

# COMMUNIQUE



## Preferred Partners Meeting Highlights

Meeting 1 – January 20, 2023

Chaired by Katherine Peoples

### 1. ADU Grant Fund Status

Based on the \$24 Billion budget shortfall that the California State is facing, it is highly unlikely that the State will release the \$50 million that is earmarked for ADU Grant funds, anytime soon. Phone calls will be made to clients on the HPP Cares ADU waitlist, these calls will be followed by written communication. We will continue to keep our ears on the ground incase the State decides to relook the budget a few months from now, and we will timeously inform everyone concerned.

### 2. Grant Funds Cancelations

We have had cancelations by clients who have been awarded the ADU grant funds. The two main reasons for cancelations are: a) Tax-related matters that come with receiving the Grant, and b) clients who are unable to raise funds or secure loans to build their ADU projects.

One of the meeting participants asked if HPP Cares can help determine if some of the Preferred Partners clients, who have been quiet for months, are on the list that canceled their grants. Katherine agreed to this, asking Preferred Partners to send names of clients they need HPP Cares to check on.

### 3. Invoicing Department Improvements

There have been staff changes in the Invoicing Department. This has resulted in quicker turnaround times, that is, when all relevant documents and signatures are received from clients and their respective contractors. Another improvement is that the Invoicing Department now calls ADU clients to inform them of wired payments, or checks issued. We continue to unlock the backlog. We appreciate your patience in this regard.

### 4. Submission of Invoices and Related Documents

Payment turnaround times largely depend on required documents being correctly filled-in and signed by relevant parties. We urge clients and contractors to use links provided to submit Scope of Work, invoices, and other related documents, as the Invoicing Department email address has been phased out.

## 5. Customer Service

We are constantly working on improving our customer experience. Since the introduction of Account Managers at the beginning of December, we have had to replace a few Account Managers, and additional customer service-related positions have been introduced:

- a) We now have a **receptionist** who ensures no calls are missed between 9:30am and 5pm. Clients are timeously connected to their respective Account Managers, and basic ADU Grant-related questions are answered.
- b) The **quality control** person calls ADU clients to check if everything is on track with their projects, take note of whatever clients are struggling with, and ensures that issues raised are attended to.
- c) We have an **escalations manager** working closely with Katherine to timeously resolve complicated cases.

## 6. Value-add for Preferred Partners

There's still about 60% of ADU clients that will be needing contractors as soon as they raise needed funds to construct their ADU projects. Therefore, we will be upping our game in promoting Preferred Partners so that they can access these clients. The plan goes beyond just listing the Partners on HPP Cares website. Preferred Partners who have made \$500 donations will be profiled in various HPP Cares platforms, showcasing the great work they do, thereby further exposing them to potential clients. Two participants from this morning's meeting offered to work with HPP Cares in terms of strategizing and planning.

## 7. We look forward to seeing at the next meeting.

## 8. NEXT MEETING DATE: Friday, February 17, 2023 @ 8am

