ATTACHMENT A: Mobility Services Tracking Tool

The Paperwork Reduction Act Statement: This collection of information is voluntary and will be used to evaluate the US Department of Housing and Urban Development's Community Choice Demonstration. Public reporting burden for this collection of information is estimated to average 12 minutes per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. The OMB number and expiration date for this collection are OMB #: 2528-0337, Exp: XX/XX/XXXX. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to XX at XXXX@XXX or NNN-NNN-NNNN.

Privacy Act Statement
Authority: Section 502 of the Housing and Urban Development Act of 1970 (Public Law 91-609) (12 U.S.C. §§ 1701z-1; 1701z-2(d) and (g)).
Purpose: Evaluation of the Community Choice Demonstration (CCD).
Routine Use: The information will be used for the purpose set forth above and may be provided to Congress or other Federal, state, and local agencies, when determined necessary.
Disclosure: Records will be used for research and statistical analysis and will not be used to make decisions that affect the rights, benefits, or privileges of specific individuals.
SORN ID: Community Choice Demonstration Evaluation Data Files, HUD/PDR-09

Data fields to be collected on each head of household

- Head of Household Name
- Head of Household Age
- Head of Household Initial Address
- Head of Household Current Address
- Number of Children
- Age of Children
- PHA Name
- Voucher size
- Estimated voucher issuance date
- Actual voucher issuance date
- Date of pre-move appointment
- (Data from pre-move appointment)
    - Barriers to housing search
        - Credit report
        - Previous rental history
        - Previous criminal history
        - Issue with a current property manager
        - Other [open data entry field]
    - Referrals provided
        - Housing search workshop
        - Renter's workshop
        - Banking and budgeting workshop

        - Credit coaching
        - Legal services
        - Other [open data entry field]
    - Initial neighborhoods of interest
        - [Open data entry fields]
    - Initial goal move date
    - Initial date estimated to begin receiving unit referrals
- Has driver's license [y/n]?
- Someone in household has driver's license [y/n]?
- Has access to car that runs [y/n]?
- Date of attendance at housing search workshop
- Date of attendance at renter's workshop
- Date of attendance at banking and budgeting workshop
- Followed up on credit coaching referral [y/n]?
- Followed up on legal services referral [y/n]?
- Followed up on other referrals [y/n]?
- (For each proactive pre-move check-in from the program or contact from the client)
    - Date of check-in
    - Check-in format
        - In-person
        - Phone
        - Text
        - Video call
    - Topic discussed
        - Barriers to Housing Search
            - Credit report
            - Previous rental history
            - Previous criminal history
            - Issue with a current property manager
            - Other [open data entry field]
        - Referrals provided
            - Housing search workshop
            - Renter's workshop
            - Banking and budgeting workshop
            - Credit coaching
            - Legal services
            - Other [open data entry field]
        - Opportunity neighborhoods
            - Neighborhoods of interest
            - Questions about neighborhood amenities and features
            - Questions about schools
            - Other [open data entry field]
        - Applications submitted
            - Address
            - Neighborhood
            - Contract rent
            - Payment standard

                - Security deposit
                - Property owner name
                - Accepted or denied?
                - Reason for denial
                    - Credit report
                    - Previous rental history
                    - Previous criminal history
                    - Other [open data entry field]
            - Family financial assistance [open data entry field]
            - Owner incentives [open data entry field]
            - HCV Issues
                - Recertifications
                - Inspections
                - Other [open data entry field]
            - Other topics [open data entry field]
- (For each unit referred to the client)
    - Address
    - Neighborhood
    - Bedroom size
    - Contract rent
    - Payment standard
    - Security deposit
    - Property owner name
    - Property owner previously rented to PHA?
    - Property owner previously rented as part of mobility program?
    - Date referral provided to client
- (For family financial assistance provided on behalf of the client)
    - Application fee
        - Amount
        - Paid date
        - Paid to
        - Paid for address
    - Transportation stipends
        - Amount
        - Paid date
        - Bus or train
    - Holding Fee
        - Amount
        - Paid date
        - Paid to
        - Paid for address
        - Kept by owner due to family backing out [y/n]?
    - Security Deposit
        - Amount
        - Paid date
        - Paid to

        - Paid for address
    - Utility Arrears
        - Amount
        - Paid date
        - Paid to
    - Administrative or Processing Fees
        - Amount
        - Paid date
        - Paid to
        - Paid for address
    - Move-in Fees
        - Amount
        - Paid date
        - Paid to
        - Paid for address
    - Coach's Discretionary Fund
        - Amount
        - Paid date
        - Paid to
        - Purpose [open data entry field]
- (For owner incentives paid to a property owner associated with the client)
    - Signing Bonus
        - Property owner name
        - Property owner address
        - TIN
        - Amount
        - Paid date
        - Paid to
        - Paid for address
    - Damage Mitigation Fund
        - Property owner name
        - Property owner address
        - TIN
        - Amount
        - Paid date
        - Paid to
        - Paid for address
- (Unit Approval Process)
    - Date request for tenancy approval (RFTA) received
    - Property owner
    - Address
    - Contract rent
    - Bedroom size
    - Payment standard
    - Neighborhood
    - Date RFTA approved

  - Date inspection scheduled for
  - Date second inspection scheduled for
  - Unit pass/fail
  - Lease start date
  - Move-in date
  - Date welcome packet mailed
  - Scheduled date for initial post-move check-in with client
  - Scheduled date for initial post-move check-in with owner
- (For each proactive post-move check-in from the program or contact from the client)
  - Date of check-in
  - Check-in format
    - In-person
    - Phone
    - Text
    - Video call
  - Topics discussed
    - Accessing neighborhood features and amenities
    - School and/or day care enrollment
    - Property owner interactions
    - Upkeep of the home
    - Utility transfers
    - Meeting neighbors
    - Transportation
    - Retention in neighborhood/opportunity area
    - Other topics [open data entry field]
  - Referrals provided
    - Credit coaching
    - Legal services
    - HCV case manager
    - Second move services
    - Other [open data entry field]
  - Scheduled date for follow-up check-in
- (For post-move one month check-in with owner)
  - Date of check-in
  - Check-in format
    - In-person
    - Phone
    - Text
    - Video call
  - Topics discussed
    - HAP payments
    - Incentive payments
    - Client interactions
    - Upkeep of home
    - HCV questions
    - Other [open data entry field]

- Date moved to phase 3: family preparation
- Date moved to phase 4: searching and applications
- Date moved to phase 5: leasing-up
- Date moved to phase 6: post-move
- Date moved to phase 7: successful move
- Date moved to inactive clients caseload
- Date client requested to unenroll in study

Data fields to be collected on property owner recruitment and engagement

- Property Owner Events
    - Property owner advisory group meeting
        - Date of advisory group meeting
        - Time length of advisory group meeting
        - Time spent preparing for advisory group meeting
    - Property owner outreach event
        - Date of outreach event
        - Time length of outreach meeting
        - Time spent preparing for outreach event
- Property Owner Engagement
    - Number of property owners contacted, daily
    - Number of new units listed, daily
    - Time spend engaging with property owners
- For each unit listed by the program
    - Address
    - Neighborhood
    - Contract rent
    - Bedroom size
    - Payment standard
    - Security deposit
    - Property owner name
    - Property owner previously rented to PHA?
    - Property owner previously rented as part of mobility program?