



Housing Preservation Strategy

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Beyond the Blueprint

2025 Habitat for Humanity Midwest Regional Conference

Session Agenda

- Welcome & Introductions
- State of Housing Preservation
- Deploying a Strategy
- Things to Consider Before you Begin
- Q&A



The State of Housing Preservation



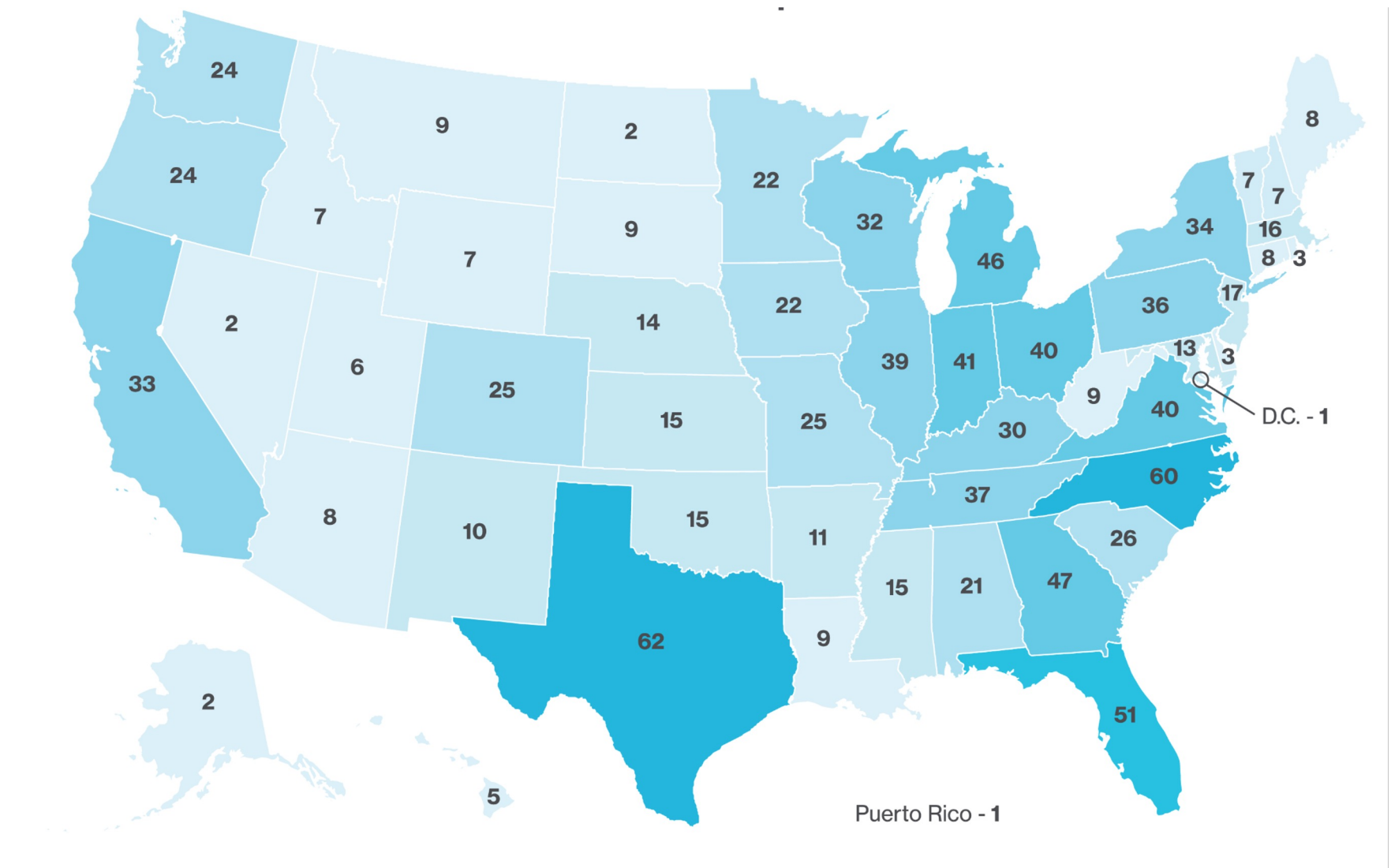
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Repairs @ Habitat for Humanity

500+ affiliate organizations stabilizing nearly 12,000+ homes per year.

Habitat for Humanity has become the largest nonprofit Repair organization for low-income communities in the U.S.



Number of affiliates providing repairs per state



Expected Growth of Repairs across HFH US

Critical Mass Achieved in Repairs

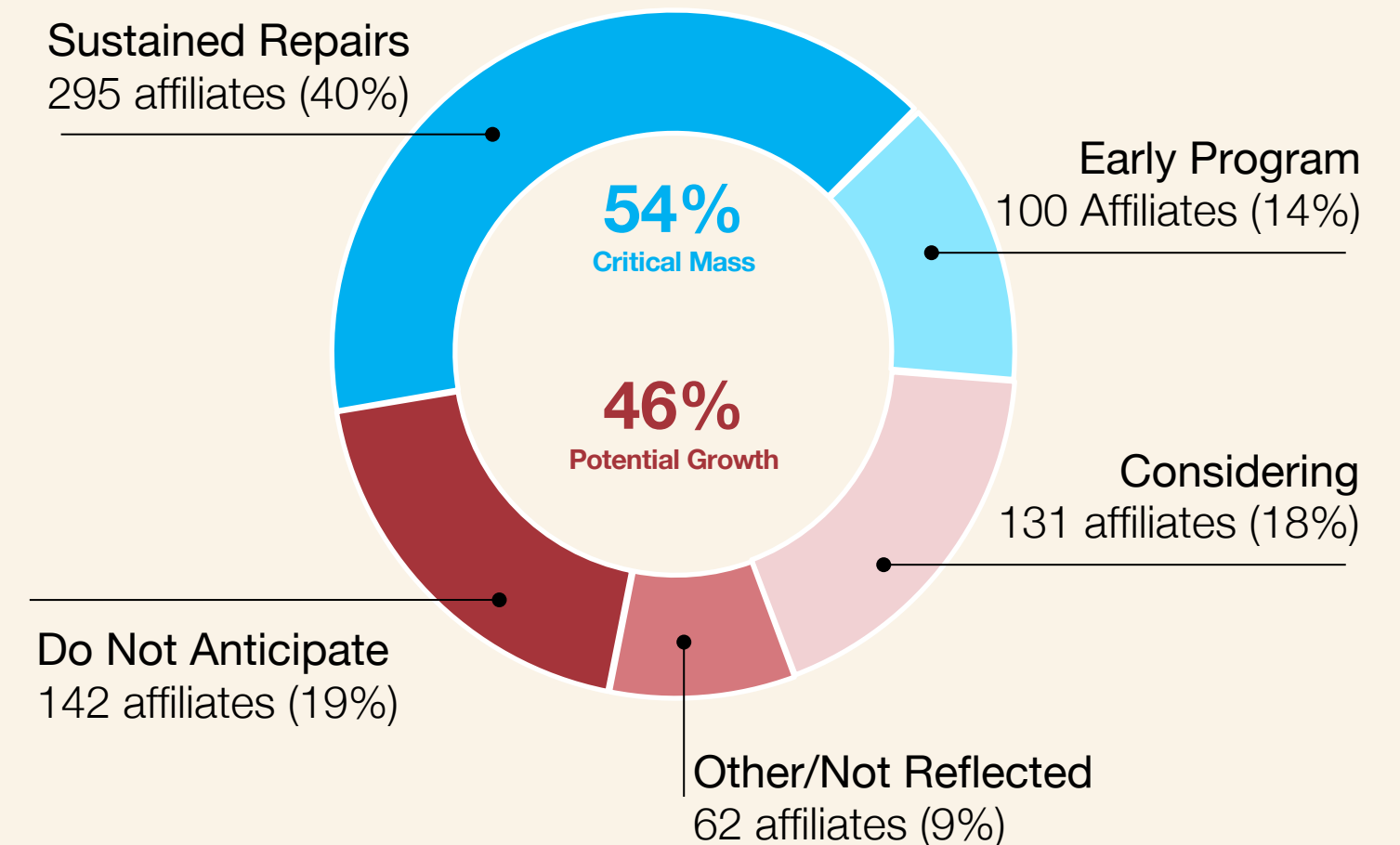
- 54% of affiliates engaged in repairs
- Strong momentum in program adoption
- Nearly 20% considering launching repair programs

Readiness & Growth Opportunities

- 27% unsure/considering – Enforcing focus it to strengthen affiliate repair readiness

FY25 Q1 Pulse Survey:

Self-identified Repair Program Status of US Affiliates



* 730 out of 1,006 affiliates replied to this question for a response rate of 73%



Repairs Landscape

1. "Repairs" vary across affiliates
2. No universal definitions or standard approaches
3. Local funding, workforce, etc. shape programs
4. Inconsistent tracking of impact/outcomes
5. Are we not capturing full impact?
6. How can we present a unified strategy

Repairs across HFH U.S.

- Aging in Place
- Ramps and Rails
- Home Modifications
- Fall Prevention
- Housing Plus
- Minor Home Repair
- Critical Home Repair
- Home Rehabilitation
- Neighborhood Revitalization
- Nonprofit Facility Repair
- Senior Paint Program
- Home Preservation
- Veteran Repair
- Weatherization Program
- Healthy Homes
- Rooftop Solar Program
- Brush With Kindness
- Home Maintenance
- Disaster Recovery
- Rock The Block
- Energy Efficiency
- Water Conservation
- Lead Hazard Program



Why Housing Preservation?

- **Repair is tactical** – You have a symptom; you address the root cause.
- **Repairs are transactional** – A repair-focused approach limits how affiliates participate in housing discussion
- **Repair is singular** – Does not reflect the many types of ways affiliates help stabilize and contribute to long-term housing resilience.



Deploying a Housing Preservation Strategy



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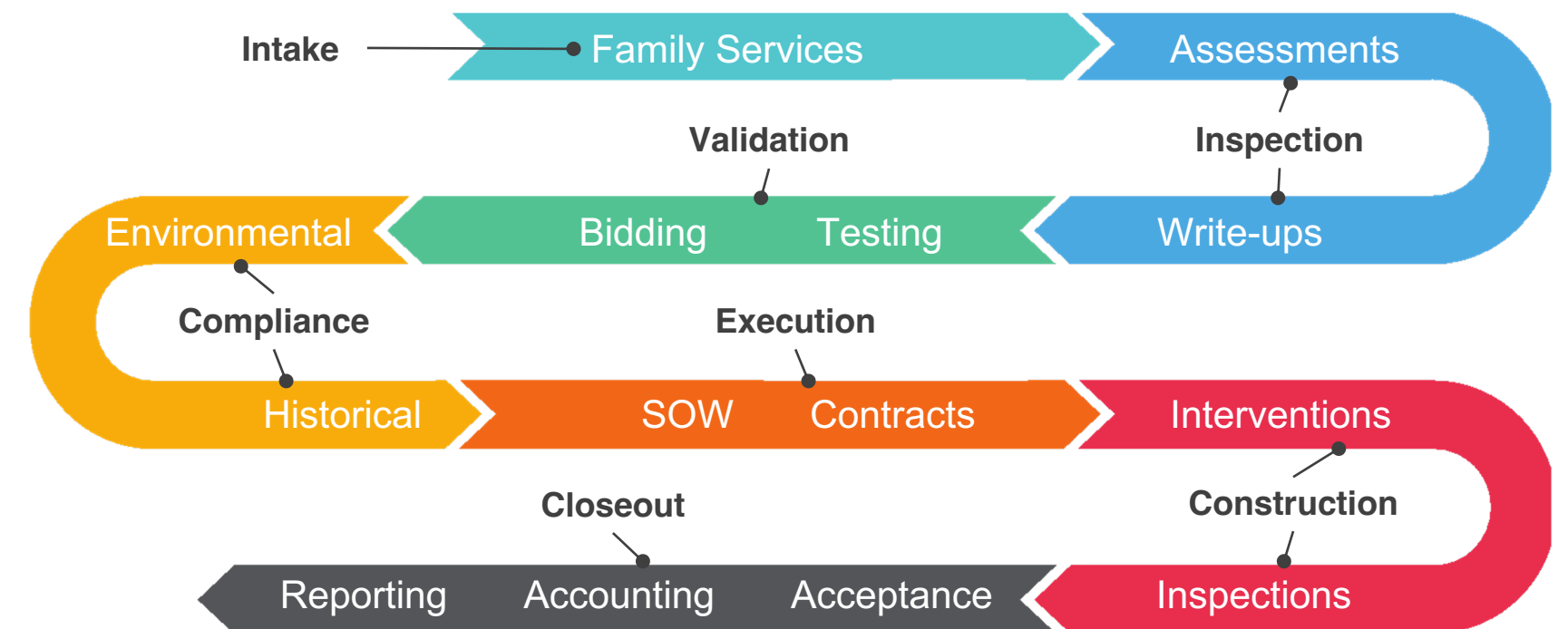


Repairs Complexity



The Repairs Lifecycle

- Structured process for delivering home repairs
- Guides projects from intake to completion
- Aligns with Habitat's Housing Preservation strategy



How it Works: From an Affiliate Perspective

- Intake & Selection Process
- Home Assessments
- Determining Scope & Budget



How it Works: From an Affiliate Perspective



- Working with the homeowner
- Maintaining communication and clear expectations



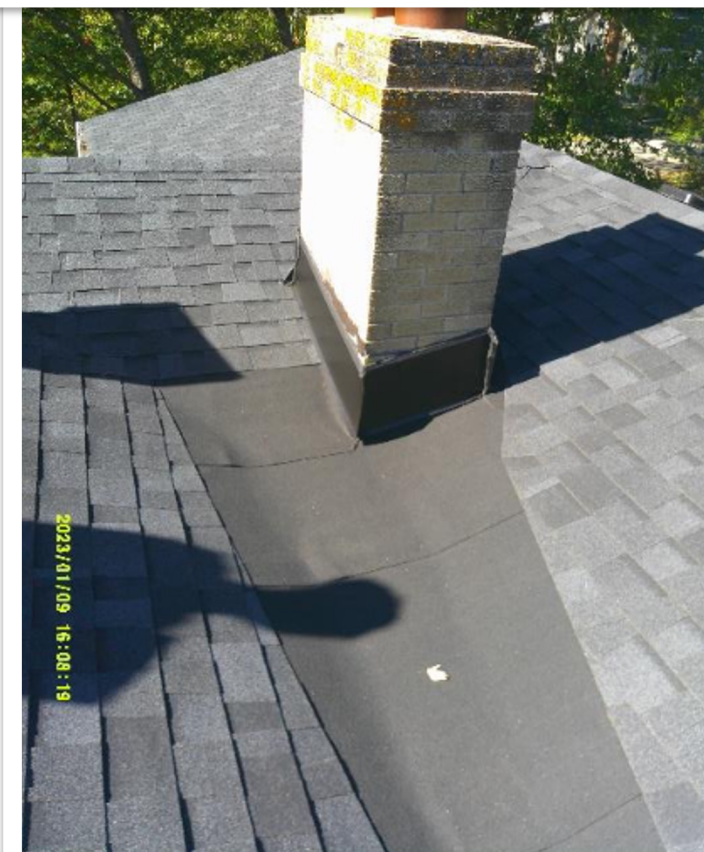
How it Works: From an Affiliate Perspective

- Scheduling & Managing repairs
- In-house repair (ex. Ramps) vs Contractor (plumbing, HVAC, etc.)
- Is there a volunteer component?

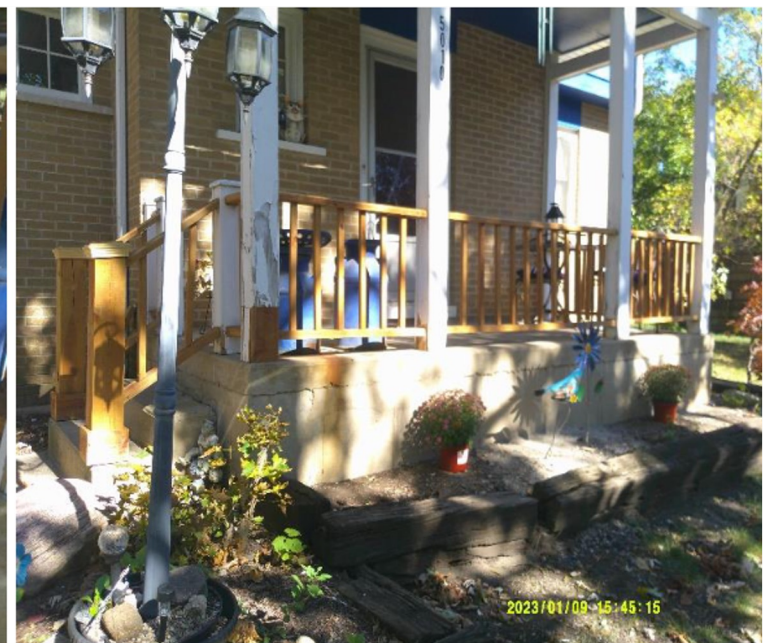
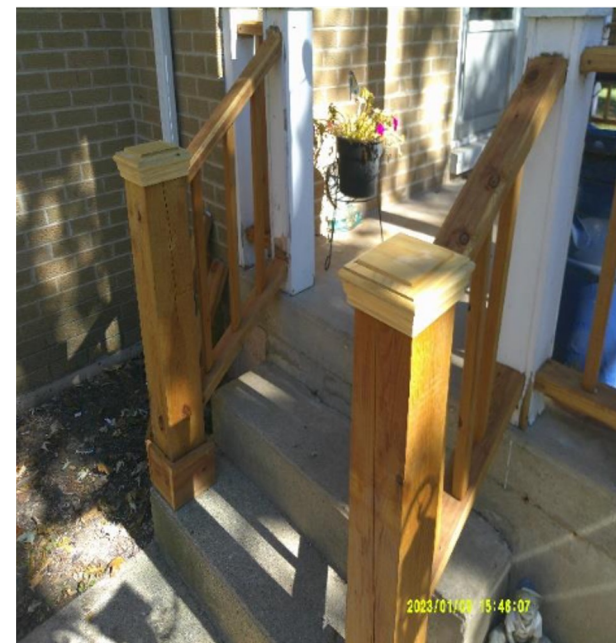
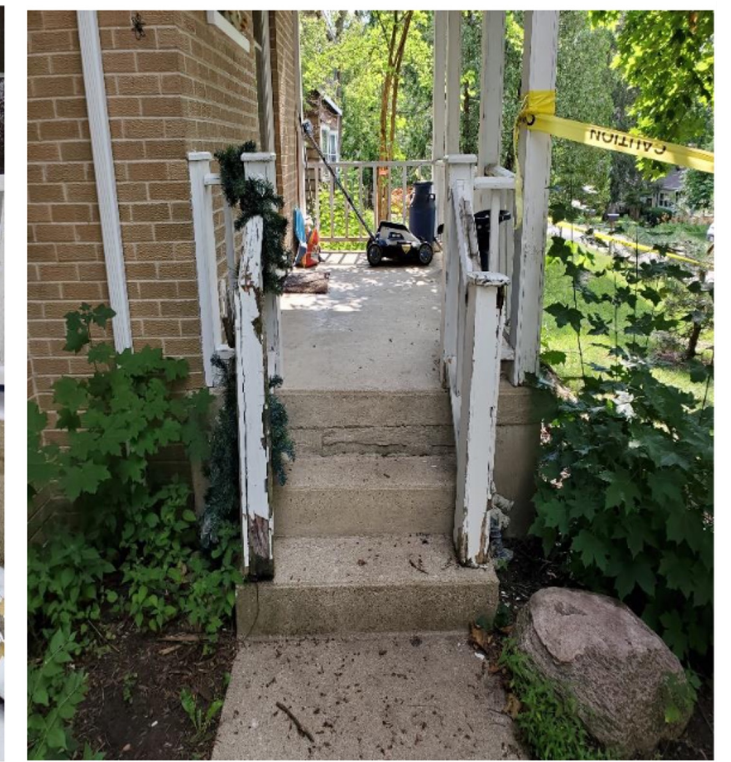
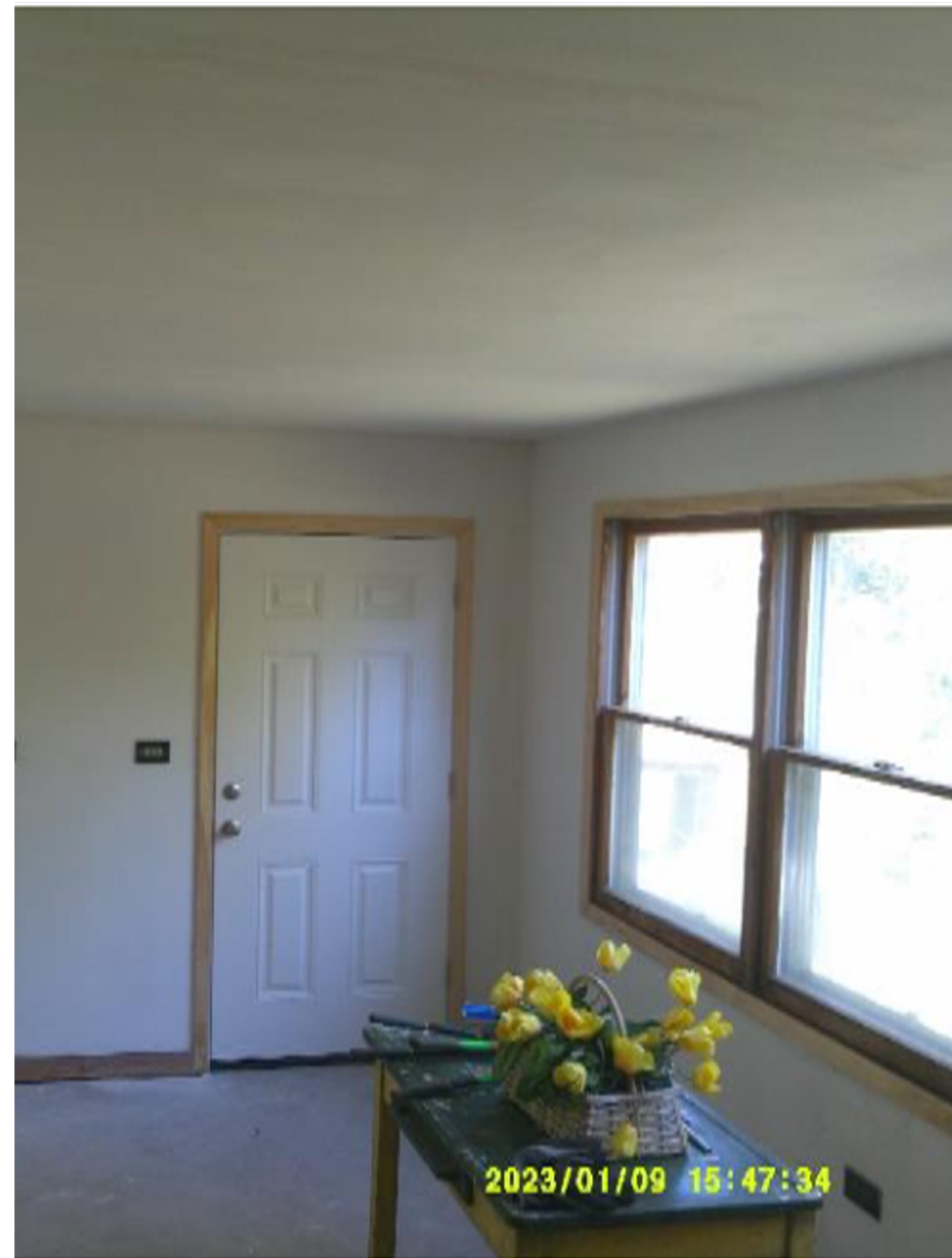


How it Works: From an Affiliate Perspective

- Closing-out
- Before and after pictures
- Impact statements



How it Works: From an Affiliate Perspective



Things to Consider Before you Begin

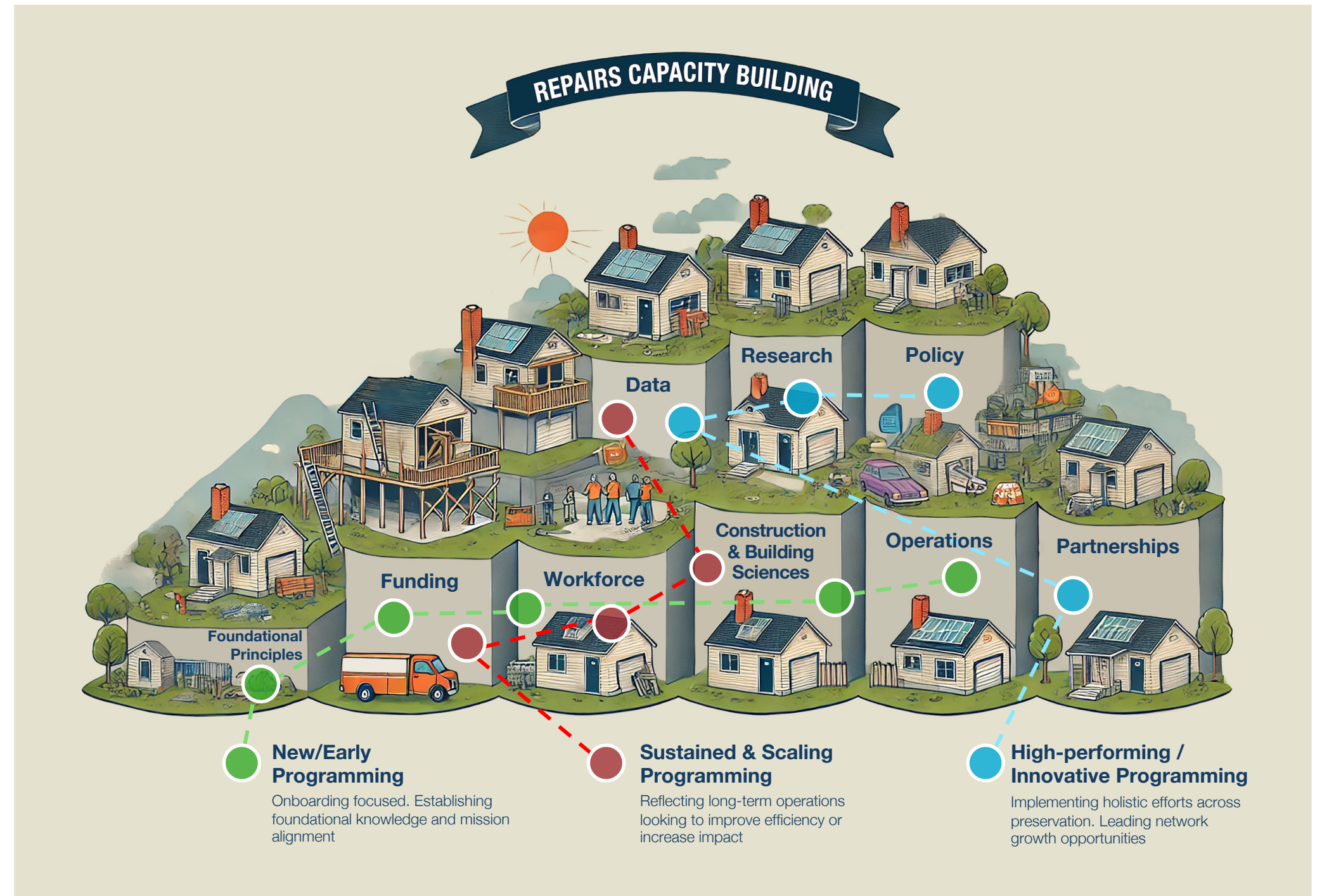


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Supporting Network Growth

1. Capacity building drives Habitat's repair expansion
2. Structured onboarding supports program growth
3. Reflect the network needs



Pre-programmatic Considerations

- Stakeholder Support
- Key Contracts & Documentation
- Compliance & Governance
- **Policies & Procedures**



Policies & Procedures

Policy & Procedure Manual Best Practices

1. Establish policies for high-risk activities
2. Don't establish policies until you are certain...start small
3. Policies are board approved
4. Procedures are board **reviewed**
5. It is a living document, so add to it when necessary
6. Leverage as a tool for new staff onboarding
7. Inconsistent results are good candidates for procedure review and mapping

U.S. Affiliated Organization Policy 33

Home Repairs



Adopted: January 2019

Last reviewed: June 2023

1.0 Purpose

To establish minimum criteria for affiliates operating programs to repair occupied properties not owned by the affiliate ("Repair Programs").

2.0 Policy

2.1 Repair program requirements

2.1.1. Affiliates must operate in a manner consistent with a written, board-approved policy that addresses the following topics:

- Project assessment and selection.
- Repair partner selection criteria, qualifications and process.
- Owner and household member participation requirements.
- Staffing and volunteer participation.
- Pricing and repayment model.
- Types of construction activities affiliate is prepared to undertake.
- Financial sustainability.
- Risk management.
- Safety.

2.1.2. Affiliates must ensure that all repair work is completed in full compliance with all applicable local building codes and accessibility standards, in a good and workmanlike manner, using durable materials, and in a manner consistent with industry standards.

2.1.3. Before commencing work, affiliates must execute a written agreement with each property owner or authorized representative that clearly defines the scope of the repair work, the cost of services, any pricing and/or repayment terms, any required owner and household member participation, and any other requirements. Upon completion of the work, affiliates should secure a certificate of completion signed by the property owner or authorized representative.

2.1.4. Affiliates must be aware of and comply with all federal, state or local consumer protection laws applicable to home improvement projects.

2.1.5. If an affiliate offers financing arrangements to owners or other consumers to pay for repair work (e.g., mortgages, consumer loans, deeds of trust, deeds to secure debts or other state-specific equivalents), the affiliate is subject to the jurisdiction of the Consumer Financial Protection Bureau, or CFPB, and must comply with the CFPB's most current supervision and examination procedures. In addition, the affiliate must comply with all applicable laws regarding consumer lending, including without limitation the Truth in Lending Act, or TILA; Real Estate Settlement Procedures Act, or RESPA; fair housing and fair lending laws; and all applicable state and local laws.

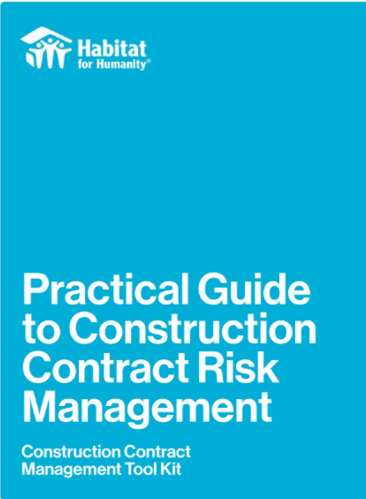
2.1.6. Any subcontractors hired by the affiliate to perform repairs must be adequately insured and bonded (where appropriate) and should perform work in a manner consistent with local best practices, and positively reflect the mission of Habitat for Humanity.

Repairs Policy 33 – **START HERE**



Key Resources

Start here:



Contractor Templates

Contractor Agreement Template

Contractor Request for Proposal

Contractor Notice to Proceed

Contractor Change Order

Contractor Back-charge Template

Subcontractor Templates

Subcontractor Agreement Template

Subcontractor Request for Proposal Template

Subcontractor Notice to Proceed Template

Subcontractor Change Order Template

Subcontractor Back-charge Template

Contractor Examples

Lien Waiver Example

#	PROCESS	SHORT DESCRIPTION	REQUIRED DELIVERABLES	ASSIGNED TO
1	FAMILY SERVICES / INTAKE	Supports all efforts from client interest to the verification of client eligibility according to funding guidelines. Document verification should be completed early and must be complete before contract execution.	Application, supporting documentation	N/A
2	ASSESSMENT	Visual inspection of property. Conduct client needs assessments and capture visual evidence of needs, concerns, and proposed scope of work.	Before Photos	N/A
3	WRITE-UP	Detailed proposal of interventions that best serve client needs based upon the onsite assessment are summarized in the project write-up.	Write-up (should include, photos, cost estimation, specifications, prioritization)	N/A
4	TESTING	Where necessary, perform testing based upon assessment/needs to determine final course of action within SOW.	Test results	N/A
5	BIDDING	Write-up activities are sent for bid to establish accurate budget and ability to assist client.	Qualified bids (cost reasonableness review)	N/A
6	ENVIRONMENTAL REVIEW	Environmental Review evaluates and analyzes environmental impacts related to proposed activities that will occur on a typical site.	Environmental Review Clearance	N/A
7	HISTORIC REVIEW	Projects will be reviewed to determine if a historic property is potentially affected by the undertaking.	Historic Review Clearance	N/A
8	SOW	Represents the final scope of work that will be addressed based upon due diligence of steps 1-7.	Final Statement of Work	N/A
9	CONTRACT(S) EXECUTION	All parties agree upon final SOW and execute agreements that reflect scope, timelines, warranties, payment obligations, etc. of a project.	Homeowner contract, Subcontractor agreement(s), SOW approval	N/A
10	CONSTRUCTION	Modify, Repair, Replace, Remodel	Housing interventions	N/A
11	PROGRESS/FINAL INSPECTION(S)	Visual confirmation all work against the details/methods of the SOW and building code. Workmanship inspection and final pictures of completed work to be included. Client to provide signature of approval upon completion.	After photos, Release (satisfaction statement/notice of completion/etc.)	N/A
12	REIMBURSEMENT	Depending upon type of funding, costs incurred in accordance with a pre-approved budget and draw schedule will be requested for reimbursement after draw criteria have been met.	Reimbursement Draw	N/A
13	CLOSE-OUT SURVEY	Administer client outcomes measurement survey within ____ days of completion of project.	Outcomes Survey	N/A
14	REPORTING (QUARTERLY)	Typically includes quarterly project accomplishments with demographics and challenges and impacts pertaining to delivery/commitments.	Quarterly Report Submission	N/A

To access these links, first login to My.Habitat

- What is Housing Preservation?
 - Policy 33 (Repairs)
 - Repairs AOM *(Updated 2024)*
 - The Construction Contract Management Toolkit
- Repairs Project Lifecycle resource
 - Repair-based Policies & Procedures Manual *(How-To Guide – DRAFT available by request)*

Repair Operations Considerations

It starts and stops with funding!

- Evaluate Loans vs. Grants
- HFHI grant funding opportunities. Funding announcements available at:
 - VivaEngage Repairs Community ([link](#))
 - Block Talk newsletter ([link](#))



Housing Preservation Success Strategies

STEP 1: EVALUATING READINESS

- Sufficient cash reserve
- Sustainable funding identified
- Staff ready for growth
- Board ready for growth
- Existing programs are stable



Housing Preservation Success Strategies

STEP 2: DEVELOPING A PRESERVATION STRATEGY

1. Start slowly/grow organically
2. Prioritize “sustainable business” mentality
3. Align message & Value Proposition -- (*Housing Preservations vs. Repairs*)
4. Invest in proper tools
5. Continuous improvement
6. Evolution is key to long-term survival
7. Develop risk management plan
8. Establish good behaviors early





Q&A



Thank you!



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