

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



CDBG Eligibility National Objectives

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.



CDBG Beneficiary Count

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?



LMA Beneficiary Count

The HUD Exchange provides a mapping tool to calculate the LMA beneficiary count. This tool is found using the following link:

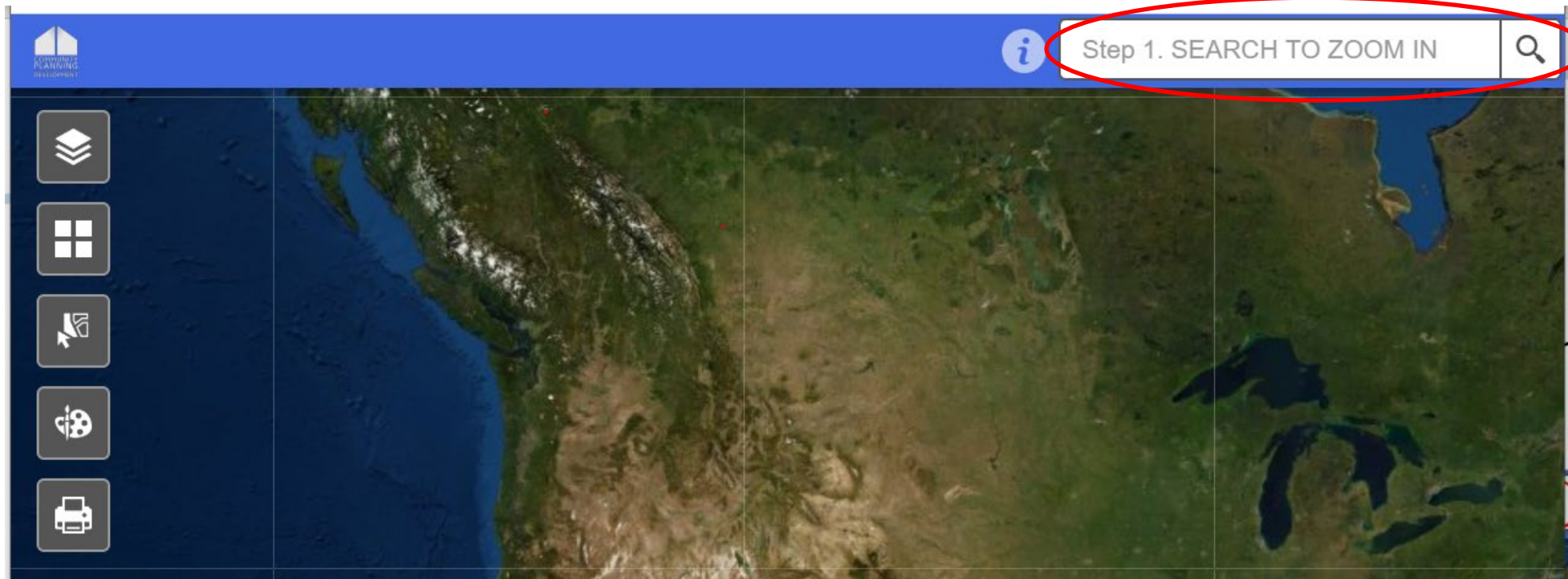
<https://hud.maps.arcgis.com/home/item.html?id=ffd0597e8af24f88b501b7e7f326bedd>

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.

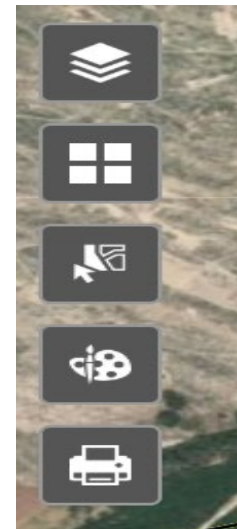




LMA Beneficiary Count

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

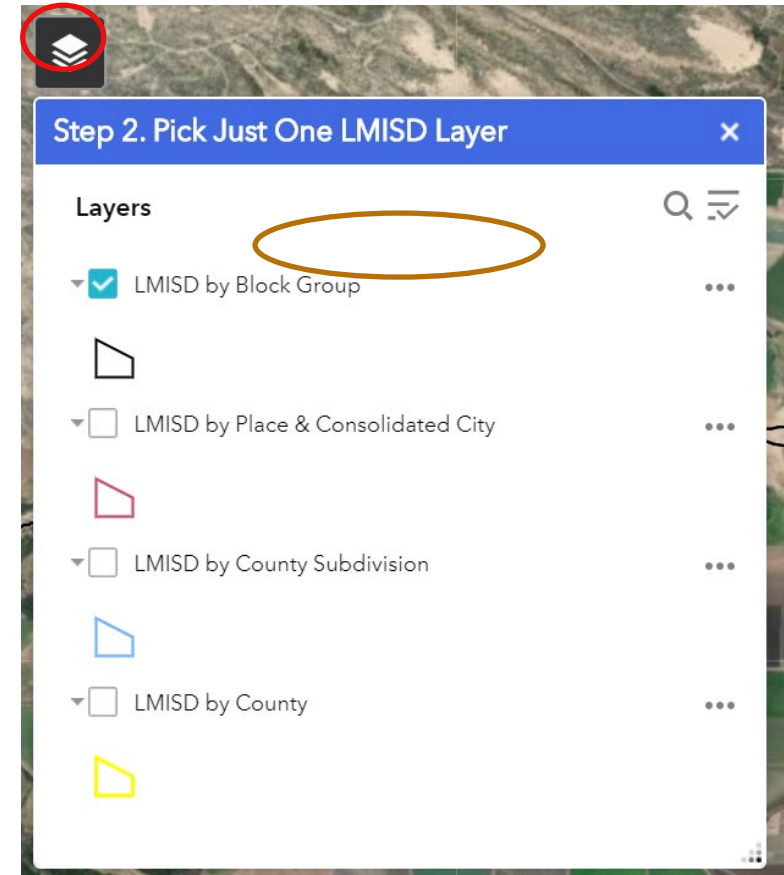




LMA Beneficiary Count

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





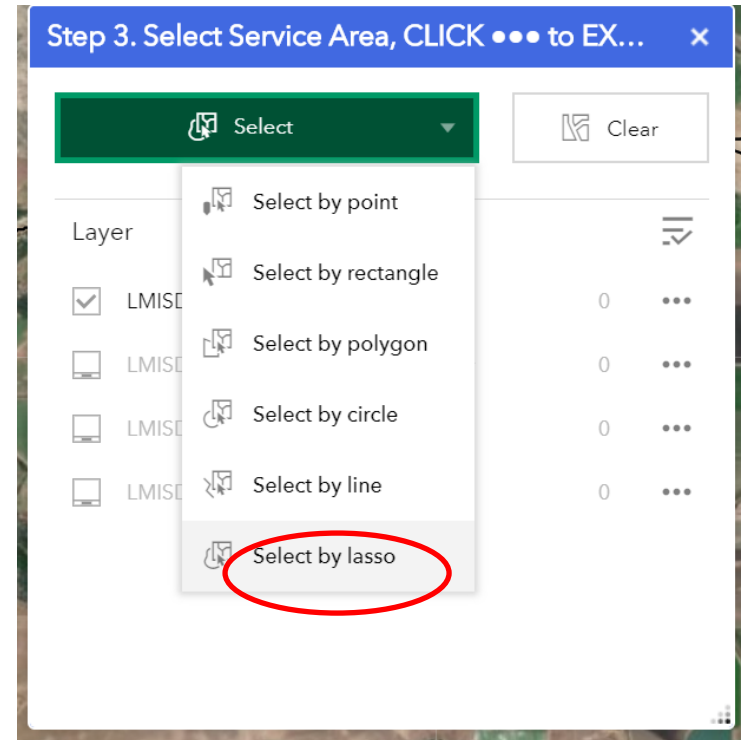
LMA Beneficiary Count

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)



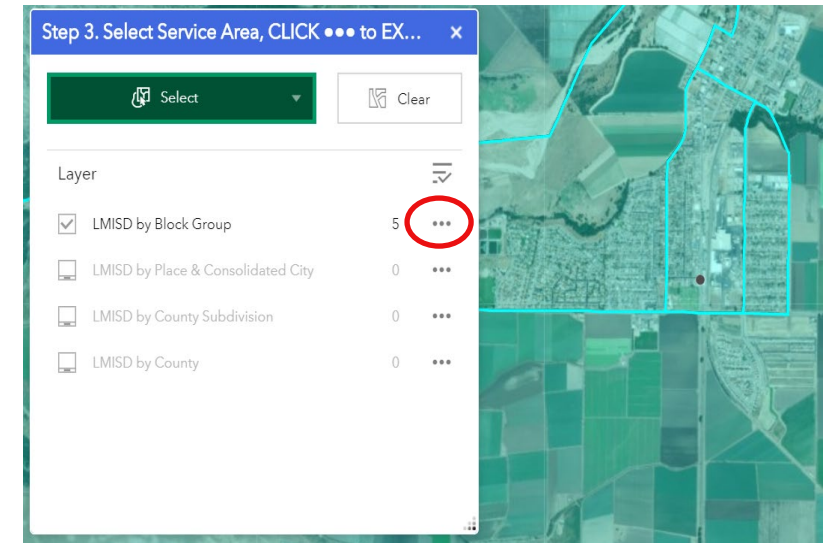


LMA Beneficiary Count

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.





LMA Beneficiary Count

Step Three (continued):

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

Select that CSV file.

The screenshot shows a software interface window titled "Step 3. Select Service Area, CLICK ●●● to EX...". At the top, there are two buttons: "Select" (with a map icon) and "Clear" (with a trash icon). Below these is a list of layers under the heading "Layer". The list includes:

Layer	Count	Options
<input checked="" type="checkbox"/> LMISD by Block Group	5	...
<input type="checkbox"/> LMISD by Place & Consolidated City	0	...
<input type="checkbox"/> LMISD by County Subdivision	0	...
<input type="checkbox"/> LMISD by County	0	...

At the bottom of the window, there is a file list area. A file named "features (36).csv" is highlighted with a red circle. The background of the window shows a map with a scale bar indicating 0.4mi and coordinates -120.623 34.942 Degrees.



LMA Beneficiary Count

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

OBJECTID	GEOID	Source	geoname	Stusab	Countyname	State	County	Tract	Blckgrp	Low	Lowmod	Lmmi	Lowmoduniv	Lowmod_pct	
29415	6.08E+10	2015ACS	Block Group 1, CA		Santa Barbara	CA	6	83	2502	1	460	905	945	1140	79.39
29416	6.08E+10	2015ACS	Block Group 2, CA		Santa Barbara	CA	6	83	2502	2	1255	1905	2855	3260	58.44
29417	6.08E+10	2015ACS	Block Group 3, CA		Santa Barbara	CA	6	83	2502	3	945	1335	1380	1420	94.01
29418	6.08E+10	2015ACS	Block Group 4, CA		Santa Barbara	CA	6	83	2502	4	620	1030	1310	1625	63.38

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.

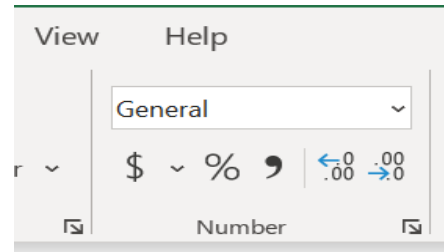
	A	B	C	D	E	F	G	H	I	J	L	N
1	OBJECTID	GEOID	Source	geoname	Stusab	Countyname	State	County	Tract	Blckgrp	Lowmod	Lowmoduniv
2	29415	6.08E+10	2015ACS	Block Group 1,	CA	Santa Barbara	6	83	2502	1	905	1140
3	29416	6.08E+10	2015ACS	Block Group 2,	CA	Santa Barbara	6	83	2502	2	1905	3260
4	29417	6.08E+10	2015ACS	Block Group 3,	CA	Santa Barbara	6	83	2502	3	1335	1420
5	29418	6.08E+10	2015ACS	Block Group 4,	CA	Santa Barbara	6	83	2502	4	1030	1625
6												
7											5175	7445
8												
9											0.695097	
10												


To calculate, divide the total sum of Lowmod beneficiaries by the total sum of Lowmoduniv beneficiaries. In the example above would be: =L7/N7(enter) – = .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.

	A	B	C	D	E	F	G	H	I	J	L	N
1	OBJECTID	GEOID	Source	geoname	Stusab	Countyname	State	County	Tract	Blckgrp	Lowmod	Lowmoduniv
2	29415	6.08E+10	2015ACS	Block Group 1, CA		Santa Barbara	6	83	2502	1	905	1140
3	29416	6.08E+10	2015ACS	Block Group 2, CA		Santa Barbara	6	83	2502	2	1905	3260
4	29417	6.08E+10	2015ACS	Block Group 3, CA		Santa Barbara	6	83	2502	3	1335	1420
5	29418	6.08E+10	2015ACS	Block Group 4, CA		Santa Barbara	6	83	2502	4	1030	1625
6												
7											5175	7445
8												
9											69.51%	

This example shows this area at 69.51% and qualifies.



Jurisdiction Wide Beneficiary Information

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:

A screenshot of a HUD Mapping tool interface. A message box is open, displaying the following information:

(1 of 4) [Navigation icons: back, forward, close]

LMISD by Block Group: Block Group 1, Census Tract 25.02, Santa Barbara County, California

Source	2015ACS
geoname	Block Group 1, Census Tract 25.02, Santa Barbara County, California
Stusab	CA
Countyname	Santa Barbara County
State	06
County	083
Tract	002502
Blckgrp	1
Low	460
Lowmod	905
.	015

[Zoom to](#) [More options icon]



Jurisdiction Wide Beneficiary Information

This box displays the Lowmod and Lowmoduniv beneficiary count and provides the LMI percentage of the area.

(4 of 4)

LMISD by Place: Guadalupe city

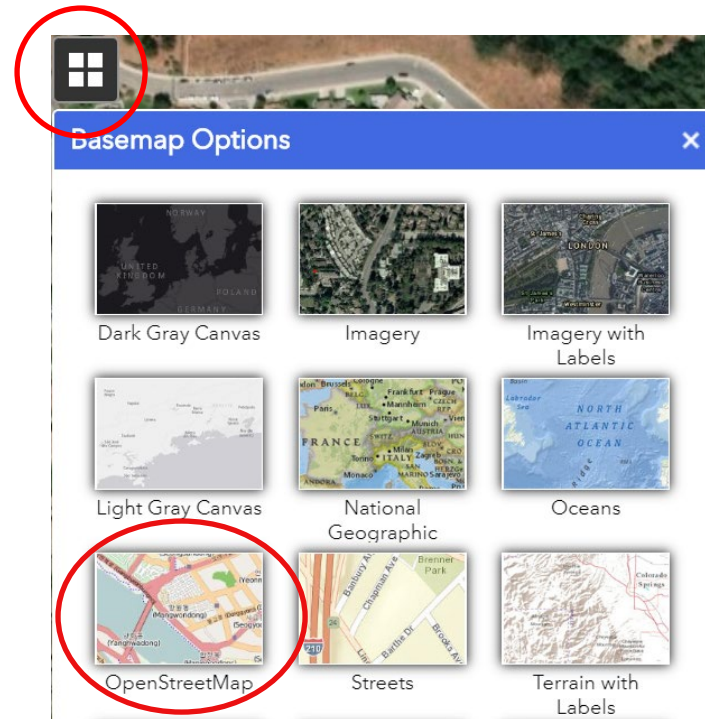
GEOID	0631414
NAME	Guadalupe city
PLACE_TYPE	Incorporated City/Town
STATE	06
STUSAB	CA
LOW	3,215.00
LOWMOD	4,985.00
LMMI	6,295.00
LOWMODUNIV	7,220.00
LOWMOD_PCT	69.04
UCLOWMOD	
UCLOWMOD_P	0.00

[Zoom to](#)



Basemap Icon

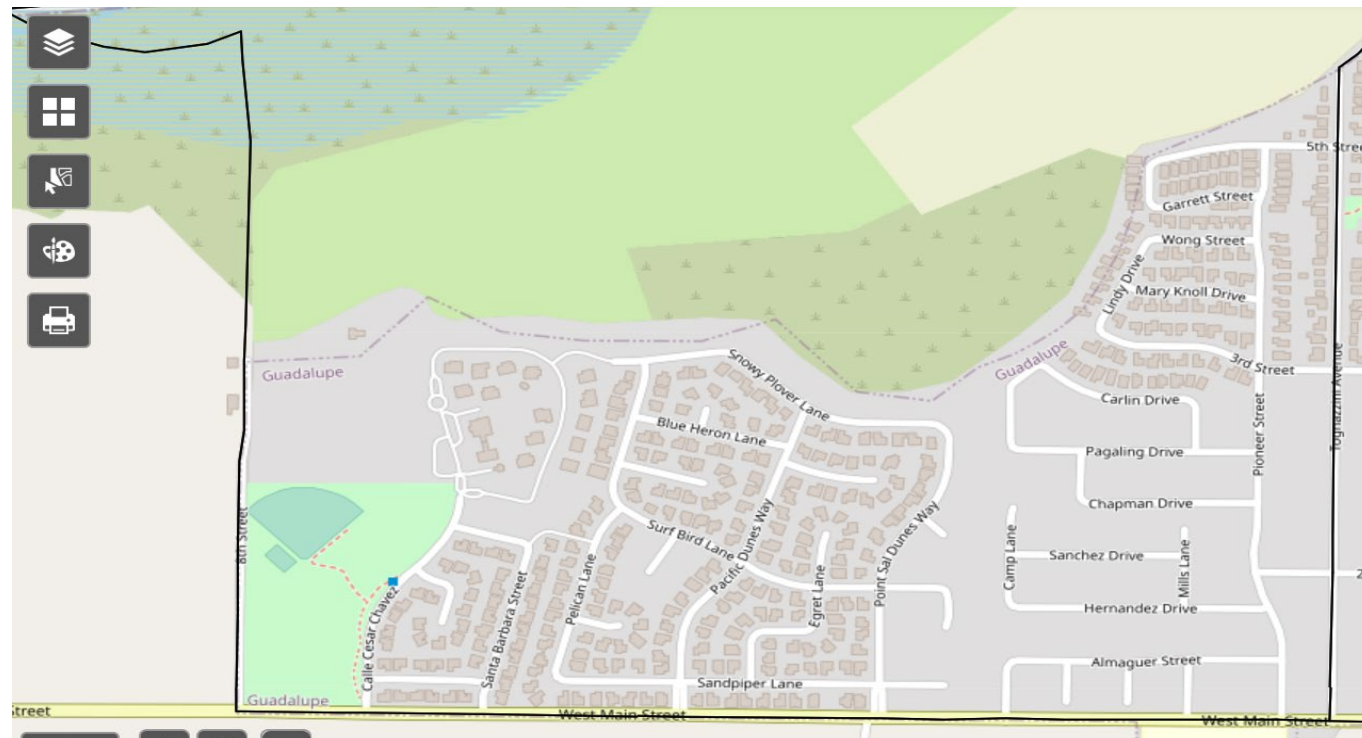
Selecting the Basemap Icon provides more options for alternative views. The default setting is satellite aerial view. The Open Street Map option is recommended for the user to see the street names when working within the mapping tool:





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?



Alternative LMA Beneficiary Count

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.

<https://www.hudexchange.info/programs/acs-low-mod-summary-data/acs-low-mod-summary-data-block-groups-places/>

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.

Stusab	Countyname	Tract	Blckgrp	Lowmod	Lowmoduniv
AL	Autauga County	020100	1	230	650
AL	Autauga County	020100	2	315	1300
AL	Autauga County	020200	1	515	1075
AL	Autauga County	020200	2	360	910

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.

Stusab	Countyname	County	Tract	Blckgrp	Lowmo	Lowmo
AL	Autauga County	001	020100	1	230	650
AL	Autauga County	001	020100	2	315	1300
AL	Autauga County	001	020200	1	515	1075
AL	Autauga County	001	020200	2	360	910

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

Stusab	Countyname	Tract	Blckgrp	Lowmo	Lowmo	niv
CA	Santa Barbara County	002502	1	905	1140	
CA	Santa Barbara County	002502	2	1905	3260	
CA	Santa Barbara County	002502	3	1335	1420	
CA	Santa Barbara County	002502	4	1030	1625	

Now to calculate the data



Alternative LMA Beneficiary Count

This is the final product of the filters:

Stusab	Countyname	Tract	Blckgrp	Lowmo	Lowmo	niv
CA	Santa Barbara County	002502	1	905	1140	
CA	Santa Barbara County	002502	2	1905	3260	
CA	Santa Barbara County	002502	3	1335	1420	
CA	Santa Barbara County	002502	4	1030	1625	
				5175	7445	

Step Four: Calculate

1. Sum Lowmod and Lowmoduniv – Highlight columns and select (!) to convert to numbers.



Alternative LMA Beneficiary Count

Step four continued:

Stusab	Countyname	Tract	Blckgrp	Lowmo	Lowmo	niv
CA	Santa Barbara County	002502	1	905	1140	
CA	Santa Barbara County	002502	2	1905	3260	
CA	Santa Barbara County	002502	3	1335	1420	
CA	Santa Barbara County	002502	4	1030	1625	
				5175	7445	
				69.51%		

Calculate percentage = $j220336 / I220336$ (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:

Blckgrp	Lowmod	Lowmoduniv
1	905	1140
2	1905	3260
3	1335	1420
4	1030	1625
	5175	7445
	69.51%	

Excel Spreadsheet:

Blckgrp	Lowmo	Lowmodu
1	905	1140
2	1905	3260
3	1335	1420
4	1030	1625
	5175	7445
	69.51%	

The tools give the same result.



Questions?



Resources

- Low- and Moderate-Income Summary Data - <https://hud.maps.arcgis.com/home/item.html?id=ffd0597e8af24f88b501b7e7f326bedd>
- ACS 2011 – 2015 All Block Groups - <https://www.hudexchange.info/programs/acs-low-mod-summary-data/acs-low-mod-summary-data-block-groups-places/>
- Guide to National Objectives and Eligible Activities for State CDBG Programs - <https://www.hudexchange.info/resource/2179/guide-national-objectives-eligible-activities-state-cdbg-programs/>
- 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_vi1a&cof=FORID%3A10&ie=UTF-8&nojs=1



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