

Appendix G: Counseling Agency Service Tracking Data Collection

HUD's Pre-Purchase Homeownership Counseling Demonstration and Impact Evaluation Counseling Agency Service Tracking Data Collection

A. **Questions on Counseling and Education Initiation and Completion** (*Questions apply to both in-person and remote counseling interventions*)

1. Study participant's name
2. Study participant's address
3. Study participant's telephone number
4. Study participant's email
5. Study participant's date of birth
6. Date of study participant referral to counseling agency
7. Was any outreach needed for this participant? When and how?
8. Date first contact with counseling agency
 - o Mode: email, telephone, in-person
9. Date of first education session (workshop education or online education)
 - a. Date of registration or log-in into the online education system
10. Percent of educational curriculum completed (educational workshop/group or online education) (# modules completed/# modules)
11. Date of last education session (workshop education or online education)
12. Total number of educational sessions (online or group education/workshop)
13. Date of first counseling session (telephone or in-person)
14. Date of last counseling session (telephone or in-person)
15. Date completed intervention (study participant would have to complete both components in the specified intervention for this field to be complete)
16. Total number of counseling sessions (telephone or one-on-one counseling)

(The following questions only apply to the remote counseling intervention.)

17. Number of times study participant signs into online education system to complete all pre-purchase modules
18. Pass or fail status for online education tests
19. Overall score of online education module
20. Completion status of online education

B. **Specific questions regarding each counseling or education session**

1. Type of session:
 - a. In-person one-on-one counseling
 - b. Group education/workshop
 - c. Telephone counseling
 - d. On-line chat counseling/education

- e. Other: Specify
2. Date of session
 3. If group education/workshop, how many people participated in the group as a whole?
 4. For in-person one-on-one counseling or group education/workshop, how many household members attended?
 5. How long did the counseling or education session last? (record in minutes)
 6. Topics covered during session (check all that apply)
 - a. Initial home search
 - b. Continuing home purchase process
 - c. Mortgage options
 - d. Mortgage pre-qualification process
 - e. Shopping for a mortgage with lenders
 - f. Real estate lawyers or brokers
 - g. Predatory lending
 - h. Financial assistance
 - i. Budgeting and financial planning
 - j. Affordability of a home purchase
 - k. Understanding credit
 - l. Creating a savings plan
 - m. Preventing mortgage delinquency
 - n. Home maintenance
 - o. Housing rehab
 - p. Energy efficiency
 - q. Credit repair
 - r. Home inspections
 - s. Home insurance
 - t. Property taxes
 - u. Foreclosure
 - v. Other: Specify
 7. Who led this counseling or education session?
 - a. Name
 - b. Position
 - c. Agency

8. Did the counselor recommend any of the following action steps to the client?

Action Step	Yes	No
Prepare a household budget		
Review their credit report		
Take steps to repair their credit		
Begin saving toward amount needed to purchase a home		
Follow a debt management or other type of financial plan		
Begin the housing search process		
Other (please specify) _____		

9. Please explain the outcomes and recommendations of the counseling/education session.