Mapping and Determining CDBG Beneficiaries for Low-and Moderate-Income Areas

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• Webinar Questions:

- Click “Ask a Question” to submit a question to the team.

- You may ask questions anonymously, but if you want your name, organization, or region associated with your question, you will need to type it in the “Your Name” box.

- Questions will be read out loud throughout the presentation and answers provided if possible.

- All questions will be saved and recorded as part of the public record.
Definitions

• Acronyms:

- Low- and Moderate-Income (LMI) or (LM)
- Low and Moderate Area Benefit (LMA)
- HUD Area Median Family Income (HAMFI)
  - This is based on a national calculation and is not the same as Area Median Income (AMI)
- Low- to Moderate-Income Summary Data (LMISD)
- American Community Survey 2011/2015 (ACS)
- Grants Management System or eCivis (GMS)

Jurisdiction: Within city, county, or town limits
Every CDBG activity except general grant administration must meet a National Objective.

If an activity does not meet a National Objective, it is ineligible.

There are three National Objectives.

This training will focus on one: LMI.

Within LMI the category will be: LMA Benefit.
CDBG Beneficiary Count

LMA Criteria:

• An activity must provide benefit to all the residents of an area that is primarily residential regardless of income.

• Must meet the identified needs of LM persons (80% or below of HAMFI residing in an area where at least 51% of the residents are LM persons).

The beneficiary count of an area served by an activity is crucial.

• Beneficiary count determines whether a CDBG assisted activity complies with at least one or more national objectives.
HUD provides tools with information on LMISD residents and total population count based on the ACS.

The LMISD and ACS data uses Census information. These areas are broken down by Census Tracts and within the Census Tracts are Block Groups.
CDBG Beneficiary Count

When the applicant has determined the activity’s service area and it benefits only a certain segment of the jurisdiction – use the tool to determine which Census Tracts and Block Groups make up that area.

When the applicant determines the activity’s service area benefits jurisdiction-wide – use the tool to determine the beneficiaries for that entire jurisdiction.
Questions?
The HUD Exchange provides a mapping tool to calculate the LMA beneficiary count. This tool is found using the following link:

https://hud.maps.arcgis.com/home/item.html?id=ffd0597e8af24f88b501b7e7f326bedd

There is a helpful training video on this page that is a recommended view.
LMA Beneficiary Count

Step one: Access the map and enter the name of the jurisdiction in the search area. This is located at top right of the application.
LMA Beneficiary Count

There are five icons on the map that will be used:
1) LMISD Layers (step two)
2) Basemap Options (optional map views)
3) Select Service Area (step three)
4) Add your own labels (optional)
5) Print
LMA Beneficiary Count

Step Two: LMISD by Block Group:

1. Upon opening, all boxes are checked
2. Make sure to uncheck unneeded boxes
3. Leaving the LMISD by Block Group checked.
4. Select the ‘X’ in the top right corner to close the box
LMA Beneficiary Count

Step Three:
Select Service Area Export Method
– the lasso method is recommended.

1. Select the third icon (select service area export)
2. Select the arrow down in the green Select box.
3. Choose the ‘select by lasso’ method
4. When using the lasso tool, do not close the dialogue box. Use the double down arrows to reduce box
5. Select the area needed with the lasso (see demo)
LMA Beneficiary Count

Step Three (continued):

6. Back in the dialogue box, select the 3 dots to the right of the LMISD by Block Group row (…)

Choose Export to CSV File.
Step Three (continued):

The CSV file will show available at the bottom left of the screen. Open the ‘features’.

Select that CSV file.
LMA Beneficiary Count

Below is an example of what the CSV file will look like:

<table>
<thead>
<tr>
<th>OBJECTID</th>
<th>GEOID</th>
<th>Source</th>
<th>geoname</th>
<th>Stusab</th>
<th>Countynam...</th>
<th>State</th>
<th>County</th>
<th>Tract</th>
<th>Bckgrp</th>
<th>Low</th>
<th>Lowmod</th>
<th>Lmmi</th>
<th>Lowmoduni...</th>
<th>Lowmod_pct</th>
</tr>
</thead>
<tbody>
<tr>
<td>29415</td>
<td>6.08E+10 2015ACS</td>
<td>Block Group 1, CA</td>
<td>Santa Barbara</td>
<td>6</td>
<td>83</td>
<td>2502</td>
<td>1</td>
<td>460</td>
<td>905</td>
<td>945</td>
<td>1140</td>
<td>79.39</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29416</td>
<td>6.08E+10 2015ACS</td>
<td>Block Group 2, CA</td>
<td>Santa Barbara</td>
<td>6</td>
<td>83</td>
<td>2502</td>
<td>2</td>
<td>1255</td>
<td>1905</td>
<td>2855</td>
<td>3260</td>
<td>58.44</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29417</td>
<td>6.08E+10 2015ACS</td>
<td>Block Group 3, CA</td>
<td>Santa Barbara</td>
<td>6</td>
<td>83</td>
<td>2502</td>
<td>3</td>
<td>945</td>
<td>1335</td>
<td>1380</td>
<td>1420</td>
<td>94.01</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29418</td>
<td>6.08E+10 2015ACS</td>
<td>Block Group 4, CA</td>
<td>Santa Barbara</td>
<td>6</td>
<td>83</td>
<td>2502</td>
<td>4</td>
<td>620</td>
<td>1030</td>
<td>1310</td>
<td>1625</td>
<td>63.38</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This is where beneficiary data will be filtered.

Hide the columns labeled Low and Lmmi (right click on the column and select hide).

Delete any Census Tract and Block Group row(s) that is not within the Service Area.

When saving this worksheet for the records be sure to change the extension from .csv to .xls or .xlsx. This will ensure the next changes will be saved.
LMA Beneficiary Count

Note Lowmod calculates the number of LMI residents in the area at or below 80% HAMFI, and Lowmoduniv calculates the total population.

To calculate, divide the total sum of Lowmod beneficiaries by the total sum of Lowmoduniv beneficiaries. In the example above would be: \( \frac{L7}{N7} \) (enter) = \( 0.695097 \).
LMA Beneficiary Count

HUD calculates the LMI percentage to two decimal places. Use the Number shortcut to convert by selecting % sign:

This will convert the result as a percentage, with no decimal places. Select the box twice. This will increase the decimal place by two.

This example shows this area at 69.51% and qualifies.
Open the HUD Mapping tool and type in the jurisdiction name to obtain jurisdiction-wide beneficiary data. Click on the jurisdiction area on the map and a message box will open. Select the arrow pointing to the right until it displays City, County, or Designated Place information:
Jurisdiction Wide Beneficiary Information

This box displays the Lowmod and Lowmoduniv beneficiary count and provides the LMI percentage of the area.
Selecting the Basemap Icon provides more options for alternative views. The default setting is satellite aerial view. The Open Street Map option is recommended for the user to see the street names when working within the mapping tool:
Basemap Icon

This is an example of what the Open Street map looks like. Zooming in will provide more detail of the street names. This helps determine where Census Tracts and Block Groups are in the service area and drills down the detail information.
Questions?
The HUD Exchange provides an alternative tool to calculate LMI for determining the National Objective.

The ACS_2015_lowmod_blockgroup_all Excel report.

The Census information found at the link below, is the same in this spreadsheet as found in the mapping tool.


This tool requires the use of excel to locate and calculate the data.
Alternative LMA
Beneficiary Count

Step One: Enable editing so that excel tools can be used.

<table>
<thead>
<tr>
<th>Stusab</th>
<th>Countynamen</th>
<th>Tract</th>
<th>Blckgrp</th>
<th>Lowmod</th>
<th>Lowmoduniv</th>
</tr>
</thead>
<tbody>
<tr>
<td>AL</td>
<td>Autauga County</td>
<td>020100</td>
<td>1</td>
<td>230</td>
<td>650</td>
</tr>
<tr>
<td>AL</td>
<td>Autauga County</td>
<td>020100</td>
<td>2</td>
<td>315</td>
<td>1300</td>
</tr>
<tr>
<td>AL</td>
<td>Autauga County</td>
<td>020200</td>
<td>1</td>
<td>515</td>
<td>1075</td>
</tr>
<tr>
<td>AL</td>
<td>Autauga County</td>
<td>020200</td>
<td>2</td>
<td>360</td>
<td>910</td>
</tr>
</tbody>
</table>

Step Two: It helps to ‘hide’ all unneeded columns in this spreadsheet.
Alternative LMA Beneficiary Count

Step Three: Add ‘filters’ so the information can be drilled down to just what is needed.

1. Filter the state: Select filter – Select All – Select California
2. Filter the County as above
3. Filter Census Tract as above
Alternative LMA
Beneficiary Count

We have narrowed hundreds of thousands of columns down to this final product

<table>
<thead>
<tr>
<th>Stusab</th>
<th>Countynam</th>
<th>Tract</th>
<th>Blckgrp</th>
<th>Lowmo</th>
<th>Lowmo</th>
<th>Lowmo</th>
<th>niv</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>Santa Barbara County</td>
<td>002502</td>
<td>1</td>
<td>905</td>
<td>1140</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CA</td>
<td>Santa Barbara County</td>
<td>002502</td>
<td>2</td>
<td>1905</td>
<td>3260</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CA</td>
<td>Santa Barbara County</td>
<td>002502</td>
<td>3</td>
<td>1335</td>
<td>1420</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CA</td>
<td>Santa Barbara County</td>
<td>002502</td>
<td>4</td>
<td>1030</td>
<td>1625</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Now to calculate the data
Alternative LMA Beneficiary Count

This is the final product of the filters:

Step Four: Calculate
1. Sum Lowmod and Lowmoduniv – Highlight columns and select (!) to convert to numbers.
Alternative LMA
Beneficiary Count

Step four continued:

Calculate percentage =j220336/l220336(enter) – Go to ‘Number’ and convert to percentage as stated in the mapping tool section. Add 2 decimal points as required by HUD.
Alternative LMA Beneficiary Count

Mapping Tool:

<table>
<thead>
<tr>
<th>B1ckgrp</th>
<th>Lowmod</th>
<th>Lowmoduniv</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>905</td>
<td>1140</td>
</tr>
<tr>
<td>2</td>
<td>1905</td>
<td>3260</td>
</tr>
<tr>
<td>3</td>
<td>1335</td>
<td>1420</td>
</tr>
<tr>
<td>4</td>
<td>1030</td>
<td>1625</td>
</tr>
<tr>
<td></td>
<td>5175</td>
<td>7445</td>
</tr>
<tr>
<td></td>
<td><strong>69.51%</strong></td>
<td></td>
</tr>
</tbody>
</table>

Excel Spreadsheet:

<table>
<thead>
<tr>
<th>B1ckgrp</th>
<th>Lowmod</th>
<th>Lowmoduniv</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>905</td>
<td>1140</td>
</tr>
<tr>
<td>2</td>
<td>1905</td>
<td>3260</td>
</tr>
<tr>
<td>3</td>
<td>1335</td>
<td>1420</td>
</tr>
<tr>
<td>4</td>
<td>1030</td>
<td>1625</td>
</tr>
<tr>
<td></td>
<td>5175</td>
<td>7445</td>
</tr>
<tr>
<td></td>
<td><strong>69.51%</strong></td>
<td></td>
</tr>
</tbody>
</table>

The tools give the same result.
Questions?
Resources

• Low- and Moderate-Income Summary Data - https://hud.maps.arcgis.com/home/item.html?id=ffd0597e8af24f88b501b7e7f326bedd


• Chapter 3: National Objectives (Basically CDBG) - https://files.hudexchange.info/resources/documents/Basically-CDBG-Chapter-3-Nat-Obj.pdf

• CDBG: https://www.hcd.ca.gov/serp.shtml?q=cdbg&cx=001779225245372747843%3Amdsmtl_v1a&cof=FORID%3A10&ie=UTF-8&nojs=1
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