

City of San Diego – FY 2015 CDBD Request for Proposals, Questions 3A & 3B
Instructions: Service Areas, Census Tracts Location and Corresponding Data
If any questions, please contact CDBG@sandiego.gov

NOTE: Revised to provide additional details on 1/17/2014

How do determine whether my proposed project serves a low/moderate income (LMI) geographic area (Table 3.a) OR a limited clientele (Table 3.b)?

The most distinguishing factor between the two categories is whether the service will be offered to **all** residents of a particular LMI income area **or** to a **specific targeted group** of LMI residents. Please refer to Appendix A: City of San Diego Income Limits (found in the FY 2015 CDBG RFP Handbook) for specific income caps based on households' size.

Proposed projects which would result in the provision of benefits and/or services to **all** residents of a specific geographic area (must be primarily residential and meet the HUD income limitations) are considered AREA BENEFIT projects and hence meet the *low/moderate income (LMI) geographic area* criterion (respond to Table 3.a). The residents that benefit from such project must generally reside within the boundaries of CDBG eligible census tracts as defined by HUD. Note that while service areas may extend beyond the boundaries of CDBG eligible census tracts, documentation will be needed in order to demonstrate that at a minimum, 51% of the resident beneficiaries meet the income requirements.

Proposed projects which would result in the provision of benefits and/or services to a **specific targeted group** of persons are considered LIMITED CLIENTELE projects. Such projects benefit specific individuals and/or families that meet income requirements (LMI) or those presumed by HUD to be LMI: abused children, battered spouses, elderly persons, severely disabled adults, homeless persons, illiterate adults, persons living with AIDS, and migrant farm workers ("presumed LMI"). See below for further details. In this instance, respond to Table 3.b.

A. Low/moderate income (LMI) geographic area projects

PUBLIC SERVICE PROJECTS: A proposed project is considered to serve a low/moderate income (LMI) geographic area (and hence qualify under the Area Benefit criteria), only if the public service is available to **all** residents of an area where at least 51 percent of the residents are LMI. The area must be clearly delineated and must be primarily residential.

CAPITAL IMPROVEMENT PROJECTS: A proposed project is considered to serve a low/moderate income (LMI) geographic area (and hence qualify under the Area Benefit criteria), only if the property affected will be used for an activity that benefits **all** of the residents of a **primarily residential** area and at least 51% of those residents are LMI persons. The area must be clearly delineated and must be primarily residential.

CAPITAL IMPROVEMENT PROJECTS-HOUSING REHABILITATION PROGRAMS & PROJECTS: NA – See below.

ECONOMIC DEVELOPMENT PROJECTS: NA – See below.

B. Limited clientele projects

PUBLIC SERVICE PROJECTS: Limited Clientele activities benefit a *specific targeted group* of persons. In order to meet the LMI Limited Clientele criteria, the activity must:

- Serving at least 51 percent LMI, as evidenced by documentation and data concerning beneficiary family size and income; or,
- Having income-eligibility requirements that limit the service to persons meeting the LMI income requirement, as evidenced by the administering Agency’s procedures, intake/application forms and other sources of documentation; or,
- Serving a group primarily presumed to be LMI such as abused children, battered spouses, elderly persons, severely disabled adults, homeless persons, illiterate adults, persons living with AIDS, and migrant farm workers

CAPITAL IMPROVEMENT PROJECTS: CIP projects fall under the limited clientele criteria if the facility being improved and/or upgraded serves those presumed to be LMI (abused children, battered spouses, elderly persons, severely disabled adults, homeless persons, illiterate adults, persons living with AIDS and migrant farm workers) or limits its services to those that meet certain income requirements (income falls at or below 80% of AMI). Note that depending on the nature of the project, income requirements are still applicable—see below.

CAPITAL IMPROVEMENT PROJECTS-HOUSING REHABILITATION PROGRAMS & PROJECTS: Housing projects which serve individual clients (i.e., transitional, short-term housing) typically serve a limited clientele (presumed LMI). However, if improvements are proposed to residential housing units (single-unit or multi-unit housing), income verification must be documented in order to demonstrate conformance with federal standards.

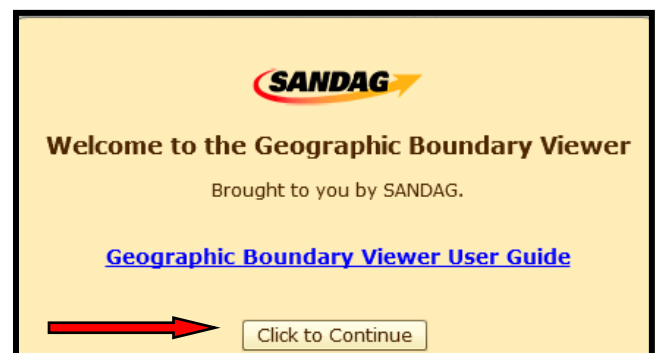
ECONOMIC DEVELOPMENT PROJECTS: Such projects typically provide services to a limited clientele that meets the income requirements (income falls at or below 80% of AMI).

NOTE: The information provided above is intended to fit to most proposed projects based on the City of San Diego records and staff experience. If you believe your project may not fit within any of the categories listed above and/or if have questions regarding which category above is the best fit for your project, contact CDBG@sandiego.gov.

I. RESPONDING TO Q 3A: LMI AREAS

Please note that that the CDBG-Eligible Census Tracts (maps and tables referenced as part of the FY 2015 CDBG RFP) refer to the 2000 Census Tracts. HUD is working towards updating this data and, as such, it is subject to change which may render a project no longer eligible for funding.

1. In order to identify the 2000 census tracts that are within the area of service of your proposed project, refer to SANDAG’s [Geographic Boundary Viewer](#). A message by SANDAG will appear on the map, hit “Click to Continue”

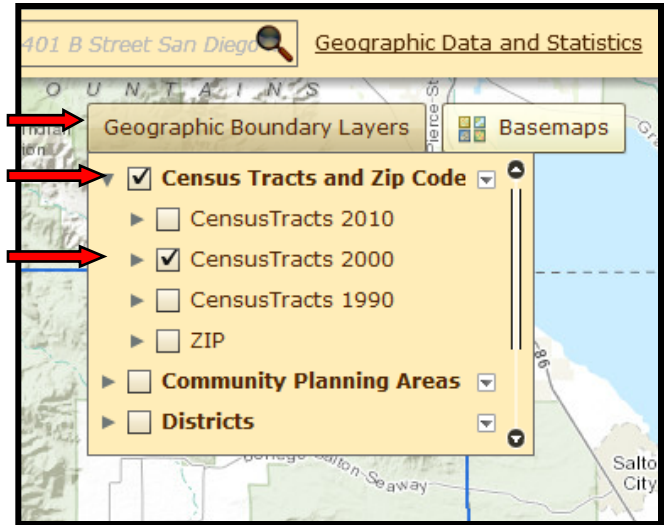


2. Place the mouse over the “Geographic Boundary Layers” tab located in the upper right hand corner of the map window to open the panel.

3. Click the checkbox of “Census Tracts and Zip Code”

4. Click on the gray arrow left to “Census Tracts and Zip Code” to expand the category.

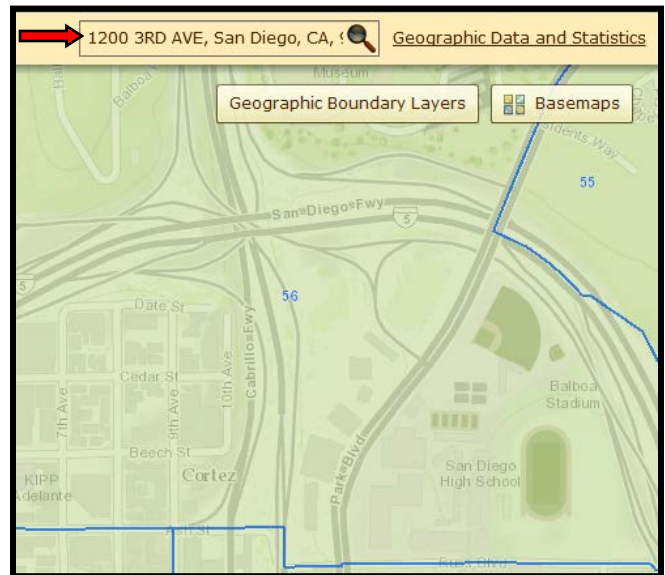
5. Click the checkbox of “Census Tracts 2000” to activate the layer. Remove selection of “Census Tracts 2010” to deactivate this layer.



6. Navigate to the Address Locator tool located in the upper right hand corner of the map window and enter a point address within San Diego County –address must be within the area of service of your proposed project.

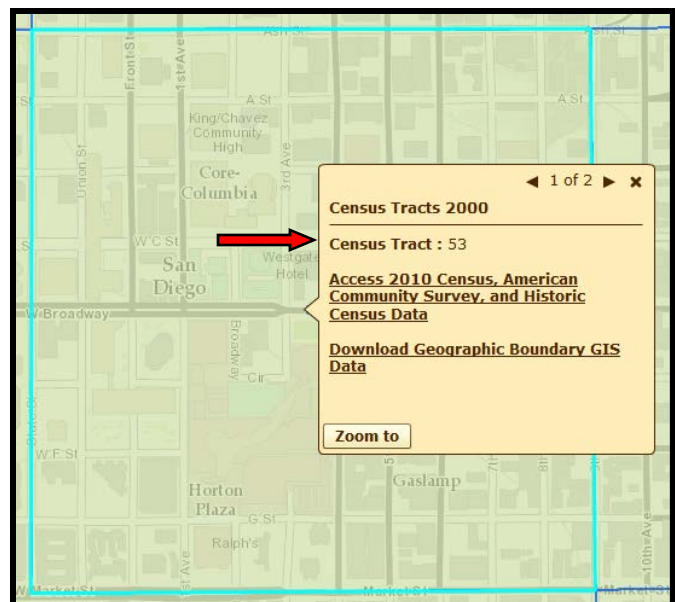
7. Click on the magnifying glass to execute tool. If more than one option is returned, select the best match. The map will automatically zoom to the selected address.

8. As the area of interest is identified, click within the boundaries of affected census tracts to view the PopUp information. The census tract number will be listed under the year 2000.



9. Zoom in and out as needed in order to identify ALL of the 2000 Census Tracts that are within the service area of the project as proposed.

10. Note you need to refer to this map in order to estimate the “area serviced by your project” within each specific census tract and provide said information in column 3 of table 3.a



11. List ALL of the 2000 Census Tracts that are within the service area of the project as proposed in column 1 of table 3a.
12. Refer to Appendix B: City of San Diego FY 2014 CDBG Eligible Census Tracts (found in the FY 2015 CDBG RFP Handbook) to identify which of all of ALL of the 2000 Census Tracts listed in column 2 are *CDBG eligible census tracts* (mark yes or no accordingly). Use the same table to identify the “percentage of LMI population” for the *CDBG eligible census tracts* (as required in column 4).
13. Finally, refer back to the [Geographic Boundary Viewer](#) (map zoomed to area of service) in order to identify “area serviced by your project” within each specific census tract. The intent of this column is to identify the areal/surface extent of the project service area within specific census tracts as service areas’ boundaries may NOT coincide with those of census tracts. Use your best professional judgment and reasonableness when arriving at these estimates.

II. **RESPONDING TO Q 3B: LIMITED CLIENTELE**

Note that there are neither prescribed steps nor prescribed sources to respond to the information requested in table 3.b. That is why, RFP respondents are asked to “describe methods and reasoning” as well as “assumptions made and data sources” under question 3b.8.

Respondents may use their own sources of information and data for completing Q 3B as there are numerous ways to arrive at this information but the choices are dependent on the type of project being proposed.

Respondent agencies may also respond to these questions by setting criteria under which they would select the population they choose to serve. Such projects would require funded agencies to require documentation to demonstrate conformance with said criteria as part of their selection process. For example, agencies may have income-eligibility requirements which limit the service to persons meeting certain income requirement, as evidenced by the administering agency’s procedures, intake/application forms, income limits, and other sources of documentation. Finally, please note that if your project is funded, the scope of the project will be based on the project as described in the response to the RFP. As such, make sure you are committed to implementing the project as described in your response.

Please find below sources described during the RFP workshops which may be of help in responding to these questions but may not be suitable for all projects.

American Community Survey (ACS) Webinar

[Audio](#) | [Presentation](#) / [Presentation](#)

While the Census Bureau counts all residents in the United States every ten years, the American Community Survey (ACS) is a nationwide survey designed to provide communities a fresh look at extensive population and housing information every year instead of the “long form” data previously collected once every ten years. The ACS includes social, economic, and housing characteristics such as education, language spoken at home, place of birth, income, employment, occupation, commuting to work, and much more. This webinar provided an overview of the survey methodology, variables collected, and geographic areas available for analysis

http://www.sandag.org/resources/demographics_and_other_data/demographics/census/index.asp

As a follow-up to the above session, this hands-on workshop highlighted how SANDAG uses Census and ACS data, including data available on the SANDAG website. In addition, the steps involved in accessing specific data through American Fact Finder was shown (e.g., demographic characteristics like age and race/ethnicity, income, disability status, primary language, school enrollment, educational attainment, poverty rates). This session was hands-on, so participants brought their real-world questions and were able to access the data needed as part of the learning process

http://www.sandag.org/resources/demographics_and_other_data/demographics/census/index.asp

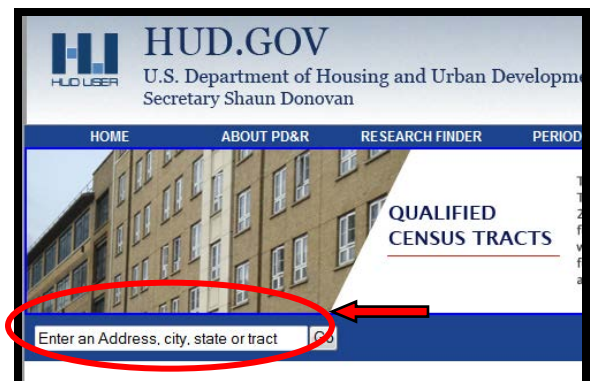
III. Other Demographic Information: HUD Qualified Census Tracts

Applicants may also want to identify whether their proposed project will provide services to areas considered “Qualified Census Tracts” by the US Department of Housing and Urban Development (and/or provide services to residents of “Qualified Census Tracts”).

The US Department of Housing and Urban Development (HUD) designates Qualified Census Tracts (QCTs) for purposes of the Low-Income Housing Tax Credit (LIHTC) program. The LIHTC program is defined in Section 42 of the Internal Revenue Code of 1986. The LIHTC is a tax incentive intended to increase the availability of affordable rental housing.

The LIHTC statute provides two criteria for QCT eligibility. A census tract must have either: 1) a poverty rate of at least 25 percent; or 2) 50 percent or more of its householders must have incomes below 60 percent of the area median household income. The area corresponds to a metropolitan or a non-metropolitan area. Further, the LIHTC statute requires that no more than 20 percent of the metropolitan area population reside within designated QCTs (This limit also applies collectively to the nonmetropolitan counties in each state). Thus, it is possible for a tract to meet one or both of the above criteria, but not be designated as a QCT.

1. In order to determine whether a proposed project falls within a QCT, refer to the [U.S. Department of Housing and Urban Development website](#).
2. Navigate to the Address Locator tool located on the left side of the website, enter an address (or census tract number) and click on “go.”
3. The map will automatically zoom to the selected address. Click on the Census Tract number where the address is located to view the PopUp information. The 2010 census tract number will be listed under the Qualified Census Tract Information along with the poverty rate of the applicable census tract.



IV. Other Demographic Information

Additional demographic data may be obtained in many different ways. The following instructions provide one of such mechanisms and it is only intended as an optional guide for the user. For example, the following steps are followed in order to identify the percentage of households (HHs) that make less than \$59,999 within a specific census tract based on 2000 census information:

1. Once affected 2000 census tracts are identified, go to the [SANDAG's Profile Warehouse website](#).
2. Select 2000 Census (under profile type), 2000 Census Tract (under geographic unit type) and your census tract number (under geographic subunit) and then click on "Get Profile."
3. Once you have downloaded your census tract profile, identify the percentage of HHs that make less than \$59,999 by adding the applicable percentages of HHs as identified under the Household Income table in the profile (See right as an example).
4. Insert the census tract number, the percentage of HHs within the census tract that make less than \$59,999 and discuss your project office location in relation to your target population in the response as requested above.
5. Similar demographic profiles can be obtained for other geographies (beyond census tracts) including zip codes.
6. The user may also choose current estimates, forecasts or information based on either of the 1990, 2000 or 2010 censuses.

DEMOGRAPHIC & SOCIO ECONOMIC ESTIMATES
2010 Census Tract: 53.00

	Apr 1, 2010	
Total Population	6,667	
Household Population	3,604	
Group Quarters Population	3,063	
Persons Per Household	1.34	

$$36 + 23 + 9 + 8 = 76\%$$

	Total Housing Units	Occupied Households	Vacancy Rate
Total Housing Units	3,840	2,694	29.8%
Single Family - Detached	2	2	0.0%
Single Family - Multiple-Unit	0	0	--
Multi-Family	3,838	2,692	29.9%
Mobile Home and Other	0	0	--

HOUSEHOLD INCOME						
Households by Income Category (2010 \$, adjusted for inflation)						
	Less than \$15,000	\$15,000-\$29,999	\$30,000-\$44,999	\$45,000-\$59,999	\$60,000-\$74,999	\$75,000-\$99,999
% of Total	36%	23%	9%	8%	5%	5%