|  |  |
| --- | --- |
| MeetingDescription | Meeting Datesand 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: |