

Instructions for the Program Beneficiary Form

Objective: The Program Beneficiary Form reports actual beneficiaries of an LCDBG project which has been completed. In contrast, the Activity Beneficiary Form(s) of the original LCDBG application reported the anticipated beneficiaries of a future project.

Data Sources: Data sources for the completion of the Program Beneficiary Form may include:

- The original Activity Beneficiary Form or original combined Activity Beneficiary Form
- A revised Activity Beneficiary Form as prepared during the application revision stage of the grant
- Known beneficiary changes that occurred during the project
- Beneficiary data from a Program Amendment
- An actual count of beneficiaries

Row 1: “Name of Grantee”: Enter the name of the grant recipient. Example: Abbeville

Row 2: “Contract Number”: Enter the six digit LCDBG contract number. Example: 555555

Row 3: This blank line will normally remain blank but may be used for extra comments.

Row 4: “FY / Type”: For “FY” Enter the funding year of the grant. Example: 2008 “Type” refers to the program type which may be one of the following: DN, DR, ED, HO, LS, PA, PF, or TE. Enter the type.

The Left Panel , Rows 6 through 29, and the Right Panel, rows 30 through 53: The left panel is used to report beneficiaries for a non-housing activity. The right panel is used to report beneficiaries for a housing grant and any other grant with “Rehabilitation Loans and Grants” as an activity. Examples:

- Only the left panel would be completed on a Public Facilities sewer project with no utility line connection work on private property.
- Both the left and right panels would be completed on a Public Facilities sewer project with utility line connection work on private property paid for with LCDBG funds.
- Only the right panel would be completed for a Housing grant.
- Only the left panel would be completed for an Economic Development grant. The number of persons should correspond to the number of jobs created/retained.

Row 6: Name of Activity—Enter a primary HUD activity name that, in general, describes the purpose of the grant. Examples: sewer, water, or streets. Do not enter activity names or report beneficiaries for acquisition or administration.

Rows 8-13: Enter persons benefiting according to their income level as determined by HUD. The low to moderate income (LMI) percentage may be transferred from the original application if no changes have been made. If there were changes then this formula may be used: (rows 10+11+12) divided by row 8 equals the LMI percentage. Round the LMI percentage to two decimal places. Example: 63.94%

Rows 14-23: Enter beneficiary data by racial groups. The definitions of each racial group remain the same as defined in the original LCDBG application package. Note that “Hispanic” is not considered a race but rather as an “ethnicity”. Of each racial group having beneficiaries, enter the persons of that racial group who also consider themselves as being of Hispanic ethnicity. The number entered for “Hispanic” will be a subset of the “Total” for each racial group.

Row 24: Enter the sum of all racial group totals in the upper data cell of row 24. Enter the sum of all of the persons of Hispanic ethnicity in the lower data cell of row 24. The upper data cell of row 24, total by racial group, must equal the number of persons as listed in row 8, total by income level. If these figures do not agree then there is an error that must be corrected.

Rows 25-29: Enter data for the indicated beneficiary categories. An elderly-occupied household, row 28, means a household that has at least one elderly person, of age 62 and up, who lives in the household—regardless of whether any elderly person is the head of the household.

The Right Panel: If a grant has an activity called “Rehabilitation Loans and Grants” then rows 30 through 53 must be completed. Otherwise, the right panel will be left blank.

Rows 30-53: The “Income Levels” listed in rows 8-12 will also be applied to rows 32-36 respectively. The “Racial Groups” listed in rows 14 through 24 will also be applied to rows 38 through 48, respectively. Additionally, beneficiary data for the right panel must also include the reporting of categories based on number of households and owner/renter status with such data to be entered according to the manner in which the column headings are labeled.

Row 33: This row should be left blank since beneficiaries in the right panel will always be 100% LMI.

Row 49: Enter only handicapped persons. Leave the cell for handicapped households blank.

Row 50: Enter the number of handicapped heads of household without regard to owner/renter status.

Row 51: Enter female headed households by owner/renter status.

Row 52: Enter elderly-occupied households without regard to owner/renter status.

Row 53: Enter total households without regard to owner/renter status. Make sure that total households, as entered on row 53 agrees with total “racial” household information from the upper right data cells of row 48 and with total “income” household information from the right data cells of row 32. If the figures do not agree then there is an error that must be corrected.

Row 54: Enter the data source(s). If necessary, attach a separate page describing the data source(s).

Rows 55-58: The beneficiary data on this form must be verified by signatures/dates of the chief elected official, administrative consultant and engineer/architect. The engineer’s signature is not required on Economic Development projects.