



Katy Responds Home Repair Process Snapshot

1. Overview

Mission: Katy Responds is dedicated to being the hands and feet of Christ by partnering with volunteers and stewarding resources to create safe and secure homes for vulnerable seniors and low-income families.

2. Referral Process

Sources of Referrals

- Churches
- Partnering Organizations
- Grants
- Individuals
- Direct emails

How to Submit a Referral

All referrals must be sent via email to the **Client Coordinator (CC)**, even if received by another team member. Clients@katyresponds.org

Required Info:

- Client Name
- Address
- Phone & Email
- List of Needs (Disaster Recovery, Empower, Age in Grace)
- Photos (optional but encouraged)

3. Client Coordinator (CC) Responsibilities



1. Schedule client appointment to determine fit.
2. Collect required documents:
 - o KR Application
 - o Income documents (18+)
 - o Tax documents
 - o Homeownership verification (via CADS)
 - o Client Story & Photo

4. Prospective Client Process

At Staff Meeting

- Add prospective client to agenda.
- Create digital and physical client file.
- Place hard copy in CEO's mailbox.
- CEO reviews by 4:00 PM same day.

If Not Approved

- CC notifies client.
- Move digital file to Denied folder.
- Move physical file to Denied cabinet section.
- Follow CEO guidance for further steps if needed.

If Approved

- Client becomes **Active Client**.
- Schedule Assessment/ Scope of Work appointment with Field Ops.



5. Scope of Work Approval

1. **Submit** within 5 business days.
2. **Ron reviews** funding and sends approval/partial/denial with budget notes.
3. **Field Ops uploads** approval PDF to client file.
4. **If not approved**, CEO coordinates with Grant Writer; CC updates client on status.

6. Approved to Start Repairs

- CC informs client of approved work and timeline.
- Field Ops coordinates volunteers and contractors.

Contractor Requirements:

- W9
- Certificates of Insurance
- ACH Info (submitted to Ops Manager for Xero & Bank setup)

Payments:

- Invoices → Field Ops → Accounting → Budget Check → Payment

Note: Volunteers cannot do roofing, electrical, plumbing, or foundation work—contractors only.

7. Change Order Process

When Additional Repairs Are Needed:

- Field Ops contacts CEO to determine if work can proceed or pause.
- Submit **KR Change Order Form** with scope & cost updates.
- CEO approves/denies.



- If approved, update FWA and notify client for initials.

8. Volunteer Repair Process

Guidelines

Use volunteer labor unless deadline requires contractors. (As in Roof, Foundation, Electrical or Plumbing needs- All Contractors only)

Scheduling

- Volunteer Coordinator handles planning.
- Presented at staff meetings:
 - Assigned Day (Tues/Thurs/2nd Sat)
 - Address, Client Name
 - Volunteer Task Scope
 - Attire, Arrival/Departure Time

Serve Day Roles

- **Media Coordinator:** Photo, video, interviews
- **Communication Coordinator:** Infoode communication
- **CC:** Hospitality
- **Field Ops:** Construction & Safety

Infoode & Communication

- Events added to Infoode (auto-updates KR website).
- Email Volunteer Forms at least 5 days prior.
- Rosters go to CC and Field Ops for prep.
- Volunteers receive project details at least 2 days prior.



Day-of Timeline

1. **Prep:** CC, Field Ops, Media arrive early.
2. **Check-in:** QR code/iPads.
3. **Orientation:** Briefing, safety, group assignments.
4. **Work Begins:** Monitor tasks and safety.
5. **Wrap-Up:** Clean up, media captures photos/stories.
6. **Post-Event:** Update Volunteer Excel with hours and attendance.

9. Completion Process

- Field Ops notifies CC of completion.
- Final walkthrough within 5 business days.
- Celebration event scheduled.
- Final FWA signed.
- Client Survey & Story with photo collected.
- Empower Opportunity offered.

Documents Required (Physical Folder)

- Application
- Income Verification (18+)
- Tax Documents
- Client Story w/ Photo
- Scope of Work + Approvals/Denials
- Change Orders



- Contractor Invoices/Bids
- Volunteer Hours Log
- Client Survey
- Completion Story + Photo

10. Celebration Event

- Invite all staff and volunteers.
- Notify media for coverage.
- Include music, food, and photos.
- Media captures final celebration content for social & archives.