



TA Performance Surveys

July 2021

Effective March 28, 2019, HUD will require TA awardees or their subawardees (henceforth referred to as “TA Providers” for the purposes of this document) to evaluate the effectiveness and performance of technical assistance delivered using HUD-defined outcomes and TA performance surveys. This requirement is pursuant to HUD’s required implementation of 2 CFR 200.301. This requirement applies to work plans that include HUD standardized outcomes, which HUD began requiring on April 20, 2018.

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Purpose of TA Performance Surveys

The purpose of the TA Performance Surveys (“TA surveys”) is to determine the effectiveness of technical assistance in meeting established outcomes. To evaluate effectiveness and outcomes resulting from technical assistance services delivered, the TA surveys collect data from the TA Recipient, HUD staff, and the TA Provider. The data will provide information about TA delivery to ensure quality TA is delivered. The data will also help HUD evaluate, prioritize, and improve the Community Compass program and its management of limited technical assistance resources.

TA surveys will measure whether a HUD TA engagement achieved its expected outcomes from the perspective of the TA Recipient, HUD Staff, and the TA Provider.

How will HUD use the TA Performance Survey data?

TA survey data will help HUD evaluate, prioritize, and improve the Community Compass program and management of limited technical assistance resources. In the future, the data collected will also be used to support risk management and award decisions.

Program authority

- 2 CFR 200.301 requires HUD to establish performance measures for its federal assistance programs.
- 2 CFR 200.328 establishes standards for monitoring and reporting program performance.
- Community Compass Program NOFA & HUD General NOFA
- Cooperative Agreement Provisions

Data collection authority

HUD is allowed to solicit survey data under the authority of the Paperwork Reduction Act, OMB Control Number: 2506-0212 (Exp. 10/31/2023).

Outcomes: The basis for TA Performance Surveys

On April 20, 2018, HUD distributed guidance on TA outcomes, which were defined as the intended results or effects the TA will have on the recipient, community, issue, or topic once the TA is completed. The guidance detailed that an expected outcome should describe what will be different as a result of the TA. Expected outcomes were further defined as the near-term results, effects, and differences from TA completion to no-later-than 90 days post-TA.

Once approved in a work plan, outcomes form the basis for much of the TA survey. Specifically, the outcome descriptions associated with work plans will auto-populate the TA surveys.

Which TA work plans require TA Performance Surveys?

The requirements and procedures in this document apply to all TA awards; however, at this time, HUD requires TA Performance Surveys for the following TA Types:

- TA – Direct
- TA- Other Direct
- TA – On-Call
- TA - Needs Assessment

Training delivery related work plans must have standardized HUD outcomes and outcome descriptions, but they will not require TA surveys. Live and remote training delivery related work plans will continue to utilize training surveys that are based on learning objectives.

Product development related work plans must have standardized HUD outcomes and outcome descriptions, but they will not require TA surveys. At this time a product survey has not been developed but may be developed in the future for HUD staff and TA Providers and would be based on learning objectives.

In rare cases, HUD may determine that a TA survey should not be administered for a particular work plan. TA Providers should consult the HUD program points-of-contact and the GTR with any questions.

When should TA Performance Surveys be initiated?

TA surveys should be initiated after the TA is completed. TA completion is defined as the point when deliverables and task completions occur and no further TA on that deliverable and/or task is expected by the recipient or planned by the TA Provider. The TA completion timing will not be the same for every work plan, nor is there one definition to satisfy all potential scenarios. The TA Provider should initiate a TA survey once the approved TA is completed and there is a reasonable expectation that survey participants will be informed enough to complete the survey with confidence, specifically whether the expected outcome was achieved and the level of customer satisfaction.

Who should receive a TA survey?

For each TA engagement, TA surveys should be sent to three types of respondents: TA Recipients, HUD Staff, and TA Providers.

1. **TA Recipients.** In general, HUD anticipates that one TA survey will be sent to the key contact for the organization that received the TA. It is permissible to send a survey to a second individual within the organization if that is appropriate for the mix of TA activities undertaken.
2. **HUD Staff.** The key HUD staff member responsible for the technical aspects of the work should receive a TA survey. This could be the POTAC, GTM, other HQ program staff, or HUD Field Office staff. The goal of these surveys is to obtain HUD's perspective on the outcomes achieved by the TA and the TA Provider's performance.
3. **TA Providers.** The TA Provider who initiates a survey should have one representative from its firm receive a TA survey. The goal of the survey is to determine the firm's assessment of its own performance.

Communicating with TA Recipient about the TA Performance Survey

It is recommended during the course of the TA that the TA Provider inform the TA recipient that they will receive a satisfaction survey from HUD after the TA engagement has ended. Their response is voluntary. Encourage them to participate.

Initiating and Administering TA Performance Surveys & the HUD User system

The TA Provider initiates and populates the TA surveys from DRGR. After all required information has been entered, the TA Provider sends the survey information to HUD User. HUD User is the designated

HUD system that generates the surveys that were initiated in DRGR. HUD User then sends the survey to the individuals designated as survey recipients and collects their responses. See [Appendix I: FAQs](#) for important critical steps to remember when creating surveys including engagement dates and writing a description of TA provided. For TA surveys, TA Providers and HUD staff will have no need to access HUD User directly. HUD User works behind the scenes and provides updates on survey status to DRGR.

What happens after a TA Performance Survey is sent to HUD User?

When HUD User receives survey details from DRGR, HUD User sends the survey, configured with the information entered by the TA Provider, to the individuals designated as survey recipients. Each survey recipient receives a unique link to their specific survey via email. HUD User sends surveys in batches approximately every hour. At this time, HUD User is not taking further action on any bounce back / undeliverable emails. There is an option in the survey for the respondent to indicate that they are not the correct individual to complete the survey and to provide the contact information for the correct individual. In this scenario, the new respondent will not be reflected in DRGR.

The initial email sent by HUD User to the survey respondents includes basic information about the survey, including the brief description of the TA, engagement dates, and a link to the individual's specific survey to complete.

HUD User tracks the status of each survey by recipient in order to send reminder emails to those who have not completed the survey. The survey closing date is set for two weeks after the survey is sent. HUD User will send two reminders: the first one will be sent one week after the initial notification, and the second reminder will be sent one day before survey closes.

See [Appendix II: TA Performance Surveys – Recipient/HUD Staff/TA Provider](#) and [Appendix III: HUD User Emails: Initial/1st Reminder/2nd Reminder samples](#) for the content of the emails and surveys.

Multiple TA Engagements under One Work Plan

Some work plans contain multiple TA engagements. This is especially true for On-Call TA work plans. For work plans with multiple TA engagements, a TA Provider should send out different surveys for each engagement. The TA Provider would follow the same steps for each engagement. TA Providers should initiate a TA survey for each individual engagement and should not group multiple engagements or TA recipients on the same survey.

Multiple Collaborating TA Providers

When appropriate and directed by HUD, multiple TA Providers may be tasked to coordinate on a particular TA engagement/activity. In some instances, HUD may identify a Lead TA Provider to coordinate, lead, and guide the overall TA effort; in others, the TA Providers may work together without a Lead TA Provider.

TA Providers working on a collaborative TA effort should always include information in the work plan indicating how TA surveys will be initiated, meaning which TA Provider organization should initiate a survey to whom for what aspect of the TA engagement. This will avoid burdening TA recipients (or other TA participants) with overlapping or redundant surveys from multiple TA Providers. TA Providers should only initiate surveys in accordance with the survey strategy outlined in the work plan scope tab.

When a Lead TA Provider is assigned, the Lead TA Provider is responsible for developing a strategy specifying which TA Provider will have responsibility for initiating a survey for which recipients, and which HUD outcomes and outcome descriptions will be related to those tasks. The Lead TA Provider should share this strategy among the assigned TA Providers.

When no Lead TA Provider is assigned, the collaborating TA Providers must coordinate and agree upon which firms will have responsibility for initiating a survey for various recipients or tasks. Since there are many different scenarios, it is best for TA Providers to consult the HUD program office and the GTR to develop a strategy for initiating TA surveys tailored to the circumstances of the engagement.

See [Appendix I: FAQs](#) and [Appendix IV: Scenarios](#) for more information on engagements involving collaborating Providers and a Lead TA Provider.

TA Survey Results

Results of individual surveys will be shared with TA Providers, HUD program staff and TA staff. TA Providers may only initiate surveys using DRGR. A TA Provider may not administer the survey by any means other than DRGR (e.g., a TA Provider may not print and distribute hard copies of the surveys).

Voluntary or Required?

TA survey completion is voluntary for all TA survey participants.

Appendix I: FAQs

Question: I want to administer a TA survey for an engagement. However, since the work plan was approved before April 20, 2018, and no edits have required standardized outcomes, the work plan doesn't include HUD standard outcomes. Can I still administer a TA survey?

Answer: You can administer a TA survey, but you must first amend the work plan to include HUD standard outcomes and qualifying outcome descriptions. The addition of HUD standard outcomes will require GTM/POTAC and GTR approval. The TA Provider may initiate the survey after the work plan amendment is approved and the TA is complete.

Question: Can I alter the text of the outcome description that auto-populated in the survey request? The outcome description does not adequately address the TA provided to the selected recipients.

Answer: Outcome descriptions should not be edited. If the outcome descriptions need to change, the procedure is to amend the work and obtain HUD program office and GTR approval, then initiate the survey request.

Question: My firm is a Lead TA Provider for an engagement. What is the best way to handle TA Surveys?

Answer: TA Providers should start the development of a work plan with the end in mind and carefully, with the HUD program office, draft expected outcomes. Outcomes, as you know, form the basis for the TA survey. At the work plan development phase for the Lead TA Provider's work plan, the Lead TA Provider (in collaboration with other TA Providers and with HUD approval) should develop a strategy to define which TA Providers will initiate the survey for which recipients or tasks. Careful up-front planning is important because survey results will be attributed to the TA Provider that initiates a survey. If changes occur as the TA unfolds, the Lead TA Provider should update the TA survey strategy. The TA survey strategy should be included in the scope of each work plan and shared among the assigned TA Providers.

The key objective for the TA survey strategy is to obtain the needed survey results while not burdening TA recipients (or other TA participants) with overlapping or redundant surveys from multiple TA Providers.

When either the Lead TA Provider or another initiates a survey, the survey should include only those expected outcomes and descriptions that the TA Provider was designated as responsible for in the TA survey strategy.

See [Appendix IV: Scenarios](#) for examples of how the survey process may work when a Lead TA Provider is involved.

Question: The Outcome guidance document defines outcomes as the near-term results, effects, and differences after TA. "Near-term" was defined as a range beginning at TA completion to no later than 90 days post-TA. If the work plan period of performance has expired but the TA Survey has not yet been initiated, how should I bill the time?

Answer: A TA Provider should bill time associated with TA surveys to the work plan management task. However, if the work plan has expired, the costs associated with the TA survey can be billed against the award administration work plan.

Question: Does this guidance on TA Performance Surveys cover all potential scenarios?

Answer: It is critical to think through your TA Performance Survey plan for each work plan and each engagement. The guidance in this document is applicable to most work plan and engagement scenarios, but there will always be exceptions and rare cases that require consultation with your GTR and HUD program staff.

Question: What are the most critical TA Performance Survey elements for TA Providers to remember?

Answer: The following bulleted list outlines the most critical things to remember.

- Document the TA survey plan in the work plan scope tab for TA efforts with multiple coordinating TA Providers.
- Ensure each TA engagement has a separate survey.
- Ensure the TA recipient does not receive redundant surveys from multiple providers for the same TA.
- Identify the correct contacts for the TA recipient.
- Identify the correct contacts for HUD staff.
- Identify the correct contacts for the TA Provider.
- Accurately input the correct email address for each respondent.
- Input quality TA descriptions that mention the TA Provider by name. They should also be concise and clear, and refer to the actual TA performed by the TA Provider. This should not be a cut and paste of the work plan scope. See the next FAQ for TA description examples.
- Input accurate TA dates that are meaningful to the TA recipient. TA dates are not necessarily the POP dates for a work plan but rather the date ranges of TA performed.
- Initiate surveys after the TA is completed and remember, this maybe before the work plan POP end (i.e. On Call).

Question: On the input screen for TA surveys where a “Brief Description of TA Provided” is requested, can I just cut and paste from the work plan scope? If not, can you provide examples of what you are looking for?

Answer: TA Providers should not cut and paste from the scope tab to fill this field. The work plan scope could be a data source, but in most cases it will need to be edited to 1) be clear and concise, 2) cover the specific TA actually provided (services and/or products), and 3) be in the format needed.

The format for the “Brief Description of the TA Provided”: Must start with the TA Provider’s name, refer to the TA recipient, and refer to the specific TA undertaken and key deliverables (products, tools, services, etc.) and accomplishments.

Example 1: Cloudburst provided technical assistance to Puerto Rico that included process mapping for disaster recovery activities. Cloudburst also provided processes and procedures to onboard new staff, translated training videos and materials, developed procedures and tools to manage subrecipients, and supported Puerto Rico in its submission of the Action Plan amendment.

Example 2: Collaborative Solutions conducted HMIS Remote TA for the City of Baltimore CoC that included an assessment; development of a local plan to end homelessness through enhanced data collection and system performance; assistance developing and implementing

strategies to achieve the plan; and support to access and utilize published guidance, tools, and other relevant resources.

Question: I initiated a survey for a TA engagement and it was sent to the identified TA Recipient. After it was sent, I learned the individual who received the TA Recipient survey is not available to respond during the 2-week survey period. The selected individual is only person informed enough to complete the survey with confidence. What are my options?

Answer: The survey may not be available depending on when the TA Recipient tries to access it. If a TA Provider learns that a survey is no longer available to a survey recipient and the survey recipient would like to take the survey, the survey can be 'revived'. The TA Provider should go to same survey and choose the option to add participants (not a new survey). The TA Provider will give the same email address as earlier for TA Recipient. Once the HUD User gets the request, it will reactivate the survey link and send another email to the TA recipient.

Question: Do we survey a TA recipient at the end of an On Call assignment if the TA is being escalated to Direct TA due to the need to address larger or systemic issues?

- When an On Call engagement that is escalated to Direct TA, a TA survey should not be initiated. If the outcome description mentioned an increase in ability or better understanding of something, a reasonable person can conclude if TA is escalated after On-Call, the recipient probably would not respond favorably to the survey in most cases, even if the TA was good. Survey plans can be documented in the Scope tab when there are multiple collaborating TA Providers. If an On Call task is not going to be surveyed for a good reason, document it in the work plan and discuss with your program POC and GTR.

Question: Do we survey TA recipients under an On Call assignment who are non-responsive or identify that they are not ready for TA at this time – but the Outcomes are known to have not been achieved?

- No, we would not want to survey these On Call tasks. Document such cases in the Scope or in the task and report in the Performance Report.

Question: How many survey recipients should there be for each survey type (Recipient, HUD, Provider)?

- The norm would be to send each survey type to 1 person (1 for Recipient, 1 for HUD, 1 for Provider). These persons should be the most knowledgeable about the TA engagement. There may be unique situations that warrant more than one survey going to one of the groups. If needed, discuss any unique situations with the POTAC/GTM and your GTR.

TA Recipient Version

HUD DIRECT TA SURVEY: TA RECIPIENT VERSION

Your organization, [TA RECIPIENT], recently received HUD-funded technical assistance led by [LEAD TA PROVIDER ORGANIZATION]. You may have received assistance from multiple firms on various topics during this engagement, but please think about the assistance coordinated through [LEAD TA PROVIDER ORGANIZATION] as you are completing this survey.

[The following description will be pre-filled for the respondent when they receive the survey.]

TECHNICAL ASSISTANCE ENGAGEMENT DETAILS

LEAD TA PROVIDER ORGANIZATION: _____

PERIOD OF PERFORMANCE: XX/XX/XXXX – XX/XX/XXXX

ADDITIONAL TA PROVIDER(S) INVOLVED IN THIS TA ENGAGEMENT:

TA DESCRIPTION: _____

We would like to ask you a few questions regarding your experience with this specific engagement and your impression of the effectiveness of the TA. Before proceeding, please confirm that you were directly involved in this TA program and feel qualified to provide general feedback on the Direct TA engagement, including questions about how well it met intended outcomes.

- Yes, I was directly involved in this TA program and feel qualified to answer this survey.
- No, I am not the right person to participate in this survey.

IF RESPONSE = NO, I am not the right person to participate in this survey; Please enter the name and email for an individual who had direct experience with the technical assistance provided to your organization and whom would be qualified to answer questions regarding achievement of intended outcomes and general feedback.

The correct respondent is:

_____ [NAME] [EMAIL]

Please complete this survey by [DATE].

If you have any questions while taking this survey, please contact communitycompass@hud.gov.

Note: Please do not use the "Back" or "Forward" buttons on the top of your browser while in the survey. By doing so, the survey will not work properly, and your responses will not be saved.

SURVEY QUESTION 1: SATISFACTION WITH TA PROVIDED

1A. Overall, how satisfied were you with the TA provided?

- Very Satisfied
- Satisfied
- Dissatisfied

- Very Dissatisfied
- I don't know

1B. How satisfied were you with the following TA elements:

Direct TA Elements	Very Dissatisfied	Dissatisfied	Satisfied	Very Satisfied	I don't know
Provider knowledge and skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provider organization and management of the work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provider communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provider follow-through	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length of TA Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of TA Support Provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focus of the TA Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordination among parties, including the TA recipient(s), TA provider(s), and HUD/Field Office staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, please specify: _____ _____ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please provide any additional comments related to your ratings: _____

ANTICIPATED OUTCOMES FOR THIS TA ENGAGEMENT

[This section comes pre-filled for the survey respondent; Questions 2-5 will be asked for each Outcome]

At the start of this engagement, the TA provider(s) and your organization agreed to work toward improving your organization's capacity in the following areas:

[List HUD Outcomes and TA provider-supplied outcome descriptions in table format]

SURVEY QUESTION 2: PROGRESS TOWARD ACHIEVING SELECTED OUTCOME(S)

To what extent has your organization [insert outcome]? See attachment at end for a sample of how this would look for a respondent.

- 100%-Outcome fully achieved
- 80%
- 60%
- 40%
- 20%
- 0%-Outcome was not achieved
- I don't know

SURVEY QUESTION 3: FOLLOW-UP ON FACTORS RELATED TO SUCCESS

[Note: This is a skip pattern question (dependent on score of 20-100% on Question 2)]

3A. What factors contributed to the improvement in the identified area? (select all that apply)

- Guidance or support provided by the TA provider
- Guidance or support provided directly by HUD
- Increase in funding or revenue dedicated to the area
- Increase in number of staff assigned to work in that area
- New organizational structure or new/increased leadership support for the area
- New political leadership
- Improvement in local economy or other external factors
- Other, please specify: _____
- I don't know

3B. How likely do you think it is that your organization will sustain improvement in the identified area over the next year?

- Very Likely
- Likely
- Unlikely
- Very Unlikely
- I don't know/ Not applicable

SURVEY QUESTION 4: FOLLOW-UP ON FACTORS RELATED TO BARRIERS TO SUCCESS

[Note: This is a skip pattern question (dependent on score of 0-80% on Question 2)]

In your opinion, which of the following prevented your organization from fully achieving this outcome? [Select all that apply]

- Assistance from the TA Provider was not adequate (please explain specific concern in the comments section)
- Guidance provided directly by HUD was not adequate (please explain specific concern in the comments section)
- Level of engagement of our organization's staff was not adequate
- Turnover in our organization's staff or leadership
- Insufficient number of available staff at our organization
- Inadequate support from our organization's leadership/management
- Decrease in or insufficient political support
- Decrease in funding or revenue dedicated to this area
- Decline in economy or other external factors
- Other, please specify: _____
- I don't know

Please provide any additional comments related to factors affecting progress toward outcomes: _____

SURVEY QUESTION 5: STATUS OF THE TECHNICAL ASSISTANCE

Is the TA provider continuing to provide support to your organization on this issue as part of a follow-up TA engagement?

- Yes
- No
- I don't know

Please explain your response: _____

SURVEY QUESTION 6: RECOMMENDATIONS FOR IMPROVING HUD'S TA PROGRAM

Please provide any recommendations for ways to improve HUD's technical assistance program: _____

EXAMPLE SURVEY QUESTION 2 – TA RECIPIENT RESPONDENT VIEW

SURVEY QUESTION 2: PROGRESS TOWARD ACHIEVING SELECTED OUTCOME(S)

Outcome	Outcome Description
Improved capacity to design system-wide strategies that address community needs (e.g., designed innovative multi-disciplinary strategies, designed coordinated place-based development to leverage neighborhood impacts)	Provide Technical Assistance and Capacity Building to the Puerto Rico Public Housing Administration and the Puerto Rico Department of Housing to include: preparation of a redevelopment/Repositioning Plan for the 9 priority sites identified by PRPHA and HUD and to provide recommendations for prioritizing modernization and development projects.

To what extent has your organization [improved capacity to design system-wide strategies that address community needs]?

- 100% -Outcome was fully achieved
- 80%
- 60 %
- 40%
- 20%
- 0%-Outcome was not achieved
- I don't know

Outcome	Outcome Description
Improved coordination and alignment with other community or regional plans (e.g., HUD plans aligned with plans of other HUD or federal programs, local and regional government agencies, service providers, or nonprofit organizations)	Provide Technical Assistance and Capacity Building to the Puerto Rico Public Housing Administration and the Puerto Rico Department of Housing to include: recommendations regarding PRPHA's Five (5) Year Plan, including alignment with the strategic plan from regional advisory board and the city's Five (5) Year Plan.

To what extent has your organization [improved coordination and alignment with other community or regional plans]?

- 100%-Outcome was fully achieved
- 80%
- 60%
- 40%
- 20%
- 0%-Outcome was not achieved
- I don't know

HUD DIRECT TA SURVEY: TA PROVIDER

VERSION

Your organization, [TA PROVIDER], recently provided HUD-funded technical assistance to [TA RECIPIENT ORGANIZATION(S)] under Work Plan [WORK PLAN NUMBER].

[The following description will be pre-filled for the respondent when they receive the survey.]

TECHNICAL ASSISTANCE ENGAGEMENT DETAILS

TA RECIPIENT ORGANIZATION(S): _____

PERIOD OF PERFORMANCE: XX/XX/XXXX – XX/XX/XXXX

WORK PLAN #: _____

ADDITIONAL TA PROVIDER(S) INVOLVED IN THIS TA ENGAGEMENT: _____

TA DESCRIPTION: _____

We would like to ask you a few questions regarding your experience with this specific engagement and your impression of the effectiveness of the TA. Before proceeding, please confirm that you were directly involved in this TA program and feel qualified to provide general feedback on the Direct TA engagement, including questions about how well it met intended outcomes.

- Yes, I was directly involved in this TA program and feel qualified to answer this survey.
- No, I am not the right person to participate in this survey.

IF RESPONSE = NO, I am not the right person to participate in this survey; Please enter the name and email for an individual who had direct experience with the technical assistance provided and whom would be qualified to answer questions regarding achievement of intended outcomes and general feedback.

The correct respondent is:

_____ [NAME] _____ [EMAIL]

Please complete this survey by [DATE].

If you have any questions while taking this survey, please contact communitycompass@hud.gov.

Note: Please do not use the "Back" or "Forward" buttons on the top of your browser while in the survey. By doing so, the survey will not work properly, and your responses will not be saved.

SURVEY QUESTION 1: SATISFACTION WITH TA PROVIDED

How satisfied were you with the following TA elements:

Direct TA Elements	Very Dissatisfied	Dissatisfied	Satisfied	Very Satisfied	I don't know
Length of TA Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of TA Support Provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focus of the TA Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordination among parties, including the TA recipient(s), TA provider(s), and HUD/Field Office staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, please specify: _____ _____ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please provide any additional comments related to your ratings: _____

ANTICIPATED OUTCOMES FOR THIS TA ENGAGEMENT

[This section comes pre-filled for the survey respondent; Questions 2-5 will be asked for each Outcome]

At the start of this engagement, your organization and the TA recipient agreed to work toward improving the TA recipient organization's capacity in the following areas:

[List HUD Outcomes and TA provider-supplied outcome descriptions in table format]

SURVEY QUESTION 2: PROGRESS TOWARD ACHIEVING SELECTED OUTCOME(S)

To what extent has the TA recipient organization [insert outcome]? See attachment at end for a sample of how this would look for a respondent.

100%-Outcome fully achieved **80%** **60%** **40%** **20%** **0%**-Outcome was not achieved I don't know

SURVEY QUESTION 3: FOLLOW-UP ON FACTORS RELATED TO SUCCESS

[Note: This is a skip pattern question (dependent on score of 20-100% on Question 2)]

3A. What factors contributed to the improvement in the identified area? (select all that apply)

- Guidance or support provided directly by HUD
- Increase in funding or revenue dedicated to the area
- Increase in number of staff assigned to work in that area
- New organizational structure or new/increased leadership support for the area
- New political leadership
- Improvement in local economy or other external factors
- Other, please specify: _____
- I don't know

3B. How likely do you think it is that the TA recipient organization will sustain improvement in the identified area over the next year?

- Very Likely
- Likely
- Unlikely
- Very Unlikely
- I don't know/ Not applicable

SURVEY QUESTION 4: FOLLOW-UP ON FACTORS RELATED TO BARRIERS TO SUCCESS [Note: This is a skip pattern question (dependent on score of 0-80% on Question 2)]

In your opinion, which of the following prevented you from fully achieving this outcome? [Select all that apply]

- Engagement Scope was not adequate (e.g. period of support, level of support, focus of the engagement)
- Guidance provided directly by HUD was not adequate (please explain specific concern in the comments section)
- HUD response to the TA request was not adequate (e.g., delays in approving TA assignment, workplan or amendments)
- Level of engagement of recipient staff was not adequate
- Turnover in recipient staff or leadership
- Insufficient number of recipient staff available
- Inadequate support from recipient leadership/ management
- Decrease in or insufficient political support
- Decrease in funding or revenue dedicated to this area
- Decline in economy or other external factors
- Other, please specify: _____
- I don't know

Please provide any additional comments related to factors affecting progress toward outcomes: _____

SURVEY QUESTION 5: STATUS OF THE TECHNICAL ASSISTANCE

Are you continuing to provide support on this issue to this TA recipient organization as part of a follow-up TA engagement?

- Yes
- No
- I don't know

Please explain your response: _____

SURVEY QUESTION 6: RECOMMENDATIONS FOR IMPROVING HUD'S TA PROGRAM

Please provide any recommendations for ways to improve HUD's technical assistance program: _____

EXAMPLE SURVEY QUESTION 2 – TA PROVIDER RESPONDENT VIEW

SURVEY QUESTION 2: PROGRESS TOWARD ACHIEVING SELECTED OUTCOME(S)

Outcome	Outcome Description
Improved capacity to design system-wide strategies that address community needs (e.g., designed innovative multi-disciplinary strategies, designed coordinated place-based development to leverage neighborhood impacts)	Provide Technical Assistance and Capacity Building to the Puerto Rico Public Housing Administration and the Puerto Rico Department of Housing to include: preparation of a redevelopment/Repositioning Plan for the 9 priority sites identified by PRPHA and HUD and to provide recommendations for prioritizing modernization and development projects.

To what extent has the TA recipient organization [improved capacity to design system-wide strategies that address community needs]?

- 100% -Outcome was fully achieved
- 80%
- 60 %
- 40%
- 20%
- 0%-Outcome was not achieved
- I don't know

Outcome	Outcome Description
Improved coordination and alignment with other community or regional plans (e.g., HUD plans aligned with plans of other HUD or federal programs, local and regional government agencies, service providers, or nonprofit organizations)	Provide Technical Assistance and Capacity Building to the Puerto Rico Public Housing Administration and the Puerto Rico Department of Housing to include: recommendations regarding PRPHA's Five (5) Year Plan, including alignment with the strategic plan from regional advisory board and the city's Five (5) Year Plan.

To what extent has the TA recipient organization [improved coordination and alignment with other community or regional plans]?

- 100%-Outcome was fully achieved
- 80%
- 60%
- 40%
- 20%
- 0%-Outcome was not achieved
- I don't know

HUD DIRECT TA SURVEY: HUD STAFF VERSION

We would like to ask you a few questions about a Community Compass technical assistance (TA) engagement that was recently delivered in your HUD region. Specifically, [TA RECIPIENT ORGANIZATION(S)] recently received technical assistance from [LEAD TA PROVIDER ORGANIZATION]. [TA RECIPIENT ORGANIZATION(S)] may have received assistance from multiple firms on various topics during this engagement, but please think about the assistance provided by [LEAD TA PROVIDER ORGANIZATION] as you are completing this survey. You may have been the person to request the TA on behalf of [TA RECIPIENT ORGANIZATION(S)], or you may have been informed about the TA as it was tasked and/or involved as the TA was delivered.

[The following description will be pre-filled for the HUD staff respondent when they receive the survey.]

TECHNICAL ASSISTANCE ENGAGEMENT DETAILS

TA RECIPIENT ORGANIZATION(S): _____

LEAD TA PROVIDER ORGANIZATION: _____

ADDITIONAL TA PROVIDER(S) INVOLVED IN THIS TA ENGAGEMENT:

PERIOD OF PERFORMANCE: XX/XX/XXXX – XX/XX/XXXX

WORK PLAN #: _____

TA DESCRIPTION:

Before proceeding, please confirm that you were directly involved in this TA program and feel qualified to provide general feedback on the Direct TA engagement, including questions about how well it met intended outcomes.

- Yes, I was directly involved in this TA program and feel qualified to answer this survey.
 No, I am not the right person to participate in this survey.

IF RESPONSE = NO, I am not the right person to participate in this survey; Please enter the name and email for another HUD staff member who had direct experience with the technical assistance provided and whom would be qualified to answer questions regarding achievement of intended outcomes and to provide general feedback.

The correct respondent is:

[NAME] [EMAIL]

Please complete this survey by [DATE].

If you have any questions while taking this survey, please contact communitycompass@hud.gov.

Note: Please do not use the "Back" or "Forward" buttons on the top of your browser while in the survey. By doing so, the survey will not work properly, and your responses will not be saved.

SURVEY QUESTION 1: SATISFACTION WITH TA PROVIDED

How satisfied were you with the TA provided to the TA Recipient?

- Very Satisfied
- Satisfied
- Dissatisfied
- Very Dissatisfied
- I don't know

How satisfied were you with the following TA elements:

Direct TA Elements	Very Dissatisfied	Dissatisfied	Satisfied	Very Satisfied	I don't know
Provider knowledge and skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provider organization and management of the work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provider communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provider follow-through	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length of TA Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of TA Support Provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focus of the TA Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordination among parties, including the TA recipient(s), TA provider(s), and HUD/Field Office staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, please specify: _____ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please provide any additional comments related to your ratings: _____

ANTICIPATED OUTCOMES FOR THIS TA ENGAGEMENT

[This section comes pre-filled for the survey respondent; Questions 2-5 will be asked for each Outcome]

At the start of this engagement, the TA provider and the TA recipient(s) agreed to work toward improving the TA recipient organization's capacity in the following areas:

[List HUD Outcomes and TA provider-supplied outcome descriptions in table format]

SURVEY QUESTION 2: PROGRESS TOWARD ACHIEVING SELECTED OUTCOME(S)

To what extent has the TA recipient organization [insert outcome]? See attachment at end for a sample of how this would look for a respondent.

100%-Outcome fully achieved 80% 60% 40% 20% 0%-Outcome was not achieved I don't know

SURVEY QUESTION 3: FOLLOW-UP ON FACTORS RELATED TO SUCCESS

[Note: This is a skip pattern question (dependent on score of 20-100% on Question 2)]

3A. What factors contributed to the improvement in the identified area? (select all that apply)

- Guidance or support provided by the TA provider
- Guidance or support provided directly by HUD
- Increase in funding or revenue dedicated to the area
- Increase in number of staff assigned to work in that area
- New organizational structure or new/increased leadership support for the area
- New political leadership
- Improvement in local economy or other external factors
- Other, please specify: _____
- I don't know

3B. How likely do you think it is that the TA recipient organization will sustain improvement in the identified area over the next year?

- Very Likely
- Likely
- Unlikely
- Very Unlikely
- I don't know/ Not applicable

SURVEY QUESTION 4: FOLLOW-UP ON FACTORS RELATED TO BARRIERS TO SUCCESS

[Note: This is a skip pattern question (dependent on score of 0-80% on Question 2)]

In your opinion, which of the following prevented this outcome from being fully achieved? [Select all that apply]

- Assistance from the TA Provider was not adequate (please explain specific concern in the comments section)
- Engagement Scope was not adequate (e.g. period of support, level of support, focus of the engagement)
- Guidance provided directly by HUD was not adequate (please explain specific concern in the comments section)
- HUD response to the TA request was not adequate (e.g., delays in approving TA assignment, work plan or amendments)

- Level of engagement of recipient staff was not adequate
- Turnover in recipient staff or leadership
- Insufficient number of recipient staff available to support this work
- Inadequate support from recipient leadership/ management support to do this work
- Decrease in or insufficient political support
- Decrease in funding or revenue dedicated to this area
- Decline in economy or other external factors
- Other, please specify: _____
- I don't know

Please provide any additional comments related to factors affecting progress toward outcomes: _____

SURVEY QUESTION 5: STATUS OF THE TECHNICAL ASSISTANCE

Is the TA provider continuing to provide support on this issue to the TA recipient organization as part of a follow-up TA engagement?

- Yes
- No
- I don't know

Please explain your response: _____

SURVEY QUESTION 6: RECOMMENDATIONS FOR IMPROVING HUD'S TA PROGRAM

Please provide any recommendations for ways to improve HUD's technical assistance program: _____

EXAMPLE SURVEY QUESTION 2 – HUD STAFF RESPONDENT VIEW

SURVEY QUESTION 2: PROGRESS TOWARD ACHIEVING SELECTED OUTCOME(S)

Outcome	Outcome Description
<p>Improved capacity to design system-wide strategies that address community needs (e.g., designed innovative multi-disciplinary strategies, designed coordinated place-based development to leverage neighborhood impacts)</p>	<p>Provide Technical Assistance and Capacity Building to the Puerto Rico Public Housing Administration and the Puerto Rico Department of Housing to include: preparation of a redevelopment/Repositioning Plan for the 9 priority sites identified by PRPHA and HUD and to provide recommendations for prioritizing modernization and development projects.</p>

To what extent has the TA recipient organization [improved capacity to design system-wide strategies that address community needs]?

- 100% -Outcome was fully achieved
- 80%
- 60 %
- 40%
- 20%
- 0%-Outcome was not achieved
- I don't know

Outcome	Outcome Description
Improved coordination and alignment with other community or regional plans (e.g., HUD plans aligned with plans of other HUD or federal programs, local and regional government agencies, service providers, or nonprofit organizations)	Provide Technical Assistance and Capacity Building to the Puerto Rico Public Housing Administration and the Puerto Rico Department of Housing to include: recommendations regarding PRPHA's Five (5) Year Plan, including alignment with the strategic plan from regional advisory board and the city's Five (5) Year Plan.

To what extent has the TA recipient organization [improved coordination and alignment with other community or regional plans]?

- 100%-Outcome was fully achieved
- 80%
- 60%
- 40%
- 20%
- 0%-Outcome was not achieved
- I don't know

Appendix III: HUD User Emails: Initial/1st Reminder/2nd Reminder samples

Note: The messages below are the same for TA Recipient, HUD Staff, and TA Provider. The only differences would be found in the subject line.

Initial Email Sent to Survey Recipient with Survey Link

From: HUD TA Division <mailto:helpdesk@huduser.gov>
Date: Fri, Apr 23, 2019 at 12:15 AM
Subject: Complete HUD TA Performance Survey for Puerto Rico
To: mailto: John.Galt@email.com

Hello John Galt,

HUD's records indicate that you have been involved in the following HUD Technical Assistance (TA) engagement:

TA Recipients: Puerto Rico
Dates: 08/01/2018 - 3/31/2019
TA Provider: Cloudburst

Description: Cloudburst provided technical assistance to Puerto Rico that included the conduct of process mapping for disaster recovery activities. Cloudburst also provided processes and procedures to on board new staff, translated training videos and materials, developed procedures and tools to manage subrecipients, and supported Puerto Rico in its submission of the Action Plan amendment.

Please provide your feedback on this TA engagement by 05/07/2019 at 23:59 EST. Access the survey by clicking on the link below or copy and paste it into your browser to access it:

https://huduser.gov/webapps/public/directta/get_survey/sWE

Note: This survey link expires on 01/25/2019 at 23:59 PM EST and is unique to you. Please do not forward this email. If you are not the correct person to take this survey, please provide an alternate point of contact via the survey link.

If you have any questions, please email communitycompass@hud.gov.

Thank you,
HUD Technical Assistance Division

Work Plan: ID 7911: Puerto Rico - Direct TA - Puerto Rico - Disaster Recovery TA Phase II

This email account (helpdesk@huduser.gov) does not have the ability to reply to emails. Please DO NOT REPLY to this email address, as all messages sent to this address will not be responded to. Please direct any inquiries to communitycompass@hud.gov. Please keep this email for your records.

1st Reminder Email Sent to Survey Recipient with Survey Link (one week after initial notification)

From: HUD TA Division <mailto:helpdesk@huduser.gov>
Date: Fri, Apr 30, 2019 at 12:15 AM
Subject: Reminder: HUD TA Performance Survey will expire in 7 days
To: mailto: John.Galt@email.com

Hello John Galt,

HUD's records indicate that you have been involved in the following HUD Technical Assistance (TA) engagement:

TA Recipients: Puerto Rico

Dates: 08/01/2018 - 3/31/2019

TA Provider: Cloudburst

Description: Cloudburst provided technical assistance to Puerto Rico that included the conduct of process mapping for disaster recovery activities. Cloudburst also provided processes and procedures to on board new staff, translated training videos and materials, developed procedures and tools to manage subrecipients, and supported Puerto Rico in its submission of the Action Plan amendment.

This survey will expire in **7** days on 05/07/2019 at 23:59 EST. Access the survey by clicking on the link below or copy and paste it into your browser to access it:

https://beta.huduser.gov/webapps/public/directta/get_survey/sWEbPIT/uhrrhneCF

Note: This survey link is unique to you. Please do not forward this email. If you are not the correct person to take this survey, please provide an alternate point of contact via the survey link.

If you have any questions, please email communitycompass@hud.gov.

Thank you,
HUD Technical Assistance Division

Work Plan: ID 7911: Puerto Rico - Direct TA - Puerto Rico - Disaster Recovery TA Phase II

This email account (helpdesk@huduser.gov) does not have the ability to reply to emails. Please DO NOT REPLY to this email address, as all messages sent to this address will not be responded to. Please direct any inquiries to communitycompass@hud.gov. Please keep this email for your records.

2nd Reminder Email Sent to Survey Recipient with Survey Link (one day before survey closes)

Same as 1st reminder with date one day before survey closes.

Appendix IV: Scenarios

Example #1 – Direct TA

Three (3) TA Recipients, A, B, and C, have the same HUD outcome and outcome description.

- The TA for recipient A was completed in January.
- The TA for recipients B and C was completed the following May.

The TA survey for A would be initiated after the TA was completed in January or soon after. New surveys will be needed for B and C. Even though both recipients share the same HUD outcome and description, they should each receive a separate survey. These surveys would be initiated in May or soon after.

Example #2 – Direct TA

Three (3) TA Recipients have the same HUD outcome but different outcome descriptions. The TA for all 3 recipients was completed at approximately the same time.

Three (3) separate surveys will be needed because each engagement / TA Recipient should be surveyed separately and because they have different outcome descriptions. The surveys would be sent at the same time following TA completion.

Example #3 – Direct TA (Lead TA Provider scenario #1)

There are 40 Direct TA recipients and eight TA Providers (including the Lead TA Provider). The TA to be delivered is the same for each of the 40 recipients and there is a standard set of HUD outcomes and outcome descriptions. Each of the TA Providers, including the Lead, has been assigned 5 recipients.

Each TA Provider will be responsible for surveying the TA recipients assigned to them in the strategy outlined in the approved work plans scope section. In total, 40 separate surveys will be issued since each engagement and TA recipient requires a separate survey.

This scenario could also be identified with certain On-Call work plans.

Example #4 – Direct TA (Lead TA Provider scenario #2)

There is one TA recipient for Direct TA that is associated with a critical, high visibility TA need. There are five TA Providers (A, B, C, D, E) involved, including one Lead. There are four tasks associated with the engagement, of which three are programmatic. Each task has its own HUD outcome and description.

Task 1: WP Development, Management & Coordination

Task 2: Assist with Grant Certification Package

Task 3: Assist with Action Plan Development

Task 4: Limited Needs Assessment for Follow-up TA

The Lead TA Provider A is coordinating the overall TA and leading Task 2.

TA Provider B is leading Task 3.

TA Provider C is leading Task 4.

TA Provider D and TA Provider E are important contributors to the effort but are not leads for any of the tasks, nor will the TA recipient associate them as their primary contact for this TA engagement.

As outlined in each TA Provider's approved work plans (scope tab), this scenario would result in three non-redundant surveys being sent to the recipient.

Who initiates surveys to be sent which organizations for what work?

- TA Provider A will initiate the survey for Task 2. Surveys sent to TA recipient, HUD staff, and TA Provider A only.
- TA Provider B will initiate the survey for Task 3. Surveys sent to TA recipient, HUD staff, and TA Provider B only.
- TA Provider C will initiate the survey for Task 4. Surveys sent to TA recipient, HUD staff, and TA Provider C only.
- Having been involved in the TA effort, TA Providers D and E will initiate TA surveys to HUD staff and the TA Provider contact, *not the TA Recipient*.

Who receives the surveys?

- The TA Recipient would receive three different surveys to complete:
 - 1) A survey regarding TA Provider A and task 2
 - 2) A survey regarding TA Provider B and task 3
 - 3) A survey regarding TA Provider C and task 4.
- The HUD staff would receive five different surveys to comment on their satisfaction with each TA Provider firm (A, B, C, D, E).
- Five different TA Provider firms would receive one survey each to comment on their individual performance.

Example #5 – Direct TA (Lead TA Provider scenario #3)

Using a similar scenario as in Example #4. There is one TA recipient for Direct TA that is associated with a critical, high visibility TA need. There are five TA Providers total, including one Lead. There are four tasks associated with the engagement, of which three are programmatic. Each task has its own HUD outcome and description.

Task 1: WP Development, Management & Coordination

Task 2: Assist with Grant Certification Package

Task 3: Assist with Action Plan Development

Task 4: Limited Needs Assessment for Follow-up TA

The Lead TA Provider A is coordinating the overall TA and is involved with each of the three programmatic tasks. TA Providers B, C, D, and E are important contributors to the effort and provide a mix of TA for the three program tasks but are not assigned as task leads.

Because Lead TA Provider A is leading the engagement as well as providing task specific TA for each of the tasks, the recipient views the Lead as the overall responsible organization for the TA and also associates them with each of the tasks, even though other TA Providers are involved. Therefore, the Lead TA Provider will send out the TA survey for all tasks and outcomes and note the supporting TA Providers on the survey initiation request. This would result in one survey going out to the TA recipient.

Who initiates surveys to be sent which organizations for what work?

- TA Provider A will initiate the survey for all tasks. Surveys sent to TA recipient, HUD staff, and TA Provider A only.

- Having been involved in the TA effort, TA Providers B, C, D, and E will initiate TA surveys to HUD staff and the TA Provider contact (NOT THE TA RECIPIENT).

Who receives the surveys?

- The TA Recipient would receive one survey to complete.
- The HUD staff would receive five different surveys to comment on their satisfaction with each TA Provider firm (A, B, C, D, E).
- Five different TA Provider firms would receive one survey each to comment on their individual performance.

Example #6 – On-Call

Ten On-Call TA engagements are expected over the course of a calendar year. HUD outcome and outcome descriptions will not be known until engagements become known and are approved but are not expected to be similar.

Surveys for On-Call TA engagements should be initiated as each engagement is completed. There is no reason to wait to send surveys in batches or wait to the end of the work plan period of performance to initiate surveys. A separate survey should be initiated for each of these On-Call TA engagements.

Example #7 – On-Call

The work plan estimates up to 25 On-Call TA recipients for a new HUD program. The TA needed is relatively narrow and is clearly defined in the scope and tasks associated with the work plan. The HUD outcomes and descriptions are the same for all recipients and were applied to each task when the work plan was developed.

Despite having the same HUD outcome and outcome description, each On-Call TA engagement will need a separate TA survey request because each on-call engagement has different TA start and completion dates. When filling out the survey request, the TA Provider enters start and end dates for the engagement, and these dates should be meaningful to the TA recipient and not simply reflect the duration of the work plan.