

## Required Steps

1. Identify Project Service Area
2. Determine if LMISD or a survey is appropriate
3. Identify Type of Questionnaire required
4. Determine if survey is large enough to be random or 100% survey
5. Conduct Survey
6. Submit documentation to TDA for approval

## When to Use a Survey

- The service area of the project does not coincide with the boundaries of a census designated geographic area.
- The service area of the project extends beyond the borders of a geographic area.
  - May use LMISD data and survey the beneficiaries beyond the geographic area or survey the entire service area.
- Project has a direct benefit

## Direct vs Indirect

- Direct Benefit
  - Installation / replacement
    - Water or sewer yard service lines
    - Onsite sewage facilities (OSSF)
    - Housing Rehabilitation
    - Anything on Private Property
    - Job Creation/Retention

## Benefit Area – Indirect Benefit

### Water Distribution Lines or Sewer Collection Lines in Residential Areas

Residents of a target area are beneficiaries if the water or sewer lines installed through the application activities provide service (or access to service) to all residents of the area.

### Water Treatment, Water Supply, Water Storage Improvements

The residents of a service area that will be served by the proposed treatment, supply, or storage improvements are counted as beneficiaries. These improvements generally provide a community-wide or system-wide benefit.

## Benefit Area – Indirect Benefit

### Street Improvements

Beneficiaries of street improvement projects include residents whose property lines abut the arterial or collector streets targeted for improvement, as well as those who rely on the targeted streets as the only way to access their area of residence.

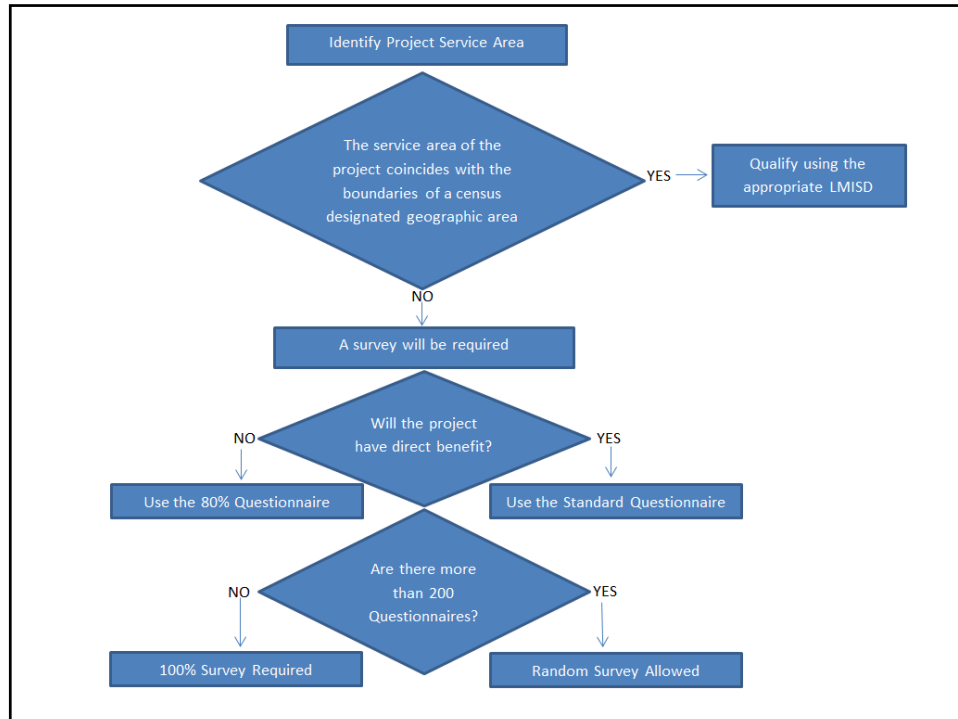
Residents of arterial street blocks whose property directly abuts either side of the collector streets targeted for improvement are also considered beneficiaries.

## Direct vs Indirect

- Direct Benefit
  - MUST use Standard Questionnaire with 30%, 50% and 80% AMFI levels
  - Need to capture additional data (e.g. race and ethnicity)
- Indirect Benefit
  - May use 80% ONLY Questionnaire

## Survey Size and Type

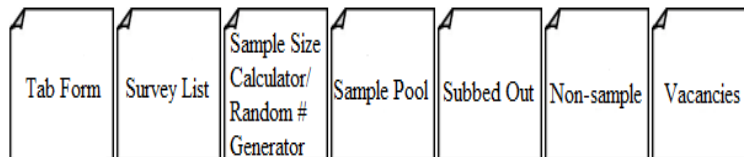
- Direct benefit is ALWAYS 100% of beneficiaries surveyed
- If there are more than 200 questionnaires for indirect benefit, a random survey may be completed.
- For less than 200 questionnaires 100% of beneficiaries must be surveyed.
- Must have 80% response rate



## Where are the forms?

- TexasAgriculture.gov
  - Grants & Services
    - Community Development
      - All CDBG Resources
        - Beneficiary Documentation
- Or just search “Beneficiary Documentation”

## Survey form order



Only random sample surveys will include the Sample Size Calculator/Random Number Generator, subbed-out questionnaires, and non-sample questionnaires.

## A Few More Things

- Surveys are good for 5 years from the date of the earliest questionnaire
- Only Surveys with signed tabulations will be reviewed
- If it's not the same target area, it's a separate survey

## Common Issues

- Not surveying the entire service area
- Counting vacancies in “Number of Households Receiving Project Benefits”
- Not reaching 80% response rate
- Each target area survey must be 51%, not a cumulative of multiple target areas to reach 51% LMI
- Poorly completed questionnaires... like these

## Common Issues

Indicating a family income different than the size indicated

3. Do any other families in your household receive project benefits? *If yes, please complete an additional questionnaire for each family that lives in the project area. Compare your family's 2015 annual adjusted gross income, or your family's 2016 monthly income, to the income levels listed below for your County.*

4. Family Size: 3

Low-to-Moderate-Inc					
1	2	3	4	5	6
<	<	<	<	<	<
\$29,350	\$33,550	\$37,750	\$41,900	\$45,300	\$48,650

Non-Low-and-Moderate-Inc					
1	2	3	4	5	6
>	>	>	>	>	>
\$29,350	\$33,550	\$37,750	\$41,900	\$45,300	\$48,650

Race  
White

## Common Issues

This...

(Circle ONE)

Response	Non-Response	Vacancy
	4	
	4	

(Circle) Yes  No

*as a member of another family or families.)  
an annual basis, to the income eligibility figures*

Males: 2 Females: 1

9	10	11	12
\$0	\$0	\$0	\$0

## Common Issues

No. Two attempts is a non-response.

Date?

Respondent's Information:

Street Address: 807 Ellington Zip Code: 79258 Phone: \_\_\_\_\_

Contact Attempts:

First Attempt: Date: \_\_\_\_\_ Time: 930  A.M.  P.M.

Second Attempt: Date: \_\_\_\_\_ Time: \_\_\_\_\_ A.M. P.M. Response:  Non-Response  Vacancy

1. Including yourself, how many people usually live in this unit?



## Common Issues

General legibility

Ropesville

County Name:  
Hockley

Respondent's Information:  
Street Address: 1504 G... Zip Code:

Contact Attempts: 1

## Preferences

- Electronic submission
  - Keep originals, just have to send them back
- Less than 200 organized by Family Size with LMI and non-LMI separated
- Random survey organized by random number generator
- Locations list with all the required information