

A. COVER SHEET



City of Independence
CDBG Home Repair Program
2023

Truman Heritage Habitat for Humanity formally submits the application for sole contractor for the City of Independence CDBG Home Repair Program 2023. The attached is considered the entire proposal for request.



Christina Leakey, President & CEO
Truman Heritage Habitat for Humanity

February 9, 2023

Date

B. PROJECT SUMMARY

Truman Heritage Habitat for Humanity (THHFH) requests \$138,596 to manage the City of Independence CDBG Home Repair Program. \$27,700 of the \$138,596 will be for administrative cost to support the program. THHFH plans to complete 5-8 projects over one year at a unit cost not to exceed \$25,000 per project.

The “Home Preservation Program” (HPP) is a Habitat for Humanity International (HFHI) initiative focused on addressing urgent home repairs for low-moderate homeowner families in the community. The program is based on the core tenant of Habitat which calls for providing a “hand up” to families and individuals in need of services that will assure safe, decent, and affordable housing. THHFH is an affiliate of HFHI and has adopted the attached HPP home repair policy in conformance with HFHI guidelines. See exhibit B attached to this proposal.

Given available funding, Truman Habitat’s proposed 2023-2024 HPP program will be able to provide 5-8 low-moderate income owner-occupied homeowners minor, emergency and/or critical home repair assistance that will improve the safety, sustainability, and affordability of the home repairs during the contract period. Offered services will include roof repairs and replacements, hazardous tree removals, HVAC, insulation, exterior trim/siding, paint, brush clean-up, collapsed sewers and other minor and critical home repairs deemed acceptable by City and meeting the console dated plan. THHFH is designated by HFHI as an Aging-in-Place affiliate and approximately 90% of our home repair projects service the elderly. THHFH is dedicated to caring for the whole person and has invested in hiring an Aging-in-Place Specialist to connect our clients to additional services in addition to home repair and safety modifications to the home.

CDBG Home Repair Project Timeline:

Activity	Months from Grant Award
Execute CDBG funding contracts & finalize procedures	0-3 months
Market the program to eligible applicants	1-3 months
Evaluate applications and determine eligibility; notify applicants	2-10 months ongoing
Develop project scopes of work and obtain required City approvals	3-10 months ongoing
Enter into work agreements with eligible homeowners and contractors	3-11 months ongoing
Conduct HPP projects (approximately 2-4 per quarter)	3-11 months ongoing
Complete project close-outs; process project payments	3-12 months ongoing
Submit project reimbursement requests to City	4-12 months ongoing
Complete grant documentation and record keeping requirements	on or before 12 months
Quarterly Reports to the City	3-12 months ongoing

C. Offeror Description and Project Team

a. Brief history of Truman Heritage Habitat for Humanity organization

The Truman Heritage Habitat for Humanity (THHFH), a 501c3 organization, mission is “Seeking to put God’s love into action, Habitat for Humanity brings people together to build homes, community and hope”. THHFH was founded in 1989, as a non-profit ecumenical Christian housing ministry, seeking to eliminate poverty housing and making decent shelter a matter of conscience and action. THHFH is an affiliate of Habitat for Humanity International, a non-profit national organization, THHFH provides safe, decent, affordable housing opportunities to low-moderate income families within 25 to 80 percent of the Area Median Income (AMI). THHFH supports housing construction products to include new single-family construction, acquisition-rehabilitation of existing housing, critical home repairs, and weatherization of existing homes. In addition, THHFH serves Eastern Jackson County, MO and has been a designated Community Housing Development Organization (CHDO) for the City of Independence since 2008. THHFH further developed its capabilities in 2015 by adding staff in the areas of site construction, accounting, and financial counseling for prospective homebuyers. In 2019, an Aging in Place program was initiated to provide home repairs and safety renovations to older adults so they can safely remain at home.

b. Description of experience and capacity to manage projects of the size and scope of the Project

Since 1989, THHFH has completed over 86 new and acquisition-rehab construction projects for homeownership opportunities, and over 131 critical home repair and weatherization projects in Eastern Jackson County, Missouri. For new home build and rehab projects, families are required to complete 350 sweat equity hours, and attend financial, budgeting and home ownership classes before moving into their home. THHFH successfully completed an NSP grant of \$2.5 million dollars that was awarded by the City of Independence in December of 2009 and completed in March 2013. This grant award allowed THHFH to build 21 homes, 17 of which were new construction and four acquisition-rehab projects, while complying with Federal, State, and local regulations, codes, and standards. THHFH has put in place an accounting system for federal grants monitoring which was used in the conduct and successful completion of the \$2.5 million NSP grant and continues to be utilized.

Currently our administrative offices are located at 501 N Dodgion Street in Independence, Missouri. THHFH functions as a construction general contractor, a mortgage lender, a financial counseling agency and an advocate for affordable housing in the Kansas City metropolitan area. Since 2013-14 THHFH has operated two ReStore discount home improvement centers, located in Independence and Blue Springs, which provide a flexible funding stream to support the operational costs of the non-profit organization. A new ReStore has recently opened in Lee’s Summit. THHFH is overseen by a CHDO-qualifying, 15-member, Board of Directors as well as committees comprised of community volunteers and Board members.

c. Description of what makes Truman Heritage Habitat for Humanity uniquely qualified to manage projects of the size and scope of the Project

THHFH is uniquely qualified to manage the City of Independence CDBG Home Repair program since designated by Habitat for Humanity International in 2013 as a “Home Preservation Program” affiliate. The Habitat for Humanity “Home Preservation Program” supports low-moderate income families with

critical & minor home repair needs and weatherization. Home repairs conducted by THHFH for low-moderate income households in Independence have been supported from CDBG funds allocated through the City of Independence. Additionally, the City of Raytown allocated funds from the annual budget to address code violations and to support home repairs for Veterans. Last year, THHFH received \$130,500 in CDBG funding from the City of Lee's Summit for providing home repairs to qualifying homeowners over a one year period. Since 2017, Spire Energy and Independence Power and Light (IPL) have provided grant funding to THHFH to support up to \$200,000 annually for weatherization projects in the City of Independence for low-moderate income homeowners.

d. Description of the Project team, including individual members, professional profile, credentials and relevant experience

The project team is overseen by the President and CEO of THHFH, Christina Leakey and managed by the Construction Director, Mark Schroer. Mark Schroer is a licensed general contractor in Kansas City, Missouri and Johnson County, Kansas. Marikate Sears, THHFH Home Preservation Program Manager will manage the day-to-day administration of the program and work directly with Independence homeowners. Paul Raddant, THHFH Home Preservation Construction Manager, will manage day to day on-site home repair construction activities and report to Mark Schroer.

Project Team

THHFH's President/CEO, Christina Leakey—will be responsible for the overall management of the 2023-2024 CDBG funded program, including directing THHFH staff participating in program activities and execution of required program contracts and certifications. Christina has served six years as the President/CEO of THHFH and previously served 21 years in the City of Independence's Community Development Department as a historic preservation specialist and community programs supervisor. During her employment with the City of Independence, Christina led the City area nonprofit housing providers and program staff in the development and implementation of a strategy for investment of \$6.2M+ in Neighborhood Stabilization Program and Community Development Block Grant-Recovery funds made available from HUD to mitigate the adverse impact of the mortgage foreclosure crisis in areas of greatest need. The City of Independence was recognized nationally for their efforts in the Neighborhood Stabilization Program. Additionally, Ms. Leakey holds the following HUD Training Certificates:

- Building HOME (2013 Revised Rule) – A HOME Program Primer
- On Solid Ground – Tools and Tactics for Managing Construction Programs
- Effective Written Agreements
- All the Right Moves – Relocation and Acquisition in HUD Programs
- Making it Work – Implementing the Lead Safe Housing Rule

Ms. Leakey's vast knowledge of managing the HUD entitlement awards for the City will help to ensure that all CDBG funds allocated to THHFH are effectively fully utilized following the guidelines set by the award agreement.

Marikate Sears, THHFH Home Preservation Program (HPP) Manager, was hired by THHFH in August, 2022 and will be responsible for the day-to-day Independence CDBG Program non-construction work with homeowners including marketing the program, contact with homeowners, reviewing program application forms, determining initial homeowner eligibility for the program, and providing

homeowner support throughout the program process. Additionally, Ms. Sears manages the schedules and the tasks of the program construction managers and executes tasks related to the program disbursement. Ms. Sears has a Bachelor of Science in Education and a Master of Instructional Technology from Northwest Missouri State University.

Paul Raddant, THHFH Home Preservation Construction Manager, was hired by THHFH in early 2022 and will be responsible for construction related work at Independence CDBG funded homeowner approved sites. The THHFH Home Preservation Construction Manager will a) conduct a field inspection to confirm the repair needed, b) draft a project scope of work, c) prepare a project cost estimate for homeowner review and approval, and (d) procure competitive bids from any work items required to be contracted. Additionally, the Home Preservation Construction Manager will be responsible for overseeing THHFH employees, volunteers and contractors providing home repair work at homeowner sites. The THHFH Home Preservation Construction manager reports to the THHFH Construction Manager. Mr. Raddant has 18 years of residential and commercial construction experience, including two years as a HFH Construction Site Supervisor in Virginia and South Carolina, 6 years of experience managing international post-disaster reconstruction projects across five countries, and four years owning and operating his own residential remodeling business in Kansas City, Missouri. Mr. Raddant holds a Project Management Professional (PMP) Certification, and has training and certification in:

- Residential Building Supervisor/ Contractor Kansas City, MO
- HUD: Building HOME
- HUD: Basically CDBG
- Fair Housing Act: Section 504 and the ADA
- NAEH: Understanding Housing First
- OSHA 10 Certified
- HFHI Competent Person Training

Construction Director, Mark Schroer—will serve as the Construction Director overseeing Home Preservation Project Managers for the 2023-24 Independence CDBG Program. Prior to Mark becoming the Construction Director in 2019, he served the role as Construction Project Manager, since joining THHFH in 2014. Mark reports directly to the President/CEO of THHFH. He will be responsible for general oversight of the construction activities, submitting environmental review requests to the City of Independence, assuring THHFH policy and CDBG rules on work safety and procedures are strictly followed, assuring lead and asbestos abatement regulations are met, preparing the scope of work on all projects, procuring contracted services, supervising work crews, ordering work supplies, managing the contract process and managing other construction related program activities. Mr. Schroer has successfully led and managed Truman Habitat's Home Preservation and Weatherization Programs since 2014. From 1987 to 2014, Mr. Schroer owned a comprehensive residential remodeling business in Kansas City, Missouri with exceptional experience in residential and commercial construction and rehabilitation including Energy Auditing (BPI). Mr. Schroer has training and certifications in:

- Energy Auditing – Building Performance Institute (BPI)
- GLYNITE Construction Services
- HFH (Habitat Competent Person Training)
- Energy & Environmental Center Energy Auditor
- Osha 10 Certified

- Osha Residential Construction safety training

Mr. Schroer earned Bachelor of Art degrees in Philosophy and Theology from Rockhurst College with a minor in Math & Science.

Chief Operating Officer, Carla Simpson—has been with THHFH since 2013. Ms. Simpson is responsible for all operating activities of the affiliate including contract management, reporting, budget oversight, and program delivery supervision. In addition, Carla oversees Human Resources for THHFH. Ms. Simpson works directly with the Construction Department and Community and Family Engagement to ensure our Home Preservation Program is performing according to contract requirements and performance objectives. Prior to her role as COO, Ms. Simpson was the Development Director for THHFH. In her role as Development Director, Carla managed all grant writing and reporting; a portfolio of donors; marketing and communications and events. Ms. Simpson has 15 years of non-profit leadership. Carla worked in non-profit management for St. Joseph and St. Mary's Medical Center Foundations in which she managed a twenty million investment portfolio for the foundations and their combined grant management program since 2006. Ms. Simpson earned her Bachelor of Arts degree in Public Administration with an emphasis in Non-profit Business Management from MidAmerica Nazarene University and graduating with honors.

Bookkeeper, Jacob Simpson - has been with THHFH since September 2020 and his role has increased in responsibility with the organization to include managing the general ledger, accounts payable and receivable and assisting with grant administration/draws/ oversight and reporting. Prior to coming to Truman Habitat, Mr. Simpson worked as an Auditor for Penn National Gaming and as an Accountant for MMGY International. Jacob has an associate degree in Business and currently completing his Bachelor of Business degree at Pittsburg State University in Accounting.

D. Description of Similar Experience and References

Truman Heritage Habitat for Humanity has been providing federally assisted home development and rehabilitation services for the City of Independence as a Community Housing Development Organization administering HOME funding since 2008, and as a subrecipient administering CDBG funding for home repair since 2013. Since that time, we have constructed more than 30 new and rehabbed units for affordable homeownership opportunities, primarily for households at or below 50% AMI. Of significant note was the award of a \$2.5m Neighborhood Stabilization Program Grant from the City of Independence in 2010 for the development of 22 units of single-family affordable homeownership opportunities on scattered sites in northwest Independence. THHFH successfully completed this contract on time and within budget, meeting all requirements for reporting, production goals, and national objective accomplishment in compliance with the HUD CDBG regulations that the NSP program was bound to. Of the 22 units of housing produced, all were subject to requirements for environmental review, HUD housing quality standards, federal procurement requirements, applicant qualification and income certification, and reporting commensurate with those applicable to the current RFP.

References—similar projects completed in the last 5 years (contacts are individuals at the time of program operation):

2018-2019 Independence Home Preservation (AKA A Brush With Kindness) Program
City of Independence

\$148,000 (Completed 18 minor home repair projects)

Population: City of Independence Homeowners at or below 80% AMI

Contact: Tom Scannell, Community Development Director, 816-325-7000, tscannell@indepmo.org

FY 2016-2022 IPL/Spire Co-delivered Weatherization Program

Independence Power & Light/Spire Corporation

\$150,000 annually (Completes 15-20) home weatherization improvement projects

Population Served: at or below 50%AMI homeowners with dual energy (electric and gas)

Contacts: Jennifer Newbold, Customer Program Administrator, 816-325-7485, jnewbold@indepmo.org

Paul Englert, Weatherization Specialist, 314-230-6050, paul.englert@spireenergy.com

FY 2016, 2017, 2018, 2020, 2021, 2022 City of Raytown Minor Home Repair/Code Violation Abatement Program

City of Raytown, Missouri

\$25,000 annually (Completes 3-6 code abatement projects); 2023 -Raytown increased grant to \$35,000

Population: Raytown Homeowners at or below 80% AMI

Contact: Ray Haydaripoor, Director of Community Development, 816-737-6093, rayh@raytown.mo.us

E. Outline of Services

a. Describe THHFH overall approach, engagement strategy for key stakeholders and work plan for project

Truman Habitat's Home Preservation Program (HPP) is based on the Habitat for Humanity International's partnership housing model which calls for giving a "hand-up" to families in need of safe, decent and affordable housing services. A "hand-up" from Habitat for Humanity aims to support homeowners struggling to achieve or maintain housing security by offering them help in a way that preserves dignity and builds a sense of community. Our signature method combines nonprofit program services, and labor from community volunteers with a sweat equity contribution from our homeowner partners to accomplish home and neighborhood improvements. In response to the City's stated need, THHFH proposes to offer, City-wide, its model Home Preservation Program home to qualifying low and moderate income (up to 80% AMI) homeowners, with a specific focus on addressing emergency and critical home repair needs. This program will be implemented in accordance with the attached Home Preservation Program Home Repair Policy and guidelines, and in compliance with all applicable provisions of 24 CFR Part 570. These services will be made possible through the utilization of THHFH general funds, in-kind donations, homeowner sweat equity, volunteer support given to the organization, and reimbursements from the Independence CDBG Program.

b. Describe the tools and methodologies THHFH intends to use to complete the Project on time and within scope and budget

Marketing and Applicant Intake

THHFH has been the sole provider of the Independence CDBG Home Repair Program for a number of years. During this time, THHFH has conducted marketing and outreach for the Program through its website, and through marketing materials and presentations to local groups.

THHFH has developed a significant waiting list of potential Independence CDBG Home Repair applicants over the last year, as a result of a significant response to marketing efforts and limitations of available Independence CDBG Home Repair funding. There are currently 18 applications submitted to THHFH which have been generally approved for the current Independence CDBG Program year but will not be served due to CDBG Program funding limitations. There are also 30 Independence residents in the THHFH general waiting list who have indicated a need for home repairs.

THHFH continues to have a general Home Preservation Pre-Qualification form on its website for Eastern Jackson County residents. This Form has been completed and digitally submitted by several area homeowners, many of whom are Independence residents. The waiting list for the 2023/24 Independence CDBG Program is significantly higher than the number of households that can be served under the 2023/24 Program due to funding limitations.

In the current year RFP, **City of Independence CDBG Home Repair Program Policies**, Page 18, under “Program Outreach and Marketing”, states “Staff will not conduct outreach or marketing when there is a waiting list of over one year. The Program Manager shall keep a waiting list in a format approved by the Community Development Department.” This is clearly the case with THHFH. The THHFH HPP Manager will work with the City to develop an acceptable waiting list format. New inquiries from Independence homeowners received in 2023 and 2024 needing home repair services will be directed to THHFH HPP staff to add to the “waiting list”. For these reasons, general Independence Home Repair Program marketing and outreach as has been conducted in prior years will not be undertaken during the 2023/24 Program year unless and until more funding is obtained than currently anticipated.

The THHFH HPP Manager will be responsible for completing 2023/2024 Independence Home Repair Program applications with eligible homeowners on the waiting list. This will be accomplished by the HPP Manager meeting directly with pre-screened eligible applicants on the “waiting list” to complete a 2023/2024 Independence CDBG Program application and obtain required supporting documents. THHFH acknowledges this would be an exception from the RFP which indicates applications may only be accepted by mail. We will comply with the City’s determination regarding this exception.

Upon receipt of a completed program application and receiving supporting documentation from the Independence homeowner, the HPP Manager will review each application to ensure eligibility verifying the following: a) qualifying homeownership (fee-simple title, current taxes and utilities, insurance, etc.), b) household income is less than 80% of area average median income, c) eligible types of home repairs are needed and d) willingness to partner (commitment to participate in sweat equity). Applicants will be given 14 calendar days to provide any missing or additionally needed documentation. If applicant fails to respond, a second notice and 14-day extension will be granted. If there is no response, applicant will be determined ineligible and notified accordingly. Completed and fully approved applications will be processed on a first come first serve basis until available Program funds are exhausted. Upon allocation of all available Program funds, THHFH will discontinue taking new applications and will notify pending pre-screened homeowners on the “waiting list” that the program is closed to additional applicants. Contact information for all subsequent inquiries will be maintained by the HPP Manager to establish future need and so that potential qualifying Independence homeowners can be notified of future grant opportunities.

Project Development and Construction Management

Upon determination of applicant eligibility, projects will be referred to the THHFH Home Preservation Construction Manager who will a) conduct a field inspection to confirm the repair needed, b) draft a project scope of work, c) prepare a project cost estimate for homeowner review and approval, and (d) procure competitive bids from any work items required to be contracted.

Prior to undertaking any choice limiting activities related to the project, the HPP Manager will submit a request for Environmental Review (including Section 106 for Historic Preservation), along with the scope of work and all required supporting documentation (maps, before photographs, preliminary lead hazard assessment, etc.), to the City of Independence for approval. Upon approval by the City, the HPP Manager will prepare a draft agreement for the specific scope of services, between THHFH and the homeowner. Once the homeowner signs and returns the agreement, the President/CEO will execute the agreement on behalf of THHFH.

Upon execution of the homeowner agreement, the THHFH Home Preservation Construction Manager will be given notice to proceed and will assume responsibility for ensuring that the entire construction process is being accomplished in a timely and compliant manner. Typical projects will involve THHFH Home Preservation Construction Manager collecting copies of required permits and verification of contractor insurance, notifying homeowner and subcontractors of project start, acquiring the necessary supplies and work force (if work will be performed by THHFH), supervision of work performed by volunteers and/or contractors, calling for any required construction inspections, assuring all requirements of the approved project scope of work are met, photographing completed improvements, and obtaining the owner's approval of completed work.

Project Closeout and Funding Reimbursement

Upon construction completion, inspection and sign-off by the homeowner the HPP Manager will notify the project close-out team as follows: instruct Accounts Payable/Receivable to issue payment and collect lien waivers to project contractors, request reimbursement from the City, prepare a final communication with the homeowner and forward copy of project file to the City for records retention. Note: THHFH will be responsible for assuring all payments to contractors are made timely. Given THHFH other housing development and program commitments, our organization is not able to cash-flow significant capital outlay for extended periods of time. Requests submitted to the City of Independence for reimbursement of project expenses from available CDBG funding will necessarily be submitted upon cost incurrence, which may result in multiple billings per month, depending on the volume of projects, and scope of project activities. THHFH will make every effort to submit complete and accurate supporting documentation with every request to ensure that reimbursement can be issued by the City at the earliest opportunity. The City's cooperation will be critical to program success.

Miscellaneous Program Guidelines

The THHFH Board approved Home Preservation Home Repair Policy is attached to this section and provides more detailed information on the approach and process which will be followed by THHFH staff in the implementation of the CDBG funded projects. No rental property will be included in the program. No detached structures such as sheds will be included in the CDBG funded scope of work. Work determined by the Home Preservation Construction Manager and the HPP Manager as needed, but not appropriate for volunteers or where the project needs to be completed in a timely manner, will be subcontracted, or performed by THHFH's skilled construction staff.

All work performed will comply with applicable local, state and federal laws and regulations. This includes compliance with the City of Independence adopted building code in effect at the time the work is being accomplished, compliance with business licensing and permit requirements, and compliance with applicable provisions of the RFP. Specifically, THHFH is fully aware of and experienced in complying with applicable federal regulations implicated by the use of CDBG program funds for home repair including, but not limited to, Part 58 Environmental Review, Section 106 Historic Preservation, Fair Housing and Equal Opportunity, the Lead Safe Housing Rule and limits on the use of Debarred and Suspended contractors.

c. Proposed Schedule. Provide a detailed schedule of THHFH work

Project Workflow and Detailed Timeline

- I. Initial Intake—within 48 business hours of applicant inquiry
 - a. HPP Manager initiates intake by speaking to or e-mailing potential applicant about home repair needs.
 - b. If there is a potential match to a current program/funding sources, the potential applicant is typically screened for eligibility:
 1. Income Guidelines
 2. Valid Homeowner Insurance
 3. Current on Mortgage and Property Taxes
 - c. If there is no funding source for the specific needs, the homeowner is placed on the HPP notification waiting list
 - d. If potential applicant meets all requirements, homeowner is notified of the website application process or an application packet is mailed out.

- II. Application Processing- complete within 5 business days of receipt
 - a. Once a completed application and supporting documentation is received, the HPP Manager
 1. Dates and time stamps application.
 2. Verifies applicant income eligibility
 3. Verifies mortgage payment is current on mortgage statement
 4. Verifies property taxes are current- <https://www.jacksongov.org>
 5. Check for open judgements- <https://www.courts.mo.gov/casenet/base/welcome.do>
 6. Runs applicant, co-applicant, and dependents through sex offender database- <https://www.nsopw.gov>
 - b. If the application is approved, send a “Notice of Completeness” to homeowner and notify construction
 - c. If the application is incomplete, or not approved, send “Notice of Incomplete” with a 14 day response period for the homeowner, or send denial letter for cause to the homeowner.

- III. Scope of Work-process initiated within 5 business days of the Home Preservation Construction Manager receiving project address and applicant file from the HPP Manager.

- a. Construction staff/HPP Manager receives notification of qualified application and makes contact with homeowner within _5_ business days to schedule home visit/assessment
- b. During the on-site assessment, the THHFH AIP Coordinator identifies repair needs (for households with a senior citizen age 62+).
- c. The HPP Manager and/or the Home Preservation Construction Manager takes “before” pictures, and necessary measurements to complete a detailed scope of work.
- d. Scope of Work is completed, with estimated budget and sent to HPP Manager to begin Environmental Review Record Preparation –within 12 days of site visit.
- e. Bids within 12 days
- f. Once the scope is approved by the Home Preservation Construction Manager, the Construction Manager notifies the HPP Manager of the project scope and project costs needed finalize the CDBG Program Homeowner Agreement.
- g. This entire process can take approximately 30 days.

IV. Homeowner Agreement

- a. The HPP Manager meets with the homeowner to go over final scope and homeowner agreement once approvals are received back from the City. The homeowner agreement which includes project cost, sweat equity requirement, repayment terms (if any), within 5 days of City approvals.
- b. Once homeowner agreement is signed by both homeowner and THHFH, begin sweat equity

V. Schedule Work

- a. Schedule licensed contractor following SOW
- b. Work can take approximately 3 weeks to complete

VI. Certificate of Completion

- a. Inspect completed project within 5 days of completion
- b. Document completed project
- c. Obtain homeowner signed certification of completion

VII. Closeout

- a. Request payment to contractors
- b. Collect invoices, submit proof of payments to contractor to City for reimbursement
- c. Final closeout of file
- d. Report quarterly the status of the Independence CDBG Home Repair Program to the City of Independence

F. Cost of Services

Truman Heritage Habitat for Humanity			
Independence Home Preservation Program—Budget 10/1/2023 - 12/31/24			
	Home Repair Program		Total
	CDBG	Other Funding Sources	
Project Management & Administration			
THHFH President/CEO	\$ -	\$ 1,500.00	\$ 1,500.00
THHFH Construction Director	\$ -	\$ 2,000.00	\$ 2,000.00
Home Preservation Program Manager	\$ 18,450.00	\$ -	\$ 18,450.00
THHFH Home Preservation Construction Manager	\$ 8,000.00	\$ -	\$ 8,000.00
Admin staff (bookkeeper, COO, etc)	\$ -	\$ 3,000.00	\$ 3,000.00
Insurance	\$ 1,250.00	\$ 1,250.00	\$ 2,500.00
Subtotal	\$ 27,700.00	\$ 7,750.00	\$ 35,450.00
Construction tools, supplies, warranty work, equipment rental			
Housing Development Hard Costs	\$ 103,596.00	\$ -	\$103,596.00
Vehicle Expense	\$ 2,800.00	\$ 2,000.00	\$ 4,800.00
Depreciation Expense (vehicle)	\$ -	\$ 1,200.00	\$ 1,200.00
Training	\$ -	\$ 1,000.00	\$ 1,000.00
Office Expenses, taxes and business insurance	\$ -	\$ 3,040.00	\$ 3,040.00
Professional Services: Asbestos, Lead, Mold & Radon Assessments	\$ 4,500.00	\$ -	\$ 4,500.00
Utilities/Occupancy	\$ -	\$ 300.00	\$ 300.00
Gifts in-kind	\$ -	\$ 2,000.00	\$ 2,000.00
	\$ -	\$ -	\$ -
Subtotal	\$ 110,896.00	\$ 10,540.00	\$121,436.00
Grand Total	\$138,596.00	\$ 18,290.00	\$156,886.00

Requested exceptions to the provision of the City's RFP:

An allowance to administer the contracted Home Repair Program in accordance with Truman Habitat's Home Preservation Program Model (guidelines attached in "Attachment B). An allowance to require sweat equity participation from assisted homeowners based on our current model. An allowance to set-aside up to 20% of the awarded contract amount for projects that would qualify as non-critical home improvements when the homeowner commits to repayment on our 0% interest home improvement loan model, in order to generate program income to support additional projects. An allowance for homeowners to submit their completed application on-line or via hand-deliver when acceptance is documented by a date and time stamped receipt from THHFH. An Exception to the requirement to respond to applicant inquiry within 24 hours, and an allowance for a response within 48 business hours.

G. Professional Services Contract (purposely unsigned) included in RFP #23001. On Feb 7, 2023 Adrienne, City of Independence Community Development Program Administrator, sent Rob Buell with THHFH an email stating: ***"The "Contract for Professional Services" included in the RFP just serves as an example. You do not need to fill it out, sign it, or turned it in with your RFP response. This example is the City of Independence's Finance/Procurement Departments standard boilerplate contract. Please take some time to just make yourself aware of and familiar with it, but most likely if Procurement does require our office to utilize this contract it, will be in addition to a contract more similar to what THHH signed for the 21-22 Minor Home Repair Program."*** We are familiar with the content of the attached document and are prepared to agree with provisions in the example contract relating to CDBG Home Repair Program services to be delivered.

H. Signed Affidavit Attached

Additional Attachment: Exhibit B THHFH HPP Policies and Procedures referenced in the submitted proposal.