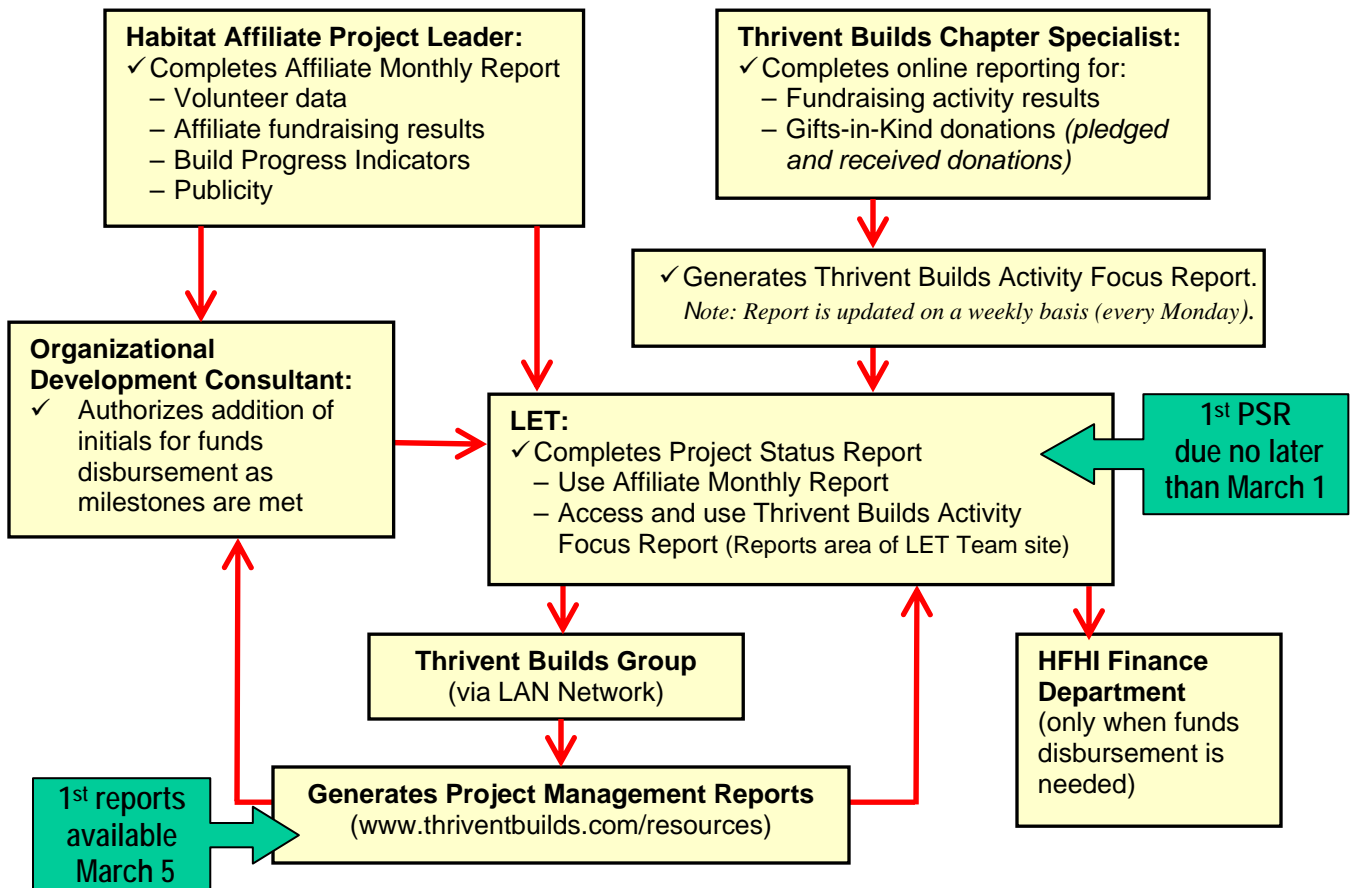


What is a Project Status Report (PSR)?

The PSR is a year-to-date report containing key *Thrivent Builds Homes* (TBH) build progress and milestone information for each Thrivent Regional Financial Office (RFO) and Habitat Affiliate. The report is used monthly by the TBH Project Team to manage the project, identify gaps or areas of concern, and reach goals in order to succeed in building homes on time.

Monthly PSR Reporting Process

1. One week prior to each monthly project team meeting:
 - ✓ Habitat Affiliate Project Leader sends the updated Affiliate Monthly Report to the LET and ODC-T.
 - ✓ Chapter Specialist completes online reporting for funds raised and Gifts-in-Kind pledged and received, which generates the Thrivent Builds Activity Focus Report. *Note: This report is updated on a weekly basis (every Monday).*
2. The LET uses the Affiliate Monthly Report and the Thrivent Builds Activity Focus Report to update the PSR, and emails an updated copy to each team member prior to the monthly team meeting. **(Note: the Affiliate Monthly Report has been updated for 2011.)*
3. Each team member reviews the report, and identifies issues, builds at risk of not being completed by December 31, and other concerns or gaps regarding the TBH project and prepares to discuss at the next team meeting.
4. **The first PSR is due on March 1, 2011.** Then, on or before the 25th day of each month (starting with March 25) the LET sends the updated PSR to the Thrivent Builds Group by copying the updated PSR to the LAN (network) drive: <T:\CustInfo\Frat\Thrivent Builds Shared\PSR> (see page 2 of this guide for details).
5. Upon completion of milestones, the LET emails the initialed PSR to HFHI to authorize the release of funding to the affiliate.



Sending the PSR to the Thrivent Builds Group (TBG) via Secured LAN Drive

On or before the 25th day of each month, LETs, on corporate computers, must use this process to remit their PSR so that the Thrivent Builds Group receives the most up-to-date information.

1. **First-time users:** A week before the PSR due date, send an email to "BOX Thrivent Builds Homes" to request access to the secured LAN drive: <T:\CustInfo\Frat\Thrivent Builds Shared\PSR>
2. You will receive an email notification when access has been approved, generally within 3-4 business days.
3. After updating the PSR, make a copy of the file and save it in your local folder named, i.e.:
C:\My Documents\TBH\psr_(3-digit RFO number).xls
(e.g., C:\My Documents\TBH\psr_123.xls).
4. Open **Windows Explorer** (Right-click on the Start button and select Explore) and navigate to the secured LAN drive: <T:\CustInfo\Frat\Thrivent Builds Shared\PSR> Note: If this is your first time accessing the secured LAN drive, you may want to add it to your **Favorites** for easy future access.
5. In the same window, open the folder in which you stored the updated PSR (e.g., C:\My Documents\TBH\psr_123.xls).
6. If all of your folders are not visible, click the Folders button within Windows Explorer.
7. **Click** on the updated PSR file, **hold down** your left mouse button, **drag** a copy of the file to the secured LAN drive: <T:\CustInfo\Frat\Thrivent Builds Shared\PSR> and **release** the mouse button. This method places a copy of the file in the LAN drive.
8. **Open** the secured LAN drive: <T:\CustInfo\Frat\Thrivent Builds Shared\PSR> to **verify** that the file copied correctly.
9. **Close** Windows Explorer.

Important Reminder:

First-time LAN users must request access to secured LAN drive one week before needed.

Questions about "Secured LAN Drive?" Contact the Technology Service Center at **800-847-4836**, at the voice prompt, say "Directory", dial **34357**, press **1** to reach the Corporate Technology Service Center, press **3** for all systems, and press **6**. Or send an email to **BOX TSC**. The direct phone number is 920-628-4357.

Authorizing the release of funds to affiliates

When the LET and ODC-T have initialed the PSR and are ready to authorize the release of funds, the LET emails the initialed PSR to Kellie-Ann Brown (thriventgrants@habitat.org) in HFHI's Finance Department and copies the appropriate ODC-T. Indicate which affiliate(s) is ready for a disbursement.

Regional Financial Office (RFO) Summary Worksheet

Note: Yellow fields are editable and blue fields are locked and cannot be changed.

THRIVENT BUILDS HOMES RFO PROJECT STATUS REPORT									
RFO #	165	MLE	Jan	Elsasser					
As of month	Jan	2011	jan.elsasser@thrivent.com			866-970-5252			
RFO SUMMARY DATA									
Number of homes	Funded:			Completed:	0				
Home build costs	RFO Total:	\$							
Funds	Needed:	\$	Pledged:	\$	-	Raised:	\$		
Thrivent led	Needed:	\$	Pledged:	\$	-	Raised:	\$		
Affiliate led	Needed:	\$	Pledged:	\$	-	Raised:	\$		
Volunteer slots	Needed:	0		Committed:	0				
Build site volunteering (actual)	Total hours (all volunteers):	0		Total volunteers:	0				
			-Lutherans:	0	or	0%	of all volunteers		
			-Thrivent members:	0	or	0%	of all volunteers		
HOME MILESTONES									
	Number of homes met	Percent of homes met	Target Date						
1. Preparedness Milestone	0	0%	March 1, 2011						
2. Resource Milestone	0	0%	Before volunteers are on site						
3. Completion Milestone	0	0%	January 15, 2012						
RFO Summary 248580 248540 248380 248370									

'As of month' field must be updated each month.

Sample

Section 1—The 'As of month' field **must be updated each month** prior to the sending the PSR via the secured LAN drive. Update the MLE fields, if necessary.

Section 2—Data is summarized from the Affiliate worksheets (see page 4-5 of this guide).

Section 3—Number and percent of homes that have met milestone requirements. Data is summarized from the Affiliate worksheets.

Project Status Report

Thrivent Builds Homes (continued)

Affiliate Worksheet

Section 1—Update yellow fields, if necessary.

THRIVENT BUILDS HOMES AFFILIATE PROJECT STATUS REPORT						
AFFILIATE	Berks County, HFH of	Project Leader	Jay		jivorra1@habitatberks.org	610-373-3439
AFFILIATE FUND CODE	248580	LET	Paul		paul.berbes@thrivent.com	410-962-7202
		ODC-T	Gb		gedson@habitat.org	800-422-4828, Ext. 4812

Section 2—Data is compiled from entries below.

AFFILIATE SUMMARY DATA						
Funds (all homes)	Needed:	\$ 162,000	Pledged:	\$ -	Raised:	\$ -
Thrivent led	Needed:	\$ 36,000	Pledged:	\$ -	Raised:	\$ -
Affiliate led	Needed:	\$ 126,000	Pledged:	\$ -	Raised:	\$ -
Volunteer slots	Needed:	-	Committed:	-		
Build site volunteering (actual)	Total hours:	0	Total volunteers:	0		
			-Lutherans:	0	or	0%
			-Thrivent Members:	0	or	0%

Section 3—Update address field with accurate data (when known) to ensure the correct address is shown on the Tracking Report. Milestones checkboxes are for your tracking purposes only (TBG does not use). Electronic initials (sign-off) of LET and ODC-T must be entered for release of funds.

HOME MILESTONES FOR FUNDING RELEASE												
Street address, City, State, Zip	301 Jefferson St, Reading, PA 19605	303 Jefferson St, Reading, PA 19605	305 Jefferson St, Reading, PA 19605									
	LET	ODC-T	LET	ODC-T	LET	ODC-T	LET	ODC-T	LET	ODC-T		
1. Preparedness Milestone	3/1/2011		3/1/2011		3/1/2011		3/1/2011		3/1/2011			
Copy of deed												
Signed build agreement												
Certificate of insurance												
Site safety plan												
Draft build schedule												
2. Resource Milestone												
Clear title												
Permits Pulled & Variances Approved												
50% funds pledged (Thrivent)	0%		0%		0%		0%		0%			
50% funds pledged (Affiliate)	0%		0%		0%		0%		0%			
50% volunteer slots committed	0%		0%		0%		0%		0%			
3. Completion Milestone	1/15/2012		1/15/2012		1/15/2012		1/15/2012		1/15/2012			
Certificate of Occupancy												
Total house cost	\$	120,000	\$	120,000	\$	120,000	\$	120,000	\$	-		
Thrivent award per home	\$	66,000	\$	66,000	\$	66,000	\$	66,000	\$	-		

Section 4—Use the TB Activity Focus Report and the Affiliate Monthly Report to complete this section. *Note: Funds raised in the previous year and carried over are not included in the TB Activity Focus Report. Enter this amount in the "Carry over funds from previous year" field.*

HOME FUNDRAISING AND VOLUNTEERING TOTALS												
Street address, City, State, Zip	301 Jefferson Street, Reading, PA 19605			303 Jefferson Street, Reading, PA 19605			305 Jefferson Street, Reading, PA 19605					
Funds - Cash and GIK	Needed	Pledged	Raised	Needed	Pledged	Raised	Needed	Pledged	Raised	Needed	Pledged	Raised
Chapter 1	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Chapter 2	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Chapter 3	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Chapter 4	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Chapter 5	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Chapter 6	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Chapter 7	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
GIK	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carry over funds from prev yr	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cash from Affiliate	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
YTD Thrivent led	\$ 11,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
YTD Affiliate led	\$ 28,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Build site volunteering	Needed	Committed	Actual	Needed	Committed	Actual	Needed	Committed	Actual	Needed	Committed	Actual
Volunteer slots												
YTD total volunteers												
-YTD Lutherans												
-YTD Thrivent members												
YTD all volunteer hours												

Section 5—Use the Affiliate Monthly Report to complete this section. **'Planned' dates must be entered on or before the March 1 PSR is submitted to the TBG.** Scorecards will show that houses are complete only when the Completed date is entered in the 'Construction Complete' field.

BUILD PROGRESS INDICATORS - UPDATE THESE DATES AS CHANGES OCCUR												
Street address, City, State, Zip	301 Jefferson Street, Reading, PA 19605			303 Jefferson Street, Reading, PA 19605			305 Jefferson Street, Reading, PA 19605					
	Planned	Completed	Status	Planned	Completed	Status	Planned	Completed	Status	Planned	Completed	Status
Thrivent Builds Affiliate Project												
Lead Selected												
Build schedule reviewed/agreed												
Family selected												
Permits pulled & variances approved												
Build infrastructure completed												
Groundbreaking ceremony												
First date volunteers are on site												
Family has earned 75% of sweat equity hours												
Rough plumbing, electrical and HVAC inspections completed												
Final plumbing, electrical and HVAC inspections completed												
Construction complete												
Dedication												

Section 6—Every month, select either **Yes** or **No** to indicate if build is at risk. If **Yes** is checked, complete the next four fields in this section to further explain the issue and what is being done to resolve it.

BUILDS AT RISK OF NOT BEING COMPLETED BY 12/31/2011				
For each build, answer these questions in 250 characters/spaces or less				
Street address, City, State, Zip	301 Jefferson St, Reading, PA 19605		303 Jefferson St, Reading, PA 19605	
This build is at risk:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Date of entering this issue				
Issue causing delay				
Intervention(s) being taken to remedy delay				
Expected resolution date				

