

LCDBG PUBLIC FACILITIES PROJECT SURVEY FORMS

Please print these instructions for reference purposes

The LCDBG Public Facilities Survey Forms EXCEL workbook contains the following worksheets:

- Survey (additional rows may be added and/or deleted from the survey portion of the table)
- Projected Occupied Households Calculator
- Survey Tabulation Form (STF)
- Projection from STF to Activity Beneficiary Form (ABF)
- Activity Beneficiary Form

The Survey worksheet is designed to auto-calculate and transfer some information to the Survey Tabulation Form. The data for Rehabilitation Loans and Grants will need to be calculated and transferred manually.

If the application involves more than one Target Area, a separate Workbook should be created for each Target Area. The Survey, Projected Occupied Households Calculator Form (if needed), Survey Tabulation Form, Projection from STF to ABF (if needed) and ABF should be completed for each Target Area surveyed. The Target Area ABFs must then be combined into one ABF.

IT IS REQUIRED THAT THE RESULTS OF EVERY SURVEY CONDUCTED BE SUBMITTED ON THESE FORMS!

Important changes from the former Public Facilities Project Survey Form:

- The use of customer lists IS NOT ACCEPTABLE.
- Data regarding owners, renters and female-headed households must be collected in order to meet HUD reporting requirements.

INSTRUCTIONS:

I. Survey Worksheet

A. At the top of the form, enter the following information:

- Community/Parish Name
- Target Area Name
- Surveyor's Name
- Date Survey was Conducted
- Total Households in Population (occupied & vacant)

B. To determine the survey sample size, go to <http://www.surveysystem.com/sscalc.htm>. Enter the Population size (the total number of residential structures will be the POPULATION size) with a Confidence Level of 95% and a Confidence Interval of 5, then click the Calculate button to obtain the required number of surveys. Print a copy of the screen and include the printout in the application. The number of surveys obtained for each surveyed area(s) as required by the survey sample size chart must be exact. Any target areas with a Population size of 50 or below must be 100 percent surveyed.

To identify the households with the Population that are required to be surveyed, go to <https://www.random.org/sequences/>. In the area identified as Sequence Boundaries, enter the Smallest Value as 1 and the Largest Value as the total number of the Population. Choose the number of columns that is preferred by the applicant for the output of the random numbers sequence, then click the Get Sequence button. Print a copy of the screen and include the printout in the application. The applicant should count down the sequence list equal to the number of required surveys identified in the previous step. Those numbers would be the required numbers and households that correspond with those numbers on the map or customer list must be surveyed. If any of those households cannot be surveyed for any reason, then the next number on the sequence list would be used to replace the original required number. For example, if the required number of surveys is 100, then households that correspond to the first 100 numbers on the sequence list would be required as surveys. If one of those households are vacant, then the 101st number on the sequence list would be used to replace the vacant household in the surveys, and so on.

If a random household survey is completed, the data on the Household Survey Forms that are submitted with the application must be in the same order as identified on the sequence list. The data cannot be in numerical order. If a 100% survey is completed, the data MUST be in numerical order. A survey is 100% only if 100% of the occupied houses are surveyed. **IF THIS IS NOT DONE CORRECTLY, THE APPLICATION WILL NOT BE RATED.**

C. To insert additional rows, Right Click on any row number (except one in the 1st or last row) on the left hand side of the survey portion of the table. Select Insert. Repeat as needed.

D. A list of EXTRA Map Key Numbers and their corresponding addresses can be inserted following the Required Map Key Numbers. Please note: any EXTRA rows which exceed the required sample number must be deleted once the survey is completed. The ONLY exception would be in the case of a 100% survey.

E. To delete extra rows, Right Click on the row number to be deleted. Select Delete. Repeat as needed.

II. Completing Survey Forms

A. For the columns titled Occupied House, Surveyed House, Female-Headed Household, Owner and Renter, survey results should be entered as follows:

- 1 = YES
- 0 or empty cell = NO

In order for the worksheets to auto-calculate, you must either leave the cell empty or enter a 1 or 0.

DO NOT USE Checkmarks or Xs.

1. If a structure originally thought to be residential is discovered to be a business, church or other exempt structure; the true nature of the structure should be entered in the survey sheet in the column titled Comments.
2. If there is no one at home on the initial survey attempt of a residence, 2 additional attempts to survey must be made. If there is no success after 3 attempts, enter Not at Home in the Comments column and enter 1 in the Occupied House column. Maintain documentation of the three attempts to contact.
3. If the structure is determined to be vacant, enter VACANT on the survey sheet in the Comments column.
4. If the structure is occupied and the occupants refuse to be surveyed, enter REFUSED in the Comments column and enter 1 in the Occupied House column.
5. In the columns titled Female-Headed Household, Owner, and Renter, enter a 1 in each column that applies.
6. In the column titled Household Income Range, enter a 1 in the correct (High, Moderate, Low or Extremely Low) income range column. If the household qualifies as High Income, enter the 1 in the High Income column and do not enter anything in the other Income columns. Similarly, if the household qualifies as Low, enter the 1 in the Low Income column and do not enter anything in the other Income columns.

B. RACIAL IDENTITY & ETHNIC IDENTITY: Enter the total number of people living in the household in the Racial Identity column claimed by the household. If the household also identifies as being of Hispanic ethnicity, enter the total persons living in the household in the column titled Hispanic. If a household identifies as being of Hispanic ethnicity, a racial identity must also be entered.

C. Monthly User Fee \$____ Per Month Yes/No: If this application is for a NEW sewer or water system, this column must be completed. On each worksheet, enter the amount it is estimated will be the monthly user fee. When surveying a household, ask if the household would be willing to pay this monthly fee and record the answer as Y (Yes) or N (No).

D. Once the required number of households has been surveyed, delete all rows exceeding the required survey number. **NOTE:** It may be useful to save a working copy of the workbook with the complete survey results before deleting extra rows. This will help if a mistake is made in the survey size. Print the Survey worksheet. This will be submitted with the completed application to support the SURVEY TABULATION FORM and ACTIVITY BENEFICIARY FORM.

III. Completing Projected Occupied Households Form, Survey Tabulation Form, Projection from STF to ABF and Target Area Activity Beneficiary Form

A. Survey Tabulation Form

The data on the Survey worksheet will automatically populate the Survey Tabulation Form for the main activity. Data for Rehabilitation Loans and Grants will have to be calculated and entered manually.

B. If this was NOT a 100% Survey, the Projected Occupied Households form must be completed. Complete this form following the instructions on the worksheet.

C. Survey Tab Form to ABF

From the Survey Tabulation Form to the Activity Beneficiary Form-**100% Survey: Do not complete this form.** Random Sample Survey: Complete this form following the instructions on the worksheet.

D. Target Area Activity Beneficiary Form

If a 100% survey was completed, data will be transferred directly from the Survey Tabulation Form. If a Random Household Survey was completed, data will be transferred from the Survey Tab Form to ABF. If there are multiple target areas, an ABF must be completed for each and then combined manually into a single ABF.

E. Print all completed forms for submission with the application.