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| --- | --- |
| **Name of Entity:** |  |

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| --- | --- |
| If this project **HAS NOT** received a funding commitment, provide the associated Project Information Form number(s) (PIF #) for this update. |  |
| If the project **HAS** received a funding commitment, provide the associated five-digit Project number for this update. |  |

A Disadvantaged Community Worksheet must be submitted to be considered for CWSRF Disadvantaged Community Funding. TWDB staff will utilize the information provided on this worksheet to determine if the entity meets the eligibility criteria.

**Note:** Information that is not submitted as requested will not be considered.

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| **Section 1. ELIGIBILITY CRITERIA** | | | | | | |
| **Eligibility for the entire service area:** The entity’s service area meets the criteria for a disadvantaged community if the Annual Median Household Income (AMHI) for the entity’s service area is less than or equal to 75% of the state’s AMHI (see [Census Data](http://www.twdb.texas.gov/financial/instructions/doc/WRD-284.docx) [Search (WRD-284)](https://www.twdb.texas.gov/financial/instructions/doc/WRD-284.pdf) **and**   1. the household cost factor (HCF) is greater than or equal to 1.0% if the service area is charged for either water or sewer service (whichever is applicable), **or** 2. the household cost factor (HCF) is greater than or equal to 2.0% if the service area is charged for both water and sewer service. | | | | | | |
| **Eligibility for a portion of service area:** A portion of an entity’s service area meets the criteria for a disadvantaged community if the AMHI for that portion is less than or equal to 75% of the state’s AMHI, **and**   1. the household cost factor (HCF) is greater than or equal to 1.0% if the entire service area is charged for either water or sewer service (whichever is applicable), **or** 2. the household cost factor (HCF) is greater than or equal to 2.0% if the entire service area is charged for both water and sewer service. | | | | | | |
| **Section 2. SERVICE AREA** | | | |  | |  |
| Indicate whether the entity is pursuing disadvantaged status for either the entire service area or a portion of its service area. For entire service area projects, a map depicting the service area boundaries with major features (highways, census boundaries, city limit boundaries, etc.) **must** be included for eligibility. Entities are allowed disadvantaged eligibility for a portion of a service area if that portion meets annual median household income (AMHI) and household cost factor (HCF) thresholds pursuant to SRF rules. For portion of a service area eligibility, a map depicting the location of proposed new household connections (to existing homes) within the portion of an entity’s service area **must** be included for eligibility. | | | | | Entire Service Area |  |
| Portion of a Service Area |  |
| **Section 3. SOURCE SOCIOECONOMIC DATA** | | | | | | |
| **Identify the source(s) for the socioeconomic data to be entered in Section 4.**  Follow the steps in [Census Data Search (WRD-284)](https://www.twdb.texas.gov/financial/instructions/doc/WRD-284.pdf) to find data. Note that it may be necessary to obtain data from multiple sources (e.g. where a city’s CCN extends beyond its city limits). | | | | | | |
| **U.S. Census Bureau Data** | County, City, Town, or Census Designated Place: | | Most recent (5-year) ACS 1 | | |  |
| The prior (5-year) ACS (for Population) 1 | | |  |
| Incongruous Census and Service Area Boundaries | | Summary File 5-yearblock group data:  Must provide a table that shows prorated data according to the example table in [Census Data Search (WRD-284)](https://www.twdb.texas.gov/financial/instructions/doc/WRD-284.pdf). | | |  |
| **TWDB-Approved Survey** | An entity must submit documentation that substantiates the inadequate or absent census data that led to the need to conduct a survey. All entities must obtain prior approval to use survey data instead of the most recently available American Community Survey data. Previously completed surveys, including surveys completed for funding from other sources, will be rejected if they do not follow survey methods listed in the latest version of the [Socioeconomic Survey Guidelines (WRD-285).](http://www.twdb.texas.gov/financial/instructions/doc/WRD-285.pdf) 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. | | | | |  |
| Date of Survey: |  | | | | |

**Disadvantaged Communities Worksheet**

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| **Section 4. SOCIOECONOMIC DATA** | | | | | | | | | | | | | | | | | | | |
| **Annual Median Household Income (AMHI)** | | | | | | | |  | | **Unemployment Rate (UR)** | | | | | | | |  | |
| **Average Household Size (AHS)** | | | | | | | |  | | **Population** | | | **Prior (5-year) ACS 1** | | | | |  | |
| 1 Population Adjustment: For SFY 2025 use the 2018 ACS 5-year estimate for Prior population and use the 2022 ACS 5-year estimate for Current population; for SFY 2024 use the 2017 ACS 5-year estimate for Prior population and use the 2021 ACS 5-year estimate for Current population | | | | | | | | | | | | | **Current (5-year) ACS 1** | | | | |  | |
| **Section 5. AVERAGE ANNUAL WATER AND SEWER COSTS** | | | | | | | | | | | | | | | | | | | |
| Using the Average Household Size entered in Section 4 and the entity’s current rate structure, calculate the entity’s average annual water and sewer costs. This information will be factored into the entity’s affordability calculations. | | | | | | | | | | | | | | | | | | | |
| **Average Monthly Water Flow per Household** | | | | | | | | | | | **Average Monthly Sewer Flow per Household** | | | | | | | | |
| **A.** | | Avg. monthly gallons per person | | | | | | | **2,325** | | **L.** | Avg. monthly gallons per person | | | | | | | **1,279** |
| **B.** | | Avg. household size (for the entire service area) | | | | | | |  | | **M.** | Avg. household size (for the entire service area) | | | | | | |  |
| **C.** | | Avg. monthly water flow per household (A×B) | | | | | | |  | | **N.** | Avg. monthly sewer flow per household (L×M) | | | | | | |  |
| **Average Monthly Water Bill** | | | | | | | | | | | **Average Monthly Sewer Bill** | | | | | | | | |
| **D.** | | Avg. monthly water flow per household (C) | | | | | | |  | | **O.** | Avg. monthly sewer flow per household (N) | | | | | | |  |
| **E.** | | Initial base water rate (first | | | |  | gallons) | |  | | **P.** | Initial base sewer rate (first | |  | gallons) | | | |  |
| **F.** | | Additional rate (each addtl. | | | |  | gallons) | |  | | **Q.** | Additional rate (each addtl. | |  | gallons) | | | |  |
| If system utilizes a tiered billing structure, attach additional rates with this worksheet. Base Line H on tiered structure. | | | | | | | | | | | If system utilizes a tiered billing structure, attach additional rates with this worksheet. Base Line S on tiered structure | | | | | | | | |
| **G.** | | Other charges (e.g., taxes, surcharges, or other fees) used to subsidize the water system | | | | | | |  | | **R.** | Other charges (e.g., taxes, surcharges, or other fees) used to subsidize the sewer system | | | | | | |  |
| **H.** | | Calculate avg. monthly water bill | | | | | | |  | | **S.** | Calculate avg. monthly sewer bill | | | | | | |  |
| **Average Annual Water Bill** | | | | | | | | | | | **Average Annual Sewer Bill** | | | | | | | | |
| **I.** | | Avg. monthly water bill (H) | | | | | | |  | | **T.** | Avg. monthly sewer bill (S) | | | | | | |  |
| **J.** | | Number of months in a year | | | | | | | 12 | | **U.** | Number of months in a year | | | | | | | 12 |
| **K.** | | Avg. annual water bill (I×J) | | | | | | |  | | **V.** | Avg. annual sewer bill (T×U) | | | | | | |  |
| **Section 6. ANNUAL FINANCIAL ASSISTANCE COST** | | | | | | | | | | | | | | | | | | | |
| Using the current market rate of 3.93% and a financial assistance term of 20 years, amortize the requested grand total and submit a copy of the amortization schedule with this form. This information will be factored into the entity’s affordability calculations. | | | | | | | | | | | | | | | | | | | |
| **W.** | | | **Annual payment on SRF financial assistance** (from amortization schedule) | | | | | | | | | | | | |  | | | |
| **X.** | | | **Total household connections** (from Section 2 of Project Information Form) | | | | | | | | | | | | |  | | | |
| **Y.** | | | **Annual financial assistance cost per customer** (W/X) | | | | | | | | | | | | |  | | | |
| **Section 7. AFFORDABILITY ADJUSTMENTS** | | | | | | | | | | | | | | | | | | | |
| Using the Unemployment Rate (UR) and Population Trends based on the ACS 5-year Surveys (Section 4), calculate the Household Cost Factor (HCF) adjustments for affordability criteria. Unemployment Rate Adjustment may not exceed an HCF increase of 0.75; and Population Adjustments may not exceed an HCF increase of 0.5. | | | | | | | | | | | | | | | | | | | |
| **Z.** | | | **Unemployment Rate Adjustments** ( [UR-State**1**/State1] \* 2) (Only use if a positive amount) | | | | | | | | | | | | |  | | | |
| **AA.** | | | | **Population Adjustments** [(Prior Population-Current Population)/Prior Population] \* 6.7 (Only use if positive amount, i.e., a decline) | | | | | | | | | | | |  | | | |
| 1 Population Adjustment: For SFY 2025 use the 2018 ACS 5-year estimate for Prior population and use the 2022 ACS 5-year estimate for Current population; for SFY 2024 use the 2017 ACS 5-year estimate for Prior population and use the 2021 ACS 5-year estimate for Current population | | | | | | | | | | | | | | | | | | | |
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| **Section 8. HOUSEHOLD COST FACTOR** | | | | | | | | | | | | | | | | | | | |
| If your utility provides water or sewer service, the minimum required Household Cost Factor (HCF) must be greater than or equal to 1.00%. If your utility provides water and sewer service, the minimum required HCF must be greater than or equal to 2.00%. If the HCF does not meet the minimum required HCF, do not submit this worksheet. | | | | | | | | | | | | | | | | | | | |
| **BB.** | | | | **Household Cost Factor** [((K+V+Y)/AMHI)\*100]+Z+AA | | | | | | | | | | | |  | | | |