

## 4 Crucial Phases To Effective Contractor Screening

### PHASE 2

#### Learning Parameters for Returned Paperwork

[“Home Service Validation System”]

*Second Edition*

### *Phase 2 – Learning Parameters for Returned Paperwork*

#### **Preview**

In this moment, we are considering the second crucial phase for bolstering our potentials towards making the safest and wisest decisions about contractor candidates. In *Phase 1*, as we recall, we considered the importance of being ready, willing, and able to present the contractor with paperwork to fill out [the application].

Of course, in an age where tablets are widely used, it may serve us well to consider the fact that *there are times* when hard copy paperwork is the best, most reliable means for recording information. We do not have to navigate a slew of buttons in order to access fresh notes we have taken. We simply look down – and there they are.

But, as it is with anything else in this world, there is a time for one thing, then for another. There is a time for using tablets, another for laptops or desktops. Each has its own parameters for efficiency.

If we need to quickly research any subject, a phone with Wi-Fi capacity will do the trick. But if we require a standard-sized print of what we research by that means – we are at an impasse.

By that same token, hard copy paper is great for trading reports in the conference room – but it is limited by physical space. How is anyone in the office two thousand miles away going to read it? If we have no means for electronic transmission, exactly as it is written – we are likewise impeded. Certainly, there is a time for each device to be perfect to the occasion. Subsequently, the greatest concern is not so much as for simply *what we use*, as it is for *what can be **best** used* in order to accomplish a *specific purpose*.

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#### Explaining Emphasis On 8.5” x 11” Application

For our special objective, it is suggested that we use an application which is standard-sized 8.5” x 11” hard copy. We may want something which:

- a. can accommodate a full page of structured paragraphs.
- b. is large enough to enable us to read all such paragraphs clearly without having to scroll to see the rest.
- c. will cause contractors to physically show up to enable us to learn what they look like, and other personal things which an *internet-short-cut* does not permit us to do.
- d. is practically weightless which can be handed as-is to others to take with them and returned completely filled out.

Succinctly, the physical property and configuration of the application is specifically designed to:

1. allow us to physically meet the person who is asking to do the work we have in mind – ahead of any further consideration.
2. allow us to *personally* emphasize our seriousness about first checking them out before arriving at a decision – one way or another.

Granted that the application can be scanned into *fillable* PDF and sent online. However, this approach hardly tells us anything about the contractors’ willingness to respect our wishes. We are not able to see the contractors’ initial reactions. There is no professional interaction – no personal cues we can detect which may or may not be favorable to us. We may not like the person – or otherwise. *A private issue.*

Nevertheless, for the application suggested in this 4-phase series i.e., *Service Validation Form*, we may want to stick with the hard copy version. One reason is that it requires *personal* initial contact with likely contractor candidates. We may not want to treat this as something we can *just do online.*

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Doubtless, we can find it significantly vital to meet contractors *personally* to present the application. It is far from likely this screening process can be complete without this first *up-close* evaluation of contractor candidates.

<b>Mandatory Contractor Application</b>	<b>Page 1 of 2</b>
<p><b>Note: Contractor Is Required To Complete This Application Off-Premises And To Return It On Mutually Agreed Date And Time.</b></p> <h2 style="text-align: center;">SERVICE VALIDATION</h2> <h3 style="text-align: center;">APPLICATION</h3> <p style="text-align: center;">All Information Must Be VALIDATED Prior To Further Project Discussion</p>	
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/Contractor _____	
9. County _____ 10. Address _____	
11. City _____ 12. State _____ Zip Code _____	
14. (In this document the term "Contractor" "Principal " or the phrase "Principal Contractor" refers to perso who is authorized to bid for this work and to take full responsibility for commencing, performing, and completing 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 _____ (whether Self or Contract Firm)	
16. Position with Contract Firm _____ 17. Bond Company: _____	
18. Principal's Landline Area Code & Phone# ( _____ ) _____ ext. _____	
19. Principle's Wireless Area Code & Phone# ( _____ ) _____ ext. _____	
20. Firm's E-mail _____	
21. Work Sought (Please, clearly specify) : _____	
<hr/> <hr/>	
<p><b><i>Below Section Completed ONLY After This Application Is Returned Properly Filled In By Contractor</i></b></p> <p>By signing this document, I, the Principal/Lead/General Contractor, gives the undersigned resident my full authorization to contact government agencies, related personal references, and other sources to verify any and all information I have entered here or have otherwise conveyed to undersigned resident.</p>	
Principal's Signature _____	
Resident's Signature _____	

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#### **Residential References In Relation To The Application**

This is also a very significant part of the system. The system does not only require contractor candidates to fill out the application *clearly and completely*, but also requires them to submit these WITH *residential references from five (five) different residents* for whom they *claim to have done* the same or similar work.

This is profound in that, we are better positioned to *run* a complete check of information contractors enter in the application. Further, we may find they are aptly *bonded, insured, and licensed or registered* [according to state/county requirements], but *residential references* speak volumes about contractors' personalities and performance.

It can suffice to mention something often overlooked about credentials: they do not establish a contractors' *productive* and *relational demeanor* with other residents they claim to have done the same or similar work for.

Although the contractor's credentials are very important, it may not be to our advantage to *settle* on that factor, alone, for making our decisions. We obviously expect them to also have *favorable references*. It can be important to us to communicate with them. The means of contact could be by *email, phone, or personally*. Yet, it is important to remind ourselves that the work done should be of the *same or similar* type.

Note: Contractors can be encouraged to communicate with favorable residential references in the community for permission to share their *email* and *phone* number. Also, if property is very near, we can ask contractors to set up a day and time with these residents for us to review same work contractors claim to have done for them.

#### **Importance of Knowing Other Details**

We may want to also consider the *specific nature* and *size* of that work since replacing a few shingles is not quite the same as replacing an entire roof. Or, a reference for the contractor *mowing the lawn* or *hanging a door*, is a stark difference from *refurbishing/renovating* a garage or driveway.

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Contractors’ competence in areas diverse from special projects we have, are not realistic or practical qualifiers. This is our major reason for being certain the contractors’ experience aligns exactly with our specific kind of project.

#### **Insist On Neighborhood Residential References**

The nature of references we require are from those residents in the area - not from those in another state, county, or neighborhood. And so, to reiterate, it is not *just the application* we expect contractor candidates to submit to our attention. We also require that to be accompanied by *five* great residential references from our community.

Additionally, it is not advisable to accept or otherwise hold on to the application *pending* contractors’ returning it with the residential references they should have had when dropping it off. It is a deviation from what they agreed to also provide. Best building tradesmen/women have dozens of favorable references related to specific work they offer. There is no such thing as an inability to gain consent from *only five*. It is no challenge.

Beware of those who otherwise complain about not being able to provide required references for some *mysterious* excuse as not being able to reach them. The hideous irony: they may be telling the truth – they are not credible enough.

**\*Best Suggestion:** Under these latter circumstances, it is advisable not to accept the returned application without the required residential references. It may be more prudent to suggest another date and time for contractors to return with both. However, we may not want to promise “holding a spot” for them. Probably not very discerning to *wait* on contractors to produce residential references, as well. We can instead expect them to keep the second appointment we have made for them to return the application along with project-related residential references from the neighborhood.

**\*Emphasis:** It is a major requirement of the system for contractors to return the application WITH those five (5) recent residential references. It follows that if a contractor does not have these along with the fully completed form, then it is supposed that he/she does not have credible references. Possibly, this person needs more time to *fabricate* them.

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However, we would much rather have a residentially *tried, proven, and confirmed* contractor in relation to what we have available. This is far more expedient than the extra time factor waiting on someone *unconfirmed*. In short, the five (5) residential references are highly essential ingredients for our *validating* the contractor’s *personal* and *productive reputation*. Please take special note of that.

#### **Contractor Returns The Application**

The contractor returns to us the application. Quite amazingly, it is 100% filled in and easy to read. Of course, all-inclusive with that are the five (5) recent residential references as agreed. Bravo. All seems in order. But according *the system*, it is recommended that we do not settle for this alone as a basis for our decision. Instead, we can kindly thank him/her for dropping it off along with the references. Then we can promise to get back the contractor on the following day or at some later time.

#### **When There Are More Than One**

Let us assume we queried five (5) contractor candidates. We can just say that we connected with most online. The others initially knocked. Bear in mind that the latter were given applications because they offered to do *identical* work.

Hypothetically, one of the five contractors drops off the application as agreed. But, what if it is not completely filled out? Or what if this person is unable to produce the five (5) recent residential references? Maybe the other contractors can.

A situation such as this is entirely in our hands. Our recourse remains entirely at our discretion. In fact, it is evident that our involvement with this 4-phase series is premised on that. What if the other four candidates also returned on schedule but with *spotty* applications? What if they had little or no favorable residential references?

#### **Oh No...Not Again?!**

Perhaps, we will have to do it all over again with five (5) different contractors. But it may be important for us to always be ready to start all over again. If we judge this as being our best recourse to get aptly skilled and reliable contractors, so be it. The rationale: all the contractors we first considered may be *unsuitable* for what we have in mind. Their work may be as inadequate as the information they returned to us.

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Finally, for us to avoid as much as possible these type of *wasted* experiences handing applications to contractor candidates, we may want to do what we can to check them out in advance. The HGRBS “Service Booklet” (link at bottom) can help.

It can enable us to know quite a bit more about contractors working in our state – in advance. We may cancel the visit. Better still, we may not even ask for them to stop by to pick up the application.

\* Unknown contractors who happen to be in the neighborhood will occasionally make unsolicited, person-to-person house calls. There is no getting around that. If we are interested, we can ask for a business card. Check for their name. If not on it, ask and be certain we spell both his/her first and last name correctly. Remember: this is no *social visit*. No time for irrelevancies or a lot of small talk.

We can let them know we will be in touch later on in the day or at another time. After they leave, we can then go online to access the HGRBS *Service Booklet* for our state. By this means, we can learn quite a bit more about the person or company ahead of time. Legitimate or the opposite? If it looks safe, we can then connect and *still* offer the application. Why?

The reason is that the application requires more detailed information we will not find using the *Service Booklet*, alone. The information in the application may not necessarily match what we have found in our preliminary online look-up activity. For example, online we discovered the contractor can legally operate in our county mowing lawns. But in the application he/she provides the license number of a legitimate *excavation* firm with a similar name.

#### Reinforcing Our Personal Standards

As we see, there is quite a bit more entailed in the *validating process* than solely paperwork and the references. Foremost, these include our personal standards for hiring the most suitable contractors trained in what we need done who have reliable residential references we KNOW about. These standards we have and those we incorporate can be a lot more useful than we may presently envision. They can guide us towards conducting our affairs as near as possible to the given recommendations of the system. Our benefit is being better prepared. We are better equipped to be more successful authorizing contractor support for our home projects.

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#### **The System - Only A Basic Guide**

Our premise is that the system is only a fundamental guide for practicing/resorting to *personal standards* towards honing the safest possible protocol against being defrauded. This system is specifically engineered, taking into consideration a wide variety of related and credible sources. Through passionately learning as much as we can using it, this can dramatically increase our capabilities for controlling the outcome of every one of our home projects. The reason is that, when followed (leaving room for adjustments), although it does not eliminate all margins for error, it can be practiced to drastically reduce them.

#### **The System “Perfect Enough”**

Since we are human, and by that virtue, incapable of creating *perfect* systems, we often can and do create those which are functionally *perfect enough* for what we would like to accomplish. We are not able to create perfect motor vehicles, boats, jets, and space shuttles, yet, on the overall, we have created them perfect enough to accomplish our objectives.

\*The same is applicable to the system. It is not, by itself perfect, but it is *perfect enough* as a strategic tool which we can *use* as well as *customize*. We can use it to influence results most suitable towards accomplishing our hiring objectives. This can be achieved within the limitations of its imperfections.

A great comparison for us to *the system* is something as elementary as a *bicycle*. By itself, that is *all* it is. In order for it to be useful to us, it is important that it is in ride-able condition. If it is not, but we need it to be, depending on our level of familiarity, we work on it until it is suitable enough for us to ride. But what if we do not know how to ride one? If we are determined enough, we will brave the risks in learning. Imaginably, who knows? If time is on our side, we could win seven-consecutive Tour de France cyclist titles like *Lance Armstrong* (1999-2005). But, like anyone else, he had to first be driven enough to adjust to learning how to make it do what he needed it to.



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Still, neither we nor bikes are perfect - but for what we need to accomplish, we treat them in such ways so as to cause them operate *perfect enough*. We are then well positioned to get them to do whatever is within our abilities – and within their structural and functional limits.

No doubt, the contractor screening process offered in this 4-phase system is not perfect, but it is designed as a bike in this sense: it has a *special function* and *relative potential* for us learning to be more effective in our contractor hiring decisions.

We are in the ideal position to make it work perfect enough to establish and maintain the sort of insight and leverage we require i.e. develop enhanced priorities for controlling the outcome of each home project!

On the overall, once we learn the approach for doing *anything* – we can then take it to the best possible level for achievement of others. For us – safer hiring of building tradesmen/women.

#### Summary

This ends *Phase 2* of the *application process*. *Phase 3* – our next stop. As we near the end of this personal guide, we may want to also consider a very significant *law* about success and failure in resident-contractor relations. This is summarized in the *Universal Law of Home Project Success & Failure*:

“ The leading reason for most successful contract-related home projects is that residents do thorough enough service validations on contractors; the leading reason for most unsuccessful contract-related home projects is that residents ‘do not do’ thorough enough service validations on contractors.” - **HGRBS**

**HOME IS THE BEST WONDER OF THE WORLD!**

**Edited with special assistance from D. Madden**

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## ***HELPFUL REFERENCES***

### **Lance Armstrong - #1 Cyclist Globally**

<https://www.mandalaheals.com/6-most-famous-bicycle-riders-in-history/>

### **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 written 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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