

CCCS of Central Oklahoma State of the Agency Report 2014																		
	Jan-14	Feb	Mar	1st Qtr To Date	Apr	May	Jun	2nd Qtr To Date	Jul	Aug	Sep	3rd Qtr To Date	Oct	Nov	Dec	4th Qtr To Date	Year to Date	%
<b>FINANCIAL COUNSELING</b>																		
<b>Client Appointment Types</b>																		
First Appointment	112	98	74	284	68	66	103	237	98	111	86	295	105	66	69	240	1,056	55%
Foreclosure Prevention	7	10	17	34	6	7	5	18	8	10	7	25	6	4	1	11	88	5%
Review (DMP)	16	14	7	37	4	3	12	19	11	11	16	38	13	11	16	40	134	7%
Housing	8	5	3	16	18	11	13	42	12	11	14	37	11	10	5	26	121	6%
Second Appointment	19	17	15	51	13	21	3	37	24	30	26	80	26	15	12	53	221	12%
Workshop	-	4	-	4	3	7	-	10	-	-	-	-	-	-	-	-	14	1%
Credit Bureau Report Review	11	4	9	24	4	6	10	20	9	9	7	25	3	12	7	22	91	5%
Housing Review	-	-	1	1	-	-	-	-	-	-	-	-	-	-	-	-	1	0%
Reverse Mortgage	12	9	12	33	21	14	8	43	11	18	18	47	19	16	12	47	170	9%
Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Military OneSource	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Exit Interview	3	1	-	4	1	1	-	2	1	-	1	2	2	1	-	3	11	1%
<b>Totals</b>	<b>188</b>	<b>162</b>	<b>138</b>	<b>488</b>	<b>138</b>	<b>136</b>	<b>154</b>	<b>428</b>	<b>174</b>	<b>200</b>	<b>175</b>	<b>549</b>	<b>185</b>	<b>135</b>	<b>122</b>	<b>442</b>	<b>1,907</b>	
<b>Client Appointment Channel Mix</b>																		
Face To Face	107	89	66	262	75	57	88	220	93	103	100	296	102	79	60	241	1,019	53%
Phone	51	41	47	139	46	43	41	130	45	48	44	137	40	39	37	116	522	27%
Internet	18	24	20	62	14	24	14	52	26	36	17	79	32	13	17	62	255	13%
Email	11	8	5	24	1	6	10	17	8	10	13	31	9	4	6	19	91	5%
Mail	1	-	-	1	2	6	1	9	-	3	1	4	2	-	2	4	18	1%
<b>Totals</b>	<b>188</b>	<b>162</b>	<b>138</b>	<b>488</b>	<b>138</b>	<b>136</b>	<b>154</b>	<b>428</b>	<b>172</b>	<b>200</b>	<b>175</b>	<b>547</b>	<b>185</b>	<b>135</b>	<b>122</b>	<b>442</b>	<b>1,905</b>	
<b>First Appt Cause of Financial Problems</b>																		
Death of Family Member	2	2	-	4	5	-	5	10	1	1	1	3	-	1	1	2	19	2%
Disability/Accident	1	3	-	4	1	2	1	4	2	7	4	13	3	1	1	5	26	2%
Gambling	1	-	-	1	1	1	2	4	2	2	-	4	2	-	2	4	13	1%
Housing Counseling	9	6	3	18	5	9	1	15	1	4	4	9	3	2	1	6	48	5%
Divorce/Separation	11	11	5	27	3	4	8	15	3	6	9	18	9	4	3	16	76	7%
Unemployment	11	4	5	20	1	3	4	8	10	7	6	23	5	5	4	14	65	6%
Poor Money Mgmt/Excessive Spending	25	30	23	78	18	24	37	79	38	36	24	98	34	23	30	87	342	32%
Reduced Income	43	32	31	106	22	16	28	66	28	28	25	81	31	24	20	75	328	31%
Medical Expense	8	8	7	23	12	6	16	34	11	19	11	41	17	5	5	27	125	12%
Tornadoes in Oklahoma	-	2	-	2	-	1	-	1	1	1	-	2	1	1	1	3	8	1%
Legal (Not debt-related)	1	-	-	1	-	-	1	1	1	-	2	3	-	-	-	-	5	0%
<b>Totals</b>	<b>112</b>	<b>98</b>	<b>74</b>	<b>284</b>	<b>68</b>	<b>66</b>	<b>103</b>	<b>237</b>	<b>98</b>	<b>111</b>	<b>86</b>	<b>295</b>	<b>105</b>	<b>66</b>	<b>68</b>	<b>239</b>	<b>1,055</b>	
<b>Appointment Results (all appt. types)</b>																		
Client Can Handle (CCH)	26	25	15	66	23	25	20	68	27	33	27	87	28	25	15	68	289	15%
DMP Counseling (DMP)	51	42	29	122	31	43	37	111	54	64	43	161	60	30	39	129	523	27%
Financial Counseling (FCO)	95	83	79	257	65	52	80	197	87	84	99	270	79	62	47	188	912	48%
HECM (Reverse Mortgage Counseling)										3			13	11	12	36	36	2%
Incomplete Session (IS)	4	2	7	13	3	2	5	10	0	6	2	8	0	6	4	10	41	2%
Referred for Legal Advice (RLA)	9	3	4	16	4	3	5	12	3	5	1	9	4	1	1	6	43	2%
Referred To Other Agency/Org. (ROA)	3	3	3	9	7	1	4	12	1	2	0	3	1	0	4	5	29	2%
Workshop (WSC)	0	4	-	4	3	7	0	10	0	0	0	-	0	0	0	-	14	1%
Other	0	-	1	1	2	3	3	8	0	3	3	6	0	0	0	-	15	1%
<b>Totals</b>	<b>188</b>	<b>162</b>	<b>138</b>	<b>488</b>	<b>138</b>	<b>136</b>	<b>154</b>	<b>428</b>	<b>172</b>	<b>200</b>	<b>175</b>	<b>544</b>	<b>185</b>	<b>135</b>	<b>122</b>	<b>442</b>	<b>1,902</b>	
<b>Call Center Inbound Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>
Client Care (1300 queue)	569	589	692	1,850	645	635	659	1,939	582	529	607	1,718	560	529	501	1,590	7,097	50%
First Time Callers (1400 queue)	532	577	523	1,632	543	497	586	1,626	541	459	552	1,552	526	424	452	1,402	6,212	44%
Housing Calls (1500 queue)	66	51	100	217	79	54	80	213	70	79	61	210	66	48	45	159	799	6%
Military OneSource (3100 queue)	6	13	7	26	20	8	12	40	13	16	28	57	6	4	10	20	143	1%
<b>Totals</b>	<b>1,173</b>	<b>1,230</b>	<b>1,322</b>	<b>3,725</b>	<b>1,287</b>	<b>1,194</b>	<b>1,337</b>	<b>3,818</b>	<b>1,206</b>	<b>1,083</b>	<b>1,248</b>	<b>3,537</b>	<b>1,158</b>	<b>1,005</b>	<b>1,008</b>	<b>3,171</b>	<b>14,251</b>	

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<b>EDUCATION</b>																		
<b># of Participants in Classes/Workshops</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>
Financial Education	2	48	36	86	105	45	215	365	44	211	86	341	59	77	38	174	966	-
Fiscally Fit Bootcamp	103	203	65	371	66	33	173	272	15	147	149	311	-	43	-	43	997	-
Housing	32	83	34	149	62	27	129	218	20	172	71	263	20	40	28	88	718	-
<b>Totals</b>	<b>137</b>	<b>334</b>	<b>135</b>	<b>606</b>	<b>233</b>	<b>105</b>	<b>517</b>	<b>855</b>	<b>79</b>	<b>530</b>	<b>306</b>	<b>915</b>	<b>79</b>	<b>160</b>	<b>66</b>	<b>305</b>	<b>2,681</b>	<b>-</b>
<b>DEBT MANAGEMENT PLANS</b>																		
<b>Beginning DMP Clients</b>	<b>669</b>	<b>660</b>	<b>654</b>		<b>664</b>	<b>619</b>	<b>599</b>	<b>664</b>	<b>581</b>	<b>562</b>	<b>546</b>		<b>568</b>	<b>548</b>	<b>547</b>			
<b>New DMP Accounts Opened</b>	<b>14</b>	<b>20</b>	<b>11</b>		<b>45</b>	<b>22</b>	<b>18</b>	<b>16</b>	<b>56</b>	<b>14</b>	<b>23</b>	<b>58</b>	<b>23</b>	<b>27</b>	<b>11</b>	<b>61</b>	<b>220</b>	
<b>Less Discontinued DMPs</b>																		
Non-Payment (NP)	6	8	-	14	16	11	12	39	9	8	-	17	18	10	8	36	106	30%
Self Administration (SA)	4	3	-	7	12	8	4	24	3	7	1	11	6	2	2	10	52	15%
Successful Completions (SC)	13	15	1	29	37	18	16	71	19	22	-	41	19	15	8	42	183	52%
Deceased (DC)	-	-	-	-	1	-	-	1	1	-	-	1	-	-	-	-	2	1%
Bankruptcy (BK)	-	-	-	-	1	1	2	4	1	-	-	1	-	1	-	1	6	2%
<b>Total DMP Accounts Closed</b>	<b>23</b>	<b>26</b>	<b>1</b>	<b>50</b>	<b>67</b>	<b>38</b>	<b>34</b>	<b>139</b>	<b>33</b>	<b>37</b>	<b>1</b>	<b>71</b>	<b>43</b>	<b>28</b>	<b>18</b>	<b>89</b>	<b>349</b>	
<b>Net DMP Gain (Loss)</b>	<b>(9)</b>	<b>(6)</b>	<b>10</b>	<b>(5)</b>	<b>(45)</b>	<b>(20)</b>	<b>(18)</b>	<b>(83)</b>	<b>(19)</b>	<b>(16)</b>	<b>22</b>	<b>(13)</b>	<b>(20)</b>	<b>(1)</b>	<b>(7)</b>	<b>(28)</b>	<b>(129)</b>	
<b>Month-end Total DMP Clients</b>	<b>660</b>	<b>654</b>	<b>664</b>		<b>619</b>	<b>599</b>	<b>581</b>		<b>562</b>	<b>546</b>	<b>568</b>		<b>548</b>	<b>547</b>	<b>540</b>		<b>540</b>	
<b>BANKRUPTCY SERVICES</b>																		
<b>Bankruptcy Certificates Issued</b>																		
Pre-Filing Certificates	55	75	85	215	101	61	66	228	70	44	73	187	36	57	33	126	756	56%
Debt Education Certificates	58	42	35	135	61	53	43	157	59	46	59	164	49	43	40	132	588	44%
<b>Totals</b>	<b>113</b>	<b>117</b>	<b>120</b>	<b>350</b>	<b>162</b>	<b>114</b>	<b>109</b>	<b>385</b>	<b>129</b>	<b>90</b>	<b>132</b>	<b>351</b>	<b>85</b>	<b>100</b>	<b>73</b>	<b>258</b>	<b>1,344</b>	
<b>Bankruptcy Counseling Appointments</b>																		
Internet Counseling Sessions not in DMS	75	83	78	236	123	89	82	294	102	78	107	287	67	79	49	195	1,012	
Bankruptcy Appointments & Workshops	63	57	55	175	44	42	42	128	43	29	32	104	18	20	26	64	471	
<b>Totals</b>	<b>138</b>	<b>140</b>	<b>133</b>	<b>411</b>	<b>167</b>	<b>131</b>	<b>124</b>	<b>422</b>	<b>145</b>	<b>107</b>	<b>139</b>	<b>391</b>	<b>85</b>	<b>99</b>	<b>75</b>	<b>259</b>	<b>1,483</b>	
<b>Primary Cause To Seek BK Counsel; DMS Stats Only -- No Internet</b>																		
Death of Family Member	1	2	2	5	2	4	4	10	2	-	-	2	-	2	1	3	20	4%
Disability/Accident	4	-	-	4	-	-	-	-	-	2	-	2	-	-	-	-	6	1%
Divorce/Separation	-	5	2	7	7	2	3	12	2	10	3	15	1	4	3	8	42	9%
Gambling	-	-	-	-	-	1	3	4	-	2	-	2	1	-	-	1	7	1%
Medical Expense	11	23	15	49	12	10	8	30	7	2	15	24	3	4	12	19	122	26%
Poor Money Mgmt/Excess Spending	19	15	12	46	15	17	15	47	19	7	8	34	9	3	8	20	147	31%
Reduced Income	18	6	13	37	4	7	4	15	7	1	3	11	3	4	2	9	72	15%
Unemployment	10	5	9	24	2	1	3	6	3	3	2	8	1	1	-	2	40	8%
Other / Unknown	-	1	2	3	2	-	2	4	3	2	1	6	-	2	-	2	15	3%
<b>Totals</b>	<b>63</b>	<b>57</b>	<b>55</b>	<b>175</b>	<b>44</b>	<b>42</b>	<b>42</b>	<b>128</b>	<b>43</b>	<b>29</b>	<b>32</b>	<b>104</b>	<b>18</b>	<b>20</b>	<b>26</b>	<b>64</b>	<b>471</b>	
<b>Bankruptcy Counseling Calls</b>																		
<b>BK Calls Into Call Center (2300 queue)</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b># Calls</b>	<b>of Calls</b>	<b>of Calls</b>	<b># of Calls</b>	<b># of Calls</b>	<b># Calls</b>	
	281	258	329	868	319	236	270	825	246	183	194	623	184	211	158	553	2,869	
<b>WEBSITE TRACKING</b>																		
Total Number of Website Visits	2,833	2,354	2,686	7,873	2,444	2,501	2,480	7,425	2,385	2,378	2,269	7,032	2,198	2,144	2,003	6,345	28,675	
Unique Visitors	2,123	1,762	1,988	5,873	1,792	1,711	1,792	5,295	1,721	1,763	1,656	5,140	1,686	1,552	1,536	4,774	21,082	
Number of Pages Viewed	7,272	6,178	6,851	20,301	6,681	6,917	6,519	20,117	6,602	5,950	6,131	18,683	5,799	5,598	5,155	16,552	75,653	
Duration	2:40	2:34	2:37	2:37	2:39	2:58	2:22	2:39	2:41	2:31	2:43	2:38	2:35	2:29	2:16	2:26	2:35	