



2023 Realtors® Care Day Site Visit Guidelines and Protocol

PROCESS

- **Applications are received by the local board. Due date is August 15.**
- **Local boards will approve applications based on meeting criteria and review all supporting documents.**
- **Local boards will conduct individual site visits for all approved applications.**
- **Site visits must occur by August 31.**
- **Local boards must use site visit checklist and follow protocol when visiting homes.**
- **Local boards must select final site(s) by August 31 and complete the Pre-Event form at rcd.njrealtor.com.**

PROTOCOL WHEN CONTACTING HOMEOWNERS

- Contact the homeowner by phone or email to arrange a time to visit and identify who will be on-site; please do not make any unannounced visits, as you could be considered trespassing.
- Introduce yourself as a Realtor® volunteer with the Housing Opportunity Foundation's Realtors® Care Day® project. Provide the homeowner with your identification and provide their informational sheet.
- Clarify directions to the home and confirm visitation time. The homeowner does not have to be present when you go but should be aware you are coming.
- Confirm that you will have access to examine all requested repairs (ensure that no gates or fences will be locked and that no animals will present a threat).
- Inform the homeowner that this visit is part of the selection process and does not guarantee their home will be selected for RCD.
- Give the homeowner a sense of what you will be doing while on site (examining the nature of the repairs that they have requested, examining the location for easy access and parking, etc.). Be sure to let the homeowner know that you will need to take pictures as a reference point for our future deliberations. If they are uncomfortable with this, please notify Foundation staff and seek direction.
- When at the physical location, make sure that you have appropriate identification on you; present it to the homeowner for confirmation of your identity.
- When at the home, please do not engage the homeowner in any conversation that could convey an obligation on the part of the foundation to accept their application.
- Complete your assessment, fill out the paperwork, take the appropriate pictures and thank the homeowner for their time.
- Let the homeowner know that we will be making final decisions by August 31. They will be contacted by phone if they are accepted into the project; they will receive a letter if they are not accepted.
- If the foundation needs additional information from them, they will be contacted.
- Only the local board's key contact (usually the AE) should be at the site visit, along with the event chair or co-chairs, and/or volunteer site manager.



**SITE VISIT CHECKLIST
(INTERNAL USE ONLY)**

| |
|--|
| <p>Critical nature of needs, 5 is highest:</p> <p>1 2 3 4 5</p> <p>Feasible RCD project:</p> <p>Yes No</p> <p>Recommend as RCD project:</p> <p>Yes No</p> |
|--|

Date of Site Visit: _____

Name of Applicant: _____

Address: _____

Individuals at Site Visit: _____

Note those items needing repair and/or safety modifications:

- | | | |
|--------------------------------|-----------------|----------|
| Deck/Patio | Handicap Ramp | Sidewalk |
| Door(s) | Landscape Needs | Siding |
| Fence/Railing | Painting | Soffits |
| Foundation | Porch | Steps |
| Gutters, Drains, Downspouts | Roof | Windows |
| Other | | |

Details and observations about repairs: _____

Would prep-work be required? Yes No

If yes, explain: _____

PROCESS FOR COMPLETING SITE CHECKLIST

- Bring homeowner's application along with the checklist.
- Note any discrepancies between the two.
- Provide as much detail as possible about the repairs and/or safety modifications needed.
- Attach additional sheets as needed with details about the home and work requested/required for the project.
- Once completed, upload the form and photos to rcd.njrealtor.com for the appropriate site.

PROCESS FOR TAKING PICTURES OF THE HOME

- Be prepared to take pictures of the home as well as all of the needed repairs.
- In order to identify each specific home at a later date, please ensure that your first picture is always one of the front of the home with the house numbers indicating the address.
- Starting on the left side of the house, proceed to take pictures around the exterior of the house.
- After you have finished with the exterior of the house, take any yard or landscaping shots that would be pertinent to the project. These will be critical at a later point if we need to assess parking for volunteers, media, dumpster placement, etc.
- Take detailed photos of requested repairs and/or safety modifications.
- Take detailed photos of any other areas that may need repairs and/or safety modifications, even if they are not on the application.
- Do not take photos of any children who might be in the area or of vehicles that display a clear view of license plates.
- Once completed, upload all site photos and the checklist to the appropriate site on rcd.njrealtor.com.