



Program Introduction: Service Delivery and Building Collaborative Relationships

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2022 Healthy Homes Production and Older Adult Home Modification New Grantee Orientation

Session Agenda

- Overview of OAHMP
- Target Population & Consideration
- Program Staff/ Key Personnel
- Program Service Model
- The power of partnerships



Program Overview

- **Who** are we serving?
 - Community Dwelling aging adult homeowners over age 62
 - **What** are we doing- Why me/us, why now?
 - Evidence proven- Occupational analysis + home mod implementation X skilled professionals = Long term risk and dependence mitigation among elders
 - **When** does this happen?
 - Following a comprehensive skilled evaluation
 - **Where** do these activities occur?
 - Within the primary residences of Older adult homeowners
 - **How** will we execute the plan?
 - Through collaborative program partnership and implementation
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Target Population & Considerations

OAHMP serves low-income homeowners > age 62

- **Falls Prevention:** Leading cause of fatal and non-fatal injuries for adults >65
- **Hospitalizations:** Every 14 seconds- emergency room visit by older adults for a fall-related injuries
- **Chronic Conditions/Illness:** National Health survey data- 85% of adults >65 impacted by 1 or more
- **Food and economic Insecurity:**
 - Fastest growing demographic in US- 80.8 million in 2040
 - The 2020 median income of older adults was \$26,668
 - 2020, 5.2 million > age 60 faced hunger and food insecurity
 - 1 in 4 adults > age 65 cut back on food & necessities due to health care costs
- **Lifestyle:**
 - Only 4.5 % of older adults live in nursing homes
 - 2% percent live in assisted living facilities
 - 93.5 % live in the community and lead full, productive lives

Ageing Adults are Our Why!!! Let's continue to aid them along their journey of life with independence & dignity!

Starting Lineup: Internal Partners

- Program Manager
- Program Director
- Occupational Therapist
- Fiscal Officer
- Authorizing Official

Program expectation is for Key Personnel and any support staff to have all necessary certifications and experience for their job descriptions/position(s)

Program Director (PD)

Program Director responsible for research, planning, development, and implementation of program strategic goals & objectives

- Limited time commitment to the grant program
- Program Director should not spend more time on the grant than the Program Manager.
- Develop or approve budgets and program operations.
- Hires and supervise program staff for projects.
- Report detailed status updates to executive team and stakeholders

Project Manager (PM)

The **Program Manager** is the center of program communication responsible for day-to-day management

- At least **50% time** commitment for the grant program
- Experienced in project management and responsible for **oversight and administration** of the Federal grant funds
- Must be **experienced** in either occupational therapy, housing rehabilitation, aging in place modifications, or other work related to the project
- **Proven evidence** indicates organizations with unqualified program management as an indicator for high risk of program failure.

Occupational Therapist (OT)

The licensed **occupational therapist** is a nationally certified, state-licensed practitioner responsible for the functional client and home assessments for OAHMP programs

- **Guides** and **informs** all OAHMP grant programs
 - establishes individualized, client-centered work plans to support needs of older adults and full participation in daily life activities.
- Contributes invaluable **expertise** in analyzing and addressing the personal and environmental needs of clients throughout the life cycle
 - Expertise to create, strategically select, and train clients on a wide range of low-cost, high-impact mods & adaptive devices to support safe and independent living
- **Vital** to hire a program OT experienced in serving older adults to produce favorable client & program outcomes
 - OT selection can impact program success and progression may impact timeliness of assessment and quality of documentation to support and justify home mod activity for the target population

Fiscal Officer (FO)

The **Fiscal Officer** is responsible for the financial management of each OAHMP grant program

- Experienced in finance
 - Manages the federal funding and financial compliance
 - Submits LOCCS drawdowns
 - Provide Fiscal oversight
 - Tracks program spending and monitors budget to control program expenses
 - FO may be responsible for/involved in bidding, procurement, and contracting the housing unit work
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- PM or PD may be the FO in some programs, if financial duties fall within their established job responsibilities
 - Must ensure that acceptable work is conducted, and acceptable products were provided before you pay invoices and before you submit invoices to HUD.
 - Are the program expenses allowable, reasonable, and justifiable?

Licensed Contractors

The **licensed contractor** executes home mods and consistently collaborates with the OT, PM, PD to prioritize activity established for each project work plan

- Must be **licensed, bonded, and insured** in accordance with state and local requirements
- Per Per 2 CFR 200.330 licensed contractor must be **procured** through a competitive process.
- Must participate in an **onboarding process** designed by the grantee before performing work that reflects the program's desired approach to interacting with older adults and their caregivers and families
- Must follow state/local municipality building codes, licensing and permit requirements for repair/modification of mobile homes, manufactured homes, and houses, as applicable
- Must provide a **warranty** period acceptable to the grantee for all home modifications
- Must **adhere** to the building codes and regulations for their state and local municipalities, as HUD does not hold the authority to supersede state/county regulations regarding building codes and permits.
- All **structural modifications** must be performed by a licensed, bonded, and insured residential contractor, or in accordance with your local and state regulations.

Contractor Considerations

- **Contractor capacity and retention are key! Home Mod programs cannot not thrive without them**
 - Closely consider recruitment and retention methods for contractors-this could make or break your program performance and ability to meet production benchmarks
 - Consider offering education and licensure reimbursement as an incentive to maintain contractor capacity
 - If staff challenged, consider Informational postings online, in person recruitment, working with vocational and technical schools, workforce development centers, and Section 3 postings to advertise contractor necessity for home mod projects.
- **Section 3 workers**
 - Section 3 is applicable to all projects and activities funded HUD for projects exceeding \$200,000. Section 3 also applies to all subcontracts exceeding \$100,000 for Section 3 covered projects.
 - Contracts valued under \$100,000 are not subject to Section 3; however, HUD encourages awardees to engage in other economic opportunities to empower low-income residents and businesses.
 - notify potential contractors about the requirements of Section 3, hire community residents, and when possible, award contracts to local businesses; and assist in obtaining compliance among contractors and subcontractors

OAHMP Program Service Model

OAHMP program service requirements to be provided by the Grantee are as follows:

1. Client intake and Verification- Confirmation of program eligibility, and consent to participate
2. Baseline Interview, in-home client functional performance and environmental assessment implementation
 - **Standardized Assessment** must be completed by OT, CAPS, or COTA
 - Questionnaires alone do not suffice for functional assessment
 - Provide an **analysis/Summary** of the baseline assessment findings
 - Document results and dates of all **oversight and supervision encounters** by OT if assessment completed by COTA or CAPS
 - **Work Order** developed by OT (CAPS, COTA with OT oversight/supervision)
 - OT **collaboration** with PM and Contractor to prioritize scope and review scope and review bids for proposed modification activity

OAHP Program Service Model

OAHP program service requirements (cont.):

3. Home Modification work by qualified licensed contractor(s)
4. Follow-up Assessment and inspection
 - Occurs within one month following service provision
 - Completed by the OT, COTA, or CAPS
 - OT inspects the work of the licensed contractor to ensure that it meets the requirements and complete a work order for any required adjustments before services are paid in full.
- 5. Complete all documentation and closeout the unit and add all docs related to the unit as attachments in the Unit work tab in HHGMs.

Important Factors to Remember

Service provision to beneficiaries is **voluntary**- Consent from each homeowner, and/or legal guardian (if applicable) is required before delivery of **any** OAHMP service

- Ensure that clients provide **signed consent** form for program entry, before work begins, and approves work when completed.
- Any party may **opt out** of services at any time (Lost to project)

OAHMP services are **client-centered** and validated by the **OT** assessment and work plan

- Federal funding intended to improve client accessibility, safety, and functional capacity for daily activities in home to prevent injury and dependence.
- We are fitting the environment to the client lifestyle and daily self care needs.
- As often as possible, program aim is to opt for simple and least intrusive options for home modifications
- Be realistic and consider cost and projected time commitment to each project undertaken and scale back as appropriate

Modification Activity: Maintenance Vs Rehabilitatio

- Activity funded under this program should be individualized, evidence-based, reasonable, cost-effective, and justifiable
- To the greatest extent possible, engage in home mods and adaptive equipment installation that meet the definition of [maintenance/Repair](#) (refer to Appendix B of the NOFO often)
 - [Maintenance](#)-based activity/ Scope = No ER
 - [Rehabilitative](#)-based activity/Scope = ER requirement and approval if over \$5K
 - Environmental review by your designated Responsible Entity and receipt of Authority to Use Grant Funds from HUD or HUD to complete an environmental review
 - HUD project approval of the project prior to commitment or expenditure of grant or match funds.
- Always consider the OAHMP program scope, [Appendix B](#), and prioritize mods for each funded project; you may not always have the capacity to address every issue within a home.
 - Braiding funding from [other sources](#) is allowable under this grant

PD&R
OAHMP
Program
Evaluation

Save the Date:

Program Evaluation Webinar

Hosted by:

HUD Policy Development and Research Team

Thursday, November 2, 2023

3:00 Pm EST



Value and Importance of Partnerships

- Evidence supports that cohesion among program staff has a direct impact on productivity, client outcomes, and program sustainability.
- Strengthen program and sustainability
- Program evolution and expansion
- Increased community/ service impact and outcomes
- Motivation to continue serving in your greatest capacity
- Internal partnerships present options or exposure to diverse external networks

Strategies to Build and maintain positive relationships

- This work is not always easy or glorifying but we do it for the greater good and to pay it forward, so it is vital to lead with **integrity and empathy!**
- **Be intentional** from the start! Select the right players
 - Ensure team members have a shared commitment to the program mission and goals
 - Are they qualified, engaging, and supportive?
- Prioritize clear, consistent, and transparent **Communication** among your team
- **Define** clear and realistic goals and expectations for your program
- **Respect**, understand, and **value** the roles and each member to build and sustain the morale and integrity of your program
- Be **flexible**, open to new strategies, innovation, and growth
- Remember: Effective leaders are self aware/accountable, unbiased, present, empowering, fair, and consistent
 - Recognize the strengths of each member of their team, collaborate, and leverage to effectively strategize and meet program goals

Let's Share!!

- What are your professional strengths?
- What challenges are you frequently met with in your program role?
- Managers: What do you wish your staff knew about you?
- Support staff: What do you wish your boss knew about you?





Thank you!!!

I appreciate your presence and engagement here today. I encourage you all to go out and do good deeds!

Program Questions:
Contact: Your GTR or
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