

# HUD CDBG Income Survey Toolkit

## Conducting Local Income Surveys in the Community Development Block Grant (CDBG) Program

### User Guide: Fulcrum Application

*Note: Refer to Appendix A in the CDBG Income Survey Guidebook for approximate costs for this data collection method.*

## 1. Introduction

This user guide supplements the Guidebook *Conducting Local Income Surveys in the Community Development Block Grant Program* and provides one option for a data collection tool. For more information, refer to the Guidebook and the [Community Development Block Grant \(CDBG\) Income Survey Toolkit](#) (Toolkit).

The Fulcrum income survey application (“app”) is designed to collect income information from individual families. It was designed for in-person surveys but is adaptable for telephone surveys. It is not suitable for respondents to use directly. Surveys can have skip patterns, embedded data, and many other features.

This guide provides step-by-step instructions for using a preprogrammed Fulcrum survey template (or “app”) to capture income in a local area. You must have a subscription to Fulcrum to use the survey. The free version of Fulcrum may allow you to view the survey, but it will not have full functionality.

## 2. Preparing to Use Fulcrum

- Go to <https://www.fulcrumapp.com/> and create an account. You will need a “Professional” account to use all the features of the template.
- Download the [Fulcrum App Income Survey](#) from the “Survey Instruments” section of the Toolkit.
- To add the survey app, type this address manually into your web browser’s URL bar: <https://web.fulcrumapp.com/apps/import>.
- On the import page, click “Choose File” and upload the copy of the Fulcrum instrument you saved from the CDBG Income Survey Toolkit.
- Click the “Create App” button. You are now able to edit the survey and push it to the Fulcrum app on your mobile device.
- Survey administrators can send links directly to a mobile device from their account.
- To use the app on your mobile device, open the mobile app and press the “Sign In” button to reach the login screen. Enter the email and the password for the account in order to access your survey.

- If you need to export the app template, follow the [instructions from Fulcrum](#).

## 3. Edit the Survey

### 3.1. General Editing Tips

- Edit the Survey Introduction section to add your community's name in the Introduction section.
- Reordering, deleting, or adding questions will affect your ability to use the Microsoft Forms-Fulcrum Excel Tool.
- To add/delete/change fields:
  - From the Apps page (under “Platform Menu” on the right side of the screen), scroll down to the CDBG Local Income Survey and click the “Edit App” icon (resembles a pencil).
  - Add fields through the Fields column, which is next to the Layout column.
  - Change fields by clicking on the section you would like to change in the Layout column and edit as needed.
  - To delete a whole section (i.e., Demographics), choose the red trash bin in the upper right-hand corner of the section you would like to delete. To delete a question within a section, hover over the question and delete it using the red trash bin in the upper right-hand corner of the question.
  - Once you have finished editing your survey to fit your community's needs, select Save App.

### 3.2. Updating the Addresses and Unique IDs

- In the Fulcrum app (desktop version), click on the survey that needs to be updated.
- Click on the “Family ID Address” button to open the question options.
- Click on the “Expression” section to open the calculation editor.
  - We suggest copying the code into a separate text editor to avoid errors.
- The address variable is composed of groups of Family IDs that are paired with the street address for that family. You may enter multiple unique family IDs for the same address to allow for the possibility of more than one family at the same address. To paste the new information, it must be formatted as follows:

```
[  
  ['FamilyID1', 'Street Address1'],  
  ['FamilyID2', 'Street Address2'],  
  ['FamilyID3', 'Street Address3']  
  ['SOS', 'Please Enter Address Below']  
]
```

**Note:** Make sure to include the “SOS” code as an entry in the array above. The SOS code allows you to enter an address if you do not have a unique family ID or if there is an issue entering the ID.

- Click on “Save and Exit” to complete the update.

### 3.3. Updating Low and Moderate Income (LMI) Data

For the app to work properly, the stored LMI data must be updated for your area. **Replace the stored data with the income limits for your area.**

- To get the most recent CDBG Income Limits, visit the [U.S. Department of Housing and Urban Development \(HUD\) Exchange website](#).
- To update the LMI data in Fulcrum, log in with your username and password.
- Click on the survey that needs to be updated; this will open the survey page.
- Click on the “Edit App” button on the right side to edit the app structure.
- Click on the “Dollar Amount” button to open the question options.
- Click on the “Expression” section to open the calculation editor.
- You will need to edit the income variable. The income variable is your area’s 80 percent Income Limit. To add the current information, it must be formatted as follows:

```
var income =[LMI values];
```

The [LMI values] array should include eight distinct values—one for each of the standard family sizes, as follows:

```
[28850,33000,37100,41200,44500,47800,51100,54400]
```

Note: Income limits for families of nine or more persons are calculated separately. The code is included in the sample app.

This code should be included below the list of FIPS values—it is in Fulcrum, but if it gets deleted, paste this:

```
var i = $persons_per_family
var value = []
if (i <= 8) {
  value = income[i-1];
} else if (i > 8) {
  value = CEILING(income[3]*POWER(1.08,(i-4)),.01);
} else {
  value = ""
}

SETRESULT(value)
```

- After updating the income variable, click on “Save.” Then click on “Save and Exit” to complete the update. The new income limits will be pushed out to all users the next time they open the Fulcrum app on their mobile electronic device.

## 4. Collecting Data

- Use the mobile version of Fulcrum to collect data in the field. It can be installed on a smartphone or tablet. We do not recommend using the desktop version of Fulcrum for data collection.
- Open the mobile app and log in if necessary. Choose “Apps” from the bottom of the screen. The Apps page will have a list of all the surveys in your account. Choose the survey you will use. The name of the survey (app) will appear at the top of the screen.
- If you have already started collecting data, you will see a list of “All Records.” These are the previous responses to the survey.
- If the open survey is not the survey you want to use, go back to the home screen and choose the correct app.
- To add a new record to the survey, press the “+” in the bottom right-hand corner of the screen. This will open the Survey Introduction and the Unique ID fields.
- In the field, read the introduction before proceeding. If the family consents, enter their Family ID under the Unique ID heading. The five-character family ID is case-sensitive. If found in the list of IDs, the app will automatically populate the address field.
- Confirm that the address is correct. If the address is not correct, click “No” and manually enter the address.
- Confirm current residence, the number of people who live at the address, and the number of people in the family.
- The income section will now appear. If the respondent does not want to provide their exact income, select “Prefers not to provide exact income.” This will make the “Income Card” section appear, which will ask if the family falls above or below the 80 percent LMI limit for the family size.
- After filling in the income section, the option to save should appear in the upper right-hand corner. Check the information entered so far and save the record.
- After saving the record, press the “+” to collect data for the next household.
- To synchronize your data with the cloud, click on the “Refresh” button in the top right-hand corner of the home screen.

## 5. Exporting Data

- Log in to <https://web.fulcrumapp.com/>.
- Click on “Apps” under the “Platform Menu.” This will open all your available apps.
- Click on the survey you would like to extract data from, then click “Export Data” (icon is an arrow pointing down toward a label) from the menu, which will open the exporter tool.

- We recommend downloading the file as a comma-separated values (CSV) file, which is the default for the exporter. Click “Next,” followed by “Finish” to continue.
- It will take a moment for Fulcrum to collect the data. When complete, select the “Download” button on the right side of the screen to download the file.
- The data will download as a zip file, from which you can extract the CSV file.
- If you need to perform any data cleaning, it must be done before adding the data to the Excel Tool in the next step.

## 6. Analysis Using the Excel Tool

- Open the Excel tool: [Fulcrum and Microsoft Forms Data Entry Tool](#).
- Review the “Instructions” sheet of the tool.
- Open the file with the saved Fulcrum data in Excel and select the entire sheet by clicking any cell and pressing Ctrl + A. Copy the data to your clipboard by clicking Ctrl + C or pressing the Copy button in the Excel tools ribbon.
- Paste the data into the “Fulcrum Input” sheet. Click the top-left cell of the sheet (“A1”), then paste the data from your clipboard using Ctrl + V or the Paste button in the Excel tools ribbon.
- The formulas will run automatically.
- Add the required information in the “Reference” sheet.
- Results will be generated in the “Report” sheet, which you can print by clicking the printer symbol (displayed at right). The report will output as a PDF file.

