



Partner Family Progress Tracking Worksheet

Family: _____ Phone Number: _____ Email: _____

FSV: _____ Phone Number: _____ Email: _____

Preliminary Items	
__/__/__	Board approves applicant family.
__/__/__	Family Selection Committee member or staff person notifies family of board action.
__/__/__	Habitat Office arranges for family to attend upcoming board meeting for introduction.
__/__/__	Family Selection Committee provides to the Family Support Committee a copy of the approved <i>Partner Family Summary</i> and the <i>Partner Family Profile</i> .
__/__/__	Family Support Committee selects a Family Support Volunteer and gives him/her a <i>Partner Family Work Folder</i> .
__/__/__	FSV introduces him/herself to the partner family.
__/__/__	<p>Habitat Office schedules an organizational meeting with the Executive Director, the Partner Family, and the FSV. At this meeting (check as completed):</p> <ul style="list-style-type: none"> <input type="checkbox"/> FSV presents the <i>Homeowners' Guide</i> to partner family. <input type="checkbox"/> Executive Director reviews the <i>Letter of Acceptance</i> with partner family. <input type="checkbox"/> Partner family and Habitat representatives sign the <i>Letter of Acceptance</i>. <input type="checkbox"/> Partner family member(s) sign <i>volunteer liability waiver(s)</i>. <input type="checkbox"/> Executive Director reviews the <i>generic mortgage</i> included in the Partner Family Work Folder with the Partner Family. <input type="checkbox"/> FSV reviews the <i>Sweat Equity Tracking Worksheets</i> with the partner family. <input type="checkbox"/> Partner Family begins to develop an individual plan and timeline for the sweat equity. <input type="checkbox"/> Executive Director returns signed forms to Habitat Office. <input type="checkbox"/> Habitat Office gives a copy of <i>Letter of Acceptance</i> to the partner family or to the FSV who will give it to the partner family.
__/__/__	Partner Family attends board meeting for introduction.
Following the organizational meeting	
__/__/__	Partner Family completes <i>individual plan and timeline for sweat-equity hours</i> and delivers a copy to FSV.

__/__/__	FSV files a copy of <i>sweat equity plan</i> at Habitat Office and keeps a copy.
__/__/__	Habitat Office organizes a meeting with the partner family, a representative from the construction committee, the FSV, and the construction coordinator to discuss basic home description and the design of the specific home for the family.
__/__/__	Partner Family completes initial sweat-equity (50 hours for single head of household, 100 hours for two-person head of household) and house construction is begun.
__/__/__	Partner Family and FSV discuss and complete <i>Partner Family Construction Choices</i> sheet.
__/__/__	Partner Family and FSV choose roofing and siding colors from supplier named by Construction Coordinator. Supplier: _____
__/__/__	Partner Family and FSV choose room paint colors from Sherwin-Williams who donate this paint.
__/__/__	Partner Family and FSV review Habitat's Hunter-Douglas GIK online page at http://gik.habitat.org/product/gik20/Privacy-Blinds and make preliminary choices on color(s).*
__/__/__	Partner Family and FSV make final choice on mini-blind colors and provide information to construction coordinator and Habitat office.*
__/__/__	Habitat Office or Construction Coordinator place online order for mini-blinds. (<i>This step may be delayed until exact dimensions of windows are known.</i>)
__/__/__	Partner Family and FSV choose kitchen and bath cabinets from supplier named by Construction Coordinator. Supplier: _____
__/__/__	Partner Family and FSV get lighting budget information from construction coordinator and choose lighting.
__/__/__	Partner Family and FSV get flooring budget (or sq ft guideline) information from construction coordinator and choose flooring for kitchen and bath (usually vinyl) and living room (carpet).
Approximately one month before closing	
__/__/__	Habitat Office (or <i>Family Selection Committee chairperson</i>) repeats credit check on the family to determine whether there have been significant changes.
__/__/__	Family Selection Committee chairperson is notified of status related to above check. <ul style="list-style-type: none"> ▪ If status is OK, proceed to the next step. ▪ If status is not OK, the Habitat Office will arrange a meeting with the family and the Executive Director to resolve. The Habitat Office may invite the FSV to participate.
__/__/__	Partner Family provides Habitat office with financial information relevant to establishing mortgage payments (such as checkstubs for two previous paychecks).
__/__/__	Partner Family chooses homeowner's insurance seeking advice from FSV if desired.

__/__/__	Partner Family fills out <i>VCPL book choice form</i> and returns to Habitat office.
__/__/__	Habitat Office organizes a meeting for partner family, FSV, and Executive Director to: <ul style="list-style-type: none"> <input type="checkbox"/> Review sample mortgage <input type="checkbox"/> Review payment procedures and <i>mortgage payment policy</i> <input type="checkbox"/> Review <i>Home Buyers Warranty</i> <input type="checkbox"/> Have relevant parties sign appropriate documents including the <i>purchase agreement</i>.
__/__/__	Habitat Office works with FSV and partner family to schedule Home Blessing.
__/__/__	Partner family provides Habitat Office with names and addresses of friends and family who should be invited to the Home Blessing.
__/__/__	Habitat Office prepares and mails Home Blessing invitations.
__/__/__	Habitat Office provides press release to the media.
__/__/__	Habitat Office arranges for keys, yellow ribbon, camera/cameraman, and other appropriate parties (VCPL representative, Rotary Club representative, etc.) to be present at Home Blessing.
__/__/__	FSV arranges for bible, refreshments, and any other support items (video presentation, etc.) to be present at the Home Blessing.
Approximately two weeks before closing:	
__/__/__	FSV confirms sweat equity requirement has been met by the family and notifies Habitat Office.
__/__/__	Habitat Office confirms Downpayment has been paid in full.
__/__/__	Habitat Office purchases homeowner insurance and files <i>certificate</i> .
__/__/__	Habitat Office works with FSV and partner family to schedule closing.
__/__/__	Habitat Office purchases <i>Home Buyer's Warranty</i>
__/__/__	Habitat Office requests from family the check stubs and documentation necessary to support Habitat request for HUD grant and the FHLBI grant if applicable to this mortgage.
__/__/__	Partner Family arranges for utilities (electricity, water, gas, telephone, alarm service, trash pickup) to be turned on or transferred.
__/__/__	Partner Family provides <i>all necessary paperwork</i> to support Habitat's request for HUD funds grant and FHLBI grant (as requested in an earlier step).

__/__/__	Habitat Office determines final house price, the amount of escrow and principle payments, prepares <i>mortgage</i> , and send documents to title company.
__/__/__	Construction Coordinator, Partner Family, and FSV perform walk-through to orient the family on house details and to identify for the <i>punchlist</i> any unfinished items or items that need attention.
__/__/__	Habitat Office and Construction Coordinator obtain final inspections and occupancy permit.
__/__/__	Habitat Office reminds all involved parties of closing appointments.
__/__/__	FSV confirms partner family has arranged for a minister to be present at the Home Blessing.
__/__/__	Habitat Office arranges for keys, camera/cameraman, media and other appropriate parties for Home Blessing.
__/__/__	FSV or Habitat Office prepares Home Blessing program to be distributed at the event.
__/__/__	Habitat Office reminds media of upcoming Home Blessing and encourages newspaper and television coverage.
Around the time of closing:	
__/__/__	Habitat Office, Partner Family and FSV review the responsibilities outlined by the <i>Letter of Agreement</i> and the <i>Mortgage Payment Policy</i> .
__/__/__	Home Blessing takes place.
After closing and Home Blessing:	
__/__/__	Partner Family moves in. FSV should be sure to offer assistance.
__/__/__	Habitat Office provides partner family with copies of all closing documents.
__/__/__	FSV asks Partner Family to provide feedback on the efforts and effectiveness of the work of the Family Support Committee and the Family Support Volunteer (FSV).
__/__/__	FSV give Habitat Office a copy of this feedback to be placed in homeowner's file.
About one year after Home Blessing:	
__/__/__	FSV closes formal relationship with an exit letter to the partner family.