

## Chapter 3 National Objectives

There are three federal national objectives for the Community Development Block Grant (CDBG) Program. However, the state of Oregon only qualifies projects for funding under two of the three national objectives. **All projects and the individual activities funded in whole or in part with CDBG funds must meet one of these national objectives:**

- **Benefiting Low- and Moderate-income Persons**–This is the primary program objective. The state must ensure that no less than 70 percent of the CDBG funds that it administers are spent for projects that meet this objective.
- **Urgent Need**–This must be a bona fide emergency declared by the Governor. CDBG funds are generally not available for meeting other community development needs having particular urgency because existing conditions pose a serious and immediate threat to the health or welfare of the community, and other financial resources.

### **Benefiting Low- and Moderate-income Persons**

The federal regulations provide that in any case where there is substantial evidence that an activity might not principally benefit low- and moderate-income persons, even though the activity conforms to the literal reading of the low- and moderate-income benefit criteria, the presumption that the activity meets the national objective will be rebutted. The grant applicant/recipient must document how the activity will meet the low- and moderate-income benefit national objective.

There are four ways a project can meet the low- and moderate-income national objective. These are: 1) Area Wide, 2) Limited Clientele, 3) Housing, and 4) Jobs. With the exception of the “Jobs” objective, the remaining three objectives (Area Wide, Limited Clientele and Housing) are described in the following sections.

### **Area Wide Qualification (LMA)**

- The Area Wide Qualification applies to an activity, the benefits of which are available to all the residents in a particular area, where at least 51 percent of the residents are low- and moderate-income persons. Such an area need not be conterminous with census tracts or other officially recognized boundaries but must be the entire area served by the activity. It is critical that the service area proposed by the applicant and approved by the state is the entire area served by that activity.
- Units of general local government may, at the discretion of the state, use either U.S. Department of Housing and Urban Development (HUD) provided data comparing census data with appropriate low- and moderate-income levels or survey data that is methodologically sound and pre-approved by Business Oregon.
- An activity that serves an area that is not primarily residential in character will not qualify under this criterion, as determined by Business Oregon.
- The Area Wide Qualification also applies to an activity, where the assistance is for a public improvement that provides benefits to all the residents of an area that is limited to paying special assessments levied against residential properties owned and occupied by persons of low and moderate income.

**Area Wide Documentation Needed (LMA)**

1. All applicants must provide a map with their application showing the proposed project's entire service area. Community facility projects qualifying under this national objective must also provide written documentation such as a policy or other document demonstrating the use of the facility will be restricted to the residents within the defined service area.
2. The easiest way for applicants to document low- and moderate-income benefit for area-wide projects is to use the 2016 Low and Moderate Income Survey Data (LMISD) data. See Table A beginning on page 2-3 of this handbook.

Applicants for area-wide benefit projects that have been determined to be eligible activities for funding under the CDBG program by Business Oregon will use a special income survey in the following situations:

- a. Boundary–The geographic area where beneficiaries live does not generally coincide with census geography;
- b. Economic Changes–2016 LMISD (effective March 28, 2016) data shows that less than 51 percent of the persons in an area are low and moderate income but the applicant believes that local economic conditions are significantly different. Compelling evidence, such as a mill/plant closing or other documentation must be presented by the potential applicant to substantiate that an income survey is necessary;
- c. Non-Economic Changes–2016 LMISD (effective March 28, 2016) data shows that less than 51 percent of the persons in an area are low and moderate income but the applicant believes that local non-economic conditions are significantly different. Documentation of natural or human made disasters or other compelling evidence must be presented by the potential applicant to substantiate that an income survey is necessary; or
- d. Demographic Changes–There is compelling evidence that current community income characteristics are **significantly different from the most current LMISD data provided by HUD**. The 2016 LMISD data was derived from 2006-2010 American Community Survey (ACS) data and published by HUD in March 2016. For example, a community with a substantial increase in population and new housing construction after 2012 cannot be assumed to have the same percentage of low- and moderate-income persons.

Population growth (increase or decrease) may be documented by comparing population data from the 2016 LMISD to the most current 2013 Portland State University (PSU) population estimate issued April 15, 2014, or other most recent PSU release.

All surveys must be conducted in compliance with HUD Community Planning and Development (CPD) Notice 14-013 dated September 25, 2014, and any other more current methodology developed by HUD. A copy of the survey methodology and a sample questionnaire is available by request from the department.

**Applicants must secure approval from the department on the survey instrument and process in order for the department to recognize the results of local income surveys.** In addition, applicants are encouraged to contract with an organization or private contractor to do the work. The cost of the survey is not eligible for CDBG assistance and cannot be recovered if a grant is awarded.

Communities planning to conduct a survey must contact their Business Oregon Regional Development Officer (RDO) **prior to beginning the survey**.

Business Oregon-approved income surveys will be valid and usable for up to five (5) years, after approval. If economic, non-economic or demographic changes occur during this five (5)-year period that would directly affect the low-moderate income data of a community and the applicant has a project determined to be an eligible activity for funding under the CDBG program, the applicant may contact Business Oregon to discuss the possibility of conducting an income survey.

**In accordance with HUD CPD Notice 14-013**, the HUD issued American Community Survey (ACS) derived LMISD must be used “to the fullest extent feasible” unless it can be documented that the data does not provide enough information regarding the income levels in the service area. In this case, a survey may be necessary. For projects determined to be CDBG eligible, surveys will be approved for the conditions identified in paragraphs a, b, c, and d above.

As soon as the 2017 LMISD data is published by HUD, the 2017 LMISD data must be utilized by the program, and will be immediately effective.

#### **Limited Clientele Qualification (LMC)**

**Note:** A facility that is open to everyone within a defined service area must qualify under the low- and moderate-income area-wide national objective.

Four possible “tests” document that beneficiaries of limited clientele facilities are principally low and moderate income. More than one test may be required, depending upon the project to be funded.

To qualify for the limited clientele national objective, an activity must benefit a limited clientele, at least 51 percent of whom are low- and moderate-income persons. The activity must meet one or more of the following tests:

- **Test 1–Limited Clientele Based on Presumed Benefit**–It must benefit a clientele who are generally **presumed** to be principally low and moderate-income persons. Activities that exclusively serve a group of persons in any one or a combination of the following categories may be presumed to benefit persons, 51 percent of whom are low and moderate income:
  - **Abused children;**
  - **Battered spouses;**
  - **Elderly persons**–Persons 60 years of age and older;
  - **Severely disabled adults**–Adults meeting the Bureau of the Census’ Current Population Reports definition of “severely disabled,”–Persons with a severe disability must meet one of the following:
    - a. Used a wheelchair or have used another special aid for 6 months or longer;
    - b. Are unable to perform one or more functional activities or need assistance with an Activity of Daily Living or Instrumental Activity of Daily Living. (Functional Activities include seeing, hearing, having ones speech understood, lifting, carrying, walking up a flight of stairs and walking. Activities of Daily Living include getting around inside the

house, getting out of bed or a chair, bathing, dressing, eating and toileting. Instrumental Activities of Daily Living include going outside the home, keeping track of money, preparing meals, doing light housework and using the telephone.)

- c. Are prevented from working at a job or doing housework;
  - d. Have a condition including autism, cerebral palsy, Alzheimer’s disease, senility or mental retardation; and
  - e. Persons who are under 65 years of age and considered disabled by Medicare or receive Social Security Income are considered to have a disability (severe disability).
- **Homeless persons**—Persons living on the street or in an emergency shelter, or who will be living on the street or in an emergency shelter without assistance;
  - **Illiterate adults;**
  - **Persons living with AIDS;** and
  - **Migrant farm workers.**
- **Test 2–Limited Clientele Based on Family Size and Income and Test 3–Limited Clientele Based on Income Eligibility**—If the facility does not serve a clientele that consists solely of presumed low- and moderate-income persons, it must:
    - For **Test 2**, require information on family size and income from every client so that it is evident that at least 51 percent of the clientele are persons whose family income does not exceed the low- and moderate-income limit. The Community Facility User Form must be completed using income limits in Table D; or
    - For **Test 3**, have income eligibility requirements that limit the activity exclusively to low- and moderate-income persons; or
  - **Test 4–Limited Clientele Based on Nature and Location of the Facility**—It must be of such a nature, and be in such a location, that it may be concluded the activity’s clientele will primarily be low- and moderate-income persons. (**Note:** The use of this criteria under the state’s program is a rarity.)
    - On February 15, 2008, the state received guidance from HUD that food bank/warehouses can qualify as meeting the LMI national objective on the basis of the nature of the service and the location where the services are provided. Food bank projects will no longer have to collect family size and income data to demonstrate compliance with the federal national objective. On May 7, 2008, the department researched and approved of this approach.
  - **Microenterprise Exception**—A microenterprise assistance project is limited to owners of microenterprises and persons developing microenterprises who are low- and moderate-income persons based upon the family size and income limits contained within Table D. For purposes of this paragraph, persons determined to be low and moderate income may be presumed to continue to qualify as such for up to a three-year period.

**Limited Clientele Documentation (LMC)**

Applicants must document how proposed activities will benefit low- and moderate-income persons in conformance with federal law. The type of documentation necessary depends upon the users of the facility. Some proposed projects may involve more than one program/activity with different clientele and different documentation. The following describes what information must be submitted for different types of limited clientele activities:

1. **Test 1–Limited Clientele Based on Presumed Benefit**

Documentation establishing that the facility or service is designed exclusively to serve a group of persons in any one or a combination of the following categories may be presumed to benefit persons, 51 percent of whom are low and moderate income: abused children, battered spouses, elderly persons, adults meeting the Bureau of the Census' Current Population Reports definition of "severely disabled," homeless persons, illiterate adults, persons living with AIDS and migrant farm workers; or

2. **Test 2–Limited Clientele Based on Family Size and Income**

Documentation that at least 51 percent of the clientele are persons whose family income does not exceed the low- and moderate-income limit (e.g., child care center that is not exclusively for low- and moderate-income persons). The current income limits can be found in Table D. Required documentation shall be one or more of the following, as appropriate:

- a. A summary that shows how many current users have family incomes above and below the low- and moderate-income limits. The summary must be based on information about the family size and family income of each user. This information may be from existing program forms (e.g., application for day care) or it can be collected using the form included in this chapter (Community Facility User Certification form) and reported on the "Documentation of Facility Users" form also contained within this chapter.

**The documentation cannot be a survey.** There must be information collected about the family of **each** beneficiary. If a family does not provide the required information, its members must be assumed to be above the income limits.

Individual information forms gathered by the applicant do not have to be included with the application but may be reviewed during a site visit by department staff and/or must be available upon request at any time from department staff.

- b. The applicant also must certify in the application that, if funded, it will ensure that family size and income data is collected on all current and future beneficiaries **and** that no less than 51 percent of the beneficiaries of the facility will be income qualified until at least five years after the grant project is closed; or

3. **Test 3–Limited Clientele Based on Income Eligibility**  
Documentation of the income eligibility requirements that limit, or will limit, benefits from the facility exclusively to low- and moderate-income persons. The income limits must be included with the application; or
4. **Test 4–Limited Clientele Based on Nature and Location of the Facility**  
Documentation describing how the nature and, if applicable, the location of the facility or service establishes that it is used or will be used predominantly by low- and moderate-income persons.

**Note:** Facilities must provide one year of family size and income data for the facility to be assisted. If one year of data is not available (new facility with no clientele history) the applicant must demonstrate how the services offered at the facility will be limited to low- and moderate-income persons so that the use of the facility will meet the national objective. This is done by the applicant providing the department application forms, policies and other documents and procedures that will be used to limit the use of the facility so that 51 percent or more of the use of the facility is for low- and moderate-income persons.

The summary form Table E titled “Documentation of Facility Users” must be completed and included with the application for all “limited clientele” projects.

#### **Housing Activities Qualification (LMH)**

An eligible activity carried out for the purpose of providing or improving permanent residential structures which, upon completion, will be occupied by low- and moderate-income households. This would include, but not necessarily be limited to, the acquisition or rehabilitation of property, conversion of nonresidential structures and new housing construction. If the structure contains two dwelling units, at least one must be occupied by a low- and moderate-income household, and if the structure contains more than two dwelling units, at least 51 percent of the units must be occupied by low- and moderate-income households.

When CDBG funds are used for housing services eligible under section 105(a)(20) of the Act, such funds shall be considered to benefit low- and moderate-income persons if the housing units for which the services are provided are HOME-assisted and the requirements of 92.252 or 92.254 of this title are met.

#### **Housing Documentation (LMH)**

For each activity carried out for the purpose of rehabilitating or constructing housing that is determined to benefit low- and moderate-income households, each applicant must provide a description of how local program policies will ensure that only income qualified households will benefit along with a copy of the client intake and screening forms and applicable income limits to be used.

**Note:** Only the housing program gathers data by household size and household income. Household size and income is an aggregate of multiple families residing within the same residence. To determine LMI status, the household size and income are compared against the family size and income chart contained in Table D.

**Urgent Need**

To comply with this national objective a project must be designated to alleviate existing conditions that the local government certifies and the state determines:

- Pose a serious and immediate threat to the health or welfare of the community (Governor declared “State of Emergency” or Presidential declared disaster, through FEMA declaration);
- Are of recent origin or recently became urgent (i.e., Governor’s Emergency Declaration was within 12 months preceding the local government’s certification and the state’s determination);
- The applicant is unable to finance the activity on its own; and
- Other sources of funds are not available to carry out the activity.

**Urgent Need Documentation**

- **A description of the nature and degree of seriousness of the conditions requiring assistance.**
- Evidence that the state grant recipient certified that the CDBG activity was designated to address an urgent need.
- Information on the timing of the development of the serious condition.
- Evidence confirming that other financial resources to alleviate the need are not available.

Table C National Objective

<b>Low and Moderate Income</b>	
<b>Area Wide/Sub-Area</b> 24 CFR 570.483 (b)(1)(i)	<p><b>Definition</b>–The activity must serve an area that is primarily a low- and moderate-income permanent residential area (at least 51% low and moderate income.)</p> <p><b>Examples</b>–Public Works projects, Libraries, Fire Stations, Health Clinics, Community Centers and Family Resource Center projects.</p>
<b>Limited Clientele–in general</b> 24 CFR 570.483 (b)(2)(ii)	<p><b>Definition</b>–The activity benefits a specific group(s) of low- and moderate-income persons (excludes housing). An activity may meet this criteria if it serves a 51% low- and moderate-income clientele, exclusively serves a presumed group (see definition below), be of such a nature and location that it can be concluded to serve a low- and moderate-income clientele, or remove material or architectural barriers for the mobility or accessibility of elderly persons or adults meeting the definition of “severely disabled.” To assist an entire facility, all services in a facility must be limited to those serving a clientele that is at least 51% low and moderate income. <b>(Facilities that are open and available to everyone in the area must qualify under the area wide national objective. Under the limited clientele national objective, the facility must qualify based on services to limited clientele, not by use of the facility, and each user must be income qualified.)</b></p>
<b>Presumed Limited Clientele</b> 24 CFR 570.483 (b)(2)(ii)(A)	<p><b>Definition</b>–Clientele that are generally presumed to be low and moderate income as determined by Housing and Urban Development. These are abused children, elderly persons, battered spouses, homeless persons, severely disabled adults, illiterate adults, persons living with AIDS, migrant farm workers.</p> <p><b>Examples</b>–Senior Centers 60+, Homeless Shelters and Domestic Violence Shelters.</p>
<b>Test 1–Limited Clientele based on Presumed Benefit.</b>	
<b>Family Size and Income Eligibility Limited Clientele</b> 24 CFR 570.483 (b)(2)(ii)(C) or 24 CFR 570.483 (b)(2)(ii)(B)	<p><b>Definition</b>–Activities require information on family size and income that confirm at least 51% of clientele are low and moderate income. Information on family size and income can be determined by clients completing the Community Facility User Certification Form (Test 2) or having income eligibility requirements (Test 3).</p> <p><b>Examples</b>–Head Start Centers and Microenterprise Assistance.</p>
<b>Test 2-Limited Clientele based on Family Size and Income and Test 3-Limited Clientele based on Income Eligibility.</b>	
<b>Nature and Location Limited Clientele</b> 24 CFR 570.483 (b)(2)(ii)(D)	<p><b>Definition</b>–Facility of such a nature, and be in such a location, that it may be <b>concluded</b> that the facility’s clientele will be primarily low- and moderate-income persons.</p> <p><b>Example</b>–Food Banks and Head Start Centers</p>
<b>Test 4-Limited Clientele based on Nature and Location of the facility.</b>	



<b>Low and Moderate Income</b>	
<b>Housing/Direct Benefit</b> 24 CFR 570.483 (b)(3)	<b>Definition</b> – Activities carried out for purpose of providing or improving permanent residential structures, that upon completion, will be owned and occupied by low- and moderate-income persons. Must household size and income qualify all applicants.
	<b>Example</b> – Housing Rehabilitation.

<b>Urgent Community Needs</b>	
<b>Urgent Need</b> 24 CFR 570.483 (d)	<b>Definition</b> – These projects must be designed to alleviate existing conditions which the grantee certifies, pose a serious and immediate threat to the health or welfare of the community, are of recent origin, unable to finance on their own, other funding resources are not available to carry out the activity.
	<b>Examples</b> – Major catastrophe such as a flood or earthquake that threatens the community residents with spread of serious disease. The community’s other resources may well be depleted and other federal programs may not be sufficient to cover all costs.

**Table D–2017 Low- and Moderate-Income Limits  
Effective April 14, 2017**

County	Median Family Income estimate for 2017	Income Level Note 1	1-Person Family	2-Person Family	3-Person Family	4-Person Family	5-Person Family	6-Person Family	7-Person Family	8-Person Family
Baker	\$52,200	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Benton Note 2	\$87,400	Low	\$28,650	\$32,750	\$36,850	\$40,900	\$44,200	\$47,450	\$50,750	\$54,000
		Moderate	\$45,850	\$52,400	\$58,950	\$65,450	\$70,700	\$75,950	\$81,200	\$86,400
Clatsop	\$59,700	Low	\$20,900	\$23,900	\$26,900	\$29,850	\$32,250	\$34,640	\$37,050	\$39,450
		Moderate	\$33,450	\$38,200	\$43,000	\$47,750	\$51,600	\$55,400	\$59,250	\$63,050
Columbia Note 3	\$74,700	Low	\$26,150	\$29,900	\$33,650	\$37,350	\$40,350	\$43,350	\$46,350	\$49,350
		Moderate	\$41,850	\$47,800	\$53,800	\$59,750	\$64,550	\$69,350	\$74,100	\$78,900
Coos	\$50,400	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Crook	\$49,900	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Curry	\$50,400	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Deschutes Note 2	\$64,000	Low	\$22,350	\$25,550	\$28,750	\$31,900	\$34,500	\$37,050	\$39,600	\$42,150
		Moderate	\$35,750	\$40,850	\$45,950	\$51,050	\$55,150	\$59,250	\$63,350	\$67,400
Douglas	\$54,900	Low	\$19,250	\$22,000	\$24,750	\$27,450	\$29,650	\$31,850	\$34,050	\$36,250
		Moderate	\$30,750	\$35,150	\$39,550	\$43,900	\$47,450	\$50,950	\$54,450	\$57,950
Gilliam	\$61,400	Low	\$21,500	\$24,600	\$27,650	\$30,700	\$33,200	\$35,650	\$38,100	\$40,550
		Moderate	\$34,400	\$39,300	\$44,200	\$49,100	\$53,050	\$57,000	\$60,900	\$64,850
Grant	\$51,000	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Harney	\$40,400	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Hood River	\$65,800	Low	\$23,050	\$26,350	\$29,650	\$32,900	\$35,550	\$38,200	\$40,800	\$43,450
		Moderate	\$36,900	\$42,150	\$47,400	\$52,650	\$56,900	\$61,100	\$65,300	\$69,500
Jackson Note 2	\$53,600	Low	\$18,800	\$21,450	\$24,150	\$26,800	\$28,950	\$31,100	\$33,250	\$35,400
		Moderate	\$30,050	\$34,350	\$38,650	\$42,900	\$46,350	\$49,800	\$53,200	\$56,650
Jefferson	\$50,600	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Josephine	\$46,500	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Klamath	\$48,700	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Lake	\$46,800	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Lane Note 2	\$59,000	Low	\$20,650	\$23,600	\$26,550	\$29,500	\$31,900	\$34,250	\$36,600	\$38,950
		Moderate	\$33,050	\$37,800	\$42,500	\$47,200	\$51,000	\$54,800	\$58,550	\$62,350

**Table D–2017 Low- and Moderate-Income Limits  
Effective April 14, 2017**

County	Median Family Income estimate for 2017	Income Level Note 1	1-Person Family	2-Person Family	3-Person Family	4-Person Family	5-Person Family	6-Person Family	7-Person Family	8-Person Family
Lincoln	\$53,700	Low	\$18,800	\$21,500	\$24,200	\$26,850	\$29,000	\$31,150	\$33,300	\$35,450
		Moderate	\$30,100	\$34,400	\$38,700	\$42,950	\$46,400	\$49,850	\$53,300	\$56,700
Linn	\$55,100	Low	\$19,300	\$22,050	\$24,800	\$27,550	\$29,800	\$32,000	\$34,200	\$36,400
		Moderate	\$30,900	\$35,300	\$39,700	\$44,100	\$47,650	\$51,200	\$54,700	\$58,250
Malheur	\$49,500	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Marion Note 3	\$58,400	Low	\$20,450	\$23,400	\$26,300	\$29,200	\$31,550	\$33,900	\$36,250	\$38,550
		Moderate	\$32,700	\$37,400	\$42,050	\$46,700	\$50,450	\$54,200	\$57,950	\$61,650
Morrow	\$55,400	Low	\$19,400	\$22,200	\$24,950	\$27,700	\$29,950	\$32,150	\$34,350	\$36,600
		Moderate	\$31,050	\$35,450	\$39,900	\$44,300	\$47,850	\$51,400	\$54,950	\$58,500
Polk Note 3	\$58,400	Low	\$20,450	\$23,400	\$26,300	\$29,200	\$31,550	\$33,900	\$36,250	\$38,550
		Moderate	\$32,700	\$37,400	\$42,050	\$46,700	\$50,450	\$54,200	\$57,950	\$61,650
Sherman	\$64,100	Low	\$21,950	\$25,100	\$28,250	\$31,350	\$33,900	\$36,440	\$38,900	\$41,400
		Moderate	\$35,150	\$40,150	\$45,150	\$50,150	\$54,200	\$58,200	\$62,200	\$66,200
Tillamook	\$51,700	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Umatilla	\$58,100	Low	\$20,350	\$23,250	\$26,150	\$29,050	\$31,400	\$33,700	\$36,050	\$38,350
		Moderate	\$32,550	\$37,200	\$41,850	\$46,500	\$50,250	\$53,950	\$57,700	\$61,400
Union	\$53,300	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Wallowa	\$55,000	Low	\$19,250	\$22,000	\$24,750	\$27,500	\$29,700	\$31,900	\$34,100	\$36,300
		Moderate	\$30,800	\$35,200	\$39,600	\$44,000	\$47,550	\$51,050	\$54,600	\$58,100
Wasco	\$53,200	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Wheeler	\$51,000	Low	\$18,700	\$21,350	\$24,000	\$26,650	\$28,800	\$30,950	\$33,050	\$35,200
		Moderate	\$29,900	\$34,150	\$38,400	\$42,650	\$46,100	\$49,500	\$52,900	\$56,300
Yamhill Note 3	\$74,700	Low	\$26,150	\$29,900	\$33,650	\$37,350	\$40,350	\$43,350	\$46,350	\$49,350
		Moderate	\$41,850	\$47,800	\$53,800	\$59,750	\$64,550	\$69,350	\$74,100	\$78,900

**Note 1:** "Low income" and "Moderate Income" are defined in the federal Housing and Community Development Act of 1974, as amended. A Low-Income person is a member of a family with a gross income of no more than 50 percent of the area median income. A Moderate-Income person is a member of a family with a gross income of no more than 80 percent of the area median income. The "area" is either the county or the non-metropolitan portion of the state, whichever has the higher median income. The 2017 estimated median family income for non-metropolitan counties in Oregon is \$53,300.

**Note 2:** Benton County, Deschutes County, Lane County, Linn County, Jackson County and Josephine County are part of a Metropolitan Statistical Area (MSA). The income limits for an entire county are based upon the median family income for the MSA, even though the specific MSA area is ineligible to apply to the state-administered Community Development Block Grant program—specifically: Corvallis in Benton County, Bend in Deschutes County, Eugene and Springfield in Lane County, Albany in Linn County, Medford and Ashland in Jackson County and Grants Pass in Josephine County.

**Note 3:** This county is part of a Primary Metropolitan Statistical Area (PMSA). The income limits are based on the median family income for the entire PMSA including local governments that are not eligible for the state-administered CDBG program. For example, the median family income and income limits for Columbia and Yamhill counties are the same as those for the city of Portland, Clackamas County, Multnomah County, and Washington County. Those of Marion and Polk counties are the same as Salem PMSA.

Source: U.S. Department of Housing and Urban Development (HUD).

**Documentation of Facility Users**

Community/public facilities projects and public service projects intending to meet the low- and moderate-income limited clientele national objective will be required to submit information with the application that documents the specific historical and proposed clientele in accordance with the 2017 Method of Distribution, and in a format similar to the tables below in point #5.

Instructions:

1. Only one program should be shown in each line of Table E. If the proposed facility will offer more programs/services than can be recorded on this form, prepare additional copies of the form until each program offered by the proposed facility is accounted for.
2. Attach a copy of Community Facility User Certification Form(s) (intake or client screening forms) containing the requisite family size and income limits for the clientele in each program.
3. Classifications of persons who are presumed LMI: abused children, battered spouses, elderly persons, adults meeting the Census definition of "severely disabled," homeless persons, illiterate adults, persons living with AIDS, and migrant farm workers.
4. Prospective applicants are encouraged to consult with department staff at the earliest stages of project development concerning the documentation required for Limited Clientele Projects.

**Note:** Do not duplicate beneficiary reporting. Each user of the service can only be counted once per calendar year.

5. Identify the Race and Ethnicity of the total beneficiaries served by the facility during the reporting period:

	<b>White (non-Hispanic)</b>	<b>Hispanic</b>	<b>Total</b>
White			
Black or African American			
American Indian/Alaskan Native			
Asian			
Native Hawaiian or Pacific Islander			
Two or More races			
<b>Total</b> (Must match total reported on Documentation of Facility Users Form)			

**Table E**

Program provided at proposed facility: (e.g. Senior Center, Head Start)	Low- and Moderate-income (LMI) Limited Clientele National Objective to be met by each program/activity (Check only one for each program)	Current Clientele (Served in prior 12 months) Data collected (mm/dd/yy): to		Proposed Clientele (Estimated to be served during the first 12 months after project completion)	
		Total Number of Persons	Total Number of LMI Persons	Total Number of Persons	Total Number of LMI Persons
	___ Family size and income information are collected from all clientele and at least 51% are LMI. (2) ___ Clientele must be LMI to receive service. (2) ___ Clientele are presumed to be LMI. Classification _____ (3) ___ Clientele are LMI by Nature and Location of Facility.				
	___ Family size and income information are collected from all clientele and at least 51% are LMI. (2) ___ Clientele must be LMI to receive service. (2) ___ Clientele are presumed to be LMI. Classification _____ (3) ___ Clientele are LMI by Nature and Location of Facility.				
	___ Family size and income information are collected from all clientele and at least 51% are LMI. (2) ___ Clientele must be LMI to receive service. (2) ___ Clientele are presumed to be LMI. Classification _____ (3) ___ Clientele are LMI by Nature and Location of Facility.				
	___ Family size and income information are collected from all clientele and at least 51% are LMI. (2) ___ Clientele must be LMI to receive service. (2) ___ Clientele are presumed to be LMI. Classification _____ (3) ___ Clientele are LMI by Nature and Location of Facility.				
<b>TOTALS</b>					
<b>PERCENTAGE (LMI users)/(total users) X 100 = %</b>		<b>% LMI</b>		<b>% LMI</b>	

**Community Facility User Certification Form**

The information below is being requested because the \_\_\_[recipient]\_\_\_\_\_ received an Oregon Community Development Block Grant (CDBG) and, as part of the operation of a CDBG funded community facility, must provide the family size and income and ethnicity/race of the persons who use the \_\_[insert name of facility]\_\_\_\_\_. Your answers will be treated confidentially.

**FAMILY SIZE**–The HUD definition of family is, all persons living in the same household who are related by blood, marriage or adoption, this includes any related dependent persons over 65 or working dependent children over 18.

**NOTE:** A family is not a household. A household is defined as all persons occupying the same housing unit regardless of **their** relationship to each other. If there is more than one family residing within the housing unit, each family must complete a separate Community Facility User Certification Form.

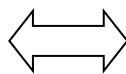
Check the appropriate box for your family size:

- |  |  |
|--|--|
| <input type="checkbox"/> Single individual | <input type="checkbox"/> Family of 5         |
| <input type="checkbox"/> Family of 2       | <input type="checkbox"/> Family of 6         |
| <input type="checkbox"/> Family of 3       | <input type="checkbox"/> Family of 7         |
| <input type="checkbox"/> Family of 4       | <input type="checkbox"/> Family of 8 or more |

**Annual Family Income**–Annual family income is defined as, the total income earned before taxes by all family members, including job earnings (wages, salary, tips, bonuses, commissions), interest, dividends, child support, alimony, welfare, social security, disability, unemployment, retirement payments, net income from business activities, farms, rents, royalties, trusts, estates, and any other income received regularly by all family members.

Check the appropriate box for your **family’s annual total gross income *before taxes* for the most recent tax reporting year.**

- |   |   |
|---|---|
| <input type="checkbox"/> \$ 0 to 27,050     | <input type="checkbox"/> \$41,751 to 44,800 |
| <input type="checkbox"/> \$27,051 to 30,900 | <input type="checkbox"/> \$44,801 to 47,900 |
| <input type="checkbox"/> \$30,901 to 34,800 | <input type="checkbox"/> \$47,901 to 51,000 |
| <input type="checkbox"/> \$34,801 to 38,650 | <input type="checkbox"/> \$51,001 or more   |
| <input type="checkbox"/> \$38,651 to 41,750 |   |



The family income figures must be updated for the county in which the project is to occur, using Table D.

**Ethnicity and Race**–As a person who uses a Community Facility funded by an Oregon Community Development Block Grant, you are asked to **voluntarily** respond to the Ethnicity and Race items below. If you do not provide responses, the operator of the community facility is **required** to supply responses based on their determination of your ethnicity and race.

Check the appropriate box of your **ethnicity**:  Hispanic  Not Hispanic.

Check the appropriate box of your **race**:

- White
- Black/African American
- Asian
- American Indian/Alaskan Native
- Native Hawaiian/Other Pacific Islander
- Two or more races
- Other

**Signatures and Certifications**—This information is subject to verification by the grant recipient, Business Oregon or the U.S. Department of Housing and Urban Development officials.

- **Community Facility User** (Person that completed this form)—By my signature below on this Community Facility User Certification Form, I am certifying that the information provided is valid and accurate.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

- **Community Facility Organization** (Entity that collected the information from the user)—The [Insert the name of organization collecting family size and income information] has reviewed the supporting documentation provided by the community facility user and has determined that the user:

\_\_\_ **Meets** the HUD requirements contained in the most current Method of Distribution.

\_\_\_ **Does Not** meet the HUD requirements contained in the most current Method of Distribution.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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