# [month/year] Touch Base: [Member]

**Project Name:**

**Project Code:**

**Project Director/s:**

**Project Start Date:**

**Meeting Date:**

**Field/Discipline/Genre:**

**Fiscal Sponsorship: [Model A/Model C]**

# Current status/overview

**Follow-up from last month:**

**Follow-up from recent Consulting hour/s:**

# financials

**Monthly account balance (from statement):**

**Major recent account activity (expenses & revenue):**

**Upcoming/pending account activity (expenses & revenue):**

**Does any of this account activity (money in or out) need to be restricted for specific purposes (projects, regranting, scholarship money, etc.)?**

**Immediate payouts/reimbursements/insurance/paperwork needs:**

**Items to include & review during next month’s touch base:**

# Future plans

**Programming:**

**Fundraising:**

**Marketing:**

**Events:**

**Other:**

**Items to review during next month’s touch base:**

# Quarterly/6 month/Annual goal review [if relevant]

**Goal:**

**Status: [Ongoing/Completed/Revised]**

**Next Steps:**

**Goal:**

**Status: [Ongoing/Completed/Revised]**

**Next Steps:**

**Goal:**

**Status: [Ongoing/Completed/Revised]**

**Next Steps:**

# Celebrations & anniversaries

**Any new videos/documentation/press to send to CW?**

**Notes for next meeting:**