

Creating Safe Homes



Great Rehab Specialists: Their Roles, Tools, Challenges

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ILLUSTRATION BY RICHARD WALDREP

When I first was hired as a rehab specialist, I had no idea what the job entailed. Fortunately, as a new profession, no one else did either. We made up the rules on a daily basis.

However, as the affordable housing industry grew and coalesced, so too did the role of the rehab specialist. Now, of the 10 basic lines of business that nonprofit sponsors use to create affordable housing, three are best operated through the rehab specialist model of production: acquisition and rehab for first-time homebuyers; scattered-site, one- to four-unit rehabs; and home improvement programs. Rehab specialists create and maintain safe homes through code repair, weatherization, and hazardous-material abatement.

Workers in this Jack- or Jill-of-all-trades have a skill set that is supported and certified by NeighborWorks® America's Construction and Production Management Program of Study.

Great rehab specialists are not just contractors who came in from the cold. The best mentor their specialized clients and use

computers to automate and accelerate their efficiency. The job demands a library, tools, and sophisticated technical knowledge of energy efficiency, environmental renovation, and the constant flow of modern materials.

I'd like to tell you about the role of this profession, its tools and techniques, and where future technical challenges will emerge.

Rehab Specialists' Roles

The rehab specialist's job entails lots of requirements spread over multiple fields. Policy and procedures codify and document these activities. Some days you'll spend the entire day inside on the computer or managing teams via the phone. Other days you'll be outdoors moving from job to job.

The rehab specialist is the job designer. You must be able to inspect a real house, with its





Before, during and after in Syracuse.

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problems, and compare it to a mythical, acceptable house. The differences are the deficiencies. Your job is to match each deficiency with a construction solution that is within the client's budget.

As there are, on average, 14,000 parts in a residential structure, construction analysis could take up all of your evening study time. Great rehab specialists build up an extensive repertoire of "perfect" materials for their clients. Four or five years of good field experience as a rehab carpenter will give you a serious head start.

Rehab specialists also are cost estimators and value engineers. HOME rules require an independent cost estimate of the proposed scope of work. The rehab specialist will be charged with creating a component-by-component cost estimate to use as proof that the government and the client received an acceptable deal on the package of work put out to bid.

Most homeowners rely on the rehab specialist to be their construction manager. While not contractually valid, in practice, most homeowners will view the rehab specialist as their general contractor. Your real task is coordinating and expediting five to eight jobs in progress at any given time. The easiest way to run lots of jobs is to build a pool of excellent contractors who can work totally independently.

Lest you think the entire job is technical, requiring a hardhat and boots, I remind you that the typical client is an elderly homeowner, a first-time homebuyer, or a low-income

tenant. They all benefit from mentoring through the renovation process. The best rehab specialists are good "therapists," who can balance the needs of the contractors with the concerns of the homeowners.

The rehab specialist is also a federal agent. Most rehab dollars are "tainted" with federal funds. Federal funds involve "golden rules," as in "she who has the gold, makes the rules." That means you must follow their procurement guidance.

Great rehab specialists maintain a library of regulations and standards. They will be conforming to the lead regs, a 28-page requirement that is thoroughly explained in a 1,200-page user's manual. Great rehab specialists know about the Secretary of Interior's historic standards, the flood plain, noise attenuation, and anti-kickback rules.

Great rehab specialists enjoy the diversity of their day-to-day activities.

Tools and Techniques

Great tools facilitate outstanding production.

When I was a boy, I was mentored by a finish carpenter whose name was Emery Woods. (His mother must have been "clairvoyant.") One day at lunch our superintendent pointed out a nail not fully set. I reached for my hammer and center punch. Emery, who had been sawing rafter ends, waved me off, picked up a rock and, with two sharp whacks, set the nail.

I learned that most people benefit from great tools, and old-time experts can make do with whatever is lying around. So what are the great

The Top 10 Tools

Great tools complete the job faster, with greater accuracy, in a most professional way. Here are my suggestions for the top 10 field tools:

- 1 **Sonic Tape Measure** – for instant room dimensions.
- 2 **Binoculars** – to put your eyes up close.
- 3 **Moisture Meter** – at least 35 percent of all house damage is caused by water, so find out where it is.
- 4 **Tablet PC** – the best input device to date.
- 5 **Housing Developer Pro®** – computers are here to stay, so get with a spec and estimate program.
- 6 **Digital Camera** – two mega pixels will do.
- 7 **Tape Recorder** – when you're climbing on your stomach through a crawlspace, it is almost impossible to take written notes.
- 8 **Cell Phone** – your protection, your contact with outer world, and the way you keep the ball moving. Make sure you get unlimited minutes.
- 9 **Disposable Overalls** – unless you've got X-ray vision, you're going to get real dirty. Disposable clothes help you along.
- 10 **Fiberglass Ladder** – aluminum just doesn't make sense when you're checking for poor quality electrical systems.



In Georgia, restoring a duplex in Gwinnett County.

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tools?

Software and Hardware. The next time you upgrade your hardware, buy a tablet PC. The ability to take the computer into the field and write directly into your checklist, in your hand, without typing, is a major advancement for man. (Someday they will perfect voice recognition, and we can kill the keyboard entirely.)

Great rehab specialists use a spec and estimating program. Housing Developer Pro®, by The Enterprise Foundation, is probably the most sophisticated program at this time. You can download a demo at www.enterprise-foundation.org.

Toolboxes. The rehab specialist inspects and evaluates homes, first, to identify defects and, later, as they are repaired. It is important to have specialty toolboxes: a preliminary inspection toolbox; a work-in-progress toolbox; and a warranty inspection toolbox. And they include more than just flashlights and sonic tape measures.

Always carry your codebook. During initial inspections, carry your rehab standard and an inspection checklist of typical repairs. During warranties, photographs of the completed product along with all change orders can help clarify issues.

Communication. Quick, precise and respectful communication is the key to great project management. Your cell phone should have every contractor's phone number preprogrammed into it. Verbal communication is an absolute "no-no" for anything that may hit the courts, so great rehab specialists follow up with both e-mail and mailed copies.

Every rehab specialist should spend at least 15 minutes a

The Top 10 References

It is difficult to apply regulations when you have the book in front of you. It is impossible without it. Here are the top 10 publications to keep you current, up-to-date, and on-target.

- 1 Your local building code
- 2 *The International Energy Code*
- 3 *The Secretary of Interior Guidelines for Historic Renovation*
- 4 *The Guidelines for the Evaluation and Control of Lead-Based Hazards in Housing*
- 5 A cost-estimating manual for renovation (www.craftsman-book.com)
- 6 *The Rehab Specialist Manual of Practice* (available at urcusa@mac.com)
- 7 *The HOME Program Rehabilitation Tune-Up Kit* by HUD (available through Community Connections, (800) 998-9999)
- 8 A full set of "Code Check" field references, including building, HVAC, electrical and plumbing
- 9 A copy of the *Journal of Light Construction Field Manual*
- 10 A copy of your state's lien laws, with explanation

There probably are about 40 other books that would be really nice to have, but if you can start with these 10, you'll do fine.

day sending e-mail. The Internet also is the best source of technical advice.

Future Challenges

Great rehab specialists cannot just surround themselves with adequate tools, procedures, documents, and software. They must also constantly update their technical knowledge with a library of references.

Every decade brings new hazardous materials to the environmental renovation field. The past has brought asbestos, radon, lead, PCBs (polychlorinatedbiphenyls) and CFCs (cloroflourocarbons). The future will bring mold, indoor air quality, and pesticides. As each new concern is codified into construction procedures, the great rehab specialist must absorb and incorporate new procedures into the subtrade, environmental renovation.

The world is running out of fossil fuels. Heating bills will become extremely expensive for our lower-income clients. Staying on top of energy-efficient methods is as important

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as knowing the structure of a building.

Each year we must select from a parade of new building materials. Each manufacturer promises great benefits at low cost. Great rehab specialists only recommend materials after the wealthy have had sufficient time to test them.

The computer industry will not sit still. To stay efficient and effective, rehab specialists must constantly update their skills at operating new software on improved hardware.

Support Systems

Great rehab specialists surround themselves with superior support systems. Fortunately, the NeighborWorks® Training Institute understands this essential role and provides excellent peer-to-peer training in the Construction and Production Management Program of Study.

Each year, more rehab specialists become certified and go on to continue their path to excellence with training and techniques learned from NTI courses. There are very important affordable housing products that depend upon the rehab specialist model.

Let's continue the tradition, and keep our great rehab specialists equipped, trained and certified. ■

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The 10 Most Effective Procedures

At NeighborWorks® Training Institutes, we investigate more than 56 different procedural segments to create a great rehab shop. The 10 most important are:

- 1 Draft a **business plan** for your rehab program.
- 2 **Solicit and satisfy great contractors.** Up to four hours a week, will save tons of future time.
- 3 **Operate within the law.** Learn about lead, basic hazmat, and your state's contracting requirements.
- 4 **Specify perfect materials,** i.e., long life, low cost, and efficient energy use.
- 5 **Automate specs and estimates.** Nobody is using a typewriter anymore. Neither will you, once you see the advantages.
- 6 **Preconstruction meetings.** A very thorough walk-through with the winning bidder heads off problems.
- 7 **Relocate occupants** during hazmat interventions.
- 8 **Identify a great punch-out team** to solve contractor disputes and warranty issues.
- 9 **Require a percentage set-aside** for warranty problems.
- 10 **Learn at least 10 new techniques** a year.