Survey Cover Letter

(Copy onto the community's letterhead.)

Date

Dear [Citizen/Ratepayer]:

The city/town/county is applying to the Montana Department of Commerce for a Community Development Block Grant on behalf of ________________ for a grant to assist with _______________. The CDBG Program is a very competitive program and we must make every effort to maximize our ranking score. Part of the application process is an income survey of our users to determine our eligibility for CDBG funds and our need for this grant.

I am enclosing a copy of this survey form and an addressed, stamped envelope in which to return this form. It will only take a moment to complete. All responses will be kept strictly confidential. No names or other identifying information will be included in the grant application; only percentage information will be included. No one else will have access to the personal information provided.

Please return it in the next few days as we need to proceed with the grant as quickly as possible. The CDBG application will be due _______. Thank you for your cooperation; your support and help will help make our project a reality.

Sincerely,

(Signer should be either the CEO of the community or consultant performing the survey.)

Sample Household Income Survey

The information requested below is vital to (community's name) application to the Montana Department of Commerce for a Community Development Block Grant.

The CDBG program is a federal program intended to assist low- and moderate-income families. Your individual response will be kept confidential and will not be available to the public. The individual responses will be added together for the grant application without any identifying information included.

The survey asks that you provide your annual income. The U.S. Department of Housing and Urban Development defines annual income as all payments from all sources received by the family head, even if temporarily absent, and by each additional member of the family household who is not a minor; a minor is defined as a person under age 18. Income includes:

1. The gross amount, before any payroll deductions, of wages and salaries, overtime pay, commissions, fees, tips and bonuses.
2. The net income from operation of a business or profession or from rental or real or personal property. This includes gross receipts minus operating expenses received from the operation of an unincorporated farm or ranch.
3. Interest and dividends.
4. The full amount of periodic payments received from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts.
5. Payments in lieu of earnings, such as unemployment and disability compensation, worker's compensation and severance pay.
6. Public assistance.
7. Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from people not residing in the dwelling.

8. All regular pay, special pay and allowances of a member of the armed forces, whether living in the dwelling or away, who is head of the family or spouse.

Instructions: The table below lists income limits for various household sizes. Find the column that matches your household's size. Review the family income listed under the household size. If your combined gross income for all adult members of your household in the year 20XX is greater than the dollar amount listed, put an X on the line next to ABOVE. If your combined gross income for all adult household members is less than the listed dollar amount, put an X on the line next to BELOW.

Family Size	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**
Family Income	$38,500	$44,000	$49,500	$54,950	$59,350	$63,750	$68,150	$72,550

Note to the survey creators: Be sure to insert the current HUD moderate income (80% of the median income) figures for your county taken from the HUD Income Limits. **The numbers inserted are only an example – delete this note.**

ABOVE ____________________ BELOW__________________

Place an X behind the word that applies.

Example: If there are three people currently living in your household and the total gross income of the two adults was $45,000, you would put an X after BELOW in the space above.

I certify that, after reviewing the CDBG definition of "annual income," the statement above is correct and complete to the best of my knowledge and belief. I agree to provide income verification if requested by local officials.

Signature

Address

Date

Sample Household Income Survey - Distinguishing Between Moderate Income and Low Income

The information requested below is vital to (community's name) application to the Montana Department of Commerce for a Community Development Block Grant.

The CDBG Program is a federal program intended to assist low- and moderate-income families. Your individual response will be kept confidential and will not be available to the public. The individual responses will be added together for the grant application without any identifying information included.

The survey asks that you provide your annual income. The U.S. Department of Housing and Urban Development defines annual income as all payments from all sources received by the family head, even if temporarily absent, and by each additional member of the family household who is not a minor; a minor is defined as a person under age 18. Income includes:

- The gross amount, before any payroll deductions, of wages and salaries, overtime pay, commissions, fees, tips and bonuses.
- The net income from operation of a business or profession or from rental or real or personal property, this includes gross receipts minus operating expenses received from the operation of an unincorporated farm or ranch.
- Interest and dividends.
- The full amount of periodic payments received from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts.
- Payments in lieu of earnings, such as unemployment and disability compensation, worker's compensation and severance pay.

- Public assistance.
- Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from people not living in the dwelling.
- All regular pay, special pay and allowances of a member of the armed forces, whether living in the dwelling or away, who is head of the family or spouse.

Instructions: This survey is not asking for you to write down your income. It asks only that you indicate by a check in the box how many people are in your household and that you put an additional check in the box that most accurately reflects the combined gross annual income for all adult members, people age 18 and over, of your household for the year 20XX.

Remember, this information is confidential. It is very important, however, that the responses are accurate because the information helps determine the level of need for grant funds or other outside assistance.

1. There is one person in my household and the total yearly household income is:
   - ☐ above $xx,xxx / year
   - ☐ below $xx,xxx / year
   - ☐ below $xx,xxx / year

2. There are two people in our household and the total household income is:
   - ☐ above $xx,xxx / year
   - ☐ below $xx,xxx / year
   - ☐ below $xx,xxx / year

3. There are three people in our household and the total yearly household income is:
   - ☐ above $xx,xxx / year
   - ☐ below $xx,xxx / year

- ☐ below $xx,xxx / year

4. There are four people in our household and the total yearly household income is:
   - ☐ above $xx,xxx / year
   - ☐ below $xx,xxx / year
   - ☐ below $xx,xxx / year

5. There are five people in our household and the total yearly household income is:
   - ☐ above $xx,xxx / year
   - ☐ below $xx,xxx / year
   - ☐ below $xx,xxx / year

6. There are six people in our household and the total yearly household income is:
   - ☐ above $xx,xxx / year
   - ☐ below $xx,xxx / year
   - ☐ below $xx,xxx / year

7. There are seven people in our household and the total yearly household income is:
   - ☐ above $xx,xxx / year
   - ☐ below $xx,xxx / year
   - ☐ below $xx,xxx / year

8. There are eight people in our household and the total yearly household income is:
   - ☐ above $xx,xxx / year
   - ☐ below $xx,xxx / year
   - ☐ below $xx,xxx / year

I certify that, after reviewing the definition of annual income, the information provided is correct and complete to the best of my knowledge and belief. I agree to provide income verification if requested by local officials.

Please sign or initial. Your response will not be considered valid for documenting without a signature or initial.

____

Signature

____

Address

____

Date

Household Income Survey – Recording Actual Income

The information requested below is vital to (community's name) application to the Montana Department of Commerce for a Community Development Block Grant.

The CDBG Program is a federal program intended to assist low- and moderate-income families. Your individual response will be kept confidential and will not be available to the public. The individual responses will be added together for the grant application without any identifying information included.

The survey asks that you provide your annual income. The U.S. Department of Housing and Urban Development defines annual income as all payments from all sources received by the family head, even if temporarily absent, and by each additional member of the family household who is not a minor; a minor as defined as a person under age 18. Income includes:

- The gross amount, before any payroll deductions, of wages and salaries, overtime pay, commissions, fees, tips and bonuses.
- The net income from operation of a business or profession or from rental or real or personal property, this includes gross receipts minus operating expenses received from the operation of an unincorporated farm or ranch.
- Interest and dividends.
- The full amount of periodic payments received from social security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts.
- Payments in lieu of earnings, such as unemployment and disability compensation, worker's compensation and severance pay.
- Public assistance.

- Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from people not residing in the dwelling.
- All regular pay, special pay and allowances of a member of the armed forces, whether living in the dwelling or away, who is head of the family or spouse.

My (our) total gross household income for 20XX was $________________________.

The total number of all people in the household is ____________________________.

Please print clearly: Survey #__________________________

Name: ____

Address: ____

I certify that the income information I have provided is true and accurate to the best of my knowledge and belief. I agree to provide income verification if requested by state and local officials.

Signature ____ Date ____________

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