

4 Crucial Phases To Effective Contractor Screening

PHASE 1

Mandatory Paperwork For Contractor Screening

[“Home Service Validation System”]

VOLUNTEER COPY [Verbose Sentence Identified Modified Into Paragraph.
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Second Edition

Phase 1 – Mandatory Paperwork For Contractor Screening

Preview

Reminder: The “*4 Crucial Phases to Effective Contractor Screening*” are the four most important steps we take towards reasonable decision making for hiring building trades personnel. These are most commonly known as *home improvement contractors*. Additionally, phases 1-4 of this resident study series are part of HGRBS “*Home Service Validation System.*” This is otherwise referred to, for brevity’s sake: “*the system.*” Subsequently, when the phrase *the system* is used in this four-phase series, it refers to the “*Home Service Validation System.*”

The Basic Design

The *4 Crucial Phases to Effective Contractor Screening* series is the only among HGRBS homeowner guides which details every major step taken in a unique application process for primarily unknown contractors. Whether we first connect with them online or in person, if they are not well known among our neighbors for great work, the system is suggested to be used.

The crux of the system:

Delaying decisions for hiring unknown building trades personnel [various vocations of home improvement contractors] until we learn more about them. Through incorporating the application process, this allows for the time we need to check them out thoroughly. When we have the system in place, this establishes a reasonably legitimate reason for not making an on-the-spot decision.

*The application used to initiate the process is free and downloadable online. It is the *Service Validation Form*, engineered via HGRBS - otherwise referred to as “the application.” This first phase provides details about it. Subsequently, as we read on, we will gradually develop greater clarity on how useful this can be.

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["Home Service Validation System"]

Service Validation Form [the application]

Mandatory Contractor Assessment		
Note: <u>CONTRACTOR IS REQUIRED TO COMPLETE THIS FORM OFF-PREMISES AND TO RETURN IT AS DIRECTED</u>		
SERVICE VALIDATION		
(This is a screening document. All information must first be <i>VALIDATED</i> before there is any further project discussion)		
1. DATE _____	2. County work is to be performed _____	
3. Contractor's License/Registration # _____	4. Issuing County _____	
5. Issuing State _____	6. Date Issued _____	7. Date Expires _____
8. Full Name of Contract Firm/Individual Contractor _____		
9. County _____	10. Address _____	
11. City _____	12. State _____	13. Zip Code _____
14. (In this document the term "Contractor" "Principal " or the phrase "Principal Contractor" refers to the individual authorized to bid for this work and to take full responsibility for commencing, performing, and completing it specific to expectations of homeowner or duly authorized tenant, and to be held liable for any resulting damages or unauthorized expenditures relative to the same).		
15. Principal's Legal Name _____		
16. Position with Contract Firm _____		
17. Name of Principal's Bond Company _____		
18. Contract Firm's Landline Phone () _____ - _____		
19. Principal's Wireless Phone () _____ - _____		
20. Firm's E-mail _____		
21. Work Sought (Please, clearly specify): _____		
*Note: This part filled out after applicable contractor returns the completed form Authorization		
By signing this document, I, the Principal/Lead/General Contractor, give the undersigned resident my full authorization to contact government agencies, any personal references, and other sources to verify any and/or all information I have entered here or have otherwise conveyed to undersigned resident.		
Principal's Signature _____		
Resident's Signature _____		
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In this guide, we are going to understand a bit more about the system, and how we can make it work for us. We are launching into this study through first doing a brief rehash of what was covered in the *Introduction*. Then, we are going to really dig into this initial major concern: *mandatory paperwork*. This is key to implementing the entire screening process.

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[“Home Service Validation System”]

Rehash+

In the *Introduction*, we opened with the fact that there is apparently no distinctly standardized contractor screening system for many of the private home decision makers of our country. Of course, this is in relation to successfully validating contractors before hiring. Although the *Home Service Validation System* i.e. *the system* is perhaps among the first contractor screening methods of its kind in America, it is not the only.

There are many of us who have working systems for making the right decisions about contractors. However, by a representative observation of actual victimization of private home residents by detrimental contractors, we apparently did not have or use protocol which was effective enough to prevent those unfortunate situations. For this reason, the application process presented using this 4-phase strategy, is proposed for standardization.

Unreliable Information = Unreliable System

Evidently, the least informed in matters fruitful to resident-contractor relations, are most apt to hire without first having a reasonably intact hiring procedure. Expressed differently, some among us are presently unable to make adequate hiring decisions because we do not have a working knowledge-base for so doing. We have no ongoing access to specialized data we can refer to for guiding our hiring behavior.

These guides can help change that. They can enable us to customize a reasonably effective anti-fraud hiring approach. But as in anything, we can have a desire to learn, but if we are unwilling to sacrifice personal time required to do so, then chances are against us achieving that benefit.

This is true also with this personal study where special focus is on how we can best improve protocol at home for hiring building tradesmen/women. Home repair and improvement contractors are often considered involved in the *building trades*, as well.

Presently, we probably have so many things on our minds that we regularly run out of time before we can get it all done. Learning *the system*, as it applies to the study at hand, can also be overwhelming – when we do not proceed at a reasonable pace for learning. No doubt, there are lots of questions we have. There are lots of answers we will receive – one day at a time.

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But of all there is to consider about true effectiveness of this approach, there are two fundamental principles which can ensure maximum benefit. Here they are:

1. We must **believe** we can make the *4 Crucial Phases to Effective Contractor Screening* work for us.
2. We must **customize and carry out** these principles each time the challenge of hiring unknown contractors, whether invited or not, arrives at our door.

Roots To Bad Hiring Choices

In short, there are so many among us who are aware of the risks hiring contractors unknown for their outstanding work in OUR community – but hire in spite of that. We may want to promise ourselves to always ward against that sort of weakness. When we have opted to incorporate an anti-fraud system against making bad hiring choices, but we do not use it each time it is warranted, then it is not an issue of the system *not working*.

Instead, it is that of our *thinking*. Experience shows that we can have the best strategy in the world, but if we do not have an *effective pattern of thinking* which moves us towards using it, what good is it?

Invariably, as we proceed to consider taking this first pivotal step towards successfully implementing *the system*, let us continually bear in mind the fact that, in this *social business* of home, what we know to do, but decline to enforce, can be very damaging to our aspirations.

An Irish Proverb: “*You’ll never plow a field by turning it over in your mind.*”

Step 1: Presenting the “Service Validation Form”....

Whether the contractor comes to our door or is there by invitation, we may not want to offer him/her a tour of what we hope to get done. Instead, if we are interested in services this person offers, we can present him/her with *the application*.

However, if we connect with a contractor online or elsewhere in person, we may consider it great diplomacy to be candid about the fact that the visit would be for picking up *the application*.

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In the first edition of this *Phase 1* home guide (2018), it was suggested that we allow for:

1. giving the contractor a tour or walk-around to show what we needed done.
2. escorting the contractor back outside to wait until we returned with the application for him/her to fill out elsewhere.

Yet with the advent of Covid-19, and the risk of its spread inviting contractors for a walk-around [whether in or outside our home], it is now suggested that we decline doing so – for all time. It can be more time-efficient and safer to physically hand the application to the contractor at the door. Then we can suggest that he/she brings it back on a *scheduled day and time*.

This also takes into consideration the fact that we still do not know enough about the contractor to risk our time and well-being inviting him/her to *hangout* for any length of time on our premises. It is an *official* rather than a *social* visit. But, quite naturally, we can be smoothly diplomatic about it.

Advance Notice to Contractors Invited Over

Better to let contractors know in advance of visit that it is *only* for picking up the application. This way, ground rules for the visit are clear and we are relieved knowing contractors we invite over are aware of that.

Ideal scenario:

- a. contractor has advance notice of what to expect.
- b. contractor drops by.
- c. we hand the contractor the application. Since the application also has an instruction sheet for how to fill it out, we hand him/her that as well and explain what it is in our own way.
- d. we ask the contractor to take the application to fill out elsewhere, using the instruction sheet on how to correctly fill it out.
- e. we suggest a day and time most convenient for us for the contractor to drop off the application.
- f. we also suggest that when the contractor returns the application, it should be accompanied by current references of five (5) residents *in the neighborhood* for whom he/she has successfully performed the same or similar work.

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Dealing With Contractor Declining Application

No doubt, there will be contractors who question our use of the application. If we invited them, we can assume we have brought this crucial information to their attention. If they happen to be in the neighborhood and offer a service we can use, we can explain that we have an application process. They would first have to fill out the application. Fast forward: we asked them to wait (without inviting them in) then return with the application along with its instruction sheet. In either case, here is an idea of what we can say – but in our own words:

“Please take this with you, and return it to me around this time tomorrow, okay? I’ll also need 5 references from other residents around this area you’ve done the same type of work for, okay?” That is, as we say - *“Plain and simple.”*

Presenting Application To Candidate

One of the most extraordinary keys to deterring home fraud is to decline consideration of contractors who have not worked in our neighborhood recently. If they have not successfully completed several projects in our community related to what we would like attended to, it is not suggested that we hand them an application.

We may want use their absence of reputable experience in our locale as an automatic disqualifier for any further consideration – even if they live in the neighborhood. We may not want to be guided by the fact that they are immediate neighbors as a *reasonable basis* for overlooking their lack of a great community reputation delivering on work comparable to what we have in mind.

In addition, for contractor candidates we may be interested in doing business with, it is not recommended for us to hesitate handing them an application. Concurrently, we can be on guard against showing signs of insecurity about what we are doing by *waiting* for the contractor to respond to it. We can instead approach this with a firm grimace indicating to the contractor that he/she either fills it out or be excluded from any further consideration. We may or may not regret it, but, at that point, the most important thing is for the contractor to be *cooperative*. This is our home. We have house rules. The application process can be adopted as part of them. Our prerogative.

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We can firmly offer the contractor the application to take with him/her since it is now part of our house rules. Are they made to be broken? The application is the instrument we are using for protecting our interests. One of our greatest responsibilities to where we live is nurturing respect for our house rules. Declining to agree with taking our application along with him/her to fill out, displays an initial unwillingness to grant our wishes.

The application is one of our most crucial safeguards against making a wrong decision. It would seem that contractors who attempt avoiding it are sending a terrible message: they do not care about our concerns for ensuring we make a right decision using this process. Why? A leading reason is very probably - they are more concerned about *themselves*. Subsequently, they relegate *our need* for personal and property security as secondary to *their own*. This is not a good sign.

It is precisely this negative predisposition among *some* contractors which is behind variations of home fraud i.e., doing little to nothing worthy of disbursements we can prematurely make.

We Can Be Kind – But Firm

We may not want to feel guilty or apologetic presenting an unknown contractor with the application along with its instruction sheet. We can politely offer it. If there are questions, we can say – but again, using our own method of approach:

“Yeah. Really nice speaking with you but right now we’re just doing applications. So, please take these with you. Page 1 is the application we need you to fill out, and Page 2 shows you how to do it. ”

Then set up a day and time for them to drop it off.

Certainly, there may be more questions - and we can be so kind as to listen for a few seconds or so. Then we can add emphasis, in our own words:

“Please take this with you and fill it out, okay? You can bring it back around this time tomorrow (or at some later date w/specific time) with a MINIMUM five (5) contacts in the neighborhood you’ve recently done the same work for. Okay?”

For us, we may fare quite a lot better to impart the fact that this is mandatory procedure for our household before making these kinds of decisions. We can incorporate this system into our house rules as *non-negotiable*.

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Stay On Top Of The Game

If the contractor attempts to return it earlier than what was previously agreed, that can be taken as a red flag. The action indicates a basic unwillingness on the part of the contractor to honor our agreement for it to be returned with references at a mutually specified later time. On appearance, it is a small thing. Yet this seemingly minuscule act can be an omen surrounding this person not adhering to terms of any contract we may sign.

Nevertheless, it remains our prerogative to decide if whether or not we can trust this person. What are we going to do - compliment this slight of deviance by hiring this person on the basis of such extraordinary *ambition*? But there is another word for that: *desperation*. We may not want to be rushed like this. If contractors have financial troubles, we are not responsible for bailing them out. Our first responsibility in resident-contractor relations is to defending the sanctity and security of our household. We need to ensure we invest extra time required to carefully research contractors (particularly those new to us). A few hours in a day are often not enough. We require more time. It is not advisable to succumb to this *pressure tactic* of contractors returning information we require previous to the agreed upon day and time.

Summary

This ends *Phase 1* of the *application process*. *Phase 2* – our next stop. It is suggested that we pace ourselves between phases for maximized benefit. If we treat this process as we would reading a novel i.e. as just something to breeze through for enjoyment or quick information – we can miss a lot. It may be better, as time allows, to read *Phase 1* over and over again until we can virtually *see* ourselves using it. Then we may want to tackle *Phase 2*. Invariably, it is solely within our authority to dictate our own approach to internalizing the anti-fraud values of this 4-phase series. We establish the pace of our learning. Let us do it masterfully!

HOME IS THE BEST WONDER OF THE WORLD!

Edited with special assistance from D. Madden

In association with HGRBS a 501 (c) (3) nonprofit of independent volunteers

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HELPFUL REFERENCES

HGRBS SUPPORT

<https://www.hgrbs-flagship.com/contact-us.php>

Service Validation Form

<https://www.americanprivatehomefront-hgrbs.com/service-validation-form.php>

Service Booklet

<https://www.american-homeowners-fast-track.org/service-booklet.php>

American Homeowner's Fast Track to Best Contractors!



This writtin tutorial is sponsored in association with HGRBS as a private service contribution to the amazing efforts of American private home decision makers towards locating, selecting, and hiring the best contractors for the best results in matters of home maintenance and improvement.

It all begins with making the right decisions. We are better prepared to make the right decisions when we have all the right information about the people we hope to entrust our precious home projects to. This is about doing all the right things to that effect and more!

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