

**SHELBY URBAN COUNTY  
CDBG APPLICATION WORKSHOP  
PROGRAM YEAR 2025**

**PRESENTED BY  
SHELBY COUNTY DEVELOPMENT SERVICES**

# INTRODUCTIONS

## **Shelby County Team**

- Christie Hester (Director, Development Services)
- Shelli Davis (Director, Grants Management)
- Josh Osborne (Manager, Planning & Community Development)
- Eric Womack (Community Development Programs Specialist)

# SHELBY URBAN COUNTY

- Shelby County is an entitlement grantee for direct CDBG funds from HUD.
- Program Year 2025 Allotment is **\$858,304**.
- The CDBG funds shall be spent on eligible projects within the geographical footprint of the Shelby Urban County.
  - Unincorporated areas of Shelby County
  - Incorporated areas of Alabaster, Calera, Chelsea, Columbiana, Harpersville, Helena, Indian Springs Village, Montevallo, Pelham, Vincent, Westover, Wilsonville, and Wilton
    - Full incorporated areas of Calera (Chilton County), Helena (Jefferson County), and Vincent (St Clair and Talladega Counties)
- Policy Board recommended and County Commission adopted 2 projects in PY 24

# SECTIONS

- Shelby Urban County
- **Eligible Activity and Beneficiary**
- Application Basics
- Online Application Guide
- Next Steps

# HUD NATIONAL OBJECTIVES

The project or activity shall address at least one of the following three National Objectives:

**1) Benefiting Low- and Moderate-Income (LMI) Persons**

- a) This is referred to as the **primary** objective since **at least 70 percent of the CDBG funds awarded shall benefit low- and moderate-income persons**. LMI persons are those with household incomes at or below 80 percent of the median family income (MFI).

Subcategories are:

- i. Area Benefit**
- ii. Limited Clientele**
- iii. Job Creation or Retention**
- iv. Housing

**2) Aid in the Prevention / Elimination of Slums and Blight**

- 3) *Meet an Urgent Need*** (rarely utilized as it is associated with a natural or manmade disaster within an 18 month period immediately preceding application deadline)

# CDBG ACTIVITIES

**Rule of Thumb: An activity not specifically included as eligible is excluded.**

[www.shelbyal.com/1213/CDBG-Resources](http://www.shelbyal.com/1213/CDBG-Resources) - Chapter 2 Categories of Eligible Activities

## ELIGIBLE

- Acquisition of real property
- Demolition of blighted / unsafe structures
- Economic development activities
- Housing rehabilitation
- Public facility improvements
- Public infrastructure
- Public service projects

## INELIGIBLE

- Buildings used for the general conduct of government
- Direct income payments
- General government expenses
- New housing construction
- Operation and maintenance of public facilities / improvements
- Political activities
- Purchase of equipment

# LOW-MOD AREA BENEFIT

- The area benefit category is the most commonly used national objective for activities that benefit a residential neighborhood. An area benefit activity is **one that benefits all residents in a particular area**, where at least **39.5 percent** of the residents are LMI persons.
  - *With Shelby County being an Exception Grantee for this program year, the LMI percentage for area benefit is **39.5% rather than 51%**.*
- Examples of **area benefit activities** may include the following when they are located in a predominately LMI neighborhood:
  - Acquisition of land to be used as a neighborhood park;
  - Construction of a health clinic;
  - **Improvements to public infrastructure like water/sewer lines;** and
  - **Development of a community center.**

# LOW-MOD LIMITED CLIENTELE

- The limited clientele category is a second way to qualify specific activities under the LMI benefit national objective. Under this category, **51 percent of the beneficiaries of an activity have to be LMI persons.**
- In contrast to the area benefit category, it is **not the LMI concentration of the service area** of the activity that determines whether the activity will qualify or not, **but rather the actual number of LMI persons that benefit from the activity.**
- Activities in this category **provide benefits to a specific group of persons rather than everyone in an area.** It may **benefit particular persons without regard to their residence,** or it may be an activity that provides a **benefit to only particular persons** within a specific area.

# LIMITED CLIENTELE BENEFICIARY DETERMINATION

- **Benefit a clientele that is generally presumed to be principally LMI. This presumption covers abused children, battered spouses, elderly persons, severely disabled adults, homeless persons, illiterate adults, persons living with AIDS and migrant farm workers; or**
- Require documentation on family size and income in order to show that at least 51 percent of the clientele are LMI; **or**
- Have income eligibility requirements limiting the activity to LMI persons only; **or**
- Be of such a nature and in such a location that it can be concluded that clients are primarily LMI. An example is a day care center that is designed to serve residents of a public housing complex.

# LIMITED CLIENTELE BENEFICIARY DETERMINATION

- The following guidance should be used for the purpose of reporting on LMI beneficiaries who are **Limited Clientele – Presumed Benefit**:
- Abused children - **extremely low income**
- Victims of domestic violence- **low income**
- Severely disabled adults - **low income**
- Homeless persons - **extremely low income**
- Illiterate adults - **low income**
- Persons with AIDS - **low income**
- Migrant farm workers - **low income**
- **Elderly** assistance is to acquire, construct, convert, and/or rehabilitate a **senior center** or to pay for providing center-based senior services, report the beneficiaries as **moderate income**. If assistance is for other services (**not center-based**), report the elderly beneficiaries as **low income**.

# SECTIONS

- Shelby Urban County
- Eligible Activity and Beneficiary
- **Application Basics**
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# APPLICATION GUIDELINES

- **Maximum CDBG Funds Requested**
  - Public Service Applications up to **15%** of allotment (**HUD CAP**)
  - Capital Service Applications up to 100% of allotment
- **Minimum CDBG Funds Requested**
  - A minimum of **\$100,000** has been set
- **Minimum Match Required**
  - Projects up to and including \$250,000 **10% Match**
  - **Projects greater than \$250,000** **15% Match**

# SERVICE AREA OF A CDBG-FUNDED ACTIVITY

- The service area is the entire area to be served by the CDBG-funded activity.
- One of the crucial aspects of qualifying an activity as principally benefiting LMI persons on an area basis is the proper identification of the (boundaries of the) service area.
- The boundaries of the service area must be defined before deciding which data to use to determine the percentage of LMI persons and not vice versa.
- HUD will generally accept the service area determined by applicants unless there is substantial evidence to the contrary.
- In assessing such evidence, the full range of direct effects of the assisted activity will be considered. **(The activities when taken as a whole must not benefit moderate income persons to the exclusion of low income persons.)**
- Also, the area to be served by a CDBG-funded activity does not need to be coterminous with census tracts or other officially recognized boundaries, but it is critical that the service area be the entire area served by the activity.

# **SERVICE AREA OF A CDBG-FUNDED ACTIVITY**

## **Nature of the activity**

In determining the boundaries of the area served by a facility, one must consider whether the facility is adequately equipped to meet the needs of the residents. A park that is expected to serve an entire neighborhood cannot be too small or have so little equipment (number of swings, slides, etc.) that it would only be able to serve a handful of persons at a time.

Conversely, a park that contains three ball fields or a ball field with grandstands that can accommodate hundreds of spectators cannot reasonably be said to be designed to serve a single neighborhood.

Such would apply to the case of assisting a small two-lane street in a residential neighborhood versus that of assisting an arterial four-lane street that may pass through the neighborhood but is clearly used primarily by commuters.

## **Location of the activity**

Where an activity is located may affect its capacity to serve particular areas, especially when the location of a comparable activity is considered. A library cannot reasonably benefit an area that does not include the area in which it is located.

When a facility is located near the boundary of a particular neighborhood, its service area would be expected to include portions of the adjacent neighborhoods as well as the one in which it is located.

## **Accessibility issues**

If a geographic barrier such as a river or an interstate highway separates persons residing in an area in a way that precludes them from taking advantage of a facility that is otherwise nearby, that area should not be included in the service area. Language barriers might also constitute an accessibility issue in some circumstances.

# **LMI PERSONS DOCUMENTATION**

## **AREA BASIS DATA SOURCE**

### **HUD OPTION**

- Applicants should use **HUD-provided** Low Moderate Income Summary Data (**LMISD**) if **both** the project's service area is municipality-wide **AND** the municipality is at least **39.50%** LMI. LMISD can be used if the service area is generally residential, matches census data, and services are available to all.
  - **Low Moderate Income Summary Data (LMISD)**
    - LMI percentages are determined for each block group, **municipality**, and CDBG grantee based on the **2016-2020 American Community Survey ACS 5-year estimate**.

# **LMISD EXERCISE**

## Including results for *hud lmsid* mapping application

Search only for *hud lmsid* mapping application

www.hudexchange.info · programs · acs-low-mod

### ACS 5-Year 2016-2020 Low- and Moderate-Income Summary Data

Update: New Low- and Moderate-Income Summary Data (LMISD) based on the 2016-2020 American Community Survey (ACS) are now available in spreadsheet form. A new interactive...

#### Lmsid by Block Group

These State-level data sets provide summarized estimates of...

#### All Block Groups

All Block Groups - ACS 5-Year 2016-2020 Low- and...

#### Exception Grantees

Exception Grantees - ACS 5-Year 2016-2020 Low- and...

#### CDBG Low- and Moderate-Incom...

Update: New Low- and Moderate-Income Summary Data (LMISD)...

#### Data Dictionary

Data Dictionary - ACS 5-Year 2016-2020 Low- and...

#### Archive

Section 244 ARC/RPZ. Public Law 114-113, Sec. 244, states...

# ACS 5-Year 2016-2020 Low- and Moderate-Income Summary Data

**Update:** New Low- and Moderate-Income Summary Data (LMISD) based on the 2016-2020 American Community Survey (ACS) are now available in spreadsheet form. A new [interactive map application](#) is posted.

The Community Development Block Grant (CDBG) program requires that each CDBG funded activity must either principally benefit low- and moderate-income (LMI) persons, aid in the prevention or elimination of slums or blight, or meet a community development need having a particular urgency. Most activities funded by the CDBG program are designed to benefit low- and moderate-income (LMI) persons. That benefit may take the form of housing, jobs, and services. Additionally, activities may qualify for CDBG assistance if the activity will benefit all the residents of a primarily residential area where at least 51 percent of the residents are low- and moderate-income persons, i.e. area-benefit (LMA). [Certain [exception grantees](#) may qualify activities as area-benefit with fewer LMI persons than 51 percent.]

The Office of Community Planning and Development (CPD) provides estimates of the number of persons that can be considered Low-, Low- to Moderate-, and Low-, Moderate-, and Medium-income persons based on special tabulations of data from the 2016-

## Overview

[CDBG Low- and Moderate-Income Data Documentation Process](#)

## Data Sets

[ACS 5-Year 2016-2020 Low and Moderate Income Summary Data Main](#)

[Map Application](#)



SHELBY



Map Layers



Select



Basemap



Print

### LMISD by Place: Columbiana city, Alabama



Geoname	Columbiana city, Alabama
Source	2020ACS
GEOID	0116768
State	Alabama
STATEFP	1
STUSAB	AL
LOW	1245
LOWMOD	2065
LMMI	2585
LOWMODUNIV	3665

### Low-Mode ACS-Basec

**From:** HUD  
**For:** CDBG, grantees to determinat  
**Descriptor**  
Data (2016-  
from the U.  
refer to [CPI](#)

### Available C

- Block Gro
- Places\* (Ir
- Incorporated
- County Su
- Counties

\*Insular Are

### HOW TO U

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**LMISD by Place:**  
Columbiana city,  
Alabama

Geoname	Columbiana city, Alabama
Source	2020ACS
GEOID	0116768
State	Alabama
STATEFP	1
STUSAB	AL
LOW	1245
LOWMOD	2065
LMMI	2585
LOWMODUNIV	3665
LOWMOD_PCT	56.30%

LMI PERSONS

TOTAL PERSONS

LMI %

Low-Mc  
ACS-Ba

From: H  
For: CD  
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Data (20  
from the  
refer to

**Availabl**

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- Places'
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- Counti

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**HOW TO**

# LMI PERSONS DOCUMENTATION

## AREA BASIS DATA SOURCE

### INCOME SURVEY OPTION

- Applicants **SHALL** use an **income survey** if the service area is not generally residential, does not match census data, or services are not available to all.
  - **Income Survey**
    - CDBG regulations require that the results of the survey meet standards of statistical reliability comparable to that of the ACS. A statistically reliable survey entails the following:
      - The applicant must clearly document the survey method used: mail questionnaire, face-to-face or telephone interviews, etc. (Each method has advantages and disadvantages.)
      - Participants must be selected through a random sampling process, and replacements for non-respondents must be selected through the same random sampling process.
    - The results of the survey shall result in a service area which meets or exceeds the **39.50%** LMI threshold.

# **INCOME SURVEY EXERCISE**

**HUD INCOME LIMITS**  
**SHELBY COUNTY (BIRMINGHAM-HOOVER METRO)**  
**EFFECTIVE JUNE 1, 2024**

<b><u># of Persons</u></b>	<b><u>Extremely Low (30% MFI)</u></b>	<b><u>Very Low (50% MFI)</u></b>	<b><u>Low (80% MFI)</u></b>
1	\$ 19,850	\$ 33,050	\$ 52,850
2	\$ 22,650	\$ 37,800	\$ 60,400
3	\$ 25,500	\$ 42,500	\$ 67,950
4	\$ 28,300	\$ 47,200	\$ 75,500
5	\$ 30,600	\$ 51,000	\$ 81,550
6	\$ 32,850	\$ 54,800	\$ 87,600
7	\$ 35,100	\$ 58,550	\$ 93,650
8	\$ 37,400	\$ 62,350	\$ 99,700

# **SAMPLE SIZE CALCULATOR EXAMPLES**

## **// [surveysystem.com/sscalc.htm](http://surveysystem.com/sscalc.htm)**

### **Sample Size**

- Confidence Level: 95%
- Confidence Interval: 5
- Population: 10
- Sample size needed: 10

### **Sample Size**

- Confidence Level: 95%
- Confidence Interval: 5
- Population: 50
- Sample size needed: 44

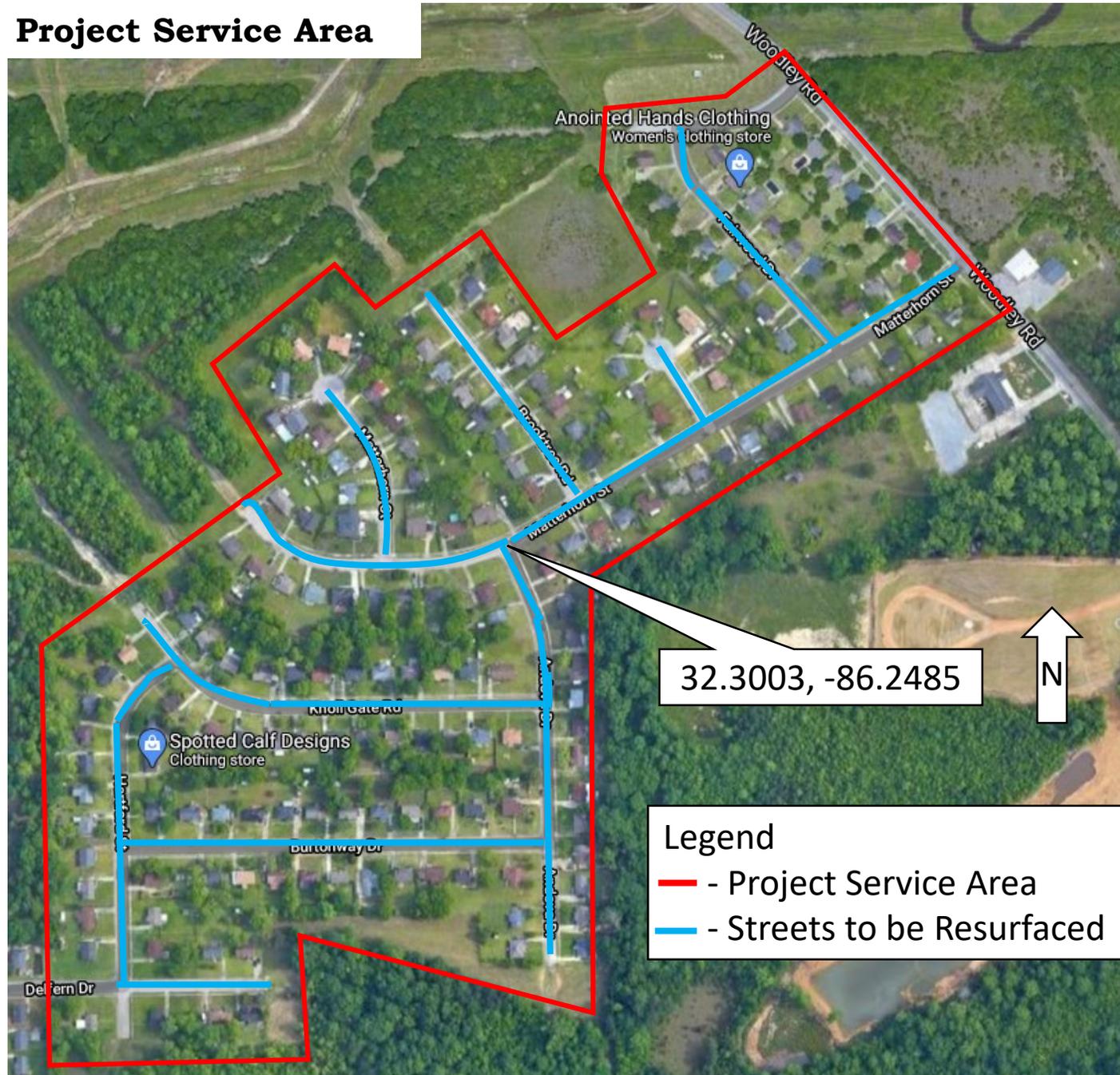
### **Sample Size**

- Confidence Level: 95%
- Confidence Interval: 5
- Population: 200
- Sample size needed: 132

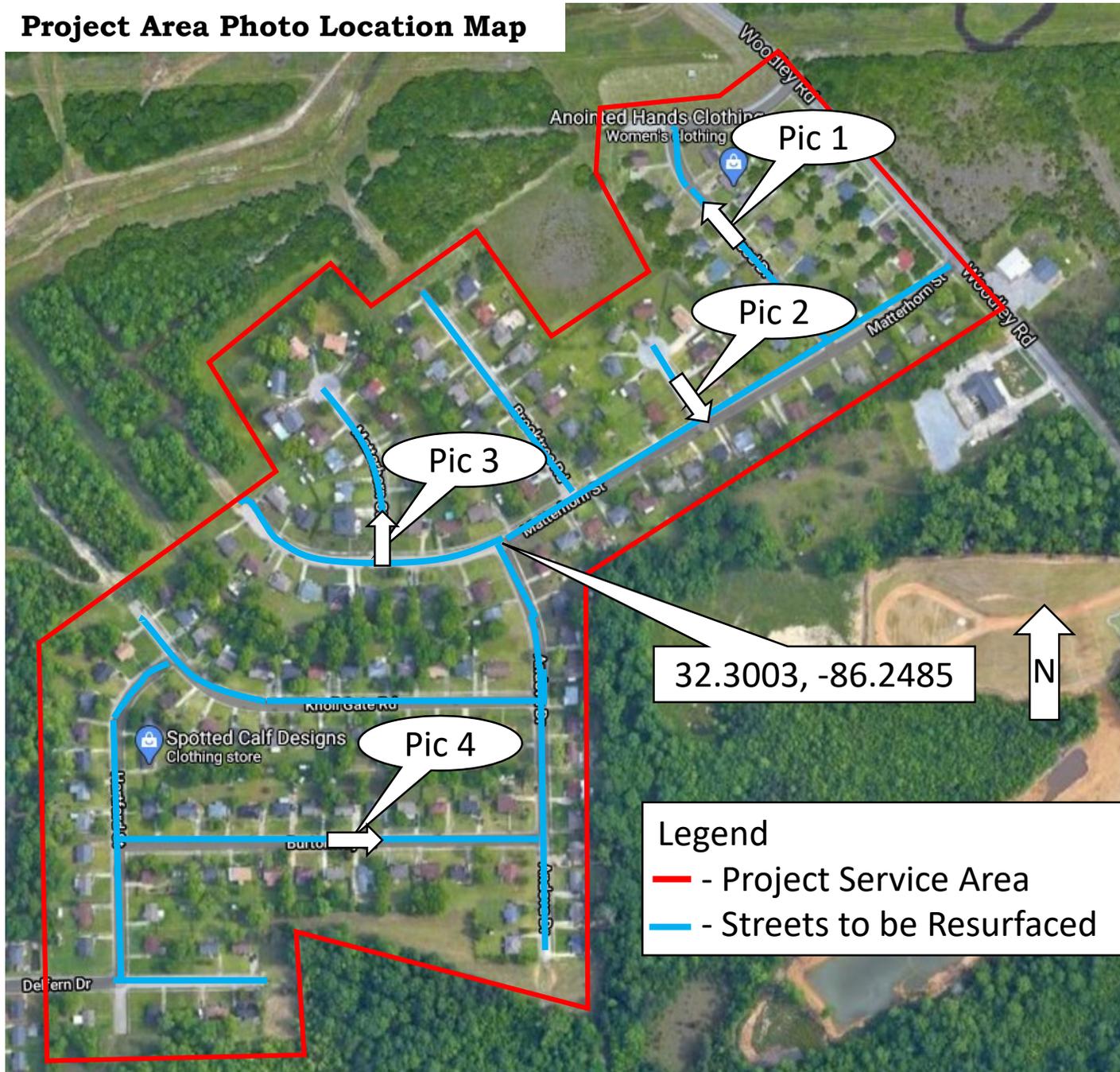
### **Sample Size**

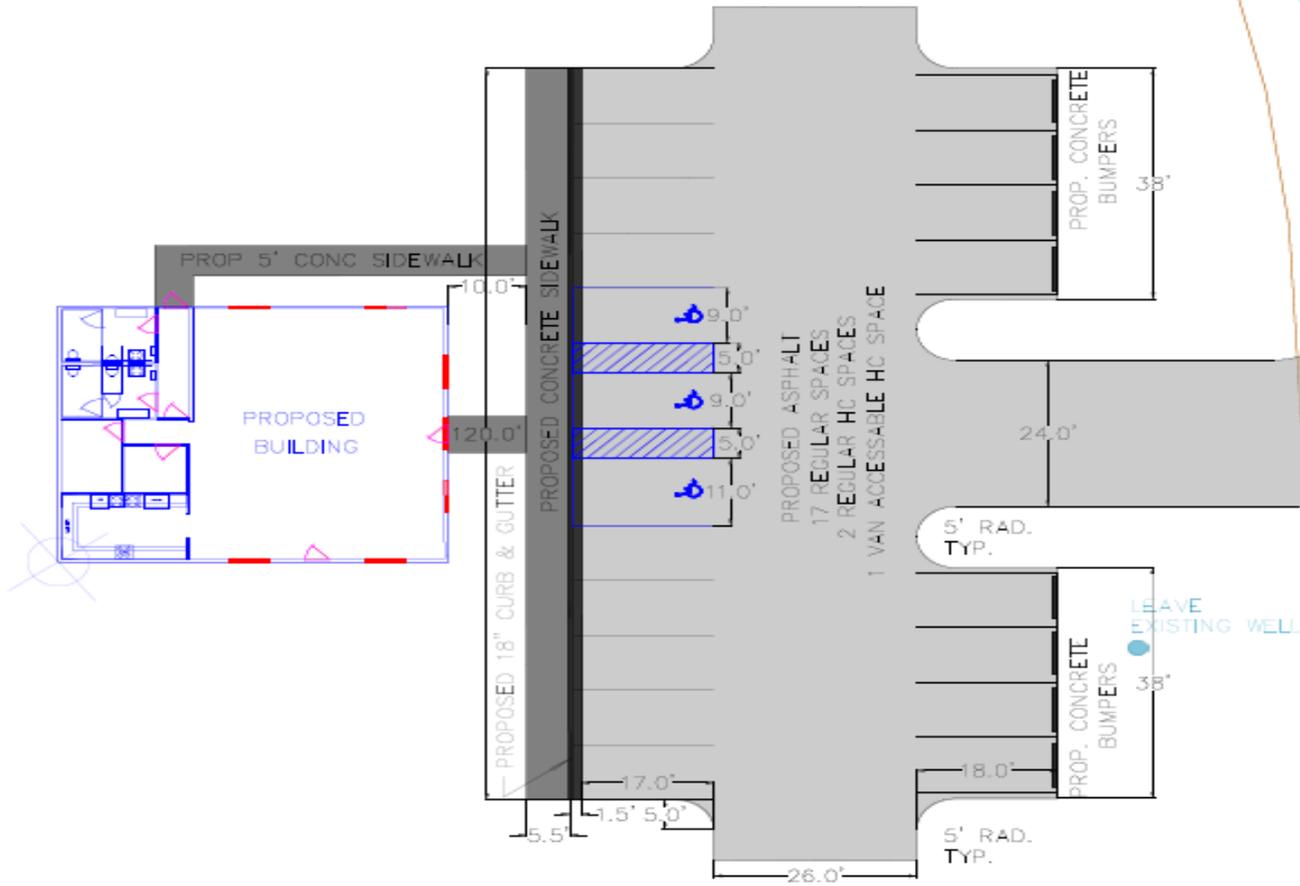
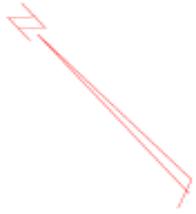
- Confidence Level: 95%
- Confidence Interval: 5
- Population: 2000
- Sample size needed: 322

# Project Service Area

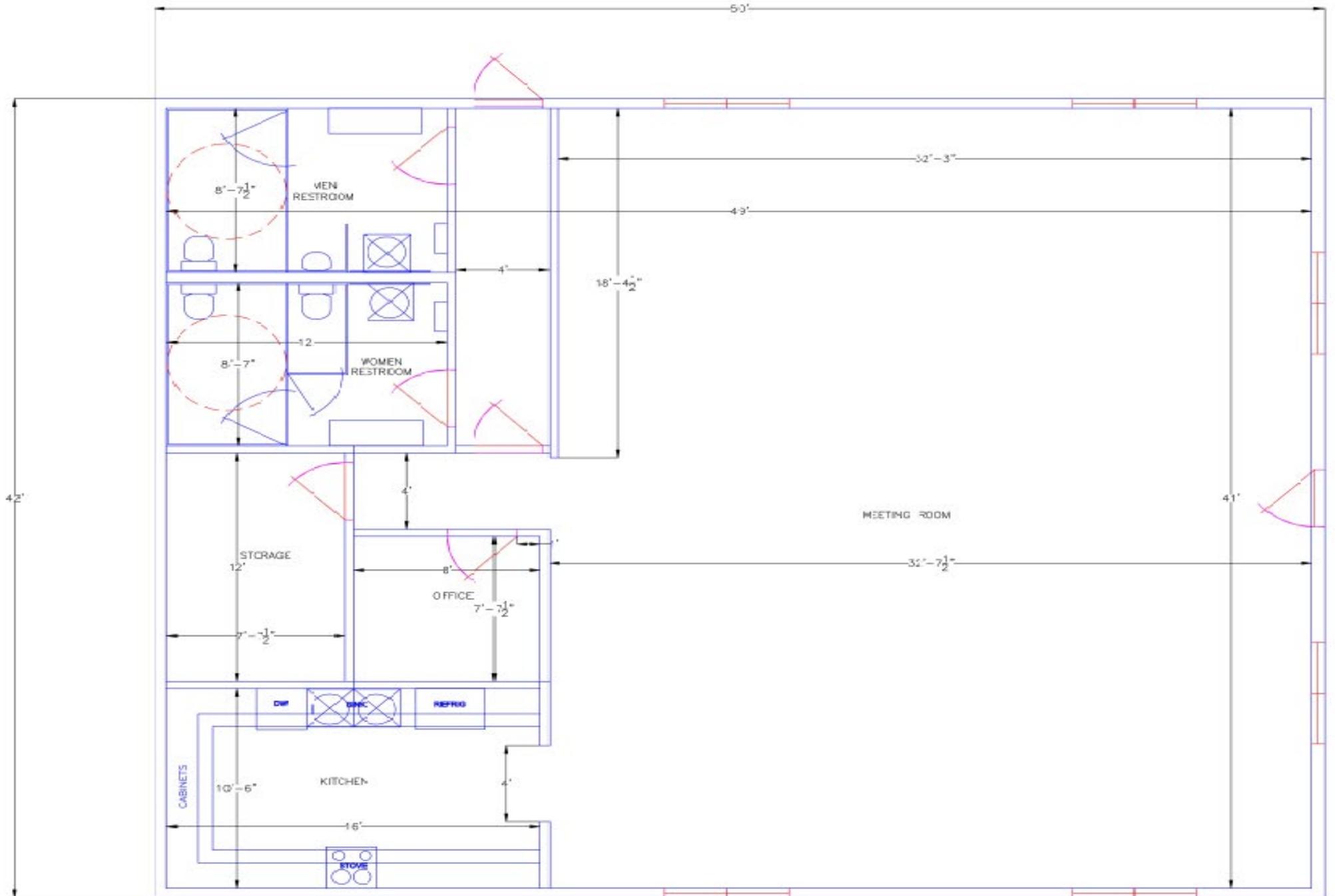


# Project Area Photo Location Map





-  TOILET
-  URINAL
-  SINK
-  HAND DRYER
-  CHANGING TABLE  
DROP DOWN
-  MIRROR
-  36° DOOR
-  5' DIAMETER  
TURNING SPACE
-  DOUBLE WINDOW



# CRITERIA

## Community Benefit (Long Term)

	Points	Maximum Points
		100
• Benefit Last 25+ Years	100	
• Benefit Last 11-25 Years	65	
• Benefit Last 5-10 Years	30	
• Benefit Last < 5 Years	0	
<u>No Documentation</u>	0	

# CRITERIA

## Community Benefit (Cost Effectiveness)

Calculated as CDBG Funds Requested / LMI Persons Benefitting

	Points	Maximum Points
		100
• \$1 - \$1,000 per Beneficiary	100	
• \$1001 - \$5,000 per Beneficiary	65	
• \$5001 - \$10,000 per Beneficiary	30	
• > \$10,000 per Beneficiary	0	

# CRITERIA

## Community Benefit (LMI)

	Points	Maximum Points
LMI % of Population Served		100
< 39.50%	0	

Incomplete Documentation of Beneficiary Calculations will not receive points.

# EXAMPLE

## Community Benefit (LMI)

### Hypothetical Projects

	Points	Maximum Points
LMI % of Population Served		100
Columbiana (Community Center)	56.30%	
Wilsonville (Town Park)	40.30%	

# CRITERIA

## Prioritized Need

	Points	Maximum Points
		100
• Water / Sewer	100	
• Mental Health	100	
• Community / Senior Center	65	
• Senior Services	65	
• Youth Services	65	
• Streets / Storm Drainage / Sidewalks	30	
• Parks	30	

# **EXAMPLE**

**Prioritized Need**

**Community Center Hypothetical Projects**

	<b>Points</b>	<b>Maximum Points</b>
		<b>100</b>
<b>Columbiana (Community Center)</b>	<b>65</b>	
<b>Wilsonville (Town Park)</b>	<b>30</b>	

# CRITERIA

## CDBG Aggregated Funding Program Years 2024-2028

	Points	Maximum Points
		100
• \$0	100	
• \$1-\$250,000	65	
• \$250,001-\$500,000	30	
• > \$500,001	0	

# CRITERIA

## Leverage / Match

Points

Maximum Points

100

$(\text{Local or Other Funds} / \text{Total Project Cost}) \times 150$

# CRITERIA

## Community Engagement / Alignment

	Points	Maximum Points
		200
• Public Hearing	50	
• Community Support Letters (5 Pts per Letter)	5-50	
• Comprehensive Plan Goal Alignment	50	
• Prior Resident Letters (5 Pts per Letter)	5-50	

# SECTIONS

- Eligible Activity and Beneficiary
- Application Basics
- **Online Application Guide**
- Next Steps

# **ONLINE APPLICATION GUIDE**

### Applicant Registration

Shelby

Town ✕ ▾

Lucy

Sky

ls@aol.com

lucys

.....

.....

✕ Cancel

✓ Submit

Primary Applicant

Shelby

Search for Funding Announcement



Sort By



### Application Details



+ Begin New Application

Application ↑	App ID ↑↓	Application Status ↑↓	Last Saved On ↑↓	Submission Date ↑↓
---------------	-----------	-----------------------	------------------	--------------------

No data

Total: 0



5



Announcement Type: Initial

Program(s): Community  
Development Block Grant

Amount

\$858,304  
.00

Apply

Attachments

Primary Applicant

Shelby

Search for Funding Announcement



Sort By



## Application Detail

### New Application

Save & Apply

Save

Close

+ Begin New Application

Application ↑

Application\*

FY25 Town of Shelby

Announcement Type: Initial

Amount

Program(s): Community

\$858,304

Development Block Grant

.00

Apply

Attachments



## Primary Applicant

Shelby

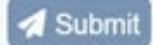
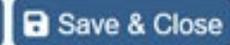
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 My Applicant Profile

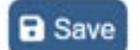
## FY25 Town of Shelby

 **Summary**  **Questions**  **Budget**

 Help

 Previous Questions Progress  **Application Attachments**  **Total Requested Amount:** **\$0.00**  Next



Application \*

FY25 Town of Shelby

Requested Amount \*

\$0.00



Project Summary \*

The proposed project...



## Primary Applicant

Shelby

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 My Applicant Profile



## FY25 Town of Shelby

 Summary  Questions  Budget

 Help

 Previous Questions Progress

Application Attachments  0

Total Requested Amount: \$0.00

Next 

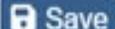
Questions <<

### Section 1: Applicant

Section 1: Applicant

- 1. Applicant Name
- 2. Application Type
- 3. Unique Entity Identifier (UEI)
- 4. Federal Employer

#### 1. Applicant Name

  Question Instruction

Select the Applicant's Name.

Primary Applicant  
Shelby

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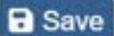


[Previous](#) Questions Progress  Application Attachments  0 Total Requested Amount: \$0.00 [Next](#)

Questions << Section 1: Applicant

- 1. Applicant Name 
- 2. Application Type 
- 3. Unique Entity Identifier (UEI)
- 4. Federal Employer Identification Number (FEIN)
- 5. Primary Contact
- 6. Secondary Contact
- 7. Tertiary Contact

### 2. Application Type

 Save  Question Instruction

Select the Application Type.

Capital Application  



Primary Applicant

Shelby

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 My Applicant Profile

 Summary

 Questions

 Budget

 Help

 Previous Questions Progress

1

Application Attachments  0

Total Requested Amount: \$0.00

Next 

Questions <<

Section 1: Applicant

Section 1: Applicant

-  1. Applicant Name
-  2. Application Type
-  3. Unique Entity Identifier (UEI)
-  4. Federal Employer Identification Number (FEIN)
-  5. Primary Contact
-  6. Secondary Contact
-  7. Tertiary Contact

7. Tertiary Contact

Not Applicable

 Save

 Question Instruction



## Shelby County Funder Portal

1 ?

Summary **Questions** Budget

**Primary Applicant**  
Shelby

All Funding Announcements

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↶ My Submitted Applications

👤 My Applicant Profile

⏪ Previous Questions Progress **1** Application Attachments 0 Total Requested Amount: \$0.00 Next ⏩

Questions <<

### Section 2: Project

- 6. Secondary Contact
- 7. Tertiary Contact

#### Section 2: Project

- 8. Project Name**
- 9. Site Address
- 10. Geographic Coordinates
- 11. Municipality
- 12. County
- 13. Census Tract(S)
- 14. Total Project Cost

### 8. Project Name

**Save** ? Question Instruction

What is your Project Name?

This is the official name that will be used by HUD in all of its documents.

Town of Shelby Water Main Project



## Shelby County Funder Portal

1 ?

**Primary Applicant**  
Shelby

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➔ My Submitted Applications

👤 My Applicant Profile

Summary **Questions** Budget

⌂ Previous Questions Progress **13** Application Attachments 0 Total Requested Amount: \$0.00 Next ⌂

Questions << **Section 2: Project**

- ✔ 6. Secondary Contact
- ✔ 7. Tertiary Contact
- Section 2: Project**
- ✔ 8. Project Name
- 9. Site Address**
- ⊖ 10. Geographic Coordinates
- ⊖ 11. Municipality
- ⊖ 12. County
- ⊖ 13. Census Tract(S)
- ⊖ 14. Total Project Cost

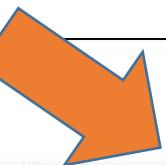
### 9. Site Address

Save Question Instruction

Enter the project's Site Address.

Address Line 1	City	Address Line 2
100 Main St	Shelby	500 Main St

+ Add Row



Progress 25% 0 \$0.00

Primary Applicant

Shelby

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Questions <<

- 8. Project Name
- 9. Site Address
- 10. Geographic Coordinates
- 11. Municipality
- 12. County
- 13. Census Tract(S)
- 14. Total Project Cost
- 15. CDBG Funding Request
- 16. Local / Other Funds



Section 2: Project

**A minimum match is required.**

**At least 10%, for project total cost up to and including \$250,000.**

**At least 15%, for total project cost greater than \$250,000.**

Funding Source	Local Fund Amount	Other Fund
General Fund	\$75,000.00	
<b>Total: \$75,000.00</b>		

+ Add Row



Progress

29%

0

\$0.00

### Primary Applicant

Shelby

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Questions <<

## Section 5: Prioritized Need

Section 3: National Objective

17. National Objective

Section 4: Urban County Goal

18. Urban County Goal

Section 5: Prioritized Need

19. Prioritized Need

### 19. Prioritized Need

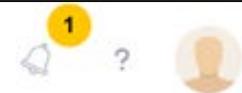
Save

Question Instruction

Which Prioritized Need will your project primarily address.

Water





Progress



0

\$0.00

Primary Applicant

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Questions <<

Section 6: Project Description (5 W's), Subsection: Project Description

Section 5: Prioritized Need

19. Prioritized Need

Section 6: Project Description (5 W's)

Project Description

20. WHAT Is The Project?

21. WHEN Will The Project Be Completed?

22. WHERE Will The

20. WHAT is the project?

Save

Question Instruction

Provide a brief, yet informative, description of the proposed project. Describe the problem. What is the impact on the community if the problem is not solved?

B I U Arial 12 pt A [color] [background color] tt Tr

Paragraph [bullets] [numbered] [list style] [link] [image] [code] [undo] [redo]

answer questions

Progress 32% 0 \$0.00

**Primary Applicant**  
Shelby

- All Funding Announcements
-  Favorite Funding Announcements
-  My Submitted Applications
-  My Applicant Profile

- Questions <<
- Section 5: Prioritized Need
    - 19. Prioritized Need
  - Section 6: Project Description (5 W's)
    - Project Description
      - 20. WHAT Is The Project?
      - 21. WHEN Will The Project Be Completed?**
      - 22. WHERE Will The

**Section 6: Project Description (5 W's), Subsection: Project Description**

**21. WHEN will the project be completed?**

Clearly describe the project timeline, including when you anticipate the project to be completed.

**B I U**  Arial 12 pt **A**   **t+** **T+**

Paragraph            

answer question

Progress 33% 0 \$0.00

Primary Applicant

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Questions <<

Section 6: Project Description (5 W's), Subsection: Project Description

Section 5: Prioritized Need

 19. Prioritized Need

Section 6: Project Description (5 W's)

Project Description

 20. WHAT Is The Project?

 21. WHEN Will The Project Be Completed?

 22. WHERE Will The

22. WHERE will the project be?

 Save

 Question Instruction

Describe the project location, include street names with number (or range). Describe surrounding areas that may also benefit.

**B** *I* U ~~S~~ Arial 12 pt **A**   **t** **Tr**

Paragraph              

answer questions

Progress 33% 0 \$0.00

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Questions <<

Section 6: Project Description (5 W's), Subsection: Project Description

Section 6: Project Description (5 W's)

23. WHY is the project needed?

 Save

 Question Instruction

Project Description

 20. WHAT Is The Project?

 21. WHEN Will The Project Be Completed?

 22. WHERE Will The Project Be?

 23. WHY Is The Project Needed?

 24. WHO Will Benefit

Explain why the project is essential. Why is the project important to your city or organization?

**B** *I* U ~~S~~ Arial 12 pt **A**             

Paragraph           

answer questions

Progress

37%

0

\$0.00

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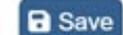
 My Applicant Profile

Questions <<

## Section 6: Project Description (5 W's), Subsection: Project Description

Section 6: Project Description (5 W's)

### 24. WHO will benefit from the project?

 Save

 Question Instruction

Project Description

 20. WHAT Is The Project?

 21. WHEN Will The Project Be Completed?

 22. WHERE Will The Project Be?

 23. WHY Is The Project Needed?

 24. WHO Will Benefit

Explain who will benefit from the project.

**B** *I* U  Arial 12 pt   **t** **T**

Paragraph            

answer question

Progress

38%

0

\$0.00

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Questions <<

## Section 6: Project Description (5 W's)

Project?

21. WHEN Will The Project Be Completed?

22. WHERE Will The Project Be?

23. WHY Is The Project Needed?

24. WHO Will Benefit From The Project?

25. Project Site Location Map

26. Project Service

### 25. Project Site Location Map

 Save

 Question Instruction

Upload a project site location map.

 Attach Document



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### Question Instruction ✕

**Your map should include the following items:**

- 1. Star or asterisk symbol denoting project location**
- 2. Label all street names**
- 3. Include a north arrow**

Cancel

25. Project Site  
Location Map

26. Project Service

🔔 1 ? 👤  
🔔 Question Instruction



## Primary Applicant

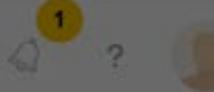
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Question Instruction

### Documents



Use checkbox to select documents, then press the Save button below.

<input type="checkbox"/>	Document Name	File Size	Date
--------------------------	---------------	-----------	------

No data

Total: 0



10



+ Browse

File Upload Instruction

Cancel

Save



Progress

40%

1

\$0.00

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Questions <<

## Section 6: Project Description (5 W's)

Project?

✓ 21. WHEN Will The Project Be Completed?

✓ 22. WHERE Will The Project Be?

✓ 23. WHY Is The Project Needed?

✓ 24. WHO Will Benefit From The Project?

✓ 25. Project Site Location Map

○ 26. Project Service

### 25. Project Site Location Map

Save

Question Instruction

Upload a project site location map.

Attach Document

Attachment Name ↑

File Size ↑↓

Application2025Notice.docx

15 KB



## Project Service Area Map

**SHELBY COUNTY**  
ALABAMA

Primary Applicant  
Shelby

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Save Question Instruction

1

?

**Question Instruction**

Your map should include the following items:

1. Service area boundary line denoting extent of project
2. Streets with labels.
3. Geographic Coordinates
4. Legend
5. North Arrow.

Cancel

## Photo Location Map

**SHELBY COUNTY**  
ALABAMA

**Primary Applicant**  
Shelby

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**Question Instruction** [Close]

Take photos of your proposed project site from at least four angles / directions.

The photos should show the overall proposed project site / area including the surrounding environment (houses or businesses).

Label each photo with the appropriate angle / direction, for example:

1. Photo 1, Facing NE
2. Photo 2, Facing SW
3. Photo 3, Facing NW
4. Photo 4, Facing SE

For larger sites that involve multiple streets, additional photos may be needed.

Create a map that includes the following information:

1. Streets with labels
2. Service area boundary line denoting extent of project
3. Dots or squares labeled with the numbers of the photos placed in the proper place

Save Question Instruction

Proposed project site



Progress

43%

3

\$0.00

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Questions <<

## Section 6: Project Description (5 W's)

Area Map

27. Photo Location Map And Associated Photos

28. Preliminary Site Plan

Section 7: Community Benefit (Long Term)

29. Community Benefit (Long Term)

Section 8: Community Benefit (Cost)

### 28. Preliminary Site Plan

Not Applicable

Save

Question Instruction

Capital projects involving infrastructure related to water or sewer lines or new construction / additions to a public facility.

Otherwise select Not Applicable.

Attach Document



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### Question Instruction



The site plan should provide a general layout of the project area and include the following:

- Proposed facilities and development;
- Existing facilities regardless of funding source;
- Future development, if known;
- Location of any existing power lines or other utilities in the project area;
- Location and measurements of any easements or rights-of-way;
- Location of floodplain, if applicable;
- Site acreage to nearest tenth of an acre, if applicable; and
- Title block information including the title of the project, north arrow, scale, and date prepared.

Save

Question Instruction

new construction /



Progress

44%

4

\$0.00

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Questions <<

Section 7: Community Benefit (Long Term)

Area Map

27. Photo Location Map And Associated Photos

28. Preliminary Site Plan

Section 7: Community Benefit (Long Term)

29. Community Benefit (Long Term)

Section 8: Community Benefit (Cost

29. Community Benefit (Long Term)

Save

Question Instruction

What is the life expectancy of your project?

**No Documentation = No Points**

Benefit Lasts 25+ Years



Attach Document



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Question Instruction



**How many years will your project benefit the community without replacement of primary materials or additional funds?**

**More points will be given to infrastructure projects due to the nature and the lifespan of the materials.**

**For instance, the water main minimal lifespans as reported by HUD are the following:**

- |                     |          |
|---------------------|----------|
| 1. Cast Iron        | 70 years |
| 2. Copper           | 50 years |
| 3. Galvanized Steel | 20 years |

**Attach documentation that includes minimal lifespans of the materials used.**

Cancel

Question Instruction

Progress

40%

5

\$0.00

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Questions <<

Section 8: Community Benefit (Cost Effectiveness)

 29. Community Benefit (Long Term)

Section 8: Community Benefit (Cost Effectiveness)

 30. Community Benefit (Cost Effectiveness)

Section 9: Community Benefit (LMI)

 31. LMI Data Source

 32. Community

30. Community Benefit (Cost Effectiveness)

 Save

 Question Instruction

What is the Cost Effectiveness of your project? How many LMI persons will benefit related to the amount of CDBG funding requested?

\$5,001 - 10,000 per Beneficiary



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Question Instruction



Divide the CDBG funds requested by the number of LMI persons benefitting.

Select the appropriate response.

Cancel

Section 9: Community Benefit (LMI)

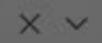
\$5,001 - 10,000 per Beneficiary

31. LMI Data Source

32. Community

Question Instruction

benefit related to the



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Progress

40%

5

\$0.00

Questions <<

Section 9: Community Benefit (LMI)

✔ 29. Community Benefit (Long Term)

Section 8: Community Benefit (Cost Effectiveness)

✔ 30. Community Benefit (Cost Effectiveness)

Section 9: Community Benefit (LMI)

⊖ 31. LMI Data Source

🔒 32. Community

31. LMI Data Source

Save

Question Instruction

Indicate if the project's LMI data source is from either HUD's Low- and Moderate-Income Summary Data (LMISD) based on the 2016-2020 American Community Survey (ACS) or Local Income Surveys.

Local Income Surveys



Progress

49%

5

\$0.00

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Questions <<

Section 9: Community Benefit (LMI)

Effectiveness)

 30. Community Benefit (Cost Effectiveness)

Section 9: Community Benefit (LMI)

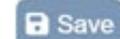
 31. LMI Data Source

 32. Community Benefit (LMI)

 33. LMI% Threshold

 34. Income Surveys And Associated Man

32. Community Benefit (LMI)

 Save

 Question Instruction

Based on your selected data source, provide the following:

1. Number of LMI Persons in your project's service area,
2. Total Number of Persons in your project's service area, and
3. LMI percentage of your service area.

LMI Persons \*

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Question Instruction



If you are using income surveys, the LMI percentage is calculated by dividing LMI persons by total persons.

Otherwise use the LMI percentage provided by HUD's Low- and Moderate-Income Summary Data (LMISD) as found in the URL below:

<https://www.hudexchange.info/programs/acs-low-mod-summary-data/acs-low-mod-summary-data-local-government>

Use the Map Application

1. Type in your Municipality and scroll to it,
2. Unselect all boxes in map layers except LMISD by Place,
3. Select your Municipality,
4. Your Municipality will be highlighted and a window will appear,
5. Your Total Persons is the row labeled LOWMODUNIV,
6. Your LMI Persons is the row labeled LOWMOD. and

Cancel

Question Instruction



Progress



5

\$0.00

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Questions <<

Section 9: Community Benefit (LMI)

Effectiveness)

30. Community Benefit (Cost Effectiveness)

Section 9: Community Benefit (LMI)

31. LMI Data Source

32. Community Benefit (LMI)

33. LMI% Threshold

34. Income Surveys And Associated Man

LMI Persons \*

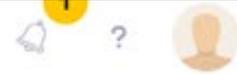
50

Total Persons \*

75

LMI % \*

66.67%



Progress

51%

5

\$0.00

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Questions <<

Section 9: Community Benefit (LMI)

Effectiveness)

30. Community Benefit (Cost Effectiveness)

Section 9: Community Benefit (LMI)

31. LMI Data Source

32. Community Benefit (LMI)

33. LMI% Threshold

34. Income Surveys And Associated Man

33. LMI% Threshold

Save

Question Instruction

A minimum LMI% threshold is required to receive CDBG Funding.

If you are unable to select either answer, you cannot receive CDBG Funding and will not be able to complete the application.

Area Benefit Threshold LMI% -- 39.50% or Greater





Progress

52%

5

\$0.00

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Questions <<

Section 9: Community Benefit (LMI)

Section 9: Community Benefit (LMI)

- ✓ 31. LMI Data Source
- ✓ 32. Community Benefit (LMI)
- ✓ 33. LMI% Threshold

34. Income Surveys And Associated Map

Section 10: Leverage / Match

- ⊖ 35. Leverage / Match

34. Income Surveys and Associated Map

Not Applicable

Save

Question Instruction

**Note: Income surveys shall be used if the project service area does not encompass the entire municipality or a LMA census tract.**

Attach copies of all Income Surveys.

Attach the Income Survey Map.

Points will not be awarded if correct and valid documentation is not included.

Attach Document

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Question Instruction ✕

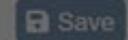
An income survey sample sheet is available in the Attachment section.

Create a map that includes the following information:

1. Streets with labels,
2. Service area boundary line denoting extent of project,
3. Dots or squares labeled with the numbers of the income surveys placed in the proper place, and
4. North arrow

**Note: Income surveys shall be used if the project service area does not encompass the entire municipality or a LMA census tract.**

Cancel

 Save

 Question Instruction

encompass the entire

d.

Progress

34%

6

\$0.00

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Questions <<

Section 10: Leverage / Match

Section 9: Community Benefit (LMI)

- 31. LMI Data Source
- 32. Community Benefit (LMI)
- 33. LMI% Threshold
- 34. Income Surveys And Associated Map

Section 10: Leverage / Match

35. Leverage / Match

35. Leverage / Match

 Save

 Question Instruction

Calculate the decimal number to be placed in the space.

Use the following equation:

$$[\text{((Local Funds + Other Funds) / Total Project Cost)} \times 150]$$

NOTE: Work left to right



Progress  34% 6 \$0.00

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#### Questions <<

### Section 10: Leverage / Match

#### Section 9: Community Benefit (LMI)

- 31. LMI Data Source
- 32. Community Benefit (LMI)
- 33. LMI% Threshold
- 34. Income Surveys And Associated Map

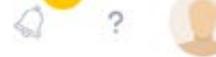
#### Section 10: Leverage / Match

#### 35. Leverage / Match

**$$[\frac{((\text{Local Funds} + \text{Other Funds})}{\text{Total Project Cost}) \times 150}]$$**

***NOTE: Work left to right***

**Place your calculated decimal number in the space provided.**



Progress



6

\$0.00

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Section 11: Community Engagement / Alignment, Subsection: Community Support Letters (6 - 10)

Questions <<

- 36. Public Hearing
- 37. Comprehensive Plan

Community Support Letters (1 - 5)

- 38. Community Support Letter 1
- 39. Community Support Letter 2
- 40. Community Support Letter 3
- 41. Community Support Letter 4

47. Community Support Letter 10

Save

Question Instruction

Attach Letter 10.

No



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Questions <<

- Support Letter 7
- ✓ 45. Community Support Letter 8
- ✓ 46. Community Support Letter 9
- ✓ 47. Community Support Letter 10
- Prior Resident Letters (1 - 5)
- 48. Prior Resident Letter 1
- 49. Prior Resident Letter 2

Section 11: Community Engagement / Alignment, Subsection: Prior Resident Letters (1 - 5)

48. Prior Resident Letter 1

Save Question Instruction

Attach a letter or email from a resident, customer, business owner, and/or other official that was previously sent to the applicant before 2025 that expressed the need for this project.

Yes X v

Attach Document



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Summary



Questions



Budget



Help

Previous Questions  
Progress



Application Attachments 7

Total Requested Amount:  
\$0.00

Next

Questions <<

Section 12: Documents, Subsection: Required Documents for All Applicants

56. Prior Resident  
Letter 9

57. Prior Resident  
Letter 10

Section 12:  
Documents

Required Document  
for All Applicants

58. Council Or Board  
Resolution(S)

59. Financial Audit

60. HUD 424-B

58. Council or Board Resolution(s)

Save

Question Instruction

Upload the City Council or board resolution(s) authorizing application for CDBG funds and available match for the project. The official resolution should be signed by the chief elected official or board president.

Attach Document



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Question Instruction



Applicant and Recipient Assurances and Certifications

U.S. Department of Housing and Urban Development

OMB Number: 2510-0017  
Expiration Date: 1/31/2026

Instructions for the HUD 424-B Assurances and Certifications

As part of your application for HUD funding, you, as the official authorized to sign on behalf of your organization or as an individual, must provide the following assurances and certifications. The Responsible Civil Rights Official has specified this form for use for purposes of general compliance with 24 CFR §§ 1.5, 3.115, 8.50, and 146.25, as applicable. The Responsible Civil Rights Official may require specific civil rights assurances to be furnished consistent with those authorities and will specify the form on which such assurances must be made. A failure to furnish or comply with the civil rights assurances contained in this form may result in the procedures to effect compliance at 24 CFR §§ 1.8, 3.115, 8.57, or 146.39.

By submitting this form, you are stating that all assertions made in this form are true, accurate, and correct.

As the duly representative of the applicant, I certify that the applicant: [Insert below the Name and title of the Authorized Representative, name of Organization and the date of signature]:

\*Authorized Representative Name:

\*Title:

\*Applicant/Recipient Organization:

1. Has the legal authority to apply for Federal assistance, has the institutional, managerial and financial capability (including funds to pay the non-Federal share of program costs) to plan, manage and complete the program as

applicant which is an Indian tribe or its instrumentality which is excluded by statute from coverage does not make this certification; and further except if the grant program authorizes or limits participation to designated populations, then the applicant will comply with the nondiscrimination requirements within the designated population.

5. Will comply with all applicable Federal nondiscrimination requirements, including those listed at 24 CFR §§ 5.105(a) and 5.106 as applicable.

6. Will comply with the acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970.

Cancel

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Summary Questions Budget

Help

Previous Questions Progress

100%

Application Attachments

Total Requested Amount: \$0.00

Next

Questions <<

Section 12: Documents, Subsection: Required Documents for Non-Profits

Resolution(S)

- 59. Financial Audit
- 60. HUD 424-B Assurances And Certifications

Required Documents for Non-Profits

- 61. Tax Exempt Certification
- 62. Articles Of Incorporation
- 63. Bylaws

63. Bylaws

Not Applicable



# Shelby County Funder Portal



Year 1

Budget Category	Direct	Cash Match	In-Kind Match	Total	Leveraged
Personnel					
Contract Services					
Fringe Benefits					
Construction      					
Rehabilitation					
Materials/Supplies					
Permits & Fees					
Eng Fees (Max 20%)					
Architectural Fees (Max 12%)					
Other					
<b>Total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



# APPLICATION TIPS AND HELPFUL INFORMATION

- Always check the question instructions for guidance
- Answer ALL questions
- Double check calculations for accuracy and consistency
- If you have already incurred costs for your project, it cannot be included in your budget
- Follow Shelby County Policies and Procedures for Federal Awards
- Thoroughly review your application prior to submission
- **Call or email with any questions while working on your application!**

# SECTIONS

- Eligible Activity and Beneficiary
- Application Basics
- Online Application Guide
- **Next Steps**

**NEXT STEPS**



# **TIER 1 CONSULTATION REQUIREMENTS**

- **Eligible Participant**
- **Urban County Project Site or**
- **Urban County Service Area**
- **UEI #**
- **FEIN #**
- **HUD 424-B**
- **Resolution**
- **Audit/Financial Statement**
- **Articles of Incorporation (NP)**
- **Bylaws (NP)**
- **501© (3) Tax Exempt Certification (NP)**
- **National Objective Addressed**
- **Urban County Goal Addressed**
- **Eligible Activity**
- **Location Map**
- **Project Site / Service Area Map**
- **LAT / LON Coordinates**
- **Preliminary Drawings**
- **Data Documentation**
  - (LMISD / Income Surveys)
- **Income Survey Map**
- **Photos / Photo Location Map**

# TIER 1 CONSULTATION

## Application Questions

- Now until March 31
- Phone, Email, or In-Person

## Wrap Up Dates

### March 31, 2025

- Morning
- Afternoon
- Evening

### April 1, 2025

- Morning
- Afternoon
- Evening

# **ONLINE APPLICATION SUBMITTAL**

- Deadline **Wednesday, April 2, 2025, 11:59 PM CST**
- **Shall only use online form** – NO hard copies – NO thumbdrives
- All required documents such as resolutions, maps, drawings, surveys, etc. shall be **uploaded** during submission process

# **APPLICANT PRESENTATION**

- Applicants who score at least **400 points** from a tabulation of criteria shall be required to present to the Policy Board
- Applicants will be notified by email by noon on **Monday, April 7, 2025**
- Presentation date is **Wednesday, April 16, 2025**, starting at **1 PM** in Columbiana at the County Administration Building

# **For Further Assistance**

**Eric Womack**

**Community Development Programs Specialist**

**205-620-6629**

**[cdbg@shelbyal.com](mailto:cdbg@shelbyal.com)**