

# **Socioeconomic Survey Guidelines**



**Texas Water Development Board  
PO Box 13231  
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**Socioeconomic Survey Guidelines**

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These guidelines apply to the following Texas Water Development Board (TWDB) programs:

- Clean Water State Revolving Fund (CWSRF)
- Drinking Water State Revolving Fund (DWSRF)
- Economically Distressed Areas Program (EDAP)

### **Introduction**

The TWDB provides funding for the above programs in the form of loan subsidies and grants for projects by communities that qualify as disadvantaged. Qualifying for disadvantaged communities funding varies according to the TWDB program under which the entity is seeking funding. One qualifying requirement common to all TWDB programs offering disadvantaged communities funding is that the entity's service area must have an annual median household income (AMHI) which is no more than 75% of the state AMHI<sup>1</sup>. For the EDAP program, an adjusted annual median household income (AAMHI) is compared to an adjusted state AMHI based on the Texas Consumer Price Index. Additionally, if an entity is pursuing connection hook-ups under the EDAP program, they must provide family income for each proposed household connection. Please consult the Survey Guidelines for EDAP Connection Assistance (TWDB-0401) for guidance on performing a survey for EDAP Connection Assistance.

### **Determining Eligibility**

In order to ascertain whether an entity meets the AMHI requirement, the TWDB relies on the most recent available American Community Survey (ACS) census data published by the U.S. Census Bureau. The most recent available ACS data must be used to determine the AMHI for the service area of a project that is proposed to be funded by the TWDB. **For the CWSRF and DWSRF programs, the most recently released ACS 5-year estimates must be used for the AMHI requirement.**

In the event that the most recent prescribed ACS data for an entity's service area is inadequate or unavailable, the entity may request the use of data obtained from a socioeconomic survey. Documentation to support the entity's conclusion that the most recent ACS data available (the ACS 5-year estimates for the CWSRF and DWSRF programs) for its service area is inadequate or unavailable must be submitted for review and approval. **All entities must obtain prior approval from the TWDB to use survey data instead of the most recent available ACS data, which is the ACS 5-year estimates for the CWSRF and DWSRF programs.** A survey that was conducted prior to TWDB approval may be considered on a case by case basis.

### **Request to Use Survey Data**

A written request sent via email or letter to use data obtained from a socioeconomic survey must be submitted to the TWDB and must include:

1. The name and address of the entity;
2. The authorized representative contact information;
3. The consultant(s) representative contact information;
4. A description of the project and any issues or conditions that it is intended to resolve;
5. The name of the TWDB funding program by which the project is proposed to be funded;
6. The approximate number of occupied dwellings in the service area, including any area located outside the current service area to which service is being extended;

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<sup>1</sup> Under the CWSRF and DWSRF programs, there is an additional requirement related to household cost factors that must be met in order to determine eligibility for disadvantaged communities funding. For more information, see the Disadvantaged Communities Worksheet, which can be found in either the CWSRF or DWSRF Intended Use Plan solicitation packet.

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7. An explanation of changed conditions not captured by ACS data, (e.g., climate, catastrophe, industry, migration, etc.); and
8. Documentation to support the entity's conclusion that the most recent ACS data, which is the ACS 5-year estimates for the CWSRF and DWSRF programs, for its service area is inadequate or unavailable. This documentation must include:
  - a. A table that identifies all US Census boundaries<sup>2</sup> that cover the entity's service area, the most recent available ACS data for the AMHI and average household size<sup>3</sup> within each boundary, the number of household water and/or sewer connections within each boundary, the percentage of total household water and/or sewer connections within each boundary, calculated proportion of AMHI and average household size within each boundary, and the resulting total AMHI and average household size for all applicable US Census boundaries. See Census Data Search (WRD-284) under Forms for an example table.
  - b. A map showing the boundaries of the entity's service area. This map must also show the locations of household water and/or sewer connections and all US Census boundaries that cover the entity's service area including any area located outside the current service area to which service is being extended.
  - c. A survey that was conducted prior to TWDB approval may be considered on a case-by-case basis.

**TWDB Review**

Once TWDB staff has determined that the documentation provided by the entity supports the use of socioeconomic survey data instead of the most recent ACS data, the entity will be notified in writing whether or not to proceed with the survey.

**Survey Guidance**

If the TWDB approves the use of socioeconomic survey data, the following general guidance should be followed.

**Independent Surveyor(s)**

The survey must be conducted by an independent surveyor(s). An independent surveyor is a surveyor that has no interest, financial or otherwise, in the planning, design, and construction of the project for which disadvantaged communities funding is being sought. A surveyor certification form (WRD-283) that documents the independent status of each surveyor must be submitted with the survey documents (see WRD-283).

It is important to select a surveyor(s) who will hold the attention of respondents, ask the questions as they are written, and accurately record responses.

**Defining the Survey Area**

The survey must be conducted in a manner wherein the data collected is representative of the entire service area including any area located outside the current service area to which service is being extended. In cases where it is not possible to survey every household, the surveyor should seek to conduct the survey in a manner that allows an adequate sample of the households to complete a survey form.

The following standards relate to the adequate sampling of the area to be surveyed.

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<sup>2</sup> Utilize the smallest geographic type (e.g. census tract or block group) for which the most recent census data is available and indicate the year for which the census boundaries were derived.

<sup>3</sup> Average household size data is required by entities seeking SRF funding only.

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1. 50 or Fewer Occupied Dwellings ( $\leq 50$ )  
All occupied dwellings must be surveyed. A response rate of 75% or greater must be attained from the occupied dwellings.
2. 51 - 100 Occupied Dwellings  
A response rate of 60% must be attained from the occupied dwellings. Additionally, the sample of dwellings must be representative of the entire population of dwellings and household incomes.
3. 101 - 200 Occupied Dwellings  
A response rate of 50% must be attained from the occupied dwellings. Additionally, the sample of dwellings must be representative of the entire population of dwellings and household incomes.
4. 200 - 300 Occupied Dwellings  
A response rate of 35% must be attained from the occupied dwellings. Additionally, the sample of dwellings must be representative of the entire population of dwellings and household incomes.
5. Greater than 300 Occupied Dwellings ( $>300$ )  
A response rate of 30% must be attained from the occupied dwellings. Additionally, the sample of dwellings must be representative of the entire population of dwellings and household incomes.

The surveyor should ensure that the survey encompasses a cross section of the household population. Essentially, the northern, southern, eastern, western, and central areas of the service area should be represented with completed survey forms. When dealing with small project areas, the survey must encompass a representative cross section of each street, subdivision, and roadside home. A map of the service area, including any area located outside the current service area to which service is being extended, that indicates which households were surveyed must be submitted to the TWDB.

If a contact list of households in the service area is not readily available, the following resources may be useful in identifying all households in the survey area: city indices, reverse directories, telephone books, tax rolls.

**Survey Form**

A survey form/instrument similar to WRD-273 must be used to obtain the required data for the service area in question. A copy of the completed survey forms must be submitted to the TWDB.

**Survey Timeframe**

All responses to the survey form must be provided within a ninety-day timeframe.

**Survey Method**

Listed below are different methods for conducting the survey. All methods should involve identifying the purpose of the survey to each potential respondent, soliciting participation from potential respondents who are qualified to represent the household, and recording responses accurately.

1. Telephone Survey – Be sure to verify the address of the respondent when conducting a survey by telephone.

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2. Door-to-Door Survey
3. Mail Survey
4. Combination Survey – This method may be advisable in some situations. For example, when no one is home to answer a door-to-door survey, a note may be left requesting that the resident telephone the surveyor. Similarly, the surveyor may telephone a residence to schedule a time to come by to conduct the survey.

Surveyors should attempt to contact residents at a time when they are most likely to obtain a high rate of response and avoid contacting residents during a time that may yield biased results. For example, most people are more likely to be at home early in the evening or on weekends. However, contacting residents only during the day from Monday to Friday may miss families with more than one employed member. Since these families could have higher household incomes than families with only one employed member, contacting residents during this timeframe may lead to the biased result of finding an excessively high proportion of low-income households.

Surveyors should ensure that each survey form is complete and that each response is recorded clearly. Incomplete or ambiguous responses can be clarified by re-contacting the respondent.

**Publicizing the Survey**

Householders are more likely to respond when surveyed if they are notified in advance of why, when, and how they will be contacted. Different options for publicizing the survey may include letters to residents, local newspaper notices, announcements at church or civic organizations, flyers, and other media. It is appropriate to indicate in the notice that the community intends to apply for funding from the TWDB and that, as part of the application, the community must provide income information from the residents in the service area. It is not appropriate to say that, in order for the community to receive the desired funding, a survey must be conducted to show that most of the residents in the service area have low incomes.

**Determining AMHI**

Calculation of the AMHI requires the surveyor or entity to arrange the survey results in either ascending or descending order. Thereafter, the surveyor or entity must identify the household income that is in the middle of the range of incomes or calculate the average of the two middle values if there is no one middle number. These calculations must be submitted to the TWDB. An example is presented in the following table:

Incomes in Ascending Order	Incomes in Descending Order
\$10,500	\$14,500
\$11,000	\$14,000
\$11,500	\$13,500
\$12,000	\$13,000
AMHI ⇨ <b>\$12,500</b>	AMHI ⇨ <b>\$12,500</b>
\$13,000	\$12,000
\$13,500	\$11,500
\$14,000	\$11,000
\$14,500	\$10,500



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**Determining Average Household Size**

This data is required by entities seeking SRF funding only. Calculation of the average household size requires the surveyor or entity to list the survey results and divide the sum by the number of responses. These calculations must be submitted to the TWDB.

**Submission of Survey Documents**

For entities seeking CWSRF or DWSRF funding, all survey documents must be submitted by the deadline specified in the annual SRF Intended Use Plan solicitation packets. For entities seeking EDAP funding, all survey documents must be submitted by the deadline indicated in the TWDB survey approval letter.

Following is a list of all survey documents that must be submitted to the TWDB:

1. Completed Surveyor Certification form (WRD-283) for each surveyor conducting the survey.
2. Map that identifies the service area, including any area located outside the current service area to which service is being extended, and indicates which households completed surveys.
3. Completed survey forms.
4. AMHI calculations based on the completed survey forms.
5. If seeking SRF funding, submit average household size calculations based on the completed survey forms.

Note: **An approved survey may be considered valid for the five (5) year period (60 months) prior to the date the TWDB receives the Project Information Form for the CWSRF and DWSRF programs or TWDB receives the application for the EDAP.**

**Contact Information**

<b>USPS Mail</b>	Texas Water Development Board Program & Policy Development P.O. Box 13231 Austin, TX 78711
<b>Overnight Mail</b>	Texas Water Development Board Program Administration & Reporting 1700 N. Congress Ave., Room 506i Austin, TX 78701
<b>Fax</b>	512-475-2086
<b>Web File Transfer</b>	Register an account at <a href="http://www2.twdb.texas.gov/FileTXFR/Login.aspx">www2.twdb.texas.gov/FileTXFR/Login.aspx</a> . After files have been uploaded, click on the envelope icon to email a web link/notice to <a href="mailto:issa.mcdaniel@twdb.texas.gov">issa.mcdaniel@twdb.texas.gov</a> or <a href="mailto:tom.entsminger@twdb.texas.gov">tom.entsminger@twdb.texas.gov</a> <b>Note:</b> Pop-ups for this site must be allowed/enabled in order for notice of your file upload to be submitted.

For questions, contact the following TWDB staff:

CWSRF - Issa McDaniel    512-463-1706  
DWSRF - Tom Entsminger    512-936-0802  
EDAP - Tom Entsminger    512-936-0802

[issa.mcdaniel@twdb.texas.gov](mailto:issa.mcdaniel@twdb.texas.gov)  
[tom.entsminger@twdb.texas.gov](mailto:tom.entsminger@twdb.texas.gov)  
[tom.entsminger@twdb.texas.gov](mailto:tom.entsminger@twdb.texas.gov)

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**Glossary**

**Adjusted Annual Median Household Income (AAMHI)** – The annual median household income identified in the most recent American Community Survey multiplied by the current Texas Consumer Price Index (CPI) and divided by the average monthly Texas CPI from the year from which data was provided.

**American Community Survey (ACS)** – A large, continuous demographic survey conducted by the Census Bureau that provides accurate and up-to-date profiles of America's communities every year. Questionnaires are mailed to a sample of addresses to obtain information about households (i.e. about each person and the housing unit itself). The survey produces annual and multi-year estimates of population and housing characteristics and produces data for small areas, including tracts and population subgroups. Questionnaires are mailed to populations of 65,000 or more for the annual survey, greater than 20,000 for the 3-year survey, and the entire country for the 5-year survey.

**Block Group** – A statistical subdivision of a census tract. A block group consists of all tabulation blocks whose numbers begin with the same digit in a census tract. For example, for Census 2000, block group 3 within a census tract includes all blocks numbered from 3000 to 3999. Block groups generally contain between 300 and 3,000 people, with an optimum size of 1,500 people.

**Census Tract** – A small, relatively permanent statistical subdivision of a county or statistically equivalent entity, delineated for data presentation purposes by a local group of census data users or the geographic staff of a regional census center in accordance with US Census Bureau guidelines. Designed to be relatively homogeneous units with respect to population characteristics, economic status, and living conditions at the time they are established, census tracts generally contain between 1,000 and 8,000 people, with an optimum size of 4,000 people. Census tract boundaries are delineated with the intention of being stable over many decades, so they generally follow relatively permanent visible features. However, they may follow governmental unit boundaries and other invisible features in some instances; the boundary of a state or county (or statistically equivalent entity) is always a census tract boundary.

**Consumer Price Index** – A measure of the average change over time in the prices paid by urban consumers for consumer goods and services, and used as an economic indicator and a means of adjusting dollar values.

**Economically Distressed Area** – As applied to the EDAP program, an area in which:

- a. water supply or sewer service is inadequate to meet minimal needs of residential users as defined by TWDB rules;
- b. financial resources are inadequate to provide water supply or sewer service that will satisfy those needs; and
- c. an established residential subdivision was located on June 1, 2005, as determined by the TWDB.

**Household Income** – The sum of money income received in the prior calendar year by all household members 15 years old and over, including household members not related to the householder, people living alone, and other non-family household members. Included in the total are amounts reported separately for wage or salary income; net self-employment income; interests, dividends, or net rental or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

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**Forms**

These forms are available on the following pages:

- Census Data Search (WRD-284)
- Survey Form for Obtaining Socioeconomic Data (WRD-273)
- Surveyor Certification (WRD-283)
- TWDB Survey Checklist

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Texas Water Development Board  
Clean Water and Drinking Water State Revolving Fund  
**Census Data Search Instructions**

To determine Disadvantaged Community eligibility in the Clean Water and Drinking Water State Revolving Fund programs, the TWDB utilizes U.S. Census Data, specifically the American Community Survey (ACS) 5-Year Estimates regarding Annual Median Household Income, Total Population, Average Household Size and Unemployment Rate. This data may be directly sourced from the Census Bureau website or through the TWDB's excel spreadsheet provided (link provided below).

This document provides step by step instructions for customers to utilize the American FactFinder website, as well as instructions regarding utilizing Prorated tables.

*[The examples pertain to obtaining 2012-2016 American Community Survey (ACS) 5-year estimates and 2008-2012 ACS 5-year estimates for the **SFY 2019 SRF program year.**]*

**SFY 2019 SRF Program – American Community Survey 5-Year Estimates – Excel File**

Data is sourced from the U.S. Census 2012-2016 ACS 5-year estimates for use in the SRF programs for State Fiscal Year 2019. Annual Median Household Income, Total Population, Average Household Size and Unemployment Rate – for a County, City, Town, Census Designated Place (CDP), Census tract, or Block Group is available in the excel document.

<http://www.twdb.texas.gov/financial/instructions/doc/ACS data for SFY 2019.xlsx>

**American Factfinder**

Annual Median Household Income, Total Population, Average Household Size and Unemployment Rate are available down to the Block Group level and Unemployment Rate is available down to the Census Tract level. Several options are available to access this data through the American Factfinder website. The following are instructions in accessing relevant data:

*Note: The U.S. Census Bureau denotes different time periods for data depending on the last year survey information was gathered (e.g. 5-year data from 2011-2015 will be categorized as 2015 data).*

**American Factfinder - Advanced Search**

Steps

1. Go to <http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>
2. Click "Advanced Search" (the direct link is <http://factfinder.census.gov/faces/nav/jsf/pages/searchresults.xhtml?refresh=t> )
3. Within the shaded box under "Step 1", type **B19013** (for the **Annual Median Household Income**) in the space labelled "topic or table name" then without selecting any options displayed, select "GO".

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4. Click “Geographies” on the left side of the screen. Select the button labelled “*all geographic types.*”
5. Click the down arrow under “*select a geographic type.*” From the drop-down menu, select the appropriate area. For example, for a county, select “*county-050*”, for a city or a Census Designated Place (CDP), select “*Place-160*”, for a Census Tract, select “*Census Tract-140.*”
6. Select a State (“*Texas*”)
7. Select the county, city / CDP and click on “*Add to your selections,*” for Census Tracts first select the county and then the census tracts from the drop-down list provided, for Block Groups first select the county, then the Census Tract and then the Block Group(s). Click on “*Add to your selections.*”
8. Close the “geographies” screen (on the right side of the geographies window).
9. Select the 2016 ACS 5-year estimates. There are several ways to select the 2016 ACS 5-year estimates from the list of data sets provided. One method is to click on the selection box on the left side of the 2016 ACS 5-year estimates, which results in a check mark being displayed, and then selecting “*View*”.
10. At this point, you may either print or download the results using the options provided on the screen.
11. Repeat the process for **B25010 - Average Household Size**, **B01003 - Total Population**, and **B23025 - Civilian Labor Force: Total and Civilian Labor Force: Unemployed** to determine **Unemployment Rate**.  
Note: To determine Unemployment Rate the entity will divide the Civilian Labor Force: Unemployed by the Civilian Labor Force:Total.

*Note: Total Population data from the 2012 ACS 5-Year Estimates is only available through the Summary Retrieval Tool.*

**American Factfinder – Download Center**

Steps:

1. Go to [http://factfinder.census.gov/faces/nav/jsf/pages/download\\_center.xhtml](http://factfinder.census.gov/faces/nav/jsf/pages/download_center.xhtml)
2. Select “*I know the dataset or table(s) that I want to download*” and then select “*Next*”
3. Under “*Select a program*” from the dropdown menu, select “*American Community Survey*”, select “*2016 ACS 5-year estimates*” from the dropdown menu, and then select “*Add to Your Selections*”. Select “*Next*” when finished with your selections.
4. Under “*Select a geographic type,*” make a selection from the dropdown menu. (For example, select “*Block Group-150,*” then “*State,*” “*County*” and “*All block groups with the county*”). Click on “*Add to your selections.*” Select on “*Next.*”
5. From the list, scroll until locating the ID that corresponds with the data:  
**B19103 for Annual Median Household Income;**  
**B25010 for Average Household Size;**  
**B01003 for Total Population;**



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**B23025 for Civilian Labor Force: Total and Civilian Labor Force: Unemployed**  
to determine **Unemployment Rate**

Note: To determine Unemployment Rate the entity will divide the Civilian Labor Force: Unemployed by the Civilian Labor Force:Total.

6. Check the box on the left side to select the data table to download.
7. Select *"Next"*, on the next screen select *"OK"*, and then select *"Download"*. The file will be downloaded to your system in a "zip" file format.

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**Census Data Search Instructions**

**American Community Survey – Summary File Data (for Experienced Users)**

For the “Summary File Data” webpage go to <http://www.census.gov/programs-surveys/acs/data/summary-file.html>. Select under 2008-2012 ACS 5-year Estimates the “5-Year Summary File”. Select the “5 Year by State” folder. Then select the two files for Texas. They are in comma delimited text format saved in a “Zip” format. Extract using Zip extracting software (free Zip extracting software is available on the Internet) and open in software such as Excel.

For “2008-2012 ACS 5-Year Estimates,” select “2012” on the “Summary File Data” webpage.

Also download the “5-year Templates” on the same “Summary File Data” webpage to identify the data in the columns.

*Note: The Summary File Data should only be needed to gather 2012 ACS 5-Year Estimates Total Population data for the Block Group geographies. Total Population data is located in Sequence Table 3. Files needed are labelled as follows:*

*2012 American Community Survey – 5-Year Estimates*

*E20125tx003000.txt*

*M20125tx003000.txt*

*G20125tx.csv*

Other options for obtaining “Summary File Data” are available at this location:

<http://www.census.gov/acs/www/data/data-tables-and-tools/index.php>

A complete list of Census Bureau data tools and apps are available at this location:

<http://www.census.gov/data/data-tools.html>

**Prorated Tables - Examples**

For census tract or block group information, a prorated data table should be used on the data found. The retrieved data must be organized in table format and prorated according to the percentage of household connections.

See: the following examples – Prorated U.S. Census Data based on Block Group data for Total Population, AMHI, and Household Size, Change in Population, and Unemployment Rates.

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**Census Data Search Instructions**

Example -- Prorated U.S. Census Data – Total Population, AMHI, and Household Size

A	B	C	D	E	F	G	H	I	J		
US Census Tract	Block Group	Population	AMHI	Average Household Size	Number of Household Connections	Household Connections as a % of Total Household Connections	Entity's Current Population (ExF)	Entity's AMHI (DxG)	Entity's Average Household Size (ExG)	County	Source
x523	1	1,279	\$29,712	2.94	200	12.33%	588	\$3,664	0.36	ABC	ACS 5 -Year Estimates
x523	2	5,079	\$60,399	3.5	66	4.07%	231	\$2,458	0.14	ABC	ACS 5 -Year Estimates
x524	1	4,683	\$43,149	3.19	1,000	61.65%	3,190	\$26,602	1.97	ABC	ACS 5 -Year Estimates
x524	4	1,439	\$45,781	2.96	356	21.95%	1,054	\$10,048	0.65	ABC	ACS 5 -Year Estimates
<b>Total</b>					<b>1,622</b>	<b>100.00%</b>	<b>5,063</b>	<b>\$42,772</b>	<b>3.12</b>		

Example -- Prorated U.S. Census Data – Change in Population

A	B	C	D	E	F	G	H	I		
US Census Tract	Block Group	Population 2010	Population 2014	Change in population 2010 to 2014	Average Household Size	Number of Current Household Connections	Household Connections as a % of Total Household Connections	Change in Population -2010 to 2014 (ExH)	County	Source
x523	1	1,240	1,279	3.15%	2.94	200	12.33%	0.39%	ABC	ACS 5 -Year Estimates
x523	2	5,106	5,079	-0.53%	3.5	66	4.07%	0.02%	ABC	ACS 5 -Year Estimates
x524	1	4,683	4,683	-9.09%	3.19	1,000	61.65%	-5.60%	ABC	ACS 5 -Year Estimates
x524	4	1,439	1,439	2.79%	2.96	356	21.95%	0.61	ABC	ACS 5 -Year Estimates
<b>Total</b>						<b>1,622</b>	<b>100.00%</b>	<b>-4.62%</b>		

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Example -- Prorated U.S. Census Data – **Unemployment Rates** at the Census Tract Level

A	B	C	D	E	F		
US Census Tract	Unemployment rate	Average Household Size	Number of Current Household Connections	Household Connections as a % of Total Household Connections	Unemployment Rate(CxE)	County	Source
x523	6.2%	3.20	266	16.40%	1.0%	ABC	ACS 5 -Year Estimates
x524	5.7%	3.00	1,356	83.60%	4.8%	ABC	ACS 5 -Year Estimates
<b>Total</b>			<b>1,622</b>	<b>100.00%</b>	<b>5.8%</b>		

Texas Water Development Board  
**Census Data Search**

There are two ways of obtaining the census boundaries for a project or service area -- through the U.S. Census Bureau's American FactFinder or by utilizing the TWDB's public map shapefiles with ArcGIS software.

**Using American FactFinder:**

*Steps:*

1. Go to <http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>
2. Click "Advanced Search" (the direct link is <http://factfinder.census.gov/faces/nav/jsf/pages/searchresults.xhtml?refresh=t>)
3. Click on "Geographies" in the left column
4. Click on the "Map" tab at the top of the pop-up screen.
5. There are multiple sets of census boundaries. Use the 2015 boundaries.
  - a. For 2015 U.S. Census boundaries:
    - i. Select "Boundaries and Features" on the left of the pop-up screen. This screen will allow you to customize a map depending on census boundaries and major features such as rivers or major highways.
    - ii. Make sure the "Display Boundaries and Features from" field is set to 2014.
    - iii. Checking boxes under "Boundary" will show boundary outlines while checking boxes under "Label" will show labels for selected boundaries. The most useful boundaries for the TWDB's programs are the 2015 Census Tract, 2015 Block Group, and 2015 Place boundaries.
    - iv. Click "Update" to display the map.
    - v. Click on the State of Texas to activate the map. You may either choose to use the zoom tool to zoom into your project or service area, or you may choose to "Find a Location" by clicking the button located on the left side of the pop-up screen.
    - vi. It is sometimes helpful to select only one geographic area at a time to view the boundaries, such as selecting Census Tracts only to clearly view the boundaries of the Census Tracts. You may then add the Block Group data and update the map.
6. By utilizing the map feature, you are able to "Select Geographies" using a host of tools (shaded in blue) that will automatically be loaded into "Your Selections" for faster data retrieval. Click the "x" in the top right corner to return to the main screen.

**Using TWDB Files (for ArcGIS users):**

*Steps:*

Texas Water Development Board  
**Census Data Search**

1. Go to [http://www.tnris.org/get-data?quicktabs\\_maps\\_data=1](http://www.tnris.org/get-data?quicktabs_maps_data=1).
2. Select "*US Census - 2010*" (located near bottom left corner of screen).  
Download and unzip the file.

Texas Water Development Board  
**Survey Form for Obtaining Socioeconomic Data**

All fields must be completed and all survey responses must be provided within a ninety-day timeframe.

SURVEY FORM			
<b>Name of City/District/Corporation/Community on Whose Behalf the Survey is Being Conducted</b>			
<b>Date of Response</b>		<b>Surveyor's Name</b>	
<b>1. Respondent's Street Address</b>			
<b>2. Please indicate the combined annual household income<sup>1</sup> for all persons in your household.</b>			
<b>3. Please indicate the total number of people living at this address.</b>			

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<sup>1</sup> Household income is the sum of money income received in the prior calendar year by all household members 15 years old and over, including household members not related to the householder, people living alone, and other non-family household members. Included in the total are amounts reported separately for wage or salary income; net self-employment income; interests, dividends, or net rental or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

NOTICE: To knowingly provide false information on this survey is a Class A misdemeanor--Tex. Pen. Code sec. 37.10. The punishment for a Class A misdemeanor is a fine of not more than \$4,000; a jail term of not more than one year; or both--Tex. Pen. Code sec. 12.21.

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Texas Water Development Board  
**Surveyor Certification**

This form must be completed and signed by each surveyor for each project seeking disadvantaged status using socioeconomic data or connection assistance using family income data.

**INFORMATION ON ENTITY FOR WHICH THIS SURVEY WAS CONDUCTED**

<b>Name of Entity</b>	
<b>Contact Person</b>	
<b>Title</b>	
<b>Mailing Address</b>	
<b>Phone Number</b>	
<b>Fax Number</b>	
<b>Email Address</b>	

**PROPOSED PROJECT FOR WHICH THIS SURVEY WAS CONDUCTED**

<b>Name of Proposed Project</b>	
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**SURVEYOR CERTIFICATIONS**

1.	I do not live within the current or proposed service area of the entity named above.	
2.	I have no interest, financial or otherwise, in the planning, design, or construction of the proposed project.	
3.	The form used to conduct the survey was based upon the Texas Water Development Board's Form WRD-273 for socioeconomic data or TWDB-0402 for family income data.	
4.	Information that was used to determine the total number of households in the service area of the proposed project was obtained from:	
5.	The number of households that were presented with a survey form is:	
6.	The number of households that returned a fully completed survey form is:	
7.	The final results and documentation of the survey were compiled by:	
8.	The survey form, responses to the survey form, tabulations of the responses, and a map indicating which households were surveyed have been reviewed and to the best of my knowledge and belief are true and correct.	
9.	I understand that a false statement on this certification form may be grounds for rejection of the survey results.	

**SURVEYOR INFORMATION**

<b>Signature of Surveyor</b>		<b>Date of Signature</b>	
<b>Name of Surveyor</b>			
<b>Residential Address</b>			
<b>Name of Employer</b>			
<b>Title</b>			
<b>Mailing Address</b>			
<b>Phone Number</b>			
<b>Fax Number</b>			
<b>Email Address</b>			

NOTICE: To knowingly provide false information on this survey is a Class A misdemeanor--Tex. Pen. Code sec. 37.10. The punishment for a Class A misdemeanor is a fine of not more than \$4,000; a jail term of not more than one year; or both--Tex. Pen. Code sec. 12.21.

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Texas Water Development Board  
**TWDB Survey Checklist**

	<b>Completed</b>
1. Receive letter from the TWDB approving the use of survey data.	
2. Prepare map of the service area and determine which households to survey.	
3. Determine survey method(s).	
4. Prepare survey form.	
5. Publicize information about the survey.	
6. Recruit and train surveyor(s).	
7. Conduct survey.	
8. Check survey forms for completeness and re-contact respondents if necessary.	
9. Document results of survey and calculate AMHI and any other required data.	
10. Submit required survey documents to TWDB.	