

Home Modification Loan Program **Guide and Bid, Scope of Work and Contract Form**

PART I: Guide and General Terms and Conditions

The Home Modification Loan Program (HMLP) provides funding for necessary home modification or adaptations which are required for an individual(s) in the household to assist with their ability to function daily.

You can complete this form and find additional resources for general contractors assisting a property owner who is receiving an HMLP loan at www.cedac.org/hmlp-for-contractors. Also found on this site, we recommend you read through [HMLP's Frequently Asked Questions for Contractor's](#) to help assist you through this process.

This form must be completed by a licensed and insured contractor (the “Contractor”) and signed by both the Contractor and the homeowner. The document is important for the homeowner’s HMLP loan application for project funding.

This form consists of three parts:

- Part I is a Guide and General Terms and Conditions
- Part II is the first section of the Bid and Contract Form and required for all projects.
- Part III is also part of the Bid and Contract Form and is made up of sub-forms.

Complete only the sub-forms needed for the project.

- Form A Ramps, Lifts and Elevators
- Form B Exterior Modifications
- Form C Bathroom Modifications
- Form D Kitchen Modifications
- Form E Permanent Adaptive Design
- Form F: Addition to Dwelling or ADU

Please be sure to include the homeowners’ name in the space provided at the bottom of each page of this form.

A few program policies to consider:

- Up-front payment before work starts is permitted but can be for materials only, contractors submit a detailed invoice, and this payment cannot more than 30% of total project cost.
- HMLP only pays up-front for materials in the first invoice; all other invoices should be submitted when the work is complete.
- A copy of the building permit will be required before any payments are made to a contractor, including up-front payments for materials.
- Change Orders are required:
 - Any deviations in the agreed upon project scope outlined in the Contract must be submitted and approved by the owner and reviewed by the provider agency for eligibility, prior to commencing said work
 - Any change to cost or project duration should be noted
- HMLP does not pay subcontractors directly
- HMLP uses construction monitors to conduct an initial inspection prior to the start of construction work. The inspection is to review the project’s scope of work with both the Contractor and homeowner. Once construction work is complete, the construction monitor will conduct a final inspection before the last disbursement.

Release of Liens:

The Contractor's application for final payment shall include a statement of release of any liens by subcontractors, laborers, or material suppliers and all other liens arising out of the work performed under this contract.

Provision of Utilities:

The homeowner agrees to furnish all necessary utilities, including water and power, at no charge to the Contractor during the construction period. This shall also include access to a telephone for receipt of messages and the placing of outgoing, local calls.

Compliance with the Law:

It is the Contractor's obligation to obtain all applicable local permits. For building construction projects, if the homeowner obtains the permits, the homeowner will not be entitled to obtain any benefit from the Guaranty Fund established under Massachusetts General Laws Chapter 142A.

The Contractor must have a current Massachusetts construction supervisor license in accordance with the Massachusetts Building Regulations. All subcontractors must meet Massachusetts licensing requirements according to their trade.

The Contractor and all subcontractors are required to be registered with the Massachusetts Board of Building Regulations and Standards, unless specifically exempt from registration. If the homeowner uses unregistered contractors, he/she will not be entitled to obtain any benefit from the Guaranty Fund established under MGL Chapter 142A. Inquiries concerning contractor registration can be made to:

Office of Consumer Affairs and Business Regulation
Ten Park Plaza, Suite 5170
Boston, MA 02116
Phone: (617) 973-8700

Insurance:

The Contractor shall carry or require that there be carried full and complete Workmen's Compensation Insurance for all of his/her employees and those of his/her subcontractors engaged in work on the Contract premises, in accordance with local and state laws governing the same.

The amount and limits of General Liability insurance and other required insurance coverage referred to herein shall be subject to the approval of the homeowner, provided however, that the Contractor shall obtain Comprehensive General Liability Insurance Coverage protecting the homeowner in the event of bodily injury including death, and property damage arising out of the work performed by the Contractor. In addition, a certificate of Automobile Liability Insurance shall be obtained for all vehicles used in the performance of this Contract for bodily injury including death and property damage per accident.

Termination:

If at any time the homeowner concludes that the work or the actions of the Contractor are:

- not in accordance with standard professional trade practices, or
- not in compliance with the scope of work specifications, or
- not in compliance with the material specified in the work specifications, or
- in violation of Contract terms, or
- a violation of applicable state and/or federal policies, regulations and laws,

Then the homeowner has the right to terminate this Contract, through a written notice of contract termination.

The Contractor may suspend or terminate this Contract by providing the homeowner with written notice for the following reasons:

- Failure by the homeowner to pay the agreed upon fee.
- Actions or inactions by the homeowner that seriously hinder the Contractor's ability to perform its obligations in accordance with this Agreement.
- A reasonable determination by the Contractor that the satisfactory completion of one or more of the agreed upon activities is rendered improbable, infeasible, impossible or illegal, without fault of the Contractor, provided however that the Contractor shall first have.
 - A. advised the homeowner of the reasons for the determination, and
 - B. developed and proposed such solutions as appear feasible, and
 - C. sought to negotiate an amendment of the Contract with the homeowner and such efforts have not satisfactorily removed the impediment to completion.

In the event of suspension or termination, the homeowner shall pay the Contractor for completed, approved and satisfactory work.

Licenses:

The Contractor, and any approved subcontractors, shall procure and keep current any licenses, certifications, or permits required for any activity to be undertaken as part of this Agreement, as may be required by federal, state, or local laws or regulations.

Amendments:

The terms of this Agreement may be modified, amended, and/or extended only by written instrument executed by both the Homeowner and contractor.

Severability:

If any provision of this Agreement is held invalid, the remainder of the Agreement shall not be affected thereby, and all other parts of this Agreement shall, nevertheless, be in full force and effect.

If you have any questions or would like further information about the HMLP requirements for this bid form, please contact the regional provider agency working directly with the homeowner on their application.

Home Modification Loan Program

Guide and Bid, Scope of Work and Contract Form

Part II: Bid, Scope of Work and Contract Form

This section includes:

- Contractor License(s) and insurance information
- List of required permits
- Estimated Project timeline
- Payment schedule
- Certification Statement

Please Include the necessary sub-form(s) to complete the Bid, Scope of Work and Contract Form.

- Form A Ramps, Lifts and Elevators
- Form B Exterior Modifications
- Form C Bathroom Modifications
- Form D Kitchen Modifications
- Form E Permanent Adaptive Design
- Form F: Addition to Dwelling or ADU

This Bid Form and Construction Contract (the "Contract") effective this _____ day

of _____, 20 _____, between:

_____ (the "homeowner(s)")

_____ (property Address)

Work to be performed by: _____ (the "Contractor")

Business address: _____

Timeline

Estimated Start Date: _____ Estimated Completion Date: _____

Work may not begin until both parties have received a fully executed copy of the contract and the three-day rescission period has expired.

It is agreed between the Contractor and Homeowner that the work shall be performed while the premises are occupied/vacant (*circle one*).

Labor Rates:

Please provide the hourly labor rate for any additional work that may be required/requested.

General Contractor _____ Rate _____

Other _____ Rate _____

Other _____ Rate _____

Borrower Name: _____ HMLP Part II

Brief Describe the Scope of Work: _____

Required Permits: Electrical ☐ Plumbing ☐ Building ☐

Will the town/city require blueprints or plans to obtain permits? Yes ☐ No ☐ If plans are required, they must be submitted with this form.

Contractor Registration

License Verification

_____ Name of License holder	_____ Construction Supervisor License #	_____ Expiration Date	<input type="checkbox"/>
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_____ Name of License holder	_____ Home Improvement Reg. #	_____ Expiration Date	<input type="checkbox"/>
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_____ Name of License Holder	_____ Lead License <input type="checkbox"/> if less than 6 sq. feet will be disturbed	_____ Expiration Date	<input type="checkbox"/>
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_____ Name of Insured	_____ Insurance Carrier	_____ Policy #
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Certification Statement

The quality of workmanship and finish shall be, consistent with a high quality of workmanship and finish in accordance with industry standards for like projects. The Contractor warrants a) that materials furnished pursuant to the proposal and will be of first-class quality and new unless otherwise stipulated, b) that the work will conform to the requirements of all authorities having jurisdiction and, c) that the work will be free from defects and encumbrances. All work performed under the contract shall be warranted by the contractor to be free from defects in labor and materials for a period of one year following the final acceptance of the work or final payment for work under the contract.

1. Part I and Part II Forms are required for HMLP funded projects.
2. Please check which sub form(s) will be included with the HMLP Bid, Scope of Work and Contract Form

- ☐ **Form A:** Ramps, lifts or Elevators
☐ **Form B:** Exterior Modifications
☐ **Form C:** Bathroom Modifications
☐ **Form D:** Kitchen/Landry Modifications
☐ **Form E** Permanent Adaptive Design
☐ **Form E** Addition to Dwelling or ADU

TOTAL PROJECT COSTS (Subcontractor, Materials, Labor)

Work Item	Total Cost
Form A Ramps, Lifts or Elevators	
Form B Exterior Modifications	
Form C Bathroom Modifications	
Form D Kitchen	
Form E Permanent Adaptive Design	
Form F Addition to Dwelling or ADU	
Permit(s)	
Disposal/Dumpster	

Payment Schedule, please note the following:

- This payment schedule will directly influence the homeowner's HMLP loan disbursement schedule.
- The materials payment and final payment percentages are calculated using total project cost, *not* the HMLP loan amount.
- Be sure to include a project milestone for each payment. Something the homeowner can easily identify as completed, so they can request payment.
- HMLP loans are secured using a mortgage or UCC, there are filing fees which often are paid using HMLP loan funds. These fees can range from \$30– \$500+.
- Is the total project cost over the HMLP loan amount? Yes ☐ No ☐ If so, amount \$_____ If over the loan maximum, the homeowner will be required to disburse their other funding prior to any HMLP loan funds.

Payment 1: If applicable, amount over loan max \$_____.

Payment 2: \$_____ Description: Loan Recording Fees (range of \$30-\$500+ exact amount supplied by the Provider Agency)

Payment 3: \$_____ Description: purchase of up-front materials

Payment 4: \$_____ Description: ☐ rough city inspection ☐ demo complete

installation of_____, ☐ framing complete
other:_____

Payment 5: \$_____ Description: ☐ installation of_____, ☐ final city inspections, other: _____

Final Payment (10%): \$_____ Description: After final HMLP inspection

As a part of any application for payment, the Homeowner may require the Contractor to furnish releases or receipts from any and all persons performing work or supplying materials or services to the contractor,

Borrower Name: _____ HMLP Part II

or any subcontractors, for work performed under this contract, if this is deemed necessary to protect the Homeowner's interest.

Resolution of Disputes

If disputes between the Homeowner and Contractor cannot be mutually resolved, the Homeowner may initiate arbitration by right as allowed under the Home Improvement Contractor Law. If agreed to by the Homeowner, the Contractor may also resolve disputes through formal arbitration.

If the Homeowner agrees to an alternative dispute resolution process as initiated by the Contractor, the following must be signed by both parties:

The contractor and the homeowner hereby mutually agree in advance that in the event the contractor has a dispute concerning this contract, the contractor may submit the dispute to a private arbitration firm which has been approved by the Secretary of the Executive Office of Consumer Affairs and Business Regulation and the consumer shall be required to submit to such arbitration as provided in Massachusetts General Laws, Chapter 142A.

Homeowner's Signature

Contractor's Signature

Notice: The signatures of the parties above apply only to the agreement of the parties to alternative dispute resolution initiated by the Contractor. The Homeowner may initiate alternative dispute resolution even where this section is not separately signed by the parties

Contract: The Contract between the Homeowner and the Contractor consists of Part I Part II and the selected sub-forms of the Home Modification Loan Program Scope of Work Guide and Bid and Contract Form.

CONTRACTOR _____
Signature

Print Name: _____

Date: _____

Homeowner(s) _____
Signature(s)

Print Name(s) _____

Date: _____

Borrower Name: _____ HMLP Part II

Home Modification Loan Program
Part II: Bid, Scope of Work and Contract Form
Form A: Ramps, Lifts or Elevators

Ramp (if more than one will be built, please duplicate)

Location: Front entrance ☐ Rear entrance ☐ Garage ☐ Other: _____

Briefly Describe, include length and width of ramp _____

Footing Material _____ Ramp Material _____

Ramp Handrail Height _____

Total Ramp Material Costs _____ Is this an allowance: Yes ☐ No ☐

Porch Landing

Location: Front entrance ☐ Rear entrance ☐ Garage ☐ Other: _____

Brief Description of work: _____

Dimensions: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Wheelchair Lift (interior or exterior)

Location: _____

Manufacturer: _____ Model No. _____

Is electrical work required? Yes ☐ No ☐ Please describe _____

Material Cost: _____ Electrical cost: _____

Stairlift (interior or exterior) (if more than one will be installed, please duplicate)

Location: _____

Manufacturer: _____ Model No. _____

Is electrical work required? Yes ☐ No ☐ Please describe: _____

Lift Material Cost: _____ Electrical cost: _____

Elevator

Location: _____

Manufacturer: _____ Model No. _____

Is electrical work required? Yes ☐ No ☐ Please describe _____

Material Cost: _____ Electrical cost: _____

SUBTOTAL Costs

Ramp, Lift or Elevator

Subtotal Material Cost: _____ Subtotal Labor Cost: _____

Subtotal Electrical Cost: _____

Electrical work performed by subcontractor? Yes ☐ No ☐

Borrower Name: _____ HMLP Form A

Home Modification Loan Program
Part II: Bid, Scope of Work and Contract Form
Form B: Exterior Modifications

Exterior Doorway

Location: Front entrance ☐ Rear entrance ☐ Garage ☐ Other: _____

Brief Description of work: _____

Hardware Type: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Walkway

Location: Front entrance ☐ Rear entrance ☐ Garage ☐ Other: _____

Brief Description of work: _____

List Materials (i.e. asphalt, concrete, etc.): _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Driveway

Please describe and include depth of gravel sub-base, depth of asphalt base, depth of asphalt finish coat and approximate area to be modified. _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Fence

Please describe & include location, approximate linear footage and height: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Other Exterior Modifications

Please describe: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Subtotal Costs Exterior Modifications

Subtotal Material Cost: _____

Subtotal Labor Cost: _____

Subtotal Electrical Cost: _____ Performed by subcontractor? Yes ☐ No ☐

Borrower Name: _____ HMLP Form B

Home Modification Loan Program
Part II: Bid, Scope of Work and Contract Form
Form C: Bathroom Modifications

Copy this form if work will be done in an additional bathroom

- Does the property have more than one bathroom: Yes ☐ No ☐
- Will the bathroom be available during construction: Yes ☐ No ☐
- Where is the bathroom located? 1st floor ☐ 2nd or 3rd floor ☐ Basement ☐ Other: _____

What are the dimensions of the bathroom? _____

Please describe the full extent of the modification (s): _____

What demolition is required? _____

What plumbing work is required? _____

What electrical work is required? _____

- Will the scope of work impact the existing flooring in the bathroom? Yes ☐ No ☐ If no, who will be responsible for any possible damage that might occur? _____

If applicable, describe the flooring work required (please discuss any work required to the floor joists or sub-flooring, waterproofing).

Flooring Material _____ Square Footage: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

- Will the scope of work impact the walls in the bathroom? Yes ☐ No ☐ If yes, please describe, please be sure to comment on any insulation and/or sheetrock or plaster work required.

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Borrower Name: _____ HMLP Form C

Prep and Paint: Please indicate: Does the scope of work include fully painting the bathroom ☐ **or** touch up of impacted area ☐ **or** the homeowner is responsible for all painting required ☐ ?

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Bathroom Doorway: Current dimension of doorway _____ If widened, new dimensions _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Bathroom Sink: What are the dimensions (height, depth, knee clearance, clear floor space)? _____

Will there be a cabinet below the sink? Yes ☐ No ☐

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Bathroom Sink Faucet: Lever-operated ☐ push-type ☐ touch-type ☐ other: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Shower/Tub: What are the dimensions? _____

Is the unit to be installed curb-less ☐ low-threshold ☐ other _____

Will the shower include a build in seat? Yes ☐ No ☐

Material type: _____

Manufacturer: _____ Model # _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Shower/Tub Fixtures: Handheld ☐ Showerhead ☐ Combo ☐ Other: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Shower/tub Grab Bars: How many will be installed near the shower/tub? _____

Will additional wall backing or supports be required. Yes ☐ No ☐

Has the homeowner identified where these should be installed? Yes ☐ No ☐

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Toilet: Please describe the turn-radius around the toilet _____

Will the toilet be: comfort height (toilet bowl 17 to 19 inches above the floor) ☐ or Standard height ☐

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Toilet Grab Bars: How many will be installed near the toilet? _____

Will additional wall backing or supports be required. Yes ☐ No ☐

Has the homeowner identified where these should be installed? Yes ☐ No ☐

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Borrower Name: _____ HMLP Form C

Additional Grab Bars: Location(s): _____ Quantity: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

List of Bathroom Accessories (towel bars, medicine cabinets, shower current rod or glass doors)
please list: _____

Material Cost(s): _____

Other Bathroom Modifications: Please describe: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Subtotal Costs Bathroom Modifications

Subtotal Material Cost: _____

Subtotal Labor Cost: _____

Subtotal Electrical Cost: _____

Performed by subcontractor? Yes ☐ No ☐

Subtotal Plumbing Costs: _____

Performed by subcontractor? Yes ☐ No ☐

Borrower Name: _____ HMLP Form C

Home Modification Loan Program
Part II: Bid, Scope of Work and Contract Form
Form D: Kitchen

What are the dimensions of the Kitchen? _____

Please describe the full extent of the modification(s). Please be sure to discuss any layout changes:

What demolition is required? _____

What plumbing work is required? _____

What electrical work is required? _____

- Will the scope of work impact the existing flooring in the kitchen? Yes ☐ No ☐ If no, who will be responsible for any possible damage that might occur? _____

If applicable, describe the flooring work required (please discuss any work required to the floor joists or sub-flooring). _____

Flooring Material _____ Square Footage: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

- Will the scope of work impact the walls in the kitchen? Yes ☐ No ☐ If yes, please describe, please be sure to comment on any insulation and/or sheetrock or plaster work required.

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Prep and Paint: Please indicate: Does the scope of work include fully painting the kitchen ☐ **or** touch up of impacted area ☐ **or** the homeowner is responsible for all painting required ☐ ?

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Borrower Name: _____ HMLP Form D

Cabinets:

Number of wall cabinets: _____ Height of wall cabinets: _____ Cost: _____

Number of base cabinets: _____ Height of base Cabinets: _____ Cost: _____

Please describe hardware: _____

Please describe any special features (i.e. drop-down shelves, pull-out shelves, etc.) _____

Total Cabinet Cost: _____ Is this an allowance? Yes ☐ No ☐

Countertop: Material type: _____

Dimensions: _____ Countertop height above finished Floor: _____

Will the countertops be adjustable? Yes ☐ No ☐

Will there be an area for food prep where someone can sit? Yes ☐ No ☐

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Kitchen Sink: Sink Height: _____ Sink Depth: _____

Will there be a cabinet under the sink? Yes ☐ No ☐

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Kitchen Faucet: Lever-operated ☐ Push-type ☐ Touch-type ☐ Other: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Appliances: (funded by HMLP must be EnergyStar certified) No gas appliances are permitted.

Appliances Type: _____ Manufacturer: _____ Model #: _____

Material Cost: _____

Appliances Type: _____ Manufacturer: _____ Model #: _____

Material Cost: _____

Appliances Type: _____ Manufacturer: _____ Model #: _____

Material Cost: _____

Other Kitchen Modifications Please describe: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Subtotal Costs Kitchen Modifications

Subtotal Material Cost: _____ Subtotal Labor Cost _____

Subtotal Electrical Cost: _____ Performed by subcontractor? Yes ☐ No ☐

Subtotal Plumbing Costs: _____ Performed by subcontractor? Yes ☐ No ☐

Borrower Name: _____ HMLP Form D

Home Modification Loan Program
Part II: Bid, Scope of Work and Contract Form
Form E: Permanent Adaptive Design Features

Interior Doorway(s) Modification: Total # of doorway(s) to be modified: _____

Location of doorway(s) to be modified: _____

Width of modified doorway(s): _____

Will any thresholds be removed? Yes ☐ No ☐ If yes, is any flooring patching required and be included? Yes ☐ No ☐

Material Cost per doorway: _____

Total Cost: _____ Is this an allowance? Yes ☐ No ☐

Central Air Conditioning (funded by HMLP must be EnergyStar certified)

Manufacturer: _____ Model #: _____

Required Ductwork: _____

Briefly describe any electrical work required: _____

Electrical Cost: _____ Performed by subcontractor? Yes ☐ No ☐

Total Material Cost: _____

Laundry: Please briefly describe the scope of work: _____

Materials: _____

Will the laundry facilities be moved? Yes ☐ No ☐ Will the existing appliances be used? Yes ☐ No ☐

Appliances: (funded by HMLP must be EnergyStar certified)

Appliances Type: _____ Manufacturer: _____ Model #: _____

Material Cost: _____

Appliances Type: _____ Manufacturer: _____ Model #: _____

Material Cost: _____

Adaptive and Safety Design Modifications:

Window locks

Quantity: _____ Cost: _____

Specialized door locks

Quantity: _____ Cost: _____

Alarm system

Manufacturer: _____ Model # _____

Quantity: _____ Cost: _____

Security Lighting

Quantity: _____ Cost: _____

Borrower Name: _____ HMLP Form E

Other Adaptive Design or Safety Features:

Please describe: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Subtotal Costs Permanent Adaptive Design Features

Subtotal Material Cost: _____

Subtotal Labor Cost: _____

Subtotal Electrical Cost: _____ Performed by subcontractor? Yes ☐ No ☐

Subtotal Plumbing Costs: _____ Performed by subcontractor? Yes ☐ No ☐

Borrower Name: _____ HMLP Form E

Home Modification Loan Program
Part III: Bid, Scope of Work and Contract Form
Form F Addition to Dwelling or ADU

Contractors must include project blueprints or plans sufficient for obtaining municipal permits for any project that includes an increase in the livable square footage of a dwelling or the creation of an accessory dwelling unit (ADU).

HMLP requires that any addition to dwelling or ADU project be fully electric unless it ties into an existing HVAC system that uses fossil fuels. HMLP encourages ADU projects to use solar energy whenever possible, and homeowners will be required to certify that they considered solar.

Please use the bathroom and kitchen sub-forms to provide the details for these spaces.

The project scope is: Adding additional living space ☐ Accessory Dwelling Unit (ADU) ☐

Has the municipality adopted a Specialized Energy Code? Yes ☐ No ☐ Or Stretch Energy Code? Yes ☐ No ☐

Will the unit be tied into the existing septic system? Yes ☐ No ☐ Have you confirmed the existing system has sufficient capacity? Yes ☐ No ☐

Provide a General Description of Project Scope: _____

What are the dimensions of the additional living space or unit? _____

If the space is being converted, what is the space currently? Garage ☐ Basement ☐ Attic ☐

Other: _____

Does the municipality currently consider this livable square footage? Yes ☐ No ☐

The space or unit will include Bedroom ☐ Bathroom ☐ Full Kitchen ☐ Partial Kitchen ☐

Other: _____

How many windows will the additional living space include? _____

What is the size of the windows to be installed? _____

If there are existing windows, what is the size of these windows? _____

If applicable, what are the forms of egress? _____

Masonry/Landscaping: Briefly describe: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Foundation/footings/Slab: _____

Borrower Name: _____ HMLP Form F

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Roofing: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Siding: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Carrying beam/Lally column: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Framing: _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Windows (funded by HMLP must be Energy Star certified)

of windows: _____ size: _____

Manufacturer: _____ Model _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Insulation (funded by HMLP must be Energy Star certified)

Manufacturer: _____ Model _____

Quantity: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Doors (exterior doors must be Energy Star certified)

of interior doors: _____ # of exterior doors: _____

For exterior doors only Manufacturer: _____ Model #: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Flooring (include joists and subflooring): _____

Flooring Material(s) _____ Square Footage: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Borrower Name: _____ HMLP Form F

Sheetrock/Plaster: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Finish Carpentry: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Prep and Paint: all paint and prep included ☐ **or** the homeowner is responsible ☐ ?

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

HVAC (funded by HMLP must be Energy Star certified): _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Electrical: Tie into existing electrical panel ☐ Current Capacity: _____ Install sub-panel ☐

Briefly describe (please note if this includes bathroom & kitchen): _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Plumbing, briefly describe scope: (please note if this includes bathroom & kitchen): _____

Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Other, briefly describe: _____

List Materials: _____

Material Cost: _____ Is this an allowance? Yes ☐ No ☐

Subtotal Costs Addition to Dwelling or ADU

Subtotal Material Cost: _____

Subtotal Labor Cost: _____

Subtotal Electrical Cost: _____ Performed by subcontractor? Yes ☐ No ☐

Subtotal Plumbing Costs: _____ Performed by subcontractor? Yes ☐ No ☐

Borrower Name: _____ HMLP Form F