ___ below \$80,950
- _____ 5 Persons - Total Income is ___ above or ___ below \$87,450
- _____ 6 Persons - Total Income is ___ above or ___ below \$93,950
- _____ 7 Persons - Total Income is ___ above or ___ below \$100,400
- _____ 8 Persons - Total Income is ___ above or ___ below \$106,900

“Any false statements made knowingly and willfully may subject the signer to penalties under Section 1010 of Title 18 of the United States Code.”

Income Limits Updated: 5/1/2024

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CDBG PROGRAM FAMILY INCOME SURVEY DEFINITIONS AND EXAMPLES

Definitions

1. Pursuant to 24 CFR 5.403, **family** includes but not limited to the following, regardless of actual or perceived sexual orientation, gender identity, or marital status:

- A single person, who may be an elderly person, displaced person, nearly-elderly person, or any other single person; or

- A group of persons residing together, and such group includes, but not limited to:

i. A family with or without children (the temporary absence of a child from the home due to placement in foster care shall not be considered in determining family composition and family size).

ii. An elderly family—a family whose head (co-head), spouse, or sole member is a person who is at least 62 years of age. It may include two or more persons who are at least 62 years of age living with one or more live-in aides. (A live-in aide is a person who resides with one or more elderly persons or near elderly persons, or persons with disabilities).

iii. A near-elderly family—a family whose head (co-head), spouse, or sole member is a person who is at least 50 years of age but below the age of 62, living together; or one or more persons who are at least 50 years of age but below the age of 62 living with one or more live-in aides.

iv. Disabled family—a family whose head (including co-head), spouse, or sole member is a person with disabilities. It may include two or more persons with disabilities living together, or one or more persons with disabilities living with one or more live-in aides.

v. A displaced family—a family in which each member, or whose sole member, is a person displaced by governmental action, or a person whose dwelling has been extensively damaged or destroyed as a result of a disaster declared or otherwise formally recognized pursuant to Federal disaster relief laws.

vi. The remaining member of a tenant family.

vii. A single person who is not an elderly or displaced person, or a person with disabilities, or the remaining member of a tenant family.

2. Pursuant to 24 CFR 570.3, **household** means all persons who occupy a housing unit. A household may consist of persons living together or any other group of related or unrelated persons who share living arrangements, regardless of actual or perceived sexual orientation, gender identity, or marital status.

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3. Entitlement grantees may select any one of the two definitions of **income**:

(i) Annual income as defined at 24 CFR 5.609 (except that if the CDBG assistance being provided is homeowner rehabilitation under 24 CFR 570.202, the value of the homeowner's primary residence may be excluded from any calculation of net family assets); or

(ii) Adjusted gross income as defined for the purpose of reporting under Internal Revenue Service (IRS) Form 1040 for individual Federal annual income tax purposes.

4. Pursuant to 24 CFR Part 5 and 24 CFR 570.3, **low-income person** refers to member of a family that has an income equal to or less than the Section 8 very low-income limit established by HUD. Unrelated individuals shall be considered as one-person families for this purpose. (The Section 8 very low-income limit is income that does not exceed 50 percent of the median income for the area, as adjusted by HUD.) Unrelated individuals shall be considered as one-person families for this purpose.

5. **Moderate-income person** means a member of a family that has an income equal to or less than the Section 8 low-income limit and greater than the Section 8 very low-income limit, established by HUD. Unrelated individuals shall be considered as one-person families for this purpose.

The following examples are provided to guide your completion of the survey:

Example No. 1

Particular house (single unit structures) within a surveyed area where three single people reside. In this case there are three one person families and each person's income determines whether they are a low and moderate income person, based upon the income limits for a one person family.

Example No. 2

Particular house (single unit structure) within surveyed area where a man resides with a woman and her two children. The man and woman are not legally married; however, the man has access to the entire house and financially contributes to the support of the woman and her two children. In this case, the four people would be a family and the income of both the man and woman would be considered in determining whether they were low-and-moderate income persons, based on the Section 8 income limits for a four person family.

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Example No. 3

Particular house (single unit structure) within surveyed area where a family of four rents a room to a man unrelated to the family who does not have access to the other rooms in the house other than a bathroom. In this case, there is one family of four and a one-person family, each of which is determined separately as to whether they are low and moderate income.

**CDBG PROGRAM FAMILY INCOME SURVEY
INTERVIEW SCRIPT**

Hello, my name is _____. May I speak with _____? I am assisting _____ in the completion of a survey to gather information essential to support applications for funding under the Community Development Block Grant (CDBG) Program.

Are you familiar with the CDBG Program?

If No: Each year the County receives CDBG funds from HUD to undertake housing and community development projects (i.e., street improvements, water and sewer projects, recreation improvements, etc.) that have benefited low/moderate income families.

In order to ensure that these CDBG funds are used to benefit low/moderate income families, _____ is conducting an income survey.

At this time, with your permission, I would like to ask you three brief questions. The answers to all of the questions that I ask will be kept confidential. Do I have your permission to proceed with the questions?

- 1. May I have your name please?**
- 2. How many family members are residing in your home ("Family" includes a single person or a group of persons residing together)?**
- 3. Would you tell me whether, during the past twelve months, the total income of all members of your family was above or below \$_____.**

That completes my questioning. Thank you for your participation.

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CDBG PROGRAM FAMILY INCOME SURVEY

SUMMARY SHEET

Once all surveys are conducted, the applicant should complete this form. Calculate to 2 decimal places (For example xx.xx%).

Number of FAMILIES surveyed in person: _____

Number of FAMILIES surveyed by telephone: _____

LOW AND MODERATE INCOME WORKSHEET

1. Enter the TOTAL number of FAMILIES in the target area.
If more than one family resides in the household, conduct separate surveys for each family. 1. _____

2. Enter the total number of FAMILIES interviewed. 2. _____

3. Enter the total number of persons in the FAMILIES interviewed. 3. _____

4. Enter the total number of persons in the FAMILIES interviewed who are low and moderate income persons. 4. _____

5. Divide Line 4 by Line 3. 5. _____

6. Multiply Line 5 x 100. This is the percentage of low and moderate persons in the service area. 6. _____ %