

Guide for Starting and Running a Home Repairs Program

Background — Harpswell Aging at Home (HAH), founded in fall 2015, is a community-led organization committed to fostering initiatives that help people thrive while aging at home. One of these initiatives is its home repairs program, dedicated to helping low-income Harpswell residents, 60 and older, live safer, warmer, and drier in their homes as they age. In its nearly 4 years of existence, the HAH home repairs program has made typically 25 to 35 individual modifications (“jobs”) to each of the homes of more than 80 seniors with insufficient income to pay for having this needed work done.

The average of about \$1,500 funding for materials and occasional contracted work for each of these homes has come from Habitat for Humanity/ 7 Rivers Maine, Community Development Block Grants (CDBG) from Cumberland County, grants from local charitable organizations, the Town of Harpswell, and a number of individual donors.

The HAH home repairs team started with 6 volunteers and grew in about 2 years to a steady size of 20 to 25 volunteers — most over 70 years old and retired from a wide variety of careers; most having considerable home repairs skills; and all with big hearts and a strong desire to make their communities a better place to live by helping seniors age more safely, warmly, and dryly in their homes. The team has gelled very nicely and is genuinely rewarding and fun to work with.

Overview/Purpose of this Guide — The Maine Council on Aging and many Habitat for Humanity affiliates throughout Maine are setting up a statewide network of home repairs teams to support seniors who want to age in their homes but don’t have the ability to do repairs work themselves or the income to pay for modifications needed to make their homes safer, warmer, and drier. The purpose of this guide is to provide a useful tool for communities that desire to set up their own home repairs program.

This guide identifies and briefly explains the essential elements of a home repairs program. In addition, because every program needs some form of administrative structure to ensure a common understanding of the program's goals, the processes to be used to achieve those goals, and individual responsibilities, this guide provides numerous samples of the types of administrative documents and forms used by the HAH home repairs program; these sample documents and forms can be easily modified for use in other communities to create their own unique structure for their new home repairs programs.

Essential Elements of a Home Repairs Program — The essential elements of a home repairs program for low-income seniors are listed below, along with a brief explanation of each:

- 1. A leader** who is willing to take on the responsibility for setting up, organizing, and running the program, which takes considerable time, energy, and persistence — The leader doesn't need more than a basic level of understanding and skills in home repairs. He/she does, however, need the ability to organize and delegate the activities of others and the ability to communicate clearly with others.
- 2. Clerical support** for the leader, at whatever level is needed; for example, if the leader is not proficient with or inclined toward use of computers, someone who can create, revise, store, and send out documents and forms to those who need them.
- 3. A clearly written set of goals, expectations, and processes, including forms** for key activities — For the HAH home repairs program, these are laid out in our "Step-by-Step Process for HAH/Habitat Home Repairs" document (see pages 9 through 27 below). As noted in that document, "Bolded text in this document summarizes HAH's and Habitat's philosophy and approach regarding our interactions with participants, other organizations, and each other. This text is used

as training” material for new volunteers, who are expected to carefully read and follow the bolded text.” For other home repairs programs, this type of guidance could be in one or more separate documents.

For a broader understanding and guidance, the HAH home repairs program process, along with the documents and forms used in this process, is as follows; naturally, this process will need to be customized to fit the unique circumstances and needs of each community forming a home repairs program:

- The applicant (homeowner) calls the Harpswell Town Office to apply for our home repairs assistance (this partnership with the Town is described in “Community Partners” below). The Town receptionist screens the caller to ensure he/she meets the eligibility criteria (listed on the application form; see pages 28 through 30 below). If the caller meets the criteria, the receptionist fills out the rest of the form and sends it to Habitat for project number assignment and to the HAH lead project coordinator (HAH’s name for the home repairs team leader) for action.
- The HAH lead project coordinator (team leader) assigns one of the project coordinators (described in “Volunteers” below) to the project and tentatively schedules the date for the initial visit/in-home needs assessment to the applicant’s home.
- The project coordinator contacts the applicant, using the “Intake Call Form” (see pages 31 through 33 below), and schedules the initial visit to the applicant’s home.
- At the beginning of the initial visit, the project coordinator asks the applicant to sign the “Homeowner Release and Waiver Form” (see pages 34 and 35 below).

- Then the project coordinator and the materials list developer (described in “Volunteers” below) conduct a thorough in-home needs assessment, using the “Initial Visit Assessment Checklist” (see pages 36 through 39 below). This needs assessment explores how the applicant uses his/her home and identifies additional physical improvements, in addition to those initially requested by the applicant, that would allow the applicant to live in the home safer, drier, and warmer. (The types of work the HAH team does, and what it doesn’t do, are described in an addendum to the “Step-by-Step Process for HAH/Habitat Home Repairs”; see pages 9 through 27 below. Early on in the formation of a new home repairs program, the scope and types of work the team will and won’t do needs to be determined, and the checklist needs to be revised accordingly.) During and/or after the needs assessment, the applicant decides which of these newly identified improvements he/she would like to have done.
- Following the initial visit, the materials list developer lists each job and the materials needed for each job using the “Home Assessment and Materials List” form (see pages 40 and 41 below). The materials list developer also designates which materials are to be ordered from Hancock Lumber for delivery.
- When the lead project coordinator schedules the first workday for the project, the project coordinator orders from Hancock Lumber the deliverable materials to arrive two days before that date, and arranges with the materials purchasers on the team (see “Volunteers” below) to purchase the remaining materials and bring them to the work site on that date. (The team normally works every Thursday, or Wednesday if rain or snow is forecast for Thursday, from about 8am to 4pm.)
- The team works on successive Thursdays until the project is complete (typically averaging about 2 1/2 workdays, but at times as short as half a work day or as long as 5 or even 6 work days). At

the end of each workday, the trash generated by that day's work is taken to the Town Transfer Station by the team's dump/trash disposers (see "Volunteers" below).

- At the end of the last workday, the project coordinator gives and reviews with the applicant the "End-of-Work Letter" (see page 42 below), which contains the project coordinator's name and contact information for any questions that may arise. The project coordinator also notifies the Town Codes Enforcement Officer that the team's work is complete and ready for final Codes Enforcement inspection.
- Each project is officially completed when the lead project coordinator submits to Habitat the "Project Summary Sheet" (see page 43 below). This report summarizes the work done, work and administrative hours expended for the project, number of workdays used, completion date, total cost for materials and subcontracted work (if any), and other information if the project is funded by a Community Development Block Grant (CDBG). If the project is to be funded by a CDBG, Habitat and the Town use this report to get County reimbursement. If not, Habitat uses data in the report to support its fundraising efforts.

4. Volunteers — It's possible, especially early in the program, for the program leader to do most or all of the coordinating activities described above, leaving performance of the actual repairs work to the rest of the team. However, delegating many of these activities to individual (willing) team members will go a long way toward making the program run more smoothly and preventing program leader burnout. For this purpose, willing volunteers will soon be needed to carry out each of the following activities:

(A) Project coordinators — The HAH team has 6 of these volunteers, which means that each project coordinator manages every sixth project; this allows each project coordinator to

manage one project about every 3 or more months — a manageable workload. The project coordinator’s responsibilities and activities for each project are described in detail in “Project Coordinator Actions for Each Home Served” (see pages 44 through 51 below).

- (B)** Materials list developer — To support the project coordinators’ ordering of needed materials, these 3 volunteers, in turn, help do the in-home needs assessment, then list the individual jobs to be done and the needed materials on the “Home Assessment and Materials List” form (see pages 40 and 41 below).
- (C)** Materials purchasers — To further support the project coordinator, these 3 volunteers, in turn, go to Lowe’s to purchase the materials that can’t be delivered by Hancock Lumber.
- (D)** Tool trailer/tool van coordinator — Whatever means is used to convey the team’s tools and supplies to the work site (see “A complete set of tools, and transportation for tools” below), having someone on the team responsible for keeping the trailer or van supplied, orderly, and clean goes a long way toward keeping the team efficient and making the work day go smoothly.
- (E)** Dump/trash disposers — This single volunteer, backed up by 2 or 3 others whenever necessary, saves the rest of the team a lot of time at the end of the workday by loading trash into his truck and hauling it to the Town Transfer Station.
- (F)** Bookkeeper/accountant — Keeping track of all the expenses for each project; ensuring Hancock Lumber, Lowe’s, and other supplier and the occasional subcontractor invoices are paid; providing credit cards to the team’s materials purchasers; reimbursing team members when they need to purchase materials or supplies using their own credit cards; and submitting end-of-project invoices to the County for reimbursement for CDBG-funded projects is a significant workload that is best done by someone not on the work team.

For HAH work, the team is fortunate to have Habitat's finance manager/bookkeeper do these essential activities (see "Community Partners" below).

- (G)** Records keeper — Many details regarding completed projects are needed for various purposes, from fundraising to annual reporting to answering program status questions. Having one individual (perhaps the administrative support person supporting the program leader) keep these records on an ongoing basis as each project is completed can save a lot of time trying to pull together the data after the fact. (A sample of the spreadsheet used by the HAH program is on page 52 below.)
- (H)** Communications coordinator — Preferably, this role would be done by a separate committee of the community's aging-in-place program: the community needs to be informed of the existence and purpose of the community's home repairs program, and homeowners needing home repairs assistance need to be motivated/solicited to apply for this assistance. This can be done in a wide variety of ways including website, Facebook, local newspaper notices/articles, posted flyers, rack cards and other handouts, etc.

- 5. A complete set of tools, and transportation for tools** (trailer, truck, or van) — Although, early on, each team member can be tasked with bringing certain tools and supplies, this will inevitably result in frustration and inefficiency as the team finds other needed tools and supplies weren't anticipated and are missing. The HAH program was fortunate to receive two grants from local charitable foundations to purchase and outfit a tool trailer (see pages 53 through 54 for photos) and many of the needed tools; the remainder of our tools were donated by Habitat, Harpswell residents, and team members. (A list of tools we've found to be needed to do the types of work we do is on pages 55 through 57 below.)

6. **Funding** to pay for materials and supplies, subcontracted work, insurance, tools and supplies, tool transportation, and admin/office supplies — A home repairs program requires considerable funding, for both startup and ongoing activities. Ideally, this funding can be obtained from partners, charitable organizations, and community development block grants. If these sources are insufficient, various fundraising activities will be needed, preferably to be done by other committees of the community's aging-in-place program.

7. **Community Partners** — The more community support a home repairs program has, the easier it is to start up and run. HAH's primary partners are the Town of Harpswell and Habitat for Humanity/7 Rivers Maine. A clear and detailed memorandum of understanding between the home repairs program and each partner is very helpful to ensure a clear understanding of expectations and responsibilities of each partner. (See pages 58 through 60 for HAH's Memorandum of Understanding between HAH and Habitat.)

The Town of Harpswell provides the following support:

- o screens all home repairs applicants for eligibility
- o provides administrative support such as copying documents and providing meeting rooms for committee meetings
- o provides some annual funding
- o obtains and administers Cumberland County Community Development Block Grant (CDBG) funding
- o provides Building Codes support in the form of advice and inspections to ensure Codes compliance.
- o helps keep the community informed of HAH's programs by including HAH promotional material in its annual report mailings

Habitat provides the following support:

- o does background checks for new team volunteers
- o donated several of the team's major tools, including table saw and chop saw

- o provides funding for materials and supplies, and for subcontracted work the team is unable to do, for work not funded by CDBG grants
- o provides liability insurance for the team
- o provides bookkeeping/accounting services described in 4.(F) above

8. Insurance for volunteer liability, and tools and tool transportation — For HAH, Habitat provides the liability insurance, and donations to HAH cover the cost of insurance for the tools and the tool trailer.

Footnote: If you have questions about this Guide or would like additional information on anything related to starting and running a home repairs program, contact Bob Bauman at jrbauman@aol.com.

Addenda — The following documents, forms, and photos are provided (each is referenced in the text of this Guide) to further help communities setting up new home repairs programs:

- o Step-by-Step Process for HAH/Habitat Home Repairs — Pages 9 through 27
- o Application for Home Repairs Form — Pages 28 through 30
- o Intake Call Form — Pages 31 through 33
- o Homeowner Release and Waiver Form — Pages 34 and 35
- o Initial Visit Assessment Checklist — Pages 36 through 39
- o Home Assessment and Materials List Form — Pages 40 and 41
- o End-of-Work Letter — Page 42
- o Project Summary Sheet — Page 43
- o Project Coordinator Actions for Each Home Served — Pages 44 through 51
- o Project spreadsheet (without data entered) — Page 52
- o Photos of tool trailer — Pages 53 and 54

- Tools List — Pages 55 through 57
- Memorandum of Understanding Between HAH and Habitat — Pages 58 through 60

Addendum to Guide for Starting and Running a Home Repairs Program

This addendum provides the many documents, forms, and photos referenced in the text of this Guide.

Step-by-Step Process for Harpswell Aging at Home (HAH) Home Repairs Work in Partnership with Habitat for Humanity/7 Rivers Maine (Habitat) — A Cumberland County Community Development Block Grant (CDBG) Assisted Program

This document describes the step-by-step processes used for HAH Home Repairs and Resources work in partnership with Habitat with funding assistance from the Cumberland County CDBG program.

The HAH Lead Project Coordinator is:

Steve Ingram — singram3@myfairpoint.net; (207) 833-6182 (H), (207) 208-7901 (C).

The HAH Project Coordinators are:

John Ferraro — 3fs@comcast.net, 207-833-3132 (H);

Peter Lieberwirth — peter.lieberwirth@gmail.com, 978-502-7641;

Bruce Brandt — blbjtb2@gmail.com, 207-798-7928 (H), 415-216-6814 (C);

Jon Lichter — jonlichter@aol.com, 617-872-6550;

Greg Rolfson — grolfson@gmail.com, 207-833-3075 (H), 601-946-0894 (C); and

Steve Normand — sn@stevenormand.com, (207) 751-6394.

Bolded text in this document summarizes HAH's and Habitat's philosophy and approach regarding our interactions with participants, other organizations, and each other. This text is used as "training" material for new volunteers, who are expected to carefully read and follow the bolded text. New volunteers are expected to commit to working with the team an average of at least two workdays per month, since Habitat pays about \$50 to do a background check on each volunteer, plus the cost of providing liability insurance for each volunteer.

Initial Contact –

All requests/inquiries for home repair work, including outside chores, go to Linda Strickland at the Harpswell Town Offices (207-833-5771). Normally, the applicant

(called "participant" herein) must be the homeowner/resident who is in need of home repair work. However, in the event he/she is physically or mentally unable to answer Linda's questions and describe the work needed, a caregiver/guardian or family member can handle the call. In such a case, the caregiver/guardian or family member would also need to be available to interact with the project coordinator and materials list developer during the initial visit, including helping the participant to understand and sign the two forms needing signatures, or sign for the participant if needed.

Linda answers the participant's questions and screens for eligibility using the HAH intake form, confirming the participant:

- lives in Harpswell
- is 60 years old or older **
- owns his/her home or lives in a home owned by someone in his/her family
- has an annual household income under the following limits (80 percent of the Area Median Income for Cumberland County): ****
 - \$41,450 for household of one
 - \$47,400 for two
 - \$53,300 for three
 - \$59,200 for four
 - \$63,950 for five
 - \$68,700 for six
 - \$73,450 for seven
 - \$79,150 for eight
- does not have his/her home up for sale
- does not intend to put his/her home up for sale for at least the next 2 years
- does not rent out his/her home during any part of the year; or if so, rents it out less than 60 days per year

** If the participant is 50 to 59 years old and meets all of the other eligibility requirements, his/her request will be handled as follows:

If we don't have any active home repairs requests from 60+ year olds, we will do requested work for 50 to 59 year olds. However, if we do have active requests from 60+ year olds, we will place requests from 50 to 59 year olds on a waiting list. Thereafter, whenever we don't have any active requests from 60+ year olds, we will do work for those on the waiting list, in order of receipt. The rationale for this is that HAH was formed to help older adults meet the challenges of aging at home. From the outset, we have defined "older adults" as 60 and over. Our mission is to serve that population. However, to the extent

we are able, we will extend our services to those 50 to 59 whenever we can do so without impacting the older adults HAH was formed to serve.

**** If the participant is above the income limit but not above 125% of the income limit and meets all of the other eligibility requirements, but can pay for the cost of materials but not labor, his/her request will be handled as follows:

Depending on the urgency of the request, we will place the needed work appropriately in the queue of requested work and do the work in that order. If materials are to be purchased from Hancock Lumber, the project coordinator requests the participant to set up an account with Hancock for payment of those materials costs. For materials to be purchased from other sources, such as Lowe's, www.build.com, www.efaucets.com, or amazon.com, the participant reimburses the project coordinator by check for the cost of those materials.

Linda includes on the intake form a brief description of the home repair work requested, then asks the applicant to tell her each household member's ethnicity and race, as required by the County for CDBG funding. Linda finishes the call by asking the applicant to bring to the Town Office or mail her a copy of his/her documentation, which she gives to Terri Sawyer upon receipt. Terri Sawyer then notifies the lead job coordinator of receipt of documentation that confirms the participant's eligibility.

Following the request call, Linda confirms home ownership using town records, then turns over the request to the HAH lead project coordinator by email, copy to Terri Sawyer, Habitat, Judy Muller (HAH Resources Team Lead), and others. Habitat assigns the unique Habitat sequential number to be used for this project (however, a Habitat number is not assigned for those participants whose income exceeds the income limit, since Habitat/CDBG funding cannot be used for those jobs) and emails this information to the HAH lead project coordinators and Linda. The HAH lead project coordinator assigns the next project coordinator in sequence to this project and tentatively schedules the date for the initial visit to the participant's home. The assigned project coordinator then contacts the participant and schedules the initial visit to the participant's home as described in more detail below.

Environmental Review – For each project that is to be funded by CDBG, Terri Sawyer completes the County-required Environmental Review and retains it until comple-

tion of the project and Habitat request for reimbursement. Along with the reimbursement check, Terri sends the Environmental Review and the income documentation to Habitat for retention and review by the CDBG administrator as needed.

Overall Philosophy for Interactions with Participants –

An important policy/principle that must guide all interactions with participants is that all decisions regarding home repairs/improvements are made by the participant. Potential changes to the home are always presented as options for the participant's decision whether or not to do. No changes are presented as "You need to..." or "You should..." All contacts with and inputs to participants must be free of judgment or coercion. The job of the assessors is to determine and present recommended work options for the participant's decision, and the job of the work team is to do the agreed-upon work, without any judgments about the participant, his/her circumstances, or his/her decisions. An important emphasis in every interaction with participants is building a high level of trust and rapport that will foster a lasting positive relationship with them.

All work must be limited to what is needed for aging in place (in other words, work that is needed to fix problems that inhibit aging in place) – work that is necessary to ensure the older adult is safe, dry, and warm in his/her home. To help the greatest number of older adults age in place, we need to spend available grant money on only what is necessary for this purpose, and turn down requests for all other work. It's also very important that we limit the work we do to that which is within our team's capability, never promising more than we can do, and always staying within budget. (A fairly complete list of the types of work we offer, and do not offer, under our home repairs program is in the addendum to this document.)

By policy and insurance restrictions, we do not get involved in the following types of work:

- In-attic work (nothing beyond weatherizing the attic access plate)
- Roofing and/or chimneys

- Concrete and masonry work (except possibly minor re-pointing of interior surfaces to keep exhaust gases out of the home)
- Interior ladder work needing greater than an 8-foot step ladder
- Exterior ladder work other than first-floor rain gutters, eaves hand downspouts
- Work in a basement with standing water on the floor
- Work in electrical panels
- Water treatment systems
- Furnaces and heating systems
- Septic systems
- Inclined stairway chairlifts (motorized stairway chairs)
- Removal of mold, asbestos, and lead paint (these require specialized training/qualification and equipment)

Scheduling of Initial Visit –

The HAH lead project coordinator assigns the next project coordinator in sequence, schedules a tentative initial visit (normally on a Thursday afternoon from 1:30 to about 3:30). The lead project coordinator then asks the assigned project coordinator to confirm the tentative date and time are convenient for the project coordinator and the materials list developer, and to make the intake call to the participant.

During this call, the project coordinator makes the points and asks the questions on the HAH/Habitat Home Repairs Intake Call form. If the home is owned by family members or co-owned by the resident and a family member, the project coordinator points out to the applicant that each of the owners of the home, as well as the resident (if the resident is not an owner) must sign the forms authorizing HAH/Habitat to do the planned work; this is necessary to protect HAH and Habitat from having a lawsuit filed against them by an owner who does not agree with our having done work on his/her house.

Initial Visit –

In the initial visit, the project coordinator and the materials list developer conduct a thorough in-home needs assessment.

The purpose of the in-home assessment is to help HAH better meet the needs of older adults aging in their homes. The purpose of the approach used in the assessment is to explore how the participant uses his/her home and identify physical improvements that would allow him/her to use it better (that is, safer, drier, and warmer).

HAH Policy on Confidentiality and Disclosure of Personal Information

Note: This policy is signed by each volunteer prior to working with the Home Repairs Team.

In the course of helping older adults address the challenges of aging at home, HAH volunteers may become aware of personal, and sometimes confidential, information about the older adults we serve. Except for the disclosures authorized below, HAH volunteers agree not to disclose personal and confidential information about the older adults they serve.

HAH volunteers may share necessary information about an older adult without permission of the older adult with other HAH volunteers to accomplish the mission of HAH, to secure necessary support and feedback related to safety concerns, or to carry out assigned tasks.

HAH volunteers may share necessary information about an older adult with a person or agency outside HAH only with said older adult's written permission.

HAH volunteers may share necessary information in exigent circumstances related to the older adult and if they are making a report to an appropriate agency as required or permitted by law.

All written records that contain personal or confidential information related to older adults shall be maintained by the HAH volunteer in a means that ensures the information will not be viewed by a third party. Upon the completion of any work by the volunteer, said records shall be provided to the Committee lead for retention as necessary or be destroyed by the volunteer.

Overall approach – The in-home assessment starts with “Yes,” and tries to address all of the participant’s needs for safety, warmth, and dryness within the capability of the work team, while fully recognizing we can’t be everything to everyone and we have to stay within budget. For those needs the work team cannot address, we try to refer the participant to other agencies that may be able to provide the help

needed. The assessors make recommendations regarding home repairs/improvements, but all decisions are to be made by the participant regarding what repairs/improvements are to be done on his/her home.

Conduct of initial visit —

At the beginning of the initial visit, the job coordinator introduces the HAH assessment personnel, asks the participant to sign the “Homeowner/Occupant Consent and Release and Waiver Form” and offers to mail a copy of the form to the applicant if desired. During this discussion, the project coordinator calls the participant’s attention to the two paragraphs regarding agreement to allow photos to be taken and used, internally and externally, to promote the HAH home repairs and resources program. If the home is owned by family members or co-owned by the resident and a family member, the project coordinator points out to the resident that each of the owners of the home, as well as the resident (if the resident is not an owner), must sign the two forms authorizing HAH/Habitat to do the planned work; the project coordinator then arranges with the resident to give him/her the forms for the resident to promptly obtain the owner(s)’ signature(s) and return the signed forms to the project coordinator.

The job coordinator and the materials list developer do a thorough review of each room and the home exterior (usually with the participant accompanying them, unless the participant is unable to do so) to identify needed work for recommendation to the participant for the participant’s consideration and decision.

When this tour of the house is completed, while the materials list developer takes necessary measurements and pictures and records other details needed to develop the materials list for the participant-agreed-to work, the project coordinator briefly reviews with the participant the participant-agreed-to work to be done, and explains to the participant that he will type up this work on the Home Assessment and Materials List form and return it to the participant for signature. If the home is owned by family members or co-owned by the participant and a family member, the project coordinator again points out to the participant that each of the owners of the home, as well as the resident (if the resident is not an owner) must sign the two forms authorizing HAH/Habitat to do the planned work; the project coordinator then arranges with the participant to give him/her the forms for the participant to promptly obtain the owner(s)’ signature(s) and return the signed forms to the project coordinator. In this discussion, the project coordinator also points out that the project scope (including materials, subcontracted labor, trash disposal fees, and any other costs) cannot normally exceed the \$1,500 budgeted limit for the project,

and that if, after development of the materials list, the project scope needs to be reduced to be within budget, the project coordinator will contact the participant and get his/her input regarding what work to eliminate.

The Home Assessment and Materials List will include any planned subcontracted electrical, plumbing and/or other work required by Code (see summary below) to be done by a licensed person. On the Home Assessment and Materials List form, the project coordinator annotates the sequential number assigned by Habitat for this home, which is used on all subsequent records to ensure the participant's privacy.

During the assessment, the project coordinator gives the participant a copy of the HAH/Habitat Tip Sheet for Safety at Home, explaining its intended use: this tip sheet contains a number of helpful actions participants can take without HAH involvement.

Electrical power – The project coordinator confirms the availability of power for portable power tools outside the house and requests agreement of the participant for the team to use this power.

The project coordinator suggests that participants living alone have a friend(s) visiting during the work, if that would increase the participant's level of comfort with having a work team in his/her home.

Scheduling of work – Following the initial visit, the lead project coordinator schedules the work on a date(s) and at time(s) acceptable to the participant and compatible with availability of HAH work team members. The HAH work team works on each Thursday, with Wednesdays as the backup day when needed to avoid working in inclement weather.

Delivery of Materials — The project coordinator informs the participant that Hancock Lumber will deliver to his/her home the materials needed for the job the day before work is scheduled to begin.

Communications with the work team — 3 to 5 days before each workday, the project coordinator emails each team member the worksite address, the list of work to be done, and any other information needed by the team (e.g., special tools needed for the work). The email asks the team members to review the work list and select those jobs he/she would be interested in doing.

HAH/Harpswell Code Enforcement Officer (CEO) Interface –

General guidance is as follows:

- A permit and CEO inspection are required for wheelchair ramps and all structural changes (e.g., door widening, rotted flooring replacement).
- **Electrical Work** –
 - No permits are required for any electrical work.
 - Electrical work involving new service (added receptacles, switches, fixtures) must be done by a licensed electrician (exception: outdoor low-voltage lighting does not require a license, and we may replace long-term-use extension cords with permanent wiring and receptacles, switches, and light fixtures).
 - Replacement of existing defective receptacles, switches, and fixtures, and movement of existing receptacles, switches, and fixtures in conjunction with the widening of doorways, may be done by non-licensed personnel.
- **Plumbing Work** –
 - Plumbing work involving new service must be done by a licensed plumber. A permit and inspection are required.
 - Plumbing work involving installation of new fixtures or material in existing service may be done by non-licensed personnel; however, a permit and inspection are required.
 - Removal and replacement of existing plumbing fixtures with either the existing or new fixtures and repair or replacement of leaking or blocked supply or drain piping with either the existing or new piping may be done by non-licensed personnel, without permit or inspection (exception: replacement of an existing toilet in conjunction with rotted flooring requires a structural permit).
- Smoke and CO detectors must be installed following NFPA requirements (see Addendum to this document) and manufacturer directions, without need for permit or CEO inspection. Battery-powered detectors meet Code.
- If we remove/replace more than 50% of a structure (porch, deck, support system, etc.), we must rebuild to meet current building code. If less than 50%, use current code as a guide, but new members must be at least as close to code as removed members.
- When in doubt, consult with the CEO to be sure Town Code requirements are met.

Permits – If the planned work needs a permit, or if consultation is needed to ensure Code compliance, the project coordinator meets with the Harpswell Code Enforcement Officer to obtain the permit(s) and/or resolve questions. If a permit fee is required (normally not required for HAH work), the project coordinator obtains a Habitat check from Connie Wendell, identifying the unique Habitat-assigned number for this job, to pay for the permit.

Inspections – The project coordinator schedules and coordinates all Town inspections with the Harpswell CEO.

HAH/Habitat Interface –

Materials list – The team member who accompanies the project coordinator on the initial visit develops a materials list (using the Home Assessment and Materials List Form, identified with the unique number for this job); in unusual circumstances, this may require a second visit. The materials list sent to Hancock Lumber must include the delivery address and the needed date for delivery to the job site (the day before work is scheduled to begin).

Licensed work – If any of the work requires a licensed electrician and/or licensed plumber, or a special service such as glass repair or a locksmith, the project coordinator engages the services of a trusted contractor(s) from the HAH Contractor Referral List. Following receipt of a written estimate of cost and schedule, as well as proofs of insurance and license, the project coordinator schedules the contracted work, preferably simultaneous with the HAH work team being on the job site, but if that is not possible, at a time acceptable to the participant. Upon completion of the contracted work, the project coordinator ensures the job was done satisfactorily, annotates the contractor's invoice(s) with the project number, and has the invoice(s) sent to Habitat for payment.

Completed (Signed by participant) Habitat forms – The project coordinator keeps on file the Homeowner/Occupant Consent and Release and Waiver Form, the HAH Work Plan, and the Home Assessment and Materials List Form. The project coordinator sends a copy of the Home Assessment and Materials List Habitat for its review.

CDBG Reimbursement of Habitat for Materials – Habitat is reimbursed by the Town of Harpswell, which is in turn reimbursed by the Cumberland County CDBG administrator, for final materials costs at the end of each project. Upon receipt of Habitat's invoice for these materials, Terri Sawyer sends Habitat the CDBG reimbursement check, the Environmental Review for the project, and the participant's documentation of total gross annual income from all sources. Habitat retains the Environmental Review and income documentation for review by the CDBG administrator.

Materials Purchases — The project coordinator orders lumber, insulation, lever-type door locksets, rain gutters, and fasteners from Hancock Lumber, Brunswick for

delivery to the job site the day before the work is to be done (these materials are cheaper from Hancock than from other sources). Our Hancock contact for ordering HAH materials is Denise Smith, dsmith@hancocklumber.com; her backups are Mike Michaud, mpmichaud@hancocklumber.com and Evan Beaulieu, ebeaulieu@hancocklumber.com.

Other materials are ordered by the project coordinator from other sources as follows, and are charged to the Habitat/7 Rivers account at those sources; materials ordered online should normally be delivered to the project coordinator's residence:

- [amazon.com](https://www.amazon.com) — kitchen and bathroom faucets, grab bars, toilet seat risers, LED light bulbs, GFCI receptacles, and CO detectors
- [Lowe's](https://www.lowes.com) — Kitchen and bathroom faucets, handheld shower units, lever-type door locksets, grab bars, caulking, and electrical fixtures, LED light bulbs, GFCI receptacles, and accessories; also, other materials not available elsewhere (Lowe's materials are normally purchased by one of the team members who have volunteered for this role, as requested by the project coordinator; the Habitat Lowe's credit card is used for these purchases, and the purchases are tax exempt).
- [Durfee's Flooring](https://www.durfee.com), [Roger's Ace Hardware](https://www.acehardware.com), and [F.W. Webb](https://www.fwwebb.com) also have Habitat accounts we can charge materials to, for unusual materials not available elsewhere.

Habitat Interior Storm Windows — Following the initial visit, the project coordinator orders any interior storm windows from Habitat using the Habitat New Window Order Form. The Habitat policy is that a maximum of 6 windows can normally be ordered for each home; however, with Habitat's's authorization, additional windows may be ordered if warranted by the circumstances. The cost of these windows is not included in the total cost of our projects.

Conduct of Work –

The project coordinator confirms with the participant that it's okay to begin work, then introduces the HAH work team to the participant, and the team begins performing the scheduled work.

The on-site "work rules" each team member agrees to abide by are:

- **No smoking, drinking of alcoholic beverages, use of illegal drugs, horseplay, or music on the job site**
- **Safety First** — place high priority on your own safety and that of others. Use common sense, stay observant, use the following safety practices, and remind other team members if you see someone not using them:

- For all but the most straightforward, low-risk jobs where two people would be inefficient, work in teams of two or more.
- Use appropriate personal safety protection, including:
 - hearing protection — for at least power sawing, grinding, and sanding
 - eye protection — for at least work that generates flying debris
 - respiratory protection — for at least power sawing, grinding, and sanding; and in dusty conditions or when mold or mildew is present
- Use a spotter/holder for straight-ladder work, and rope off straight ladders so they don't slide.
- Stop and consult with others whenever you're unsure of any job detail, including how to safely use any tool you're not familiar with.
- Ensure table, chop, and other saws and grinders are placed and used in locations where materials being handled and cut will not injure others in the vicinity.
- Keep all work areas, including those around table, chop, and other power saws, free of debris and clutter.
- Ensure snowy, icy, and other slippery conditions are promptly corrected.
- Ensure electrical cords are free of cuts, frays, and broken prongs.
- Assess your own abilities accurately, and work within them. Hydrate often. Take a break when you're tired, cold, or hot. Go home if you're worn out.
- Lift alone only what is safe for you to lift; for anything heavier, asked for help.
- Use extra care when using a tablesaw: stand out of the line of the blade, so a board kicked back doesn't injure you; use a push stick; don't wear gloves. If your position or what you're doing feels awkward, stop; if you're tired or feel rushed, stop.
- When you open a circuit breaker or switch to isolate a circuit for maintenance, tag the breaker or switch with your name to ensure all others know you alone control the position of that breaker or switch. If you need to operate a tagged breaker or switch for any reason, do not operate it without the specific approval of the tag owner for EACH operation. If you are tagging a switch for isolation, be sure to tag all switch locations: two for 3-way switches, and three for 4-way switches.

Unplanned work – If, in the course of the work, new, unplanned work is identified (for example, rotten wood, water leaks, mold, or un-closable doors), the project coordinator consults with the Habitat site supervisor/executive director to determine the appropriate course of action (only when the team is unsure of the appropriate action and considers consultation necessary).

Normally:

- If the new work can be addressed using available materials, it is simply added to the scope of the project and either done on the same visit, if time is available, or scheduled for a subsequent visit if it is not.
- If additional material is needed to address the condition and the team has time and resources to purchase this material, the purchase can be made by the team from Lowe's using the Lowe's Habitat credit card or from Hancock Lumber, Brunswick using the Habitat account and identifying the purchase with the unique number for the project.

Trash Disposal – Toward the end of the job, the project coordinator coordinates removal of the trash generated during the work and disposal of this trash by the HAH work team at the Harpswell Transfer Station, charging the dump fee to the Habitat account by the project number associated with the work. The person who takes the trash to the transfer station gives the charge slip to the project coordinator for cost tracking.

Closeout –

At the end of the job, the project coordinator:

- confirms the participant's satisfaction with the work done by the team
- shows the participant how to use new items installed by the team
- asks if the participant has any questions
- gives the participant the HAH end-of-work handout, which contains the project coordinator's name and contact information to use for any questions that may arise
- if all required inspections have not been done, informs the participant of any remaining inspections and explains that the Town Code Enforcement Office will conduct them on its own schedule, informing the participant ahead of time if access to the home is needed.
- informs the participant of the HAH follow-up assessment (not applicable if the homeowner elected to not receive the services of our Resources Team): In about three months, the HAH healthcare professional will arrange for a visit to the participant's home to discuss in more detail how each change is working and to assess whether the participant needs any other help. The purposes of this visit are to ensure the participant's aging needs have been totally met, and to identify any needed program improvements.
- takes an inventory of the materials to be picked up by Hancock for credit to the Habitat account; sends an email to Hancock (Denise Smith) with this inventory, requesting pickup of the materials, crediting the Habitat account, and sending an email copy of the credit invoice to the project coordinator

- informs the Town CEO of the project completion and readiness for CEO inspection

Records and Reports –

Following completion of the work and receipt of all Hancock invoices including returns credits, the project coordinator develops and emails to the head project coordinator a Project Summary Report, containing the details regarding the project that Cumberland County requires for CDBG-funded projects. The original application form and the home assessment and materials list, updated to describe all work done, are attached. This report is sent to Habitat by the lead project coordinator and is used by Habitat for CDBG reimbursement invoicing and for quarterly reporting and fundraising activities. For CDBG-assisted projects, the Project Summary Sheet includes for County use (some of this information is in the two attachments):

- the homeowner's initial request
- initial assessment of homeowner's home repairs needs
- project completion date
- summary of actions taken
- total cost of project, including materials, subcontracted work, permit fees, and transfer station fees
- number of work days to complete
- total volunteer hours, both work and administrative
- household total gross annual income
- number of people in household
- each home occupant's ethnicity and race
- reactions from homeowner upon completion of work

The lead project coordinator combines many of these numbers with those of other projects and reports them monthly to both HAH and Habitat for their internal reporting and fundraising activities.

After smoke detectors are installed, the project coordinator fills out the Red Cross Service Acknowledgement Form, signs the form, gets the homeowner's signature on the form, and mails it to Home Fire Campaign, C/O Ron Springel, American Red Cross, 2401 Congress Street, Portland, ME 04101.

A week before the 3-month followup assessment, the HAH Health Professional schedules and conducts the 3-month follow-up visit with the participant. Following completion of the 3-month follow-up assessment, the healthcare professional enters resulting information into HAH's Survey Monkey database.

On an ongoing basis for each CDBG-assisted project, the project coordinator collects all receipts and invoices for each project, identifying each with the unique number for the project, and retains them, or copies or scans of them, for possible reference to resolve total cost questions from Habitat (Connie Wendell) for her use in determination of total project cost.

Liability of Volunteers —

HAH/Habitat home repair volunteers have ZERO personal liability if a person is harmed as a direct result of work completed by that volunteer. The employee is protected by federal law, stronger state law, and the waiver [the Habitat/HAH Release and Waiver form that we have every homeowner sign at the beginning of each initial visit]. Maine has one of the best “good Samaritan” laws in the country. Basically, unless you intentionally cause the harm as a volunteer, your work is covered, and you’re not liable (except for drivers and the exception is only up to the amount of auto insurance). On top of this, BOTH HAH and Habitat have liability insurance because, while the volunteer is immune from liability, the organization using the volunteer may not be (even though there is immunity there too – it’s limited – the waivers, training, checks & balances, and written policies speak to the immunity of the organization – basically, if the organization did everything right, they won’t be liable either). Again, this just covers the organization – without it, if HAH was sued, the liability would be limited to our assets. The Board insurance protects the Board members from individual liability.

Created July 2017

Revised: July 25, 2019 for CDBG use

Addendum to Step-by-Step Process document — Types of Home Repairs Work Offered by Harpswell Aging at Home (HAH) —

In partnership with Habitat for Humanity 7/Rivers Maine, HAH offers a wide range of home repairs to eligible older adults, to keep them Safer, warmer, and drier as they age in their homes. The following is a fairly complete list of the types of work we offer:

To enhance the resident's SAFETY:

- Install wheelchair ramps, with or without side railings and handrails depending on height above ground; and remove the ramps within a month of when the need for the ramps no longer exists (removal is required by the Town of Harpswell Building Code)
- Replace rotted wood on decks, porches, railings, and handrails, and in support structures for houses, decks, and porches
- Install second handrails on stairways that have only one handrail (and in some cases, two handrails on stairways that have none)
- Rebuild or reinforce handrails, especially on outside stairways, to make them more stable
- Install grab bars in or near tubs and showers, and near toilets
- Install non-skid self-adhesive strips on floors of showers and/or bathtubs, to prevent slips and falls
- Raise the height of toilet seats by installing seat risers, with or without safety handles depending on homeowner preference
- Install side railings and balusters on decks and porches where none exist and the Town of Harpswell Building Code requires them
- Install handrail(s) alongside outside walkways to allow safe use in icing conditions
- Replace round door knobs/openers with lever-type door openers, for residents with arthritic hands
- Replace non-ground-fault-circuit-interrupting (GFCI) receptacles located within 6 ft of exposed water with GFCI receptacles
- Install wireless doorbells, slide latches or chains, and/or peepholes at entry doors
- Install static or motion-sensing outside lighting to ensure adequate light levels for safe ingress and egress
- Install, and/or replace batteries in, smoke detectors and carbon monoxide (CO) detectors for increased fire safety

- Increase stairway light levels by installing light fixtures and/or three-way switches, or by increasing size of light bulbs in use
- Install hallway handrails for greater stability between bedroom and bathroom
- Install rubber treads on bare stair treads to prevent slips and falls
- Install non-skid padding under throw rugs to prevent slips and falls
- Install “D” type drawer and door pulls on kitchen and bathroom cabinets to facilitate opening, for residents with arthritic hands
- Replace defective light fixtures, especially in kitchens, bathrooms, and outside entry doors, to ensure sufficient light levels in these areas
- Increase the size of door stoops, to prevent falls from too-small stoops
- Trim doors as needed to allow opening and closing without rubbing on floor or door frame
- Build platform to raise height of front-loading laundry equipment, for safer loading and unloading
- Clean clogged dryer vent hose, to eliminate fire hazard
- Replace small or hard-to-see house numbers with large, readily visible house numbers, to facilitate Emergency Medical Team location of the house when responding to emergencies; also, install second set of house numbers on roadside mailbox, so visible from both directions
- Install fatigue-reducing gel mats on floors in kitchen work areas, for residents with arthritic or other knee/hip conditions who need these mats

To enhance the resident's WARMTH:

- Install Fiberglas or rigid foam insulation on underside of house floor, on walls and on ceilings where none exists; or on inside of skirting around crawlspace where none exists
- Reinstall floor, wall, and ceiling insulation that is falling or has fallen down; covering reinstalled insulation with plastic sheet to act as a moisture and air barrier
- Install Fiberglas or rigid foam insulation around sill plate to reduce heat loss from basement or crawlspace
- Make (custom-manufactured by Habitat) and install interior storm windows to reduce heat loss through windows, especially single-pane windows
- Replace broken window glass and storm door glass to reduce heat loss
- Wrap under-house heating air ducts to reduce heat loss; also, rewrap these ducts when the insulation has fallen off the ducts

- Seal cracks around entry doors with weatherstripping to stop air leaks and reduce heat loss; also, adjust door latches to make entry doors close more tightly for same reason

To enhance the resident's DRYNESS:

- Caulk cracks around windows and doors to stop water (and air) intrusion
- Install rain gutters and downspouts to direct rainwater and snow melt away from the house
- Regrade yards when able, or dig water-diversion trenches, to keep water from getting underneath or inside houses.
- Install rain-diverting strips on roofs above entry door stoops and stairways, to prevent resident from getting wet (for dryness), and to prevent ice formation on stoops and stairs (for safety)
- Replace rotted trim around windows and doors, to block water entry through compromised trim
- Repair leaking sinks, faucets, and drains

Types of work that is not offered by HAH — because of policy, cost, risk, liability, insurance restrictions, and/or lack of requisite skills and/or licenses or certifications — include the following:

- painting, staining, and varnishing/polyurethaning
- in-attic work (beyond weatherizing the attic access plate)
- roofing and/or chimneys
- concrete and masonry work (except possibly minor re-pointing of interior surfaces to keep exhaust gases out of the home)
- interior ladder work needing greater than an 8-foot step ladder
- exterior ladder work higher than first-floor rain gutters, eaves, and downspouts
- work in a basement or crawlspace with standing water on the floor
- work in electrical panels
- water treatment systems
- furnaces and heating/air conditioning systems
- water wells
- septic systems
- inclined stairway chairlifts (motorized stairway chairs) (special license required)
- removal of mold, asbestos, lead, and other toxic residues (these require specialized training/qualification and equipment)

In addition, because of limited funding available for this work, we do not offer work that does not enhance SAFETY, WARMTH, and/or DRYNESS, such as work that is only cosmetic, enhances appearance only, updates fixtures or accessories to a different design, increases comfort only, and so on.

Addendum to Step-by-Step Process document — NFPA Guidelines for Installing Smoke and CO Detectors

For both smoke detectors and CO detectors, the HAH process for replacing existing detectors is as follows:

- If the existing detector is more than 2 years old, replace it with a new detector, and discard the existing detector.
- If the existing detector is less than 2 years old, replace the battery in the detector, then check detector operation —
 - if operable, leave it in place (or move it to required location if mislocated);
 - if inoperable or questionable, replace it with a new detector, and discard the existing detector.

Smoke Detectors/Alarms — (NFPA 72, 2013)

- In all sleeping rooms and guest rooms
- Outside of each separate dwelling unit sleeping room, within 21 ft of any door to a sleeping room, with the distance measured along a path of travel; where this area is separated from the adjacent living areas by a door, a smoke detector shall be installed in the area between the door and the sleeping rooms, and additional detectors shall be installed on the living area side of the door as specified below
- In the living area(s) of a guest suite
- On every level of a dwelling unit, including basements; where the interior floor area for a given level of a dwelling unit, excluding garage areas, is greater than 1,000 sq ft, smoke detectors shall be installed as follows:
 - All points on the ceiling shall have a smoke detector within a distance of 30 ft travel distance, or shall have an equivalent of one smoke detector per 500 sq ft of floor area. One smoke detector per 500 sq ft is evaluated by dividing the total interior square footage of floor area by 500 sq ft.
 - Where dwelling units include great rooms or vaulted/cathedral ceilings extending over multiple floors, smoke detectors located on the upper floor that are intended to protect this area shall be permitted to be considered as part of the lower floor(s) protection scheme.

Summary of all requirements for smoke detectors:

- Bedrooms — one in each sleeping room, PLUS one outside, as described above

- Living Rooms — one in each living room
- Dining Room — one in each dining room that is separate from kitchen and/or living room
- Stairways — at top of every stairway inside house
- Levels — at least one on each floor level
- Electrical appliances — one in every room where electrical appliances are operated (e.g., space heaters, humidifiers, air purifiers, etc.)
- However, NO smoke detectors in (these requirements supersede those above):
 - Kitchens and within 3 ft of doors to kitchens
 - Bathrooms and within 3 ft of doors to bathrooms
 - Garages
 - Unfinished/Uninsulated Attics
 - Within 3 ft of:
 - Forced-air supply ducts used for heating and/or cooling
 - Ceiling or whole-house ventilating fans
 - Other high-air-flow areas
 - Fluorescent lights
- Each smoke detector shall be located on the wall, ceiling, or other location as specified in the manufacturer's published instructions that accompany the detector.

CO Detectors/Alarms — (NFPA 720, 2012)

- One outside of each separate dwelling unit sleeping area in the immediate vicinity of the bedrooms
- Optionally, one inside each dwelling unit sleeping area
- In multi-story houses, at least one on every occupiable level, including at the top of the basement stairs (if the house has a basement), excluding uninsulated attics and crawl spaces
- However, NO CO detectors in (these requirements supersede those above):
 - Kitchens or within 10 ft of kitchens
 - Bathrooms or within 10 ft of bathrooms
 - Garages
 - Unfinished/Uninsulated Attics
 - Areas subject to direct sunlight
 - Within 15 ft of furnace or other fuel-burning heat sources

- Within 3 ft of:
 - Forced-air supply or return ducts used for heating and/or cooling
 - Ceiling or whole-house ventilating fans
 - Other high-air-flow areas
- Each CO detector shall be located on the wall, ceiling, or other location as specified in the manufacturer's published instructions that accompany the detector. (Note that, unlike smoke, CO has about the same density/weight as air, so CO distributes evenly throughout the room/house.)

Addendum to Step-by-Step Process document — Electrical Code Requirements for GFCI Receptacles (210.8)

Ground-fault circuit-interrupter (GFCI) protection for personnel shall be provided in all 125-volt, 15- and 20-ampere receptacles installed in the following locations:

- Bathrooms — within 6 ft of the outside edges of sinks, bathtubs, and shower stalls
- Kitchens — where the receptacles are installed to serve the countertop surfaces; also, within 6 ft of the outside edges of sinks; also, receptacles that supply dishwashers
- Sinks in other rooms — within 6 ft of the outside edges of the sinks
- Laundry areas
- Garages and accessory buildings that have a floor at or below grade level not intended as habitable rooms and limited to storage areas, work areas, and the like
- Unfinished basements (defined as portions or areas of the basement not intended as habitable rooms and limited to storage areas, work areas, and the like)
- Crawl spaces at or below grade level
- Indoor wet locations (defined as wet at any time)
- Outdoors
- Boathouses; also, receptacles up to 240 volts that supply boat hoists in dwelling units (defined as a structure containing one or more bedrooms)
- Locker rooms with associated showering facilities

**APPLICATION FOR HARPSWELL AGING AT HOME (HAH) HOME REPAIRS,
RESOURCES, AND HOME HELPERS — Cumberland County Community Development Block Grant (CDBG) Project Number ____ (from Habitat)**

Harpowell Aging at Home (HAH) is a volunteer organization that provides a wide range of services to Harpswell seniors to help them meet the challenges of aging in their homes. Three of the HAH services that help Harpswell seniors have qualifying conditions that must be met for participation. This is the application for HAH services in Home Repairs, Resources, and Home Helpers. Funding for the Home Repairs program is currently provided by Cumberland County CDBG, Habitat for Humanity 7 Rivers, and the Town of Harpswell.

Date: _____

Name: _____

Address: _____

Phone: _____ Email: _____

Applicant Eligibility Confirmed:

- Lives in Harpswell ____
- Is 60 years old or older ____ If between 50 and 60, please run by Steve Ingram for HAH decision on eligibility for home repairs, and tell applicant we will respond within a few days.
- Owns their home or lives in a home owned by a family member ____
 - If answer is No, and applicant has been a renter in Harpswell for at least one year ____ is eligible for Resources and Home Helpers — See next page
- Is your home currently for sale? ____ (“Yes” is not eligible for Home Repairs, but is eligible for Resources — See next page)
- Do you plan to put your home up for sale during the next 2 years? ____ (“Yes” is not eligible for Home Repairs, but is eligible for Resources — See next page))
- Do you rent out your home during any part of the year? ____ (“No” is eligible; if “Yes,” ask: Do you rent it out less than 60 days per year? ____ (“Yes” is eligible; greater than 60 days rental per year is not eligible for Home Repairs)

- Has a total gross annual household income (including home rental income, if any) under:

\$41,450 for household of one _____

\$47,400 for two _____

\$53,300 for three _____

\$59,200 for four _____

\$63,950 for five _____

\$68,700 for six _____

\$73,450 for seven _____

\$79,150 for eight _____

- Best estimate of total gross annual household income: \$_____

Home ownership confirmed _____

Description of home repair work requested:

Because the funds for the materials we will use to do your home repairs come primarily from a Cumberland County Community Development Block Grant, we are required by both federal and county government to help them ensure nondiscriminatory use of public funds by asking you for three additional pieces for information:

1st. Each Home Occupant's Ethnicity: Hispanic __ Non-Hispanic __

2nd. Each Home Occupant's Race: White __ Black/African American __
 Black/African American & White __ Native Hawaiian or Other Pacific Islander __
 Asian __ Asian & White __ American Indian or Alaskan Native __ American Indian/Alaskan Native & White __ American Indian/Alaskan Native & Black __ Other
 __

3rd. The county requires us to ask you for documentation of the total gross annual income for your household. This documentation could be a copy of your last year's Federal Income Tax Return (if you filed a tax return last year), or if you didn't file a

tax return, whatever other documents show each source for income, such as your latest Social Security annual statement. Please bring a copy of this documentation to the Town Office or mail a copy of the documentation to:

Linda Strickland, Harpswell Town Office, P.O. Box 39, Harpswell, ME 04079

Other important HAH services — The Home Repairs you just requested are only one of the many HAH services offered by Harpswell Aging at Home.

If you would like a visit from a Harpswell volunteer on the **Resources Team** who can tell you about other services and programs that you might not yet know about, I will have someone from the Resources Team call you to arrange a home visit. YES___
NO___

You may also be eligible for assistance with home cleaning and outside chores by our **Home Helpers Team**. If you would like this kind of assistance, I will have someone from the Home Helpers Team call you with more information. YES___ NO___

Please Email to:

Steve Ingram (singram3@myfairpoint.net)

Terri Sawyer (tsawyer@town.harpswell.me.us)

Judy Muller (jmullerlcs@gmail.com)

Jerry Klepner (deanklepner@mac.com)

Kathy Smith (Kathy@habitat7rivers.org)

Julie Moulton (jamoultonhah@gmail.com)

Created July 2017 Revised Sept 2, 2019

HAH/Habitat Home Repairs Intake Call Form — CDBG Assisted Project
Habitat Project Number _____ Date of Call: _____

Confirm contact information:

Name: _____

Address: _____

Home Phone: _____ Cell Phone: _____

Email Address: _____ Ask if okay to add to HAH master email list for occasionally sending helpful HAH information. Yes___ No___

Emergency contact: _____ (This is in case we need to contact you but are unable to.) Phone: _____ Email: _____
Address: _____

Make the following important points:

___ We are pleased to provide home repairs work for you, and thank you for requesting our help. Our volunteer workers get a lot of satisfaction out of making a difference in the lives of others, and we look forward to working on your home to help you live in your home safer, warmer, and drier. [*Other thoughts if needed: You've contributed to this community for many years; the work we'll be doing on your home is your community thanking you by giving back to you. This is a win-win: you get free work done on your home, and each of us gets the satisfaction of making a difference in your life AND the fun of working together with a bunch of re-tired seniors from all walks of life who really enjoy working with each other.*]

___ The home repairs work we do will cost you nothing — no cost for materials; and no cost for labor. The way we do this is: we're partnered with Habitat for Humanity 7 Rivers, which provides the funding for us to buy materials; Habitat receives this funding from a Cumberland County Community Development Block Grant, donations, other grants, Restore profits, and the Town of Harpswell. The repair work is done at no cost for labor by Harpswell Aging at Home volunteers, so there is no cost to you for anything we do for you.

___ You are in total control of what work we do in your home. We will make some recommendations that we think will increase your home's safety, warmth, or dryness, but the decision as to what work will be done is yours.

__Participation in our home repairs program is handled confidentially. On our first visit to your home, we will ask you to sign a form authorizing us come into your home to do the home repairs work you want us to do. The form also asks if you would be willing to allow us to use photographs of the work we'll do for promoting our home repairs program. That is also your decision; you're in total control of what we do.

Ask the following questions:

How did you hear about the HAH/Habitat 7 Rivers Home Repairs Program?

HAH Member__CHANS__Police/Fire/EMT____
HAH Newsletter__VTN Driver __Town Office____
Facebook__ Church____Harpwell Anchor____
HAH HR participant__Neighbor/Friend____
Other_____

Number of people in your household?____

Age(s) of those in your household?____

Do you live in a: house__ cottage__ Duplex__ Mobile home__(Make_____ Model_____)

Year your home was built (approximately) _____

Do you have any pets in your home?_____ Do you anticipate any problem with your pet(s) to have work going on in your home? _____

Are you or anyone in your household a smoker? If so, would you be willing to refrain from smoking while the team is in your home (because of smoke allergies of some on our team)?

Confirm what you would like our home repairs team to do for your home:

Discuss the following:

To help us prepare to do this work on your home, two or three of us would like to come to your home to do an in-home assessment. The purpose of this visit is to understand the work you've asked us to do, and to walk through your home with you and identify possible additional work that could make your home safer, warmer, and drier. These visits take about 1 1/2 to 2 hours. Schedule date and time for initial visit/in-home assessment (normally Thursdays at 1:30):

Scheduled date and time: _____

In advance of this visit, we would also like to give you an opportunity to think about some other types of work you might want us to do on your home, by sending you a list of the types of work we do and the types of work we don't do. Would you like us to send this list by email or regular mail? When you receive the list, please look it over carefully to see what other work you might want us to do besides the work you requested that we just talked about. Then tell us about this additional work when we come to your home.

Note to project coordinator: Send a copy of this completed form, and a copy of your email to others involved in the initial visit, to:

Lead project coordinator (Steve Ingram)

Judy Muller, head of Resources Team (jmullerlcs@gmail.com)

Julie Moulton (jamoultonhah@gmail.com) — for entry of homeowner info into HAH Master Database if homeowner wants to receive informative HAH emails

Updated January 12, 2020 for CDBG use



CDBG-Assisted Project with Harpswell Aging at Home (HAH)

Homeowner/Occupant Consent and Release and Waiver Form

This form is to be signed by the Homeowner/Occupant during the initial site visit, before work begins.

This Release and Waiver of Liability (the "Release") is executed on this ____ day of _____, 2020, by _____ (the "Homeowner/Occupant"), in favor of Habitat for Humanity / 7 Rivers Maine, Inc. (HFH7RM), a Maine non-profit organization.

CONSENT:

- I, the Homeowner/Occupant, consent to having HFH7RM share the information they collect with *Harpswell Aging at Home (HAH)*.
- I, the Homeowner/Occupant, has asked to have HFH7RM's staff and volunteers to perform work on my home and to engage in the activities related to installing repair materials inside and on the exterior of my home.
- I give permission for HFH7RM's staff and volunteers to enter my home to install the repair materials needed to complete the agreed upon project, of which the specifics are listed on the *Home Assessment and Materials List*.

ACCEPTANCE, RELEASE AND WAIVER:

- I acknowledge that I will be consulted about the actions the staff and volunteers will take to perform the work I have requested and again when the staff and volunteers arrive to perform the project.
- I understand that HFH7RM, the organizers, the staff, and volunteers performing the work do not guarantee any of the materials installed or the work performed.
- I understand that HFH7RM, the organizers, the staff, and volunteers performing the work assume no liability for the quality of the materials installed, the quality of the work performed, or any accidental damage to my property, and I shall not hold them liable.
- I understand that HFH7RM is committed to completing the work itemized on the *Home Assessment and Materials List*. Upon completion of the work, the project will be considered finished.
- I agree to participate in pre- and post-evaluation questions to help HFH7RM and HAH measure the impact of the program.

- I agree to let HFH7RM and HAH take before and after photos of my home for internal use, and to promote the program, provided the photos do not identify me and/or the location of my home.
- I agree to let HFH7RM and HAH use my image and photos of me and/or my home to promote the program unless this box is checked.

I do hereby release and forever discharge and hold harmless Habitat for Humanity/7 Rivers Maine, its staff and volunteers, and its successors and assigns from any claims, liabilities and demands of any kind or nature, either in law or in equity, that I, the Homeowner/Occupant, may have against Habitat for Humanity/7 Rivers Maine, its staff and volunteers, and its successors and assigns which arise or may hereafter arise from work performed as part of the *Harpswell Aging at Home (HAH) Home Repairs Program*.

IN WITNESS WHEREOF, I, the Homeowner/Occupant, have executed this Release as of the day and year first written above.

Homeowner/Occupant - Signature _____

Homeowner/Occupant - Printed name

Habitat for Humanity/7 Rivers Maine Representative (Witness)

Habitat for Humanity/7 Rivers Maine Representative printed name _____

**A copy of this signed Waiver is available upon request.*

Home Repairs Initial Visit Assessment Checklist — Project ___ Date _____

Generic Checklist –

- Smoke/CO Detectors – condition? Number? Additional needed?
- Electric Cords – condition; trip hazard?
- Carpets/Rugs – torn or slippery? trip hazard? non-skid pads needed?
- Beveled Thresholds, max 1/2" rise?
- Flooring condition
- Q—Door Knobs – lever-type needed for arthritic hands?

Kitchen –

- Q—Cabinets/Shelves reachable; pull-out trays needed?
- Q—Step stool with non-slip surfaces and handle?
- Drawer/Door pulls D-type?
- Q—Sufficient work areas lighting (sink/stove/countertops)
- GFCI receptacles within 6 ft of sink and for all countertop loads?

Bathroom –

- Q—Tub/Shower – slippery (mat/strips?)
- Q—Adjustable-height shower wand?
- Q—Toilet seat min 19"? Seat riser needed?
- Q—Grab bars needed? Secure?
- Q—Pathway from bedroom lighted? Auto night light?
- Toilet paper dispenser within reach?
- Sufficient light for reading medicine labels?
- GFCI receptacles?

Stairways –

- Lighting Level adequate; accessible light switches (top and bottom)?
- Stair Treads – condition; if carpet, sound and tight?
- Handrails on both sides; sound condition; proper length/height?

Laundry —

- Equipment raised 12-15" above floor (front-load only)?
- Q—Clean dryer vent hose? Metallic?
- GFCI receptacle for washer?
- Metallic braid-covered supply hoses on washer?

Hallways —

- Well-lighted; light switch at each entrance?

Basement/Crawlspace –

- Weatherization/insulated skirt needed?
- Sufficient lighting?
- Clear path to utilities and electric panel?
- Q—Furnace Filters clean (forced-air heating)?

Electrical Panel --

- Unobstructed access to panel – 30" W, 36" D, 6.5' H
- Not in bathroom
- Dry floor in front of panel

Indications of the Need for Replacing an Electrical Fuse Panel —

- Panel door or frame warm to the touch
- Signs of electrical fire inside panel
- Charring or burn marks, or a burnt smell, inside panel
- One or more overheated wires inside panel (e.g., melted or blackened wire insulation)
- Flickering or dimming of lights when appliances are operated (may indicate need to upgrade to a larger service, e.g., 60 amp to 100 amp)
- Penny, metal plate, or other object, other than a fuse, where a fuse should be
- Presence of pennies or pieces of copper piping near panel
- Oversized fuses for any wire fed by a fuse (e.g., 30-amp fuse feeding 14 gage wire) (may also indicate need to upgrade to a larger panel)
- Rust stains or corrosion on wiring inside panel

Indications of Need for Replacing a Circuit Breaker Panel —

- If the name Federal Pacific Electric (FPE), StabLoc, or Zinsco is on the panel or breakers — illegal in most states because of long history of breakers failing and causing electrical fires
- If the panel is split-bus (containing a single main breaker and two sub breakers, each controlling a bus with several individual

Exterior —

- Rain gutters/diverters over entryways?
- Walkways/ramp condition—level/even/non-slip?
- Q—Handrail needed along walkway for icing conditions?
- Deck/porch/steps and railing condition—handrails both sides of steps
- At least 4' x 4' stoop at threshold height if steps?
- Handrail on steps if 3 or more steps high?
- Threshold 1/2" max height?
- Exterior receptacles GFCI?
- Q—Walkways well lighted?

- Q—Lighting (preferably motion-sensing) at each entry door?
- Q—Slide latch or chain inside door?
- Doorbell?
- Peephole if no sidelight or door glass to see visitors?
- Home address visible from road?
- House number on both sides of mailbox at road?
- Shrubbery not obstructing view from windows?
- Rotted wood around doors, windows?
- Rotted wood on eaves, soffit, fascia, siding?
- Auto-reversing mechanism on garage door(s) working?
- Dead or dying trees or branches hanging over or leaning precariously toward house, car, or power lines? If these conditions are noted, tell homeowner Tim Vail Tree Service has volunteered to remove such trees/branches pro bono, and offer to have Tim contact homeowner to assess whether he can remove this tree(s)/branch(es). If homeowner says Yes, tell lead project coordinator, who will pass the request to Tim Vail.

LED Light Bulb Guidance —

Color: The common light colors that you'll find on the shelves these days are---

- Soft white at 2700 K on the color temperature (K) scale
- Warm white at 2850 K - 3000 K on the K scale
- Daylight at 5000 K on the K scale
- Cool white is almost off the chart at "obnoxious" on the K scale (6000 K or higher)

For **indoor** use, get **soft white**, or warm white (noticeably whiter) as a second choice; don't get daylight unless the homeowner insists on it. Soft white or warm white is easier on the eyes and is usually available on the shelves at Lowe's. **NOTE** - When purchasing, look carefully at what's on the package, to be sure you're getting the right color.

Flood Lights: Typically used in recessed fixtures or security lights; conical in shape and easily confused with **spot lights**. It should say "floodlight" on the packaging. They also come in different sizes (diameters as well as shapes). You'll generally see this as R30 (or BR30) on bulbs for nominal 4" fixtures, and R40 (or BR40) for nominal 5" fixtures. We should **measure the can size before specifying**.

Other things to consider during the initial visit:

- Size of the base (measure if in doubt)
- Type of base (screw vs. pin-type)
- Do we need the bulbs to be dimmable?

Guidance to Homeowner (if they ask) on Owning and Using a Fire Extinguisher

Whether you choose to have a fire extinguisher in your home, or not, is purely a personal decision, based in part on how confident you are in your ability to use an extinguisher to put out a fire without referring to the instructions. If you do choose to have a fire extinguisher in your home, the following guidance from the Maine State Fire Marshal applies:

- Store it at about eye level, and clearly visible, in the most fire-prone area of the home — usually the kitchen — where you can find it very quickly.
- Check the extinguisher's charge at least twice per year, to ensure it is ready for use if needed.
- With the extinguisher in hand, read and re-read the instructions for using it until you can follow the instructions without referring to them; do this at least twice per year. If you can't use the extinguisher with confidence without referring to the instructions, don't even think about using it.
- If the fire is bigger than a standard 13-gallon kitchen trash basket, close the doors to the room, get out of the house, and call 911 immediately. Do not waste precious time trying to use the extinguisher on a fire of that size; it can spread very quickly, and you could be trapped in a burning house with no way out.
- If the fire is smaller than a 13-gallon kitchen trash basket, and you're confident you can use the extinguisher immediately without referring to instructions, go ahead and use it while someone else calls 911. If no one else is there, call 911 as soon as you have the fire out; experienced firemen should take over from there to be sure the fire can't spontaneously re-ignite into a bigger fire.

Created August 2016; Updated Dec 17, 2019

HAH Home Repairs — Home Assessment and Materials List for CDBG-Assisted Project ____

HAH Assessors:

Date:

HAH Project Coordinator & Signature:

Project Coordinator Phone Number:

Homeowner Name & Phone Number:

Home Address:

Email Address, if any:

Homeowner Signature/Authorization: _____ Date: _____

For Code Enforcement Use Only:

Map ____ Lot

Code Officer Inspection Approval: _____ Date: _____

Results of Home Assessment:

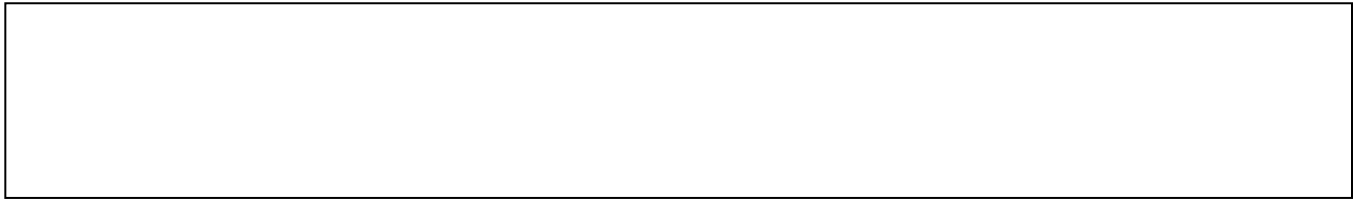
Location	Job	Materials Needed

DELIVERY DATE(S) AND ADDRESS FOR MATERIALS:

Date:

Address:

Recommend this property for Additional Work? Yes _ No _
If yes, what needs to be done?



Created June 2017

Revised July 23, 2019



**Harpswell
Aging at Home**

**Harpswell Aging at Home
PO Box 25
Harpswell, ME 04079**

www.hah.community
hah@hah.community

Dear [name]

It's been an honor for Harpswell Aging at Home (HAH) to serve you with the home repairs work we've just completed. As a reminder, in about three months, the HAH healthcare professional ([name]) will arrange for a visit to your home to discuss how each change is working for you. The purposes of this visit are to ensure we have met your home repairs and other needs, and to identify any needed improvements in our Home Repairs Program or our Resources Program.

If you have any problems, comments, or questions regarding the home repairs work we did on your home, please contact the HAH project coordinator, [name], at [phone] (home), [cell phone] (Cell), or by email at [email].

If you identify new, additional work you want done, please review the enclosed document, "Types of Home Repairs Work Offered by Harpswell Aging at Home." Then:

If the work you want done is within the scope of work we can do, please request our help by calling Linda Strickland at the Harpswell Town Offices at 207-833-



5771. Please understand, though, that except for high-pri-



**Harpswell
Aging at Home**

ority new work (e.g., a homeowner insurance renewal issue, a significantly unsafe condition, or a wheelchair ramp or grab bars urgently needed to address a new or emerging medical condition), new, additional work is normally scheduled to be done after new requests from homeowners for whom we've not yet done any home repairs work. For high-priority new work, please also call the lead project coordinator (Steve Ingram, 207-833-6182) to explain the need for your new work to be given high priority, and we'll gladly schedule your new work to meet your needs.

If the work you want done is not within the scope of work we can do, please refer to the enclosed document, "HAH Home Repairs Contractor Referral List," which lists reliable contractors, recommended by Harpswell residents, who do home repairs work for a fee.

More broadly, if you have any questions about HAH or need information or help in areas other than home repairs, you can contact HAH by email at hah@hah.community or by telephone via the Town Offices at 207-833-5771. You can also visit us on Facebook at "Harpswell Aging at Home," or go to our website at www.hah.community.

[Your Name]

Project Summary Sheet for CDBG Assisted Project: ____

The following information is contained in the attached Application for Harpswell Aging at Home (HAH) Home Repairs:

- Homeowner's initial request
- Household total annual gross income
- Number of people in household
- Ethnicity of home occupant(s)

- Race of home occupant(s)

Home Repairs Needs Assessment based on initial home visit:

- Confirmed need for work items initially requested by homeowner.
- Identified additional work needed to keep homeowner safer, warmer, and drier.
- See attached Home Assessment and Materials List for agreed-upon work plan, which includes both initially requested work and additional work identified during in-home assessment.

Summary of Action Taken: The work on the attached Home Assessment and Materials List was completed.

Total Cost of Project: \$____ *[Habitat (Connie) provides to lead project coordinator]*

Completion Date:

Number of Work Days to Complete: __ days

Total Volunteer Hours: Work: __ person-hours; Admin: __ person-hours

Reaction from Homeowner upon Completion of Work:

Submitted by: _____, Harpswell Aging at Home *[project coordinator name]*

Date: _____

Updated July 24, 2019 for CDBG use

HAH Project Coordinator Actions for Each Home Served — For CDBG-Assisted Projects (additional details are in HAH/Habitat Home Repairs Step-by-Step Process document [*in Dropbox, Home Repairs Docs for CDBG Assisted Projects, Overall and Step-by-Step Guidance for Home Repairs folder*])

Note: After receiving a homeowner request for work, Linda Strickland sends the request using the Application for HAH Home Repairs Form — CDBG [*in Dropbox, Home Repairs Docs for CDBG Assisted Projects, Reference Documents folder*] to the lead project coordinator. Lead project coordinator assigns the next project coordinator in sequence, tentatively schedules the initial visit date, and forwards the request and tentative initial visit date to the project coordinator. Project coordinator actions begin at this point:

1. Call the homeowner (HO), using the HAH HR Intake Call Form CDBG [*in Dropbox, Home Repairs Docs for CDBG Assisted Projects, Intake Call folder*], to explain our home repairs process, get additional information, and schedule the initial visit with the homeowner. Send a copy of this completed form, and a copy of your email to others who will be involved in the initial visit, to lead project coordinator, to Judy Muller (head of HAH Resources Team), and to Julie Moulton (HR/Resources administrative assistant) for entering homeowner information in HAH Master Database).

Note: Whenever we get an application for home repairs work, whether new work for a homeowner we've not yet served or follow-on work from a homeowner for whom we've already done work, Habitat will assign a new project number. For these follow-on projects, if the work is to correct a problem with work we already did, it's not necessary to use the HAH HR Intake Call Form; instead, simply call the homeowner and set up a visit to scope out the corrective work as needed for making out a new Home Assessment and Materials List Form (if needed). Also, it's not necessary to get the homeowner to sign another release and waiver form or another home assessment and materials list form. However, if the new work is in addition to the work we already did, and it falls within the scope of work we do, all of the steps described below need to be followed.

2. Conduct initial visit, using the following docs [*in Dropbox, Home Repairs Docs for CDBG Assisted Projects, Initial Visit folder*]:

- Project Coordinator Notes for Initial Visit — CDBG
- Homeowner Release and Waiver Form — CDBG (single or multiple homeowners version)
- HAH Initial Visit Assessment Checklist
- Home Assessment and Materials List — CDBG form
- HAH Tips for Safety at Home Handout

Following initial visit, mail to the homeowner a copy of the signed Homeowner Release and Waiver Form and the signed Home Assessment and Materials List, if requested by the homeowner; alternatively, give a copy of these forms to the homeowner on the first work day, if requested.

During initial visit, check for dead or dying trees or branches that hang over or are precariously leaning toward the house, car, or power line. If these conditions are noted, and homeowner would like Tim Vail to assess removing the tree(s) or branch(es) pro bono, tell lead project coordinator, who will pass the request to Tim Vail.

3. Type work list on Home Assessment and Materials List — CDBG Form; send this work list (all in pdf format and in one email, unless you want to send separately) to:

- Habitat for its review, mikec@habitat7rivers.org and Kathy@habitat7rivers.org
- the materials list developer for addition of materials for each work item
- cc: lead project coordinator for his information

4. Send Home Assessment and Materials List — CDBG Form (with or without materials entered) to Code Enforcement Officer (CEO), Bill Wells (bwells@town.harpswell.me.us), 833-5771, with copy to lead project coordinator. Fill out, and review and file with the CEO in the Town Office a building permit application if one is required; a permit is required only for:

- New plumbing service (e.g., adding an outside faucet where none now exists), which must be done by a licensed plumber
- New fixtures or material in existing service (e.g., adding a filtered water faucet on a sink by teeing into existing service), whether done by us or by a licensed plumber

(No charge for HAH building permits, and the CEO gives HAH high priority for HAH permit reviews and approvals.)

For projects that include building a **wheelchair ramp**, give a copy of the ramp drawings (both typical ramp details and specific ramp details) to Codes as soon as the drawings are ready for use. No need to review these drawings personally with the Codes officers unless the ramp is unusually complex or you have questions about specific aspects of the ramp design that you want Codes input on before building the ramp.

5. Call homeowner a week or more before start of work (as scheduled by the lead project coordinator) to confirm availability and remind him/her that Hancock will deliver materials the day before work begins. Also a week or more before start of work, contact lead project coordinator to have him arrange for someone to bring the tool trailer to and from the worksite if you need someone to pull the trailer.

6. Order materials from Hancock Lumber (lumber, insulation, lever-type door locksets, rain gutters, fasteners), amazon.com (kitchen and bathroom faucets, grab bars, lever-type door lockset, toilet seat risers, LED light bulbs, GFCI receptacles, and CO detectors), Lowe's (kitchen and bathroom faucets, handheld shower units, lever-type door locksets, grab bars, caulking, electrical fixtures, LED light bulbs, GFCI receptacles, and accessories) or other suppliers, as needed. See detailed guidance [*in Dropbox, Home Repairs Docs for CDBG Assisted Projects, Ordering Materials folder*]

7. Send email to team, 3 to 5 days before first workday, with address, list of jobs to be done and materials to be purchased at Lowe's (both should be in the home assessment and materials list attached to this email), and any other info that would be helpful for the team to know, asking that each team member review the list and select those jobs he/she would be interested in doing.

8. Take trailer to job site (lead project coordinator will arrange if project coordinator cannot pull trailer) in time for 8 a.m. start of work. Coordinate workday. Return trailer at end of day (lead project coordinator will arrange if project coordinator cannot pull trailer). Give all rechargeable batteries, including LED floodlights, to lead project coordinator for charging for next workday.

9. Keep the Lowe's purchase receipts and return credit slips (some of these might come to you from the HR Tool Trailer coordinator), the receipts for Town Transfer Station fees, and any Hancock, Amazon, or efaucets invoices or credit slips. Send a copy of these docs, or a scanned copy of them, to Habitat (Connie Wendell) for her tracking of all costs and credits for each project. Also, track your administrative volunteer hours for this project and the team's work hours for each work day using the definitions in 15 below.

10. Repeat 6, 7, 8, and 9 for any subsequent workdays.

11. On at least the last workday, have trash collected and removed for disposal at Harpswell dump, charged to Habitat account with unique job number for this project. For now, Lance Demond is the team's trash removal guy. We have no long-term volunteers yet to take the trash, but Jeff, Steve Ingram, and Greg Rolfson have graciously volunteered to take the trash to the dump for the team whenever Lance is not available.

12. At the end of the last workday:

- Give the homeowner the End-of-Work Letter for Homeowners with your contact information and information about the three-month follow-up visit [*in Dropbox, Home Repairs Docs for CDBG Assisted Projects, End of Work folder*]. Note that the three-month follow-up visit is done by the same Resources person who did the first Resources visit; if no Resources person was assigned (i.e., when the homeowner requests no Resources visit), delete the three-month visit info from the letter. Be sure to talk through with the homeowner how they should handle any comment or questions about the work we did on their home (call the project coordinator) or any additional work they want done (call Linda at the Town Office if it's work we can do, or contractor(s) on the HAH Contractor Referral List if it's not work we can do).
- If the homeowner gave us an emergency contact, send a copy of the end-of-work letter, with enclosures, to the emergency contact, along with a note that we're sending the information to them to keep them informed, so they can help the homeowner determine how to get any future needs for home repairs work met.
- Confirm the homeowner's satisfaction with the work done by the team.

- Show the homeowner how to use any new items installed by the team.
- Inform the homeowner that Code Enforcement will do an inspection to confirm all work done meets Code requirements.
- IF it appears to you that the homeowner might benefit from having help with light housekeeping chores (such as dusting, vacuuming, mopping, bathroom and kitchen cleaning, window washing, and disposal of household trash and recycling items), ask the homeowner if they need this kind of help AND have someone able and willing to do it for them. If they tell you they do need this kind of help and have no one else to give it to them, tell them about HAH's Home Helpers Program, and refer them to the Home Helpers Program by giving them Jerry Klepner's contact information: 833-5144 Home or 202-255-3611 Cell, or deanklepner@mac.com.

13. Send email to Denise Smith at Hancock (dsmith@hancocklumber.com) with an itemized list of materials to be returned, and arrange pickup of these materials to be returned for credit; remind her to put the project number on the credit invoice, and ask her to email you the credit invoice, so you can track the return credit as part of the costs for this project. Check invoice to ensure all returned items are on it. Note that the Hancock shipping manager inspects all returned material and rejects any that is damaged and cannot be restocked for future sale; as a result, the credit might be missing some items on your pickup list; you'll need to follow up with Denise Smith if you disagree with the credit given.

14. Call or email Code Enforcement that the project is complete and ready for inspection when he wants to; tell him to contact you if he wants you to accompany him on the inspection (he seldom asks unless a lot of structural work was done).

15. Track number of work days (including fractions of work days) and all volunteer hours for this project, and send to the lead project coordinator (copy to Julie Moulton, jamoultonhah@gmail.com, for tracking and reporting volunteer hours to HAH and Habitat) at the end of the project. Volunteer hours need to be tracked as either:

- administrative hours (your non-work hours for record keeping, online ordering, ordering Habitat-manufactured windows, CEO interactions and permit applications, and report forms) or
- work hours (doing the initial visit; typing the job list; developing the materials list (ask Bob G, Jeff Stann, Mike Hastings, Steve Inkellis, Jim Hays, or John Pearson); getting the Lowe's and any other non-Hancock materials (ask Steve Ingram, Tim, Bill S, Dave B, or Philip); getting Habitat-manufactured windows; cleaning, organizing, and moving the tool trailer; setting up and doing the work; and taking trash to the dump).

16. Take or scan and send Habitat Miscellaneous/Volunteer's/Other's Expense Report form [*in /Dropbox, Home Repairs Docs for CDBG Assisted Projects, Follow-up and Closeout of Project folder*] to Connie Wendell, Habitat's bookkeeper (connie@habitat7rivers.org or by mail to Habitat for Humanity/ 7 Rivers Maine, Att'n: Connie Wendell, 126 Main St, Topsham, ME 04086) for reimbursement for any materials purchased without using Habitat account or Habitat credit card; send receipt(s) with this form, and include the project number for this project.

17. After the project work is finished, prepare the Project Summary Report — CDBG [*in Dropbox, Home Repairs Docs for CDBG Assisted Projects, [Follow-up and Closeout of Project folder]*] and send it to the lead project coordinator (copy to Julie Moulton, jamoultonhah@gmail.com, for entering homeowner reactions into the HAH Survey Monkey database). The lead project coordinator will review the report, add the total project cost (from Habitat (Connie)), and send the report to Habitat (Mike Connelly at mikec@habitat7rivers.org and Kathy Smith at kathy@habitat7rivers.org) for Habitat use in getting reimbursement from Cumberland County. As mandated by the County for CDBG projects, the Project Summary Report contains the following information:

- By reference to the Application form (attached by the project coordinator):
 - the homeowner's initial request
 - household total gross annual income
 - number of people in household
 - each occupant's ethnicity and race
- Home repairs needs assessment based on initial home visit (in Home Assessment and Materials List, attached by project coordinator)

- summary of action taken (simply a statement referring to attached Home assessment and Materials List)
- total cost of project (Habitat (Connie) provides to lead project coordinator for inclusion in report before sending to Habitat)
- completion date for the project (project coordinator adds date)
- number of work days to complete (project coordinator adds days)
- total volunteer hours, both work and administrative (project coordinator adds hours)
- any reactions of homeowner(s) during the workdays and upon completion of work — any “testimonials” or expressions of appreciation or benefits to them of the work we did on their home (project coordinator adds reactions)

Note that, for homeowner confidentiality, homeowner names are not included anywhere in the Project Summary Report. Simply refer to them as “homeowner” (even if the home is owned by their family, rather than by the resident).

18. After smoke detectors are installed, fill out the Red Cross Service Acknowledgement Form [*in /Dropbox, Home Repairs Docs for CDBG Assisted Projects, Follow-up and Closeout of Project folder*], sign the form, get the homeowner’s signature on the form, and mail it to Home Fire Campaign, C/O Ron Springel, American Red Cross, 2401 Congress Street, Portland, ME 04101. Give the homeowner the Red Cross fire-safety-related information after he/she signs the Red Cross form — for the homeowner’s information and use if desired; there is no need for you to review this information with the homeowner, unless you choose to do so.

19. Three months after the end of work, the Resources Team healthcare professional sets up and conducts a three-month follow-up visit to assess the effectiveness of our home repairs and resources services in helping the homeowner(s) age in their home safer, warmer, and drier.

Totally at his option, the project coordinator may contact and accompany the healthcare professional on this visit, if desired; if not, no action is needed by the project coordinator.

20. General Guidance — From time to time, one of the homeowners we’re serving will fall or have some other accident/incident, either while we’re

working for them or not. Whenever any of us learn of such an accident/incident, we need to promptly get Judy Muller's Resources team involved, so Resources can ensure the homeowner is getting the extra help they need, such as Meals in a Pinch, Transportation, emergency call button, Seniors Calling support, home health care, etc.

21. Guidance for Handling Homeowner Calls Following Completion of Work — The end-of-work letter contains guidance to the homeowner on this (you will likely need to remind them of this guidance); in brief:

- If comments or questions about the work we did, they should call the project coordinator. For these cases, use your judgment as to how to address the comment or question. If addressing problems with the work we did results in added cost, Habitat will fund this under the same project number; a revised Summary Report will be needed for CDBG work.
- If the homeowner identifies additional work they want done, they should review the "Types of Home Repairs Work Offered by Harpswell Aging at Home."
 - If the additional work is within the scope of what we do, they should call Linda at the Town Offices to request our help. This will involve the lead project coordinator possibly assigning a different project coordinator, and Habitat assigning a new project number, and the work will be scheduled with appropriate priority in with our other new work (if high priority, they should also call the lead project coordinator to explain the need for the high priority). For CDBG projects, the homeowner will need to provide proof of income (Cumberland County requirement), which they did not have to do if their original work was not done under CDBG. Also, if the new work is high priority, they should also call the lead project coordinator to explain, so the work can be scheduled with the needed priority.
 - If the work is NOT within the scope of what we do, they should refer to the "HAH Home Repairs Contractor Referral List," which lists contractors recommended by Harpswell residents as reliable and reasonable cost.

22. General Guidance for CDBG-funded Projects —

- If the estimated cost of any job within a project is expected to exceed \$4,000, the job must have at least 2 competitive bids — for example, septic system work.
- If the total cost of the project exceeds \$5,000, Habitat will charge only \$4,999 to CDBG and fund the remainder of the total cost from its own sources. Reason: CDBG requires homeowner to take out a 5-year mortgage to pay the total cost of any work that exceeds \$5,000, and the homeowners we serve would not likely be able to take out such a mortgage.
- CDBG requires that most materials for each project be purchased from the lowest-cost source available to the team. To help us meet this requirement, the Materials Ordering guidance in paragraph 6 above and in the detailed guidance for purchasing materials [*in Dropbox, Home Repairs Docs for CDBG Assisted Projects, Ordering Materials folder*] recommend certain materials be purchased from certain sources.

Revised January 12, 2020 for CDBG use

Home Repairs Project Spreadsheet — (Format only)

Proj No.	Home-owner Name	Address Phone Number	Project Coord	Materials List Developer	Initial Visit Date	Planned Start Date	Date Cplt	Summary Report Issued	Work/Admin Hours	Work days	Total Cost

Created:

Updated:

Photos of Home Repairs Tool Trailer



Hallmark Passport — 6' x 10' (11.5' centerline)

GVWR 2,990 lbs, Dbl Rear Doors,
32" x 72" side door, 6' 6" inside



height



Tools in bins on sawhorses at job site — very handy and easy to find and return tools to the right bin; tools color-coded by

type for ease of returning to bin
Chop and Table Saw Storage

Extension Cord

Storage on both

back

doors Safety Equipment Storage on side door (cover is for rain)

Tool List for Home Repairs Tool Trailer



DEWALT BATTERY-OPERATED TOOLS (all DeWalt, so batteries are interchangeable):

- 7 1/2 inch circular saw (can be corded)
- 2 reciprocating saws (demolition saws) and blades (can be corded)
- 2 oscillating saws and blades (can be corded)
- Jig/saber saw and blades (can be corded)
- 4 cordless non-impact drivers
- 4 cordless impact drivers
- Hammer drill — 3/8" (can be corded)
- Belt sander and various grit belts (can be corded)
- Palm sander and various grit sandpaper pads (can be corded)
- 4" angle grinder and set of blades, including 1 masonry (can be corded)
- 2.5 gallon shop vac, wands, and replacement bags (can be corded)
- Blower
- Portable table saw with stand
- Portable compound miter chop saw and stand
- 2 portable rechargeable LED work lights
- Handsaw
- Hacksaw and set of blades
- Set of drill bits
- Set of spade drill bits
- Set of masonry drill bits
- 2 sets of driver bits for various types of screws
- Combination ladder
- 2 6 ft stepladders
- 4 ft stepladder
- 2 sets of sawhorses, same size as the ones we have
- Plywood for sawhorses — 3/4 sheet, cut into 2'x4'
- Set of channel-lok pliers
- Set of adjustable wrenches
- 2 vise-grip pliers
- Set of various pliers
- Set of cold chisels
- Set of wood chisels
- Set of files and rasps
- 5 utility knives and blades
- Sheet metal shears
- 2 bottle jacks, 2 tons each

Small adjustable block plane, low angle
6 combination screw drivers
Set of English Allen wrenches
Set of paint scrapers
4 carpenters hammers
1 2-lb hammer
2 Cat's claw nail removers
3-ft crow bar
5-ft iron bar
2 15-inch flat bars
Laser level
4-ft level
2-ft level
Carpenter square
Speed square
2 heavy duty T-50 staplers and staples
6 measuring tapes
2 chalk lines and chalk
2 caulking guns
4 clamps — about 14 inch and 20 inch
Tool tubs for tools and other items
2 25-ft extension cords, heavy duty
2 50-ft extension cords, heavy duty
Stud finder
Electrical volt-ammeter/multimeter
Electric circuit analyzer
Broom
Foxtail brush and dust pan
4" Bench vise
Pruning shears
Iron rake
Flat-nose shovel
Pointed-nose shovel
Pick axe
Safety equipment:
 First-aid kit
 Fire extinguisher
 2 sets of Knee pads

- 4 pairs of Hearing protectors
- Safety Glasses for each team member
- N95 disposable respirators
- Miscellaneous supplies, including:
 - Caulking, clear and white
 - Teflon tape
 - Masking tape
 - Heating duct tape
 - Duct tape
 - Electrical tape
 - Machine oil
 - Super glue
 - Wood glue
 - PVC glue and cleaner
 - Plumbers putty
 - Cable/wire staples
 - Wire nuts, various sizes
 - Wire ties, various sizes
 - Sandpaper
 - Contractor Cleanup bags
 - Spackle
 - Complete set of fasteners, including
 - masonry screws
 - wallboard screws/anchors/moly bolts
 - Timberloks
 - deck screws
 - trim screws

Memorandum of Understanding
for the Partnership between
Habitat for Humanity 7 Rivers Maine (Habitat)
and
Harpswell Aging at Home (HAH)

Whereas:

Habitat and HAH have entered into a mutually supportive partnership for the purpose of providing home repairs and weatherization services to older adults in Harpswell, the partners agree to the following:

Habitat will:

- Conduct required background checks on HAH/HABITAT home repairs volunteers when requested by the HAH/HABITAT home repairs lead job coordinator.
- Provide liability insurance for HAH/HABITAT home repairs volunteers while they are doing home repairs work on any Habitat-approved home in Harpswell.
- Provide funding of an average of \$1,500 for purchasing building materials and contracted services for each HAH/HABITAT home repairs project, for up to a total of 25 such projects in fiscal year July 1, 2017-December 31, 2018; a small percent of this funding may be used for replacement of tools and accessories damaged or worn out in the conduct of this work such as drill bits, screw driver bits, utility knife blades, saw blades, belt sander belts, palm sander paper, etc.
- When operating under the Community Development Block Grant in partnership with the Town of Harpswell, provide up to \$15,000 total additional funding for purchasing additional building materials and contracted services for unusually large HAH/HABITAT home repairs projects during this period, in varying amounts above \$1,500 as needed for each of these unusually large projects

- Provide project oversight for each HAH/HABITAT home repairs project, including review of the work plan for each of these projects and occasional on-site supervision and quality checks as desired by Habitat.
- Provide accounting services to pay for ordered materials, either directly when ordered using Habitat accounts, directly to a contractor who did work on an HAH/HABITAT home repairs project, or by reimbursement to HAH/HABITAT volunteer that purchased the materials without using a Habitat account; and track the amount spent on each HAH/HABITAT home repairs project.
- Provide HAH/HABITAT projects with free materials when available, such as smoke detectors from the Red Cross and LED bulbs from Efficiency Maine
- Handle in a manner that complies with HAH/HABITAT's confidentiality policy all personal and confidential information about the older adults HAH/HABITAT serves.

HAH will:

- Provide volunteer job coordinators and workers to conduct home repairs work for adults in Harpswell who request this work and who:
 - Are over 60¹ years old
 - Live in Harpswell
 - Own their home, or live in a home owned by their family
 - Have a combined total annual gross income below 80 percent of the Average Median Income for Cumberland County
- Conduct its home repairs activities in a manner consistent with HAH's and Habitat's agreed-upon philosophy and approach regarding interactions with participants, other organizations, and each other, as summarized in HAH's Step-by-Step Process for HAH Home Repairs and Resources Work in Partnership with Habitat for Humanity/7 Rivers Maine

¹ HAH prioritizes providing volunteer services to people in Harpswell who are 60 or older. If, however, they have met existing demand of people in need of home repair services who are 60 or older, they may provide services to people who are between 50 and 60 years of age.

- Orient, train, and oversee its home repairs volunteers to ensure adherence to this agreed-union philosophy and approach
- Partner with the Town of Harpswell such that the Town will receive homeowner requests for home repairs services, screen requesters for eligibility, and confirm home ownership using Town records
- Conduct an in-home assessment of each requesting homeowner's home repairs and other needs; help the homeowner meet his/her non-home-repairs needs, without Habitat involvement or obligation, by referring/connecting him/her to the needed services
- Obtain the homeowner's signature on Habitat's Homeowner/Occupant Consent and Release and Waiver Form
- Confer with the homeowner to develop, and get the homeowner's signed authorization for, a customized work plan to meet the homeowner's home repairs needs, limiting work to that needed to make the homeowner safe, warm, and dry in his/her home, and to the extent possible for each project, limiting the work to a cost of \$1,500.
- Provide to Habitat the work plan for each HAH/HABITAT home repairs project, using the Habitat form for this purpose, for Habitat oversight review and approval prior to project commencement.
- Order or purchase needed materials, and arrange needed contracted services, for each project; give Habitat any contractor invoices for payment and purchase receipts for reimbursement to the purchaser
- Provide to Habitat, upon completion of each project funded by Habitat, a summary report using the Habitat form for this purpose
- From time to time, when a home repairs request comes from a homeowner who does not meet the income limit for eligibility and can pay for materials but not for labor, do the needed home repairs work for the homeowner, without Habitat involvement or obligation

- Provide, register, insure, and maintain a tool trailer with tools needed by HAH/HABITAT volunteer home repairs workers; place and maintain both Habitat and HAH logos on the trailer to display to the community HAH's partnership with Habitat
- Provide to Habitat, whenever requested, HAH data for Habitat's use in fundraising activities, such as volunteer administrative and work hours.

Both parties agree that they will regularly communicate about any concerns related to the partnership and attempt to resolve the concerns in good faith. This agreement can be modified in writing by agreement of the parties at any time and is intended to be a living document that guides the partnership.

By signing below, both organizations agree to be bound by the terms of this Memorandum of Understanding:

Mark Primeau
Executive Director, Habitat
tors

Jessica Maurer
Co-Chair, HAH Board of Direc-