


MODULE 4: IMPLEMENT INTERVENTIONS



Healthy Housing Solutions^{INC}

IMPLEMENT INTERVENTIONS



-  Monitor occupant participation.
-  Manage bid process & contracting.
-  Measure and disseminate program results.

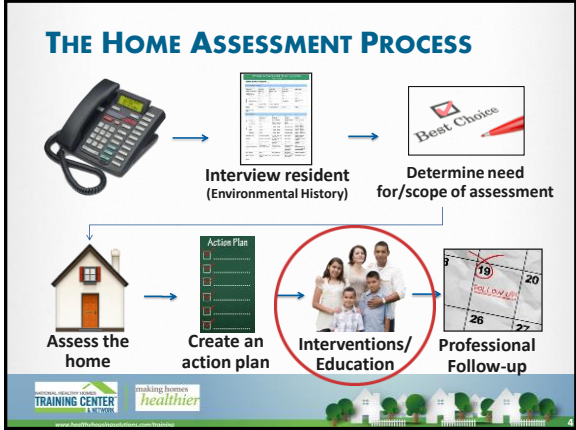



SELF ASSESSMENT

MODULE 4 – IMPLEMENT INTERVENTIONS

- Name the five steps in the bid process.
- Name at least four reasons to complete an in-house cost estimate.
- Name five suggested requirements for accepting contractor bids.
- Name five sources of program evaluation data.



HEALTH HAZARD IDENTIFICATION AND REMEDIATION PROCESS

- Bid work to Contractors?
- Assist owner/occupants in finding their contractor?
- Engage a local partner to accomplish the work (nonprofit organizations)?
- Assist the owner/occupants in a DIY approach?
- Others?

TRAINING CENTER *making homes healthier*

IDENTIFY RESPONSIBLE PARTIES

(DÉJÀ VU? WE'VE BEEN HERE BEFORE!)

- Owner
- Resident
- Volunteers
- In-house construction
- Partners
- Outside contractors

TRAINING CENTER *making homes healthier*

EFFECTIVE REMEDIATION REQUIRES

- Good Scope
- Good Spec
- **Good Cost Estimate**
- Fair Bid Process
- Quality Control
- Recordkeeping



INDIVIDUAL EXERCISE (11): YOUR CONTRACTING PROCESS



- What do you know about the process for handling contractors in your organization?
- Briefly jot down notes on your worksheet in response to the questions.
- Share your responses as part of a class discussion.



BENEFITS OF IN-HOUSE COST ESTIMATES

1. Feasibility & Budgeting
2. Manage expectations
3. No surprises on bid opening
4. Contractor honesty check
5. Keep contractor from “going under”
6. **Funders may require it**



COST ANALYSIS EXAMPLE

Break down the price by cost components, and examine each item of cost

New Roofing:

- Materials: plywood, nails, felt, asphalt shingles;
- Equipment: Cranes, dump truck
- Labor costs



SPECS WITH FULLY LOADED PRICING

- Includes labor, material overhead & profit in one number
- Used in solutions-based checklists

TIP: The easiest way to maintain up-to-date unit pricing? Have contractors provide you with an line-item breakdown.



Suggested Cost Categories

Allowable costs will differ by program

Outreach and Education Costs	Health Intervention and Assessment Costs	Housing Intervention Costs
Forms and outreach materials	Home visits	Specification costs
Media costs	Visual assessments	Average cost per housing unit
	Environmental sampling	Range of housing unit costs
Public education and training offerings	Laboratory analysis	Specific intervention costs



THE BID PROCESS

1. Specifications/Scope of work
2. Request for bids
 - Site visit
3. Bidding: formal/informal
 - Bid process and control
4. Review bids
5. Award the contract



BIDS & QUOTES

- Why bid at all?
- What are the advantages of bidding?
- What are the consequences if you don't?
- Who Controls the Bid Process?
 - Should bids go to you?
 - Should bids go to the property owner?



PROCUREMENT POLICY

- Agency may have guidelines for how jobs must be bid according to dollar value.
- Know your policy!



Suggested Requirements for Accepting/Opening Bids

- Require sealed bids or secure electronic bids
- Date & time stamp
- Hold public openings
- Get a witness (or two)
- Recording of results
- Notification of results



CONTRACT GUIDELINES

1. Scope of work
2. Timing & penalties
3. Costs, payment method & penalties
4. Change orders
5. Rules, laws, and codes
6. Warranties
7. Dispute resolution
8. Breach of contract
9. Attorney fees



DRAW SCHEDULE: BENEFITS

- Helps avoid payment conflicts
- Based on accurate, detailed estimate and schedule of values
- Strikes balance between contractor's and program's needs
- Reflects actual value of work completed
- May be highly detailed or more basic, depending on project type/size and the financing arrangements



SAMPLE DRAW SCHEDULES

Small Remodeling Project Sample

Sample Draw Schedule: Small Remodeling Project

	Work Completed	Amount
Draw 1	Demolition	\$3,000
Draw 2	Framing, wiring and plumbing rough-in, insulation.	\$6,000
Draw 3	Drywall, windows, cabinets.	\$6,000
Draw 4	Patch exterior, painting, flooring, fixtures, cleanup.	\$5,000



PROVIDE INTERVENTION RESOURCES TO RESIDENTS AND OWNERS

- Education, guidelines
- Contact information for agencies and volunteer organizations that might be able to help
- Suggestions on what materials to use and where to get them
- Recommendations for contractors if they need one
- Information, including timelines, about what work is to be completed by others



QUALITY CONTROL: MONITOR RESIDENT'S PARTICIPATION

- Telephone follow-up
- Onsite visits
- Work completion follow-up
- Long-term follow-up for bigger, more serious interventions
- Follow-up tests as needed



QUALITY CONTROL: MONITOR OTHER WORK EFFORTS



- Co-workers
- Volunteers
- Partners
- Supervisors
- Contractors
- Others?



RECORD KEEPING

- What information do they need?
- When do they need it?
- In what format?
- How do you find it?



EVALUATION STARTS AT THE PROGRAM DESIGN PHASE

- Decide early: Who's on the team, how to secure good quality data, and ways to measure qualitative and quantitative accomplishments.
- Evaluation measures include process (outputs), outcomes, and costs.
- Disseminating evaluation findings is critical to **program sustainability**.



The Logic Model can serve as an important planning and evaluation tool.

Figure 6.2 A Proposed Logic Model related to healthy homes

Program Objectives	Inputs	Activities	Outputs	Short Term Outcomes	Mid Term Outcomes	Long Term Outcomes
Reduce housing quality issues	Health Department Staff	Educate landlords about environmental health issues	Number of inspections completed	Improvement of housing and public health conditions after one year	Reduction in number of environmental health issues	Reduction in mold and lead paint exposure
Reduce housing quality issues	Housing Program Staff	Conduct risk assessments	Number of environmental health inspections	Improvement in housing conditions after one year	Reduction in number of environmental health issues	Reduction in mold and lead paint exposure
Reduce housing quality issues	Community Organizations	Provide support for rent and management	Number of tenants receiving support	Reduction in housing cost burden	Reduction in number of tenants in housing crisis	Reduction in housing instability
Reduce housing quality issues	Public Health Department	Conduct risk assessments	Number of environmental health inspections	Improvement in housing conditions after one year	Reduction in number of environmental health issues	Reduction in mold and lead paint exposure
Reduce housing quality issues	Real Estate Industry	Provide education on housing quality issues	Number of real estate professionals trained	Improvement in housing quality	Reduction in number of housing quality issues	Reduction in housing instability
Reduce housing quality issues	Real Estate Industry	Provide education on housing quality issues	Number of real estate professionals trained	Improvement in housing quality	Reduction in number of housing quality issues	Reduction in housing instability
Reduce housing quality issues	Real Estate Industry	Provide education on housing quality issues	Number of real estate professionals trained	Improvement in housing quality	Reduction in number of housing quality issues	Reduction in housing instability
Reduce housing quality issues	Real Estate Industry	Provide education on housing quality issues	Number of real estate professionals trained	Improvement in housing quality	Reduction in number of housing quality issues	Reduction in housing instability

LOGIC MODELS SERVE MULTIPLE PURPOSES

- Identify short-, immediate, and long-term outcomes for the program.
- Link expected outcomes to the program's intended activities and inputs.
- Establish program boundaries to prevent "mission creep."

WHERE DOES EVALUATION DATA COME FROM?

- Grant proposals and quarterly reports
- Newsletters, publicity materials and press releases
- Meeting minutes and administrative records
- Registration and enrollment forms
- Publications and journal articles
- Prior evaluations
- Asset and needs analyses
- Client satisfaction surveys
- Databases
- Reports held by funders or partner agencies
- Websites
- Graphs, maps, charts, photos, and videos
- Feedback from key individuals, including clients and non-participants, staff, general public, key informants, critics, staff of other agencies, representatives of advocacy groups, policy-makers, funders, federal, state, and local health & housing officials.

COMMON PROGRAM OUTPUTS

See Chapter 6,
Figure 6.6 in the
HUD Healthy
Homes Program
Guidance Manual



Figure 6.6 Common Program Outputs

<ul style="list-style-type: none"> Program Outreach and Community Education <ul style="list-style-type: none"> Number and type of presentations Audience reached (non-parented, parents, teachers, students, etc.) Community meetings, trainings, covertness, etc. Number of individuals reached Number of health fairs <ul style="list-style-type: none"> Number of nonparented participants, nonparented parents to health requests for follow-up information Number of children screened Number of housing issues tracked through fair to fair counseling Number of health fairs <ul style="list-style-type: none"> Fair to fair counseling Program Referrals <ul style="list-style-type: none"> Number of referrals from medical providers Number of referrals from community-based organizations Number of requests for information and materials requested with different needs placements Number of referrals to health housing programs to offer housing programs Number of referrals to health housing programs to other health or social service programs Healthcare Individuals Reached <ul style="list-style-type: none"> Demographics of participants and caregiver(s) Level of housing risk in terms of participants and non-participants 	<ul style="list-style-type: none"> Case Management Case Coordination and Education <ul style="list-style-type: none"> Number of children tested for lead exposure Number of homes visits Number of health housing educational interventions Number of referrals provided to families for respiratory health and social services Number of referrals to other services completed and not completed Number of families receiving housing repairs Home Assessment <ul style="list-style-type: none"> Number of assessments administered Number of homes with inaccurate conductors Number of homes with environmental samples collected Number of environmental samples collected Housing Infringement <ul style="list-style-type: none"> Number of housing violations identified and resolved Number of housing violations identified and not resolved Number of housing violations identified and not resolved Number of housing violations identified and not resolved Block Party Development Activities <ul style="list-style-type: none"> Number of contractors recruited Number of contractors recruited from the local organizations and area Number of individuals trained
--	---

MEASURE/DISEMINATE PROGRAM RESULTS WHO NEEDS TO KNOW?

- Board of Directors
- Funder Reporting
- Partners
- Marketing
- Health Agencies/Plans
- Participants
- Colleagues
- Others?



PROVIDE PROFESSIONAL FOLLOW-UP AND TESTING

- Clearance testing for contaminant hazards (LBP, Asbestos, Radon, CAZ testing for CO)
- Supportive services (Resident training, Occupational Therapist, Mental Health support)
- Testing for energy performance (Blower Door, Duct Blaster)
- Building Inspection
- Others?