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| Meeting Description | Meeting Dates and Milestone Notes |
| **Initial Plan and Discussion Meeting** | **Date:** |
| * What does the final outcome look like? Create a Statement. * What does the client/resident expect to see when it is done? * What is the budget? - How much of the budget will be allocated towards the cost of labor?   + How to budget the rest of our funds (excluding labor hours)   + What expenses will we incur?   + Will we be hiring outside help or consulting? * What resources are needed? * What is the project deadline? * List the milestone meeting dates and details * How to get anything else we will need? * What resources do we already have at our disposal? * Do we have everything we need to hit our milestones and goals? | Notes: |
| **Check-In Meeting** | **Date:** |
| * Have there been changes to the proposed outcome? * Progress made? Next steps? * What concern, issues, or obstacles need to be addressed? * What lessons have been learned? * Is the task on track to be completed on time and on budget? Why, why not? * Is help needed? What kind? | Notes: |
| **Check-In Meeting** | **Date:** |
| * Have there been changes to the proposed outcome? * Progress made? Next Steps?  What concern, issues, or obstacles need to be addressed? * What lessons have been learned? * Is the task on track to be completed on time and on budget? Why, why not? * Is help needed? What kind? | Notes: |
| **Final Project Meeting** | **Date:** |
| * Are all tasks completed? * If not, what is the plan to extend the deadline? * What resources, action steps or skills are needed to complete? * What went well with the project and what didn’t? * What lessons have been learned? * Have we completed the project on time and on budget? Why, why not? * How would we evaluate the project’s success? How will the client or resident evaluate it? | Notes: |