

# Live and Online Training Surveys: TA Providers

Starting in November 2020, the HUD Surveys website will allow TA Providers to create surveys for both Live and Online trainings. Previously, the website only allowed TA Providers to create surveys for in-person and other live events, and there was no functionality to create surveys for events like self-paced online trainings. This guidance document incorporates this new functionality.

For the purposes of the Training Surveys website and this guidance document, we will use the term “Live Training” to include in-person trainings, remote live trainings, and live webinars; and we will use the term “Online Training” to include self-paced online trainings, recorded webinars, and recorded trainings.

This November 2020 **Live and Online Training Surveys** guidance incorporates:

- Original In-Person Training Survey guidance (March 13, 2018)
- Spanish Language (for In-Person) Training Survey guidance (May 13, 2020)

## Contents

Which trainings require surveys? .....	3
<b>Live Trainings</b> .....	3
<b>Online Trainings</b> .....	3
Group TA .....	3
Survey Confidentiality .....	3
Reports.....	3
Surveys Are Voluntary.....	4
Technology.....	4
How do I administer pre- and post-assessments for a Live Training? .....	4
<b>Pre-Assessment Survey</b> .....	4
<b>Post-Assessment Survey</b> .....	5
<b>Post-Assessment Survey Reminder Email</b> .....	5
<b>Pre and Post Survey Links for Conference Events</b> .....	5
How do I administer the survey for an Online Training? .....	5
HUD Surveys website .....	6
<b>Overview</b> .....	6
<b>Creating a Survey</b> .....	6
<b>Survey Links</b> .....	9
<b>Editing a Survey</b> .....	10
<b>Deleting a Survey</b> .....	10
<b>Tracking Survey Responses</b> .....	10
Appendix I: Spanish Survey.....	12
How to create a survey when you intend to offer both English and Spanish survey options .....	12
How to administer pre- and post-assessments that include a Spanish-language option .....	13
Online Training.....	16
When is a Spanish survey option needed? .....	16
Spanish Survey Examples .....	16
Appendix II: FAQs.....	20
General FAQs .....	20
Spanish Survey FAQs .....	21
Appendix III: HUD Surveys: TA Provider Admin Role & Account Creation .....	24
Appendix IV: What will a training participant see in the surveys? .....	26
Paperwork Reduction Act Information .....	26
Live Training Surveys.....	26
Online Training Surveys .....	28

## Which trainings require surveys?

### Live Trainings

TA Providers should administer pre- and post-assessment surveys for all in-person trainings, live remote trainings, and webinars.

If a TA Provider wants to administer surveys for an in-person or remote conference or conference session, the TA Provider should consult with its GTM or POTAC during work plan development (or when editing a work plan) to develop learning objectives. See the [Pre and Post Survey Links for Conference Events](#) section for more information.

Live Training events will generate two survey links, one for the pre-assessment and one for the post-assessment.

### Online Trainings

TA Providers should administer surveys for all self-paced online trainings, recorded webinars, and recorded trainings.

Online Training events will generate one survey link that contains both the pre- and post-assessment.

### 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 or the HUD program wants to administer a survey for a Group TA engagement, the TA 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.

### Survey Confidentiality

To ensure confidentiality, TA Providers may only create and administer surveys using the [HUD Surveys](#) website (<https://huduser.gov/webapps/public/dashboard>). A TA Provider may not administer a survey through its own website or print hard copies of a survey to distribute during the training.

### Reports

Though results of individual training surveys cannot be shared with TA Providers, HUD may share aggregated survey results with TA Providers for trainings that have more than one response. HUD provides reports for Live Trainings with more than one response, with reports sent to the TA Provider (and HUD program contact) email address included on the HUD Surveys website when a TA Provider creates a survey. HUD is working on the reporting capability for the Online Training surveys and will

provide information in the near future on how survey results will be shared with TA Providers and HUD program staff.

### Surveys Are Voluntary

Completion of the surveys is voluntary for all training/event participants.

### Technology

Surveys can be completed using a mobile device (e.g., tablet or smart phone) or computer.

### How do I administer pre- and post-assessments for a Live Training?

A Live Training survey is split into two separate survey links – a pre-assessment survey link and a post-assessment survey link.

### Pre-Assessment Survey

A TA Provider should send the pre-assessment link to the individuals on the event registration list at least two days before the event starts, whether the event is in-person or remote. Please see the [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 Participant,

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

Thank you for your interest in this HUD event.

Sincerely,  
[TA PROVIDER NAME, ORGANIZATION]

*Please note: If this event requires Spanish-language versions of the survey, make sure to include the links to the Spanish surveys in your pre- and post-assessment emails to training participants. Please see [Appendix I: Spanish Survey](#) for more information on creating Spanish-language surveys.*

The TA Provider should send out the pre-assessment survey link to participants again the day before the event. They should also remind participants at the beginning of the training event to complete the pre-assessment.

### Post-Assessment Survey

A TA Provider should provide the post-assessment survey link to participants at the end of the event and ask them to complete the survey as soon as possible. For an in-person event, the TA Provider should encourage participants to complete the post-assessment before leaving the event location. The TA Provider should tell participants that the surveys will be available for two weeks after the event (or until the end date selected by the TA Provider when creating the survey). A 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 the event, the TA Provider should go to the HUD Surveys website to see whether all the attendees at the event submitted a post-assessment survey (compare the “Post Survey Count” on the HUD Surveys website to the total number of participants at the event). If all the post-assessment surveys have not been submitted, the TA Provider should send a reminder email to the attendee list. Template email language is below –

#### Email Template: Post-Assessment Survey Reminder

Dear Participant,

Thank you for your participation in the [EVENT NAME/TOPIC ] event held on [DATE].

**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]

### Pre and Post Survey Links for Conference Events

HUD User will generate links for both pre and post-assessments for a conference event. While it is ideal, when possible, to utilize both the pre and post-assessment links, there are situations where conference attendance (including break-out sessions) is not known ahead of time, reducing the utility of the pre-assessment. While the pre-assessment link is automatically generated by the HUD Surveys website, it does not have to be sent to participants.

### How do I administer the survey for an Online Training?

An Online Training survey contains both the pre-assessment and post-assessment in the same survey link, unlike the Live Training surveys which are split into two links. After creating the link for an Online Training event (self-paced online training, recorded webinar, or recorded training) using the [Creating a Survey](#) instructions, the TA Provider will send the survey link, along with the training product, to the HUD Exchange team responsible for posting online training to HUD's Learning Management System

(LMS) and to the HUD Exchange. The HUD Exchange Team will then post the product to either the LMS or the HUD Exchange and will post the survey link along with the online training product.

TA Providers should refer to the SOP for Writing Work Plans for more information on live and online training and the use of LMS ([https://www.hud.gov/program\\_offices/comm\\_planning/cpdata/guidance/](https://www.hud.gov/program_offices/comm_planning/cpdata/guidance/)).

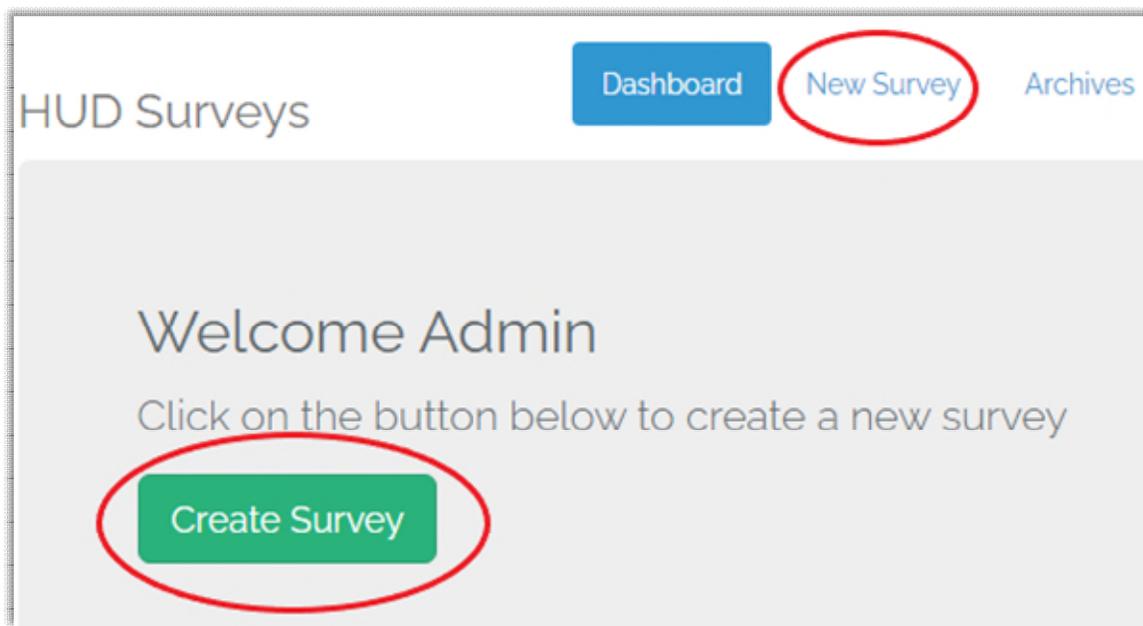
## HUD Surveys website

### Overview

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

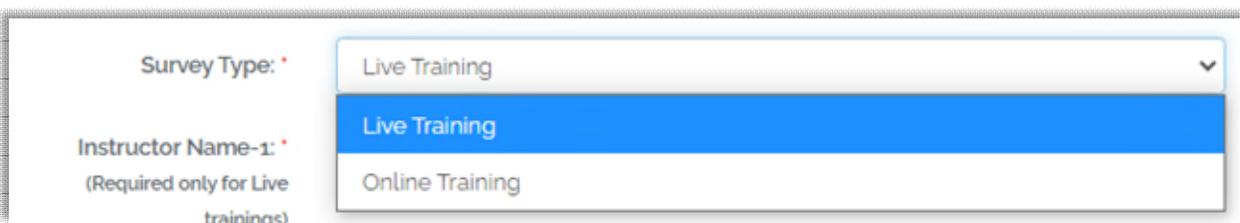
### Creating a Survey

To create a survey for a Live Training or Online Training, click the “Create Survey” or “New Survey” button on the HUD Surveys website.



### Choose a Survey Type

On the “New Survey” page on the HUD User Survey website, select either Live Training or Online Training. The next part of the creation process will be slightly different for Live Training surveys versus Online Training surveys.



*Live Training Survey*

For a Live Training event, add 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:
  - **Survey Name for an in-person training:**
    - [Training Topic] – [Training Location (City, State)] – [Training Date (Month Day, Year)]
    - Financial Management – Chicago, IL – July 22, 2020
  - **Survey Name for a live remote event or webinar:**
    - [Event Topic] – [Live Remote Event] – [Event Date (Month Day, Year)]
    - Examples:
      - Financial Management – Live Remote Training – July 22, 2020
      - CDBG-DR – Live Webinar – August 28, 2020
- **Email Address:** This is the TA Provider email address that will receive the event report after it closes for Live Training events that receive more than one response.
- **Instructor Name:** The HUD Surveys website only allows two instructors to be added to a training survey. If a training has more than two instructors, you 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 event.
- **Learning Objectives:** Add the applicable learning objectives from the work plan. Format: **The [GRANTEE] [VERB] [SPECIFIC PROGRAMMATIC GOAL]**. See the “Training Delivery and Product Development Learning Objectives” guidance document for further guidance. If you want to edit a learning objective for a survey, you must make the corresponding change in the TA Portal to ensure the learning objectives are the same in both systems. This will require you to submit a work plan amendment and receive GTM/POTAC and GTR approval for the revised learning objective in the TA Portal.

Work Plan #: \*

TA Provider: \* Select Provider

Survey Name: \*

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

Survey Type: \* Live Training

Instructor Name-1: \*  
(Required only for Live trainings)

Instructor Name-2:

Survey End Date: \*

Learning Objectives :

#1	Objective (Maximum limit is 255 characters)
----	---

Add Row

Delete Row

Create Survey

Cancel

### Online Training Survey

To create a survey for an Online Training, select Online Training as the Survey Type on the “New Survey” page. When you select Online Training, the Instructor Names and Survey End Date sections will disappear. Add the following information to the “New Survey” page –

- **Work Plan #:** Use the same work plan number used in the TA Portal and DRGR.
- **Survey Name:** Use the following naming convention for the different types of Online Trainings:
  - Training Name – Training Release Date (Self-Paced Online Training)
    - Ex. Financial Mgmt – 2/25/2020 (Self-Paced Online Training)
  - Training Name/Event Topic – Date of Webinar (Recorded Webinar)
    - Ex. DRGR 101 – 1/25/2021 (Recorded Webinar)
  - Training Name/Event Topic – Date of Training (Recorded Training)
    - Ex. CDBG-DR – 2/25/2021 (Recorded Training)
- **Email Address:** This is the email address that will receive the survey report after it closes for events with more than one response. *Please note that this reporting functionality is still in development, and HUD will inform TA Providers when it is ready for implementation.*

- **Learning Objectives:** Add the applicable learning objectives from the work plan. See the Learning Objective section of [Live Training Survey](#) for more information on learning objectives and the section on [Group TA](#).

## Survey Links

To find the survey links, go to the HUD Surveys dashboard, and click on “Click here” in the “Survey Links” column.

Active Surveys									
Work plan #	Survey Name	Survey Type	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey
KHUG-237-YUTA	CDBG-DR - Live Webinar - October 15, 2020	Live Training	Sage Computing Inc.	2021-02-11	<a href="#">Click here</a>	1	0	<a href="#">Edit</a>	<a href="#">Delete</a>

### Live Training Survey Links

For Live Training surveys, a new window will appear that shows the links for the English and Spanish pre- and post-assessment surveys. Copy each link by clicking the “Copy” button.

### Survey Links

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**Pre Survey Links:**

[Copy](#) English: <https://beta.huduser.gov/webapps/public/survey/pre/gXOmN1Z/en>

[Copy](#) Español: <https://beta.huduser.gov/webapps/public/survey/pre/gXOmN1Z/es>

**Post Survey Links:**

[Copy](#) English: <https://beta.huduser.gov/webapps/public/survey/post/gXOmN1Z/en>

[Copy](#) Español: <https://beta.huduser.gov/webapps/public/survey/post/gXOmN1Z/es>

### Online Training Survey

For Online Training surveys, a new window will appear that shows the English and Spanish survey links. As a reminder, the Online Training survey is combined into one link, instead of being separated into pre- and post-assessment links like the Live Training Survey. Copy each link by clicking the “Copy” button.

### Survey Links

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**Survey Links:**

[Copy](#) English: <https://beta.huduser.gov/webapps/public/survey/online/1B5MChM/en>

[Copy](#) Español: <https://beta.huduser.gov/webapps/public/survey/online/1B5MChM/es>

## Editing a Survey

You can edit a survey from the HUD Surveys website dashboard (which lists all open surveys) or the archive (which lists all closed surveys). However, once at least one participant has completed a pre-assessment or post-assessment for a training, you will no longer be able to edit the survey, except for the end date for a Live Training event.

Active Surveys										
Work plan #	Survey Name	Survey Type	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey	
JHDW-619-GAOP	CARES Act 101 - Recorded Webinar	Online Training	Sage Computing Inc.		<a href="#">Click here</a>	0	0	<a href="#">Edit</a>	<a href="#">Delete</a>	
KHUG-237-YUTA	CDBG-DR - Live Webinar - October 15, 2020	Live Training	Sage Computing Inc.	2021-02-11	<a href="#">Click here</a>	0	0	<a href="#">Edit</a>	<a href="#">Delete</a>	

## Deleting a Survey

You may delete a survey from the dashboard or archive if no surveys have been completed. However, once one survey has been completed, the HUD Surveys website will not allow you to delete the survey.

Active Surveys										
Work plan #	Survey Name	Survey Type	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey	
JHDW-619-GAOP	CARES Act 101 - Recorded Webinar	Online Training	Sage Computing Inc.		<a href="#">Click here</a>	0	0	<a href="#">Edit</a>	<a href="#">Delete</a>	
KHUG-237-YUTA	CDBG-DR - Live Webinar - October 15, 2020	Live Training	Sage Computing Inc.	2021-02-11	<a href="#">Click here</a>	0	0	<a href="#">Edit</a>	<a href="#">Delete</a>	

## Tracking Survey Responses

To ensure confidentiality, the HUD Survey website does not provide information on individual survey responses. However, the website does show the number of total survey responses for both Live and Online Training surveys.

### Live Training Surveys

The HUD Surveys website shows the total number of pre-assessment and post-assessment survey responses. You can find this information in the Pre Survey Count and Post Survey Count columns on the dashboard and in the archive. In the screenshot below, the CDBG-DR Live Training survey has one pre-assessment response and zero post-assessment responses.

Active Surveys										
Work plan #	Survey Name	Survey Type	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey	
JHDW-619-GAOP	CARES Act - Live Webinar - September 28, 2020	Online Training	Sage Computing Inc.		<a href="#">Click here</a>	1	1	<a href="#">Edit</a>	<a href="#">Delete</a>	
KHUG-237-YUTA	CDBG-DR - Live Webinar - October 15, 2020	Live Training	Sage Computing Inc.	2021-02-11	<a href="#">Click here</a>	1	0	<a href="#">Edit</a>	<a href="#">Delete</a>	

### Online Training Surveys

Online Training surveys are combined into one link that contains both the pre- and post-assessments, so on the HUD User website, the response count for Online Training surveys will always be the same in the

Pre Survey Count and Post Survey Count columns on the dashboard and in the archive. In the screenshot below, the CARES Act Online Training survey has received one response.

Active Surveys										
Work plan #	Survey Name	Survey Type	Provider	Survey End Date	Survey Links	Pre Survey Count	Post Survey Count	Edit Survey	Delete Survey	
JHDW-619-GAGP	<a href="#">CARES Act - Live Webinar - September 28, 2020</a>	Online Training	Sage Computing Inc.		<a href="#">Click here</a>	1	1	<a href="#">Edit</a>	<a href="#">Delete</a>	
KHUG-237-YUTA	<a href="#">CDBG-DR - Live Webinar - October 15, 2020</a>	Live Training	Sage Computing Inc.	2021-02-11	<a href="#">Click here</a>	1	0	<a href="#">Edit</a>	<a href="#">Delete</a>	

## Appendix I: Spanish Survey

How to create a survey when you intend to offer both English and Spanish survey options  
 When creating a survey for these specific trainings, you will need to add both *English and Spanish* text to the survey name and learning objective fields on the “New Survey” page on the HUD User website. You will need to separate the English and Spanish text with a single vertical bar: **[English text] | [Spanish text]**. The screenshot below shows what this looks like in the “New Survey” page on the HUD User website.

The screenshot shows the 'New Survey' form with the following fields and values:

- Work Plan #: 123-ABD-4567
- TA Provider: Sage Computing Inc.
- Survey Name: Financial Management - Chicago, IL - March 24, 2020 | Gestión financiera - Chicago, IL - 24 Marzo 2020
- Email Address: TAProvider@TA.com  
(This email will receive survey report after it closes)
- Instructor Name-1: Randy Madson
- Instructor Name-2: Lorena Stanley
- Survey End Date: 08/07/2020
- Learning Objectives: #1 Learn the basics of financial management | Aprender los fundamentos de la gestión financiera

Figure 1 "New Survey" page for a training in which you want to give training attendees the option of responding to either an English or a Spanish version of a survey.

Here is an example of what to write for the survey name and learning objective fields for a Financial Management training in which you want to give training attendees the option of responding to either an English or Spanish version of a survey:

- Survey Name Field:
  - Add the English survey name (including location and date), then a vertical bar, then the Spanish survey name (including location and date)
  - Example: Financial Management - Chicago, IL – March 24, 2020 | Gestión financiera - Chicago, IL - 24 Marzo 2020

- Learning Objectives Field:
  - Add the English learning objective, then a vertical bar, then the Spanish learning objective
  - Example: Learn the basics of financial management | Aprender los fundamentos de la gestión financiera

Always put the English text first, as whatever is before the vertical bar will go in the English survey. Do not add more than one vertical bar to these fields, and make sure that you only use a vertical bar for the purposes of separating English and Spanish text.

Important things to remember when creating a survey:

- Do not add the English learning objective as the #1 learning objective and then the Spanish translation of the learning objective as a separate #2 learning objective (see screenshot below). This will cause the same learning objective to be listed twice in both the English and Spanish surveys, once in English and once in Spanish. That is confusing to respondents, and it will compromise the survey data.

Learning Objectives :

#1	Learn the basics of financial management
#2	Aprender los fundamentos de la gestión financiera

Add Row Delete Row

How to administer pre- and post-assessments that include a Spanish-language option

#### *Finding Survey Links*

Once you create a survey, go to the Dashboard, and click on the “Click here” button under “Survey Links.” The window that opens will show four links, two English and two Spanish. Click on the “Copy” button to copy the links you need.

Survey Links

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**Pre Survey Links:**

English: <https://beta.huduser.gov/webapps/public/survey/pre/ic86HWS/en>

Español: <https://beta.huduser.gov/webapps/public/survey/pre/ic86HWS/es>

**Post Survey Links:**

English: <https://beta.huduser.gov/webapps/public/survey/post/ic86HWS/en>

Español: <https://beta.huduser.gov/webapps/public/survey/post/ic86HWS/es>

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## Important

The HUD User Survey website will *always* generate Spanish survey links, even if you did not add a Spanish survey name and learning objective when you created the survey. For a survey in which you only added an English survey name and learning objective, if you open the Spanish survey link, you will see the Spanish survey template with an English survey name and learning objective, since the website cannot translate any text that you add to the “New Survey” page. Since having a combination of English and Spanish in a single survey would be confusing to a respondent, please make sure that you do not provide the Spanish survey links unless you included a Spanish survey name and learning objective when you created the survey. Please open each link before you send it to training attendees, just to make sure everything is correct.

*Pre-Assessment Survey*

Send the English and Spanish pre-assessment links to the individuals on the training registration list at least two days before the training starts. Template email language is provided below:

Email Template: Pre-Assessment Survey Link
<p>Dear Training Participant,</p> <p>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, 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.</p> <p>This pre-assessment survey is available in both English and Spanish. You can find the survey at the following links:</p> <ul style="list-style-type: none"> <li>• English: {link to the English survey}</li> <li>• Spanish: {link to the Spanish survey}</li> </ul> <p>I look forward to seeing you at the training.</p> <p>Sincerely, [TA PROVIDER NAME, ORGANIZATION]</p>

*Post-Assessment Survey*

Provide the English and Spanish post-assessment survey links to training attendees at the end of the training and set aside 10-15 minutes to complete the survey. You should encourage training participants to complete the post-assessment before leaving the training location but also remind them that the survey will be available for two weeks after the training (or until the end date you selected when creating the survey).

One week after the training, go to the HUD Surveys website to see whether all the attendees at the training submitted a response to the post-assessment survey. You can determine this by looking at the "Post Survey Count" for the training and comparing it to the number of training attendees. If some of the post-assessment surveys have not been completed, you should send a reminder email to the training attendee list.

## Email Template: Post-Assessment Survey Link

Dear Training Participants,

Thank you for your participation in the [TRAINING NAME/TOPIC] training held on [DATE/S]. If you haven't already done so, we encourage you to complete the post-assessment survey, which is available in both English and Spanish. You can find the survey at the following links:

- English: {link to the English survey}
- Spanish: {link to the Spanish 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]

### Online Training

Spanish survey links are generated for Online Training surveys the same as for Live Training events. TA Providers should use the guidance in this appendix to determine whether including the Spanish link is needed, in addition to the English link. When a Spanish option is needed, the TA Provider will need to provide both the Spanish and English links in the email to the HUD Exchange Team.

### When is a Spanish survey option needed?

You should offer the option of a Spanish survey for trainings in which you anticipate *at least one of the training participants would likely prefer a Spanish-language survey*. Some possible reasons you would want or need to offer a Spanish survey option include:

- You delivered a training at the same location six months ago, and one of the training participants at that training requested a Spanish-language survey.
- You are delivering a training in an area that you know has a high percentage of Spanish speakers.
- The actual training will be delivered in Spanish.
- When HUD assigned you the training, the GTR or GTM instructed you to provide some materials in Spanish.

### Spanish Survey Examples

Below are examples of a pre-assessment survey for a training in which the TA Provider determined it was necessary to give training attendees the option of both an English and Spanish survey. For this survey, the TA Provider added the following information in the "Create Survey" page on the HUD User website:

- Survey Name: Financial Management - Chicago, IL – March 24, 2020 | Gestión financiera - Chicago, IL - 24 Marzo 2020

- Learning Objective: Learn the basics of financial management | Aprender los fundamentos de la gestión financiera

**English-language survey:**

## Financial Management - Chicago, IL – March 24, 2020

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

### Pre Survey

Email Address: \*

What is your name?

Organization:

Title:

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

This course's Learning Objectives were:

- Learn the basics of financial management

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
Learn the basics of financial management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Spanish-language survey:

## Gestión financiera - Chicago, IL - 24 Marzo 2020

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

### Pre Survey

Dirección de correo electrónico:

Cómo se llama?

Organización:

Título:

¿Cuántos años lleva trabajando en el campo para el cual se diseñó esta capacitación?

Los objetivos de aprendizaje de este curso fueron:

- Aprender los fundamentos de la gestión financiera

Para cada uno de los objetivos de aprendizaje, indique la medida en la que entendió el contenido ANTES de la capacitación

### ANTES DE LA EVALUACIÓN

Objetivos de aprendizaje	Ninguna comprensión del contenido relativo a este objetivo	Cierta comprensión del contenido relativo a este objetivo	Una com contenido objetivo
Aprender los fundamentos de la gestión	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Appendix II: FAQs

## General FAQs

**Question:** Why don't Online Training surveys have instructors?

**Answer:** Online Trainings include self-paced online trainings, recorded webinars, and recorded trainings, and often these events do not have an instructor. For the Online Training events that *do* have an instructor, the survey includes the following question to capture feedback –

Training Element	Very Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Very Satisfied
Relevance of the Course to your Job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Course Materials and Exercises	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instructor(s) <i>If this online course does not have an instructor, please skip this question</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Length of the Course	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Question:** Why don't Online Trainings surveys have end dates?

**Answer:** Unlike a live event that has defined start and end dates, most Online Trainings (self-paced online trainings, recorded webinars, and recorded trainings) exist online indefinitely and can be completed by a participant at any time. For instance, one participant may take a self-paced online training in August 2020, another participant may take the same self-paced online training in January 2021, and a third participant may take the same training in November 2021. Thus, a survey for an Online Training event cannot have a defined end date.

**Question:** Why does the HUD Surveys website only generate one survey link for Online Trainings, instead of two links like for Live Trainings?

**Answer:** Only one link is generated for Online Training events because the link contains both the pre- and post-assessment questions for the training participant to complete. One link, combining both pre- and post-assessment, is sufficient for Online Training surveys where the pre-assessment link is not required to be sent ahead of the training.

**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 approved learning objectives.

**Question:** The participants at a Live Training event 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:** 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:** You should note survey administration in your monthly activity reports. Currently there is no text box or button in the TA Portal or DRGR where you can indicate that you administered pre- and post-assessment surveys, but HUD is exploring ways to add that functionality.

**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 can 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 on 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).

## Spanish Survey FAQs

(See [Appendix I: Spanish Survey](#) for more details.)

**Question:** Will the GTM/GTR or other HUD staff provide translation help for the survey name and learning objectives, or does the TA Provider need to do that on its own?

**Answer:** You should use your staff, consultants, or contractors to translate the survey name and learning objectives into Spanish. If you do not have the capacity to translate the text, you should contact your GTR to discuss how to proceed.

**Question:** Are there Spanish-language versions of the TA survey?

**Answer:** HUD does not yet have the functionality to create Spanish-language versions of the TA survey.

**Question:** I created a survey, including only an English survey name and learning objectives. After I created the survey, I realized that some of the training participants will likely prefer a Spanish-language version of the survey. Is it too late to add Spanish?

**Answer:** As before, you can edit a survey on the HUD User survey website by clicking “Edit” on the website dashboard. However, once at least one participant has completed a pre- or post-assessment for a training, you will no longer be able to edit the survey, except for the survey’s end date. If you create a survey with only an English survey name and learning objective and then decide that you also need to administer a Spanish version of the survey, you will need to edit the survey to include a Spanish survey name and learning objective *before* any of the participants have completed a pre- or post-assessment.

**Question:** I’m holding a training in a predominantly Spanish-speaking area, and the training itself will be delivered in Spanish. In this situation, can I create a survey that includes *only* a Spanish survey name and learning objective, instead of including both Spanish and English translations of that information when I create the survey? I know that all the training participants will be fine with just a Spanish survey option.

**Answer:** For this training, you must still include an English survey name and learning objective in addition to the Spanish survey name and learning objective when creating the survey, even if you do not intend to administer the English-language version of the survey. If you only include a Spanish survey name and learning objective, the training report will not include English translations of that text, making it hard for non-Spanish-speaking individuals to consume the report.

**Question:** How many characters can I put in the learning objective field? I have a learning objective that is very long in English. If I have to add the English text and then the Spanish translation in the same learning objective field on the survey creation page, I don’t know if the field will be long enough.

**Answer:** The character limit for each survey name and learning objective field is 500 characters, counting spaces. This should accommodate your needs, even when adding both English and Spanish.

**Question:** What happens if a training participant tries to respond to both the English and Spanish pre- or post-assessment links?

**Answer:** When submitting a pre- or post-assessment response, a training participant must include an email address, and that email address works as a unique identifier in the HUD User system. HUD User will not allow more than one pre-assessment (or post-assessment) response from one email address, even if one response comes via the English version of the survey and another response comes via the Spanish version of the survey.

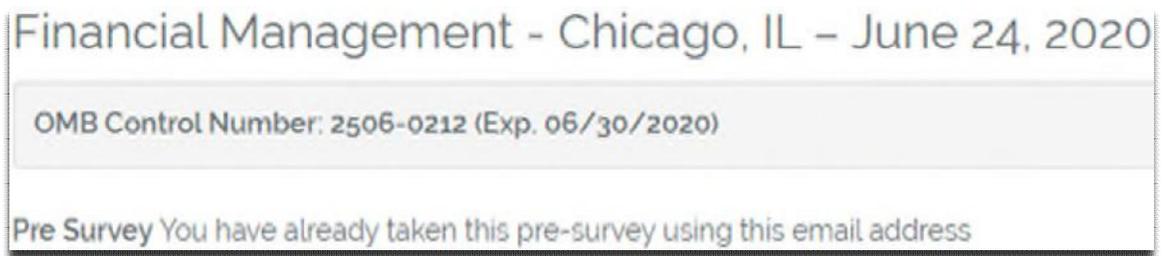
If a training participant uses their email address to respond to the English pre- or post-assessment and then tries to respond to the Spanish version using the same email address, the participant will see the following message:

Gestión financiera - Chicago, IL - 24 Junio 2020

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

Pre Survey Ya ha realizado esta encuesta previa con esta dirección de correo electrónico

If a training participant uses their email address to respond to the Spanish pre- and post-assessment and then tries to respond to the English survey using the same email address, the participant will see the following message:



## Appendix III: HUD Surveys: TA Provider Admin Role & Account Creation

### TA Provider Administrator Role:

Each TA Provider will have an account on the [HUD User Survey](#) website and 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 website 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 screenshot shows a registration form titled "Register". It contains the following fields and a dropdown menu:

- Name:** A text input field.
- E-Mail Address:** A text input field.
- Select TA-Provider:** A dropdown menu with a list of providers. The dropdown is open, showing a scrollable list of names. The top item is "Select Provider" (highlighted in blue), followed by "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".
- Password:** A text input field.
- Confirm Password:** A text input field.

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.

From: HUD User Helpdesk <[helpdesk@huduser.gov](mailto:helpdesk@huduser.gov)>  
Sent: Thursday, February 08, 2018 8:27 AM  
To: Smith, Sue J <[Sue.J.Smith@hud.gov](mailto:Sue.J.Smith@hud.gov)>  
Subject: HUD Training Survey Email Validation

### Verify Your Email Address

Thank you for creating an account on the HUD Training Survey website. Please follow the link below to verify your email address:

<https://www.huduser.gov/hudtasurvey/public/register/confirm/uCz0Qd1OfR6vHbQwxlv9bS1IZNB9O4>.

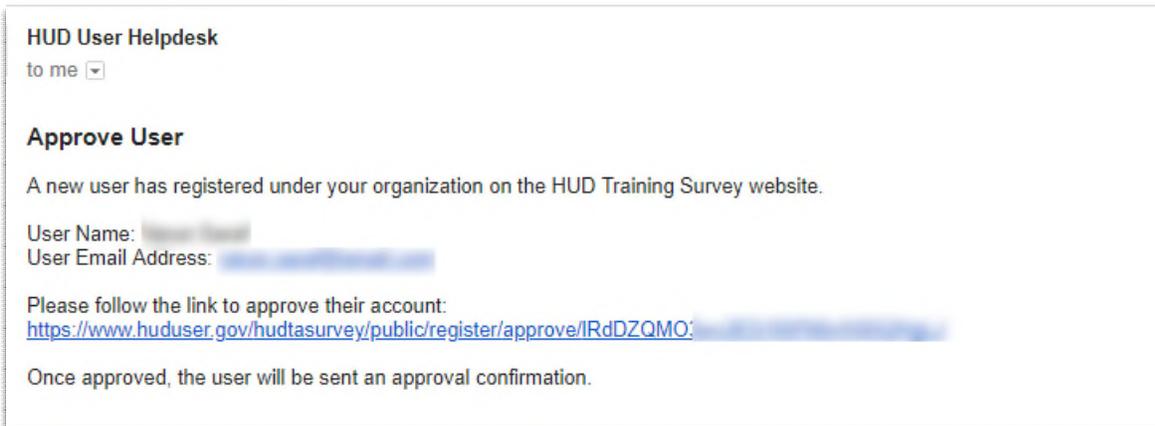
Once you verify your email address, it will be sent to TA-Provider 2 for approval.

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 website 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 website account.

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

### Paperwork Reduction Act Information

Both the Live Training survey (pre- and post-assessments) and the Online Training survey 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.

### Live Training Surveys

#### *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, 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"/>

Submit

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

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

Pre Assessment Completed. Please use the same email to complete post survey

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

### Online Training Surveys

At the top of the survey, the training participant will see the text the TA Provider entered in the "Survey Name" field (e.g., **CARES Act – Live Webinar – September 28, 2020**). The TA Provider should follow the formatting guidelines in the [Creating a Survey](#) section of the guidance to ensure the survey name makes the survey easily identifiable.

Training participants are required to add their email address to the survey to submit it. 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* and *after* the training, the utility of the training, their

satisfaction with various elements of the training, and general feedback on the training. The following screenshot is an example of what an Online Training survey will look like.

CARES Act – Live Webinar – September 28, 2020

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

Online Survey

Email Address: \*

This course's Learning Objectives were:

- The grantee will be able to identify program models being used to assist households in need

**PRE-ASSESSMENT**

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 grantee will be able to identify program models being used to assist households in need	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**POST-ASSESSMENT**

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

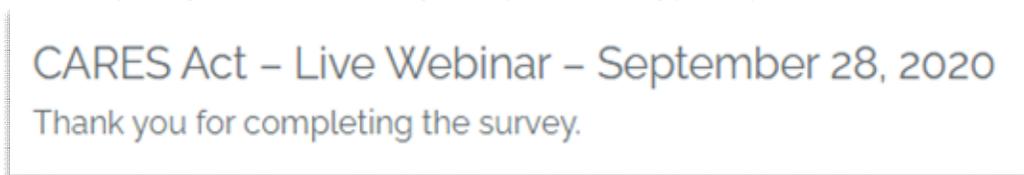
Learning Objectives	No Understanding of the Material related to this objective	Some Understanding of the Material related to this objective	Strong Understanding of the Material related to this objective	Full Understanding of the Material related to this objective
The grantee will be able to identify program models being used to assist households in need	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**SURVEY QUESTION 1: UTILITY OF TRAINING**

I am likely to apply the skills and knowledge I learned from this course in my role within my organization.

Strongly Disagree  
 Disagree  
 Agree  
 Strongly Agree

After completing the Online Training survey, the training participant will see the following message.



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

## CARES Act – Live Webinar – September 28, 2020

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

**Online Survey** You have already completed this survey.