



In-Person Training Surveys: TA Providers

Starting March 13, 2018, TA Providers will administer participant surveys for in-person trainings that have learning objectives in the TA Portal. This guidance only applies to Training Delivery work plans that include *in-person* trainings. Surveys for webinars, online trainings, and TA engagements will be implemented at a future time, and HUD will provide additional guidance for administration of those surveys.

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Purpose of Surveys

In-person training surveys will gather participant feedback and learning objectives data to help HUD evaluate and improve the deployment and management of its technical assistance and training resources. Through the new training surveys, HUD will measure:

1. Whether a HUD training achieved its intended learning objectives
2. The level of customer satisfaction from the perspective of the training participant

Which trainings require surveys?

In-Person Trainings

TA Providers should administer pre- and post-assessment surveys for all *in-person* trainings that have the new learning objectives in the TA Portal. If a TA Provider wants to administer surveys for an in-person training that does not currently have the new learning objectives (e.g., because the Training Delivery work plan was approved before the learning objectives functionality was added to the TA Portal), the TA Provider will need to amend the work plan to include learning objectives and make its GTM/POTAC and GTR aware of the reason for the amendment.

Examples

Example 1

A Training Delivery work plan includes two main tasks:

- Task 1: Review and revision of pre-existing training materials (no learning objectives)
- Task 2: Delivery of 2 CFR Part 200 training in Albuquerque, NM (3 learning objectives)

The TA Provider needs to administer surveys for Task 2 only, since Task 2 is an in-person training that has learning objectives. For this work plan, Task 1 does not require surveys because it does not cover in-person training delivery.

Example 2

A Training Delivery work plan includes five tasks:

- Task 1: Work plan development and management (no learning objectives)
- Task 2: Marketing and registration (no learning objectives)
- Task 3: Delivery of “Basically CDBG” in-person training (approved in October 2017, so no learning objectives in the TA Portal)
- Task 4: Delivery of “Effective Management of CDBG Subrecipients” in-person training (4 learning objectives in the TA Portal)
- Task 5: Delivery of “The Economic Development Toolkit” online training (5 learning objectives in the TA Portal)

For this work plan, the TA Provider needs to administer surveys for Task 4 only, since it is an in-person training with learning objectives in the TA Portal. Tasks 1 and 2 do not require surveys because they are administrative tasks, Task 3 does not require surveys because it doesn’t have learning objectives in the TA Portal, and Task 5 does not require surveys because it is an online training.

Conferences

If a TA Provider wants to administer surveys for a conference or conference session, the TA Provider should consult with its GTM or POTAC during work plan development.

Self-Paced Online Trainings

For self-paced online trainings in the Learning Management System (LMS), pre- and post-assessment surveys will be incorporated into the system in the future. HUD will notify TA Providers when this enhancement is ready for implementation.

Webinars

For live webinars, pre- and post-assessment surveys will be incorporated into LMS in the future. HUD will notify TA Providers when this enhancement is ready for implementation.

Group TA

The term “Group TA” is used to describe a group activity *within* a Direct TA work plan. Unlike a training, Group TA is (1) specific to a Direct TA engagement, (2) customized, (3) open only to grantees under the Direct TA work plan, and (4) in concert with the TA engagement. Since they are in Direct TA work plans, Group TA activities do not have learning objectives in the TA Portal, and TA Providers are not required to administer pre- and post-assessment surveys for these activities.

If a TA Provider wants to administer a survey for a Group TA engagement, the Provider must add a separate “Group TA Pre- and Post-Assessment Survey” task to the Direct TA work plan. The task must include learning objectives in the “Description” field, and the learning objectives must be formatted according to the “Training Delivery and Product Development Learning Objectives” guidance.

What learning objectives language do I add to a survey?

When creating a training survey, the TA Provider should use the following parts of the learning objective from the TA Portal: **The [GRANTEE] [VERB] [SPECIFIC PROGRAMMATIC GOAL]**. See the “Training Delivery and Product Development Learning Objectives” guidance document for further guidance on how to structure learning objectives.

If a TA Provider wants to edit a learning objective for a survey, the TA Provider must make the corresponding change in the TA Portal to ensure the learning objectives are the same in both systems. This will require the TA Provider to submit a work plan amendment and receive GTM/POTAC and GTR approval for the revised learning objective in the TA Portal.

Survey Confidentiality

Individual survey results are confidential and cannot be shared with TA Providers, other training participants, or HUD program office staff who have assisted in coordination of the training.

To ensure confidentiality, TA Providers may only create and administer surveys using the [HUD Surveys](#) website (see the [HUD Surveys Website](#) section of this guidance for more details on how to create the surveys). This ensures that individual surveys responses will not be accessible to TA Providers or other unauthorized individuals. A TA Provider may not administer the survey through its own website or print hard copies of the surveys to distribute during the training; in both of those situations, the individual

survey results would be available to the TA Provider and would violate the survey's Paperwork Reduction Act requirements.

Though results of individual surveys cannot be shared with TA Providers, HUD may share aggregated survey results with TA Providers for trainings that have 10 or more responses. HUD is currently working on a process for sharing aggregated survey results and will provide further information in the future.

Example

A TA Provider is holding a training in Chicago. The TA Provider creates pre- and post-assessment surveys on the HUD Surveys website and then prints 30 copies of each survey. The TA Provider hands out the pre-assessment at the beginning of the training and collects the responses, and the TA Provider does the same thing with the post-assessment at the end of the training.

What's wrong with this example? The TA Provider violated the confidentiality requirement by administering the surveys on paper. The TA Provider must administer the surveys electronically using the HUD Surveys website by providing the survey links to training participants.

How do I administer the pre- and post-assessments?

Surveys Are Voluntary

Completion of the assessments is voluntary for all training participants.

Pre-Assessment Survey

A TA Provider should send the pre-assessment link to the individuals on the training registration list at least two days before the training starts. Please see the [Finding Survey Links](#) section of this guidance to see how to generate the pre-assessment survey link. Template email language is provided below.

Email Template: Pre-Assessment Survey Link

Dear Training Participant,

You have registered for the [TRAINING NAME/TOPIC] to be held in [CITY, STATE], on [DATE]. Before the training, I encourage you to fill out the training pre-assessment survey {[hyperlink “pre-assessment survey” with the link to the survey](#)}, which measures your pre-training knowledge related to the training topic. At the end of the training, I will provide you with a link to a post-assessment, which will measure your knowledge gain and satisfaction with the training.

I look forward to seeing you at the training.

Sincerely,
[TA PROVIDER NAME, ORGANIZATION]

Right before the start of the training, the TA Provider should again send out the pre-assessment survey link. The TA Provider should describe the training’s learning objectives to participants at the beginning of the training and then set aside 5-10 minutes to allow participants who have not completed the pre-assessment survey to do so. Surveys can be completed using a mobile device (e.g., tablet or smart phone) or computer.

Post-Assessment Survey

A TA Provider should provide the post-assessment survey link to training attendees at the end of the training and set aside 10-15 minutes to complete the survey. The TA Provider should encourage training participants to complete the post-assessment before leaving the training location but also remind them that the surveys will be available for two weeks after the training. A training participant will be able to complete the post-assessment survey even if they did not complete the pre-assessment survey. However, once the participant completes the post-assessment, the participant will not be able to complete the pre-assessment.

Post-Assessment Survey Reminder Email

One week after a training, the TA Provider should go to the HUD Surveys website to see whether all the attendees at a training have completed the post-assessment survey. If all the post-assessment surveys have not been completed, the TA Provider should send a reminder email to the training attendee list.

Email Template: Post-Assessment Survey Reminder

Dear Training Participants,

Thank you for your participation in the [TRAINING TITLE/TOPIC] training held on [DATE/S].

If you haven't already done so, we encourage you to complete the post-assessment survey {hyperlink "post-assessment survey" with the link to the survey}. Your feedback helps HUD evaluate and improve its training program.

The post-assessment survey only takes 10 minutes to complete and will be open until [END DATE OF THE SURVEY]. Completion of the survey is entirely voluntary.

Sincerely,
[TA PROVIDER NAME, ORGANIZATION]

Example

A "Basically CDBG" training had 12 participants, and 10 participants completed the pre-assessment survey. One week after the training, only two participants had completed the post-assessment survey (see screenshot below). Because there were 12 participants and only two have completed the post-assessment survey, the TA Provider should send an email to the training attendee list, reminding participants that the post-assessment survey is open for one more week.

Active Surveys									
Work plan #	Survey Name	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey	
ABCD-M-16-013-08	Continuum of Care Training - Miami, FL - May 10, 2018	TA-Provider-1	2018-05-24	Click here	10	2	Edit	Delete	

Technology

Surveys can be completed using a mobile device (e.g., tablet or smart phone) or computer. HUD recognizes that not all training participants will have a mobile device or computer or have adequate Wi-Fi or mobile data to complete the survey at the training location. A TA Provider may choose to have a laptop or tablet available at the training location for participants to use to complete the pre- and post-assessments. However, HUD does not require that TA Providers supply a laptop or tablet.

If a training participant does not have a mobile device or laptop to use to complete the surveys at the training location, the TA Provider should inform the participant that the surveys will be available online for two weeks after the training and that the participant can complete the surveys at home after the training has concluded.

HUD Surveys Website

Overview

TA Providers will add basic information to the HUD Surveys website to create pre- and post-assessment survey links, and they will then provide those survey links to training participants. The HUD Surveys website is not connected to LMS, the TA Portal, or HUD Exchange.

TA Provider Administrator Role

Each TA Provider will have an account on the HUD Surveys website, andr will need to identify one individual who will have the “administrator” role for that Provider. The administrator will be responsible for approving account requests from individual users. Each TA Provider must keep track of user accounts. To delete a user account or name another person the administrator, the TA Provider must send an e-mail request to their GTR.

How to Create an Account

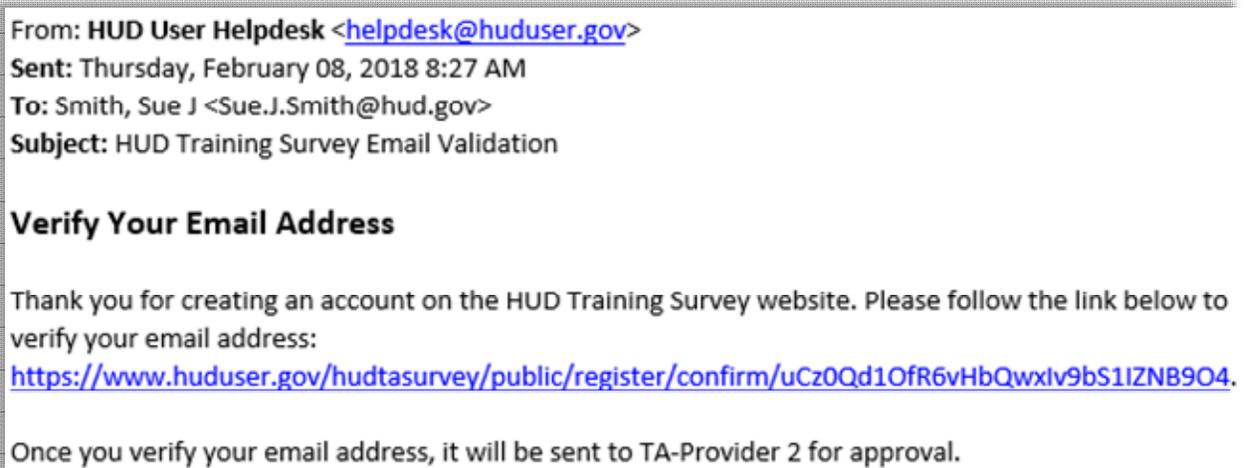
All users who register for an account under a TA Provider firm will have access to the following for that TA Provider:

- Dashboard with information on active surveys
- Archive with information on archived surveys
- Survey creation page

The HUD Surveys site will be pre-populated with a list of all active HUD TA Provider firms. When an individual user registers for an account, the user will select a TA Provider firm from the dropdown list.

The image shows a screenshot of a web registration form titled "Register". The form contains several input fields: "Name", "E-Mail Address", "Password", and "Confirm Password". The "Select TA-Provider" field is a dropdown menu that is currently open, displaying a list of provider names. The list includes: "Select Provider", "Abt Associates", "Advocates for Human Potential", "American Institutes for Research", "APD Urban Planning and Management", "Association of Alaska Housing Authorities", "BCT Partners", "Capital Access Inc.", "Cloudburst Consulting Group", "Collaborative Solutions", "Corporate F.A.C.T.S.", "Corporation for Supportive Housing", "CVR Associates", and "Du & Associates".

After completing the initial registration, the user will receive an email requesting verification of the user's email address. Below is a screenshot of the email sent to the user for verification.

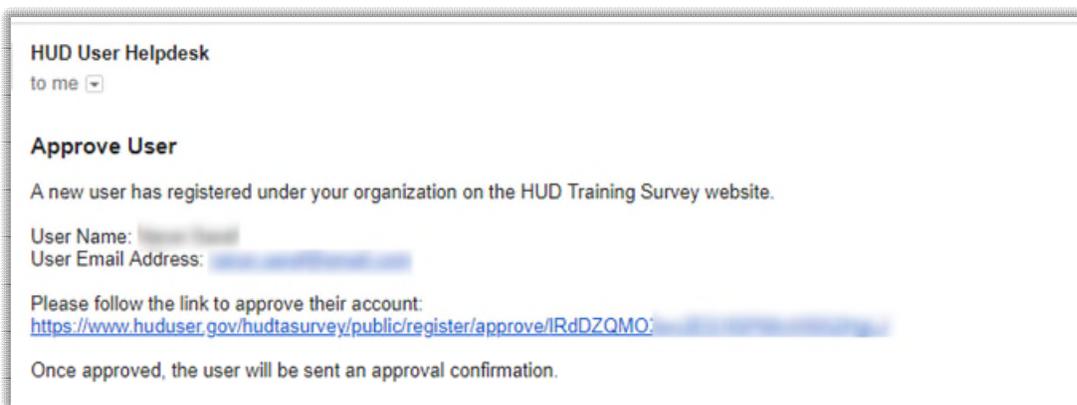


Each unique email address can only be attached to one TA Provider's account on the HUD Surveys website. If a consultant or subcontractor works for two or more TA Provider firms, that consultant/subcontractor can use a single email address to create a survey account for only *one* of the firms. If a consultant or subcontractor wants to create surveys for two or more TA Providers, the consultant/subcontractor would have to create two HUD Surveys accounts using two different email addresses.

A TA Provider should keep in mind that any user whose account is associated with a specific TA Provider on the HUD Surveys website will be able to see survey information for that TA Provider, as well as create surveys for that TA Provider.

Approving a User Account

After a user registers for an account on the HUD Surveys page and completes the email verification step, the TA Provider administrator will receive an email with a link to approve the user request. Below is a screenshot of the email sent to a TA Provider administrator for approval.



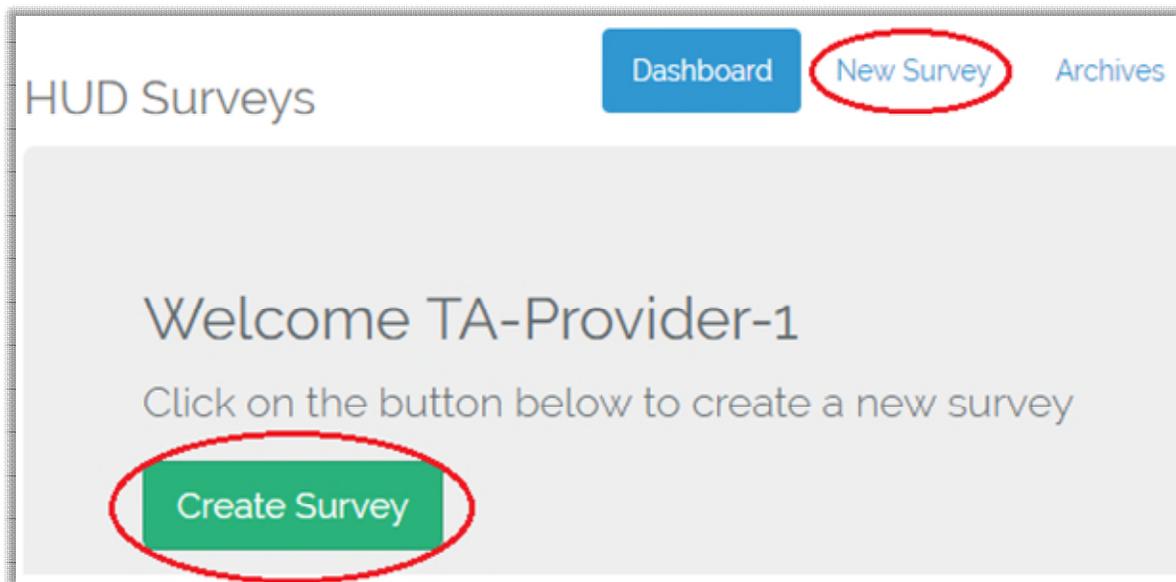
The user will be notified once a TA Provider administrator has approved the user's HUD Surveys account.

Creating a Survey

Once approved by a TA Provider administrator, a user will be able to log in and create surveys for that TA Provider.

"New Survey" Screen

To create pre- and post-assessment surveys for an in-person training, the user can click the "Create Survey" or "New Survey" button.



Once on the "New Survey" page, the user will input the following information:

- **Work Plan #:** Use the same work plan number used in the TA Portal and DRGR.
- **Survey Name:** Use the following naming convention:
 - Training Topic – Training Location (City, State) – Training Date (Month Day, Year)
 - Example: Financial Management – Chicago, IL – December 5, 2017
- **Email Address:** This is the email address that will receive the survey report after it closes for trainings that receive 10 or more survey responses. ***Please note that this feature is currently disabled, and HUD will inform TA Providers when it is ready for implementation.***
- **Instructor Name:** The HUD Surveys website only allows for two instructors to be added to a training survey. If a training has more than two instructors, the TA Provider should identify the two "lead" instructors to be added to the survey.
- **Survey End Date:** The end date should be two weeks after the last day of the training.
- **Learning Objectives:** Add the applicable learning objectives that are in the work plan.

New Survey

Work Plan #:

Survey Name:

Email Address:
(This email will receive survey report after it closes)

Instructor Name-1:

Instructor Name-2:

Survey End Date:

Learning Objectives :

#1	<input type="text" value="Objective (Maximum limit is 255 characters)"/>
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Learning Objectives Language

The learning objectives in a training’s pre- and post-assessment surveys should be identical to the learning objectives in the approved work plan in the TA Portal, with one exception: The surveys should not include the “Training Delivery” label that is included in the TA Portal.

Example
<p>Learning Objective in the TA Portal: 2 CFR Part 200 Training: The TDHE or Tribe will be able to identify applicable exceptions to 2 CFR Part 200.</p> <p>Learning Objective in a Survey: The TDHE or Tribe will be able to identify applicable exceptions to 2 CFR Part 200.</p>

Finding Survey Links

As described in the [How do I administer the pre- and post-assessments?](#) section above, the TA Provider should email the pre- and post-assessment survey links to training participants. To find the survey links, the user should go to the HUD Surveys dashboard and then click on “Click here” in the “Survey Links” column.

Active Surveys									
Work plan #	Survey Name	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey	
ABCD-M-16-013-08	Continuum of Care Training - Miami, FL - May 10, 2018	TA-Provider-1	2018-05-24	Click here	12	4	Edit	Delete	

A new window will appear that shows the links for the pre- and post-assessment surveys. The user can copy each link by clicking the “Copy” button.

Survey Links

Pre Survey Link: <https://www.huduser.gov/hudtasurvey/public/survey/pre/oBYeTbf>
Copy

Post Survey Link: <https://www.huduser.gov/hudtasurvey/public/survey/post/oBYeTbf>
Copy

Editing a Survey

A user can edit a survey from its dashboard and its archive. However, once at least one participant has completed a pre-assessment or post-assessment for a training, the user will no longer be able to edit the survey, except for the survey’s end date.

Active Surveys									
Work plan #	Survey Name	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey	
ABCD-M-16-013-08	Continuum of Care Training - Miami, FL - May 10, 2018	TA-Provider-1	2018-05-24	Click here	0	0	Edit	Delete	

Editing a Survey’s End Date

A user may extend the end date of a survey by navigating to the dashboard and clicking on the name of the survey. From the resulting pop-up window titled “Survey Information,” the use can click on the “Change Date” button to modify the survey end date. Though a user cannot edit a survey after an assessment has been taken, the user can extend the closing date for the survey.

Survey Information

Work plan #: **Prod-test-01**
 Survey Name: **Final test**
 Provider: **Sage Computing Inc.**
 End Date: **2018-03-02** Change Date
 Pre Survey: <https://www.huduser.gov/webapps/public/survey/pre/SmlatqL>
 Post Survey: <https://www.huduser.gov/webapps/public/survey/post/SmlatqL>
 Instructor(s): **Noopura Apte, Sravanthi**
 Objective(s): **Learn PHP, CSS, Error logging**

Close

Deleting a Survey

A user may delete a survey from its dashboard and archive if no surveys have been completed. However, once one survey has been completed, the HUD Surveys website will not allow the user to delete the survey.

Active Surveys									
Work plan #	Survey Name	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey	
ABCD-M-16-013-08	Continuum of Care Training - Miami, FL - May 10, 2018	TA-Provider-1	2018-05-24	Click here	0	0	Edit	Delete	

Survey Results

Though results of individual surveys cannot be shared with TA Providers, HUD may share aggregated survey results with TA Providers for any trainings that have 10 or more responses. HUD is currently working on a process for sharing aggregated survey results and will provide further information to TA Providers in the future.

Appendix I: FAQs

Question: I want to administer surveys at a training, but the training work plan doesn't include learning objectives because the work plan was approved before December 21, 2017. Can I still administer the surveys?

Answer: You can administer surveys, but you must first amend the work plan to include learning objectives and then alert the GTM/POTAC and GTR the reason for the amendment.

Question: I have a work plan that includes three in-person trainings. Two of the trainings were approved in November 2017 and don't include learning objectives; the third training was added to the work plan in February 2018 and includes three learning objectives. Do I need to administer surveys for all three trainings, or just the training that has learning objectives?

Answer: You only need to administer surveys for trainings that have learning objectives in the TA Portal.

Question: The participants at a training will not have access to computers or other electronic devices. Is it okay if I print off paper copies of the surveys and then compile the responses to submit to HUD afterwards?

Answer: You may only administer the surveys using the links created on the HUD Surveys website, and you are not allowed to administer hard copy versions of the surveys.

Question: I want to see all the responses for the survey, not just an aggregated report for trainings that have 10 or more responses. Can I administer my own training survey in addition to the training surveys required by HUD?

Answer: A TA Provider may only administer surveys that have received Paperwork Reduction Act approval, and the only surveys that meet that criteria are the surveys created and administered through the HUD Surveys website.

Question: Do I need to inform HUD when I've completed a survey for an in-person training?

Answer: The TA Provider should note survey administration in its monthly activity reports. Currently there is no text box or button in the TA Portal or DRGR where a TA Provider can indicate that it administered pre- and post-assessment surveys, but HUD is exploring ways to add that functionality to the TA Portal.

Question: Are TA Providers allowed to administer assessments at the start of a training to inform the delivery of the training?

Answer: At the start of a training, TA Providers are allowed to administer assessments designed to test the aptitude, abilities, or knowledge of training participants per guidance issued by the Office of Personnel Management in the [Paperwork Reduction Act Guide](#) (Version 2.0).

Question: I have a work plan that includes two in-person trainings. One of the trainings is in New Orleans and the other training is in Houston. Both trainings have the same three learning objectives. Can I administer the same survey for the two trainings?

Answer: Even though the two trainings address the same learning objectives, two surveys need to be created in the HUD Surveys website. The Post-Assessment Survey gathers data specific to each training location, such as participant satisfaction with the training facility and instructor(s).

Appendix II: What will a training participant see in the surveys?

Paperwork Reduction Act Information

Both the pre- and post-assessment surveys begin with a window that includes Paperwork Reduction Act information for the surveys. This includes information about the purpose of the survey and who will have access to the results of the survey. After reading the PRA information, the training participant will click on the “Continue” button to proceed to the survey.

Pre-Assessment Survey

At the top of the pre-assessment survey, the training participant will see the text the TA Provider entered in the “Survey Name” field (e.g., **Continuum of Care Training – Miami, FL – May 10, 2018**). The TA Provider should follow the formatting guidelines in the [Creating a Survey](#) section of the guidance to ensure the survey includes the training name, location, and date to make the survey easily identifiable.

Training participants are required to add their email address to the pre-assessment survey form to submit it, and they can choose to add their name, organization, title, and number of years working in the field. The pre-assessment survey will list the training’s learning objectives and then ask the training participants to identify their understanding of the material *before* the training. The following screenshot is an example of what a pre-assessment survey will look like.

Continuum of Care Training - Miami, FL - May 10, 2018

OMB Control Number: 2506-0212 (Exp. 06/30/2020)

Pre Survey

What is your name?

Email Address: *

Organization:

Title:

How many years have you worked in the field for which this training was designed? :

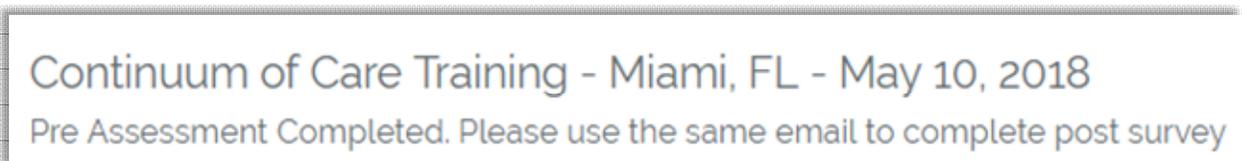
This course's Learning Objectives were:

- The CoC will be able to define systems and programs that most effectively and efficiently address HUD goals and priorities to prevent, reduce, and end incidences of homelessness.

For each of the learning objectives, indicate the extent to which you understood the material BEFORE the training:

Learning Objectives	No Understanding of the Material related to this objective	Some Understanding of the Material related to this objective	Strong Understanding of the Material related to this objective	Full Understanding of the Material related to this objective
The CoC will be able to define systems and programs that most effectively and efficiently address HUD goals and priorities to prevent, reduce, and end incidences of homelessness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

After submitting the pre-assessment survey, the training participant will see the following message.



If a training participant tries to complete the pre-assessment survey a second time using the same email address, the system will not accept the survey submission and will show the following message.

Continuum of Care Training - Miami, FL - May 10, 2018

OMB Control Number: 2506-0212 (Exp. 06/30/2020)

Pre Survey You have already taken this pre-survey using this email address.

Post-Assessment Survey

Like with the pre-assessment, training participants are required to add their email address to the post-assessment survey form to submit it, and they can choose to add their name, organization, title, and number of years working in the field. If a training participant completed a pre-assessment survey for that training and uses the same email for both surveys, the HUD Surveys website will auto-populate the name/organization/title/years information in the post-assessment based on the information in the pre-assessment.

The post-assessment survey will list the training's learning objectives and then ask training participants to identify their understanding of the material *after* the training, the utility of the training, their satisfaction with various elements of the training, ratings on the instructor(s), and general feedback on the training.

After completing the post-assessment survey, the training participant will see the following message.

Continuum of Care Training - Miami, FL - May 10, 2018

Thank you for Completing the survey.

If a training participant tries to complete the post-assessment survey a second time using the same email address, the system will not accept the survey submission and will show the following message.

Continuum of Care Training - Miami, FL - May 10, 2018

OMB Control Number: 2506-0212 (Exp. 06/30/2020)

Post Survey You have already completed this survey