

# HUD CDBG Income Survey Toolkit

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

### User Guide: Microsoft Forms

*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).

Microsoft (MS) Forms is an easy-to-use online tool that can collect information directly from families. It is designed to collect responses through a web-based form that a respondent can fill out on their own. It does not have as many features as other online survey options. It is not suitable for use on tablets for door-to-door surveying.

This guide provides step-by-step instructions for using a preprogrammed MS Forms template to capture income in a local area. You must have a subscription to MS Office to use the survey.

## 2. Setting Up Microsoft (MS) Forms

- Navigate to <https://forms.office.com/> and click “Sign In” to enter your login information.
- To copy the survey template, click [here](#) and select “Duplicate It.”
- Edit the name of the survey and the intro text to match the area for your survey.
- Edit Question 9 by clicking on the question to add low- and moderate-income (LMI) limits for the local geographic area. You can find the CDBG income limits [here](#). **Note: Any data in the survey template must be replaced with the income limits for your area.**
- MS Forms cannot be programmed to automatically calculate income limits for families of nine people or more. To add income limits for larger families, calculate the amounts using this formula:

$$\text{Income Limit} = [\text{4-person income limit}] * (1 + (0.08 * (\text{family size} - 4)))^1$$

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<sup>1</sup> Family sizes in excess of eight persons are calculated by adding 8 percent of the four-person income limit for each additional family member. That is, a 9-person limit should be 140 percent of the 4-person limit; the 10-person limit should be 148 percent.

For example, to calculate the income limit for a family of nine where the income limit for a family of 4 is \$51,450:

$$72030 = 51450 * (1 + (.08 * (9 - 4)))$$

You may add as many family sizes as appropriate for your community. The survey template goes up to a family size of 11.

- Click on each multiple-choice item to edit the value for each family size.
- Be aware that reordering, deleting, or adding questions will affect your ability to copy and paste data into the MS Forms-Fulcrum Excel tool, as the columns are prepopulated with the template order and number of MS Forms questions.
  - You may add new survey questions by selecting the “Add New” button at the bottom of the page.
  - You may delete survey questions that your community does not intend on using (i.e., demographic questions) by clicking on the question and clicking on the trash bin icon
  - Note that some questions will only appear based on the respondent’s answer because of skip patterns programmed into the template.
- To update the settings and create a custom “thank you” message, click on the three dots in the upper right-hand corner of the screen.
  - Choose “settings.” A list of setting will appear on the right-hand side of the screen.
  - Under “who can fill out this form,” choose “anyone can respond.”
  - Under “options for responses,” you can set start and end dates for the survey to be active. Do not enable “shuffle questions.”
  - If you want to customize the thank you message, type it in the box in this section.

## 2.1. Adding a Second Language

When you duplicate the survey, a Spanish-language version is included.

- You will have to edit the name of the city in the Spanish version separately and make the changes to the LMI limits as well.
- To edit the Spanish-language version, click on the three dots on the upper right-hand corner of the screen, next to the “Share” button. When you see the drop-down menu, choose “Multilingual.”
- You will now see “Additional language: Español.” Click on “Español.”
- After clicking, you will see the Spanish-language version of the survey and you can make the necessary edits.
- You also have the option of adding additional languages.

### 3. Collecting Data With MS Forms

- After editing the form, click “Share” to generate a link that can be included in a letter or embedded on a website to start collecting responses.
- MS Forms does not have the functionality to automatically fill in addresses.
- The unique family IDs that you generate for the sample cannot be linked to addresses with MS Forms; address verification must be performed after the surveys are submitted.
- For in-person interviewing, surveyors can use the same link to collect responses. Installing MS Forms on a tablet or phone is dependent on the type of operating system. It may not be feasible to use MS Forms for door-to-door data collection.

### 4. Extracting Data From MS Forms

- After opening your survey, click on “Responses.”
- You will see the number of responses and some additional information generated by MS Forms.
- Download the responses for processing by choosing “Open in Excel.” This will download the responses as a .xlsx file.
- Save the file with a name that indicates that it is raw data from the survey. Store it in a secure location.
- Review the file and do any necessary data cleaning before copying the data into the Excel Tool. Remove outliers or responses that do not include family income information.

### 5. 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 MS Forms 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 “MS Forms 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” tab.
- 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.

