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| Status Report | |
| **Project Sponsor:** | Dr. Michelle L. Kaarst-Brown |
| **Team Leader:** | Dr. Michelle L. Kaarst-Brown |
| **Team Members:** | Vedika Shenoy, Russell Stein, Aditi Shrivastava, Andrew Mauch |
| **Prepared by:** | Team 4 |
| **Date:** | 11/26/2019 |
| **Copies:** |  |
| **Description:** | EITC Field Project Status report |
| **Deliverables:** |  |

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| Accomplishments During Last Reporting Period |
| Vedika arranged a team meeting with Binita to get tips on giving a better presentation.  1st revision of key findings was drafted and summarized.  2nd revision of key findings was drafted and summarized.  The team discussed and finalized the suggestions for next steps.  Initial annotated presentation was created and sent to Michelle for approval.  Presentation approved by Michelle after several iterations.  Create annotated bibliography of the national level ERM resources.  Live rehearsal presentation completed.  Final presentation to the client with Q&A session completed.  The hard copies of national level ERM resources were handed to the client.  The soft copies of national level ERM resources were handed to the client in a flash drive. |

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| Deliverables/Milestones | | | | | |
| **Task or Deliverable** | **Completion Date** | | | | |
| Status | Plan | Revised | Actual | Comments |
| * **Initial meeting with Team lead and client to discuss and assign projects** | C | 10/15/19 |  | 10/15/19 | Completed. |
| * **Draft Project Proposal** | C | 10/18/19 |  | 10/18/19 | Project Proposal completed. |
| * **Prepare questions for the meeting with Binita** | C | 10/18/19 |  | 10/18/19 | Vedika set up the meeting with Binita and team asked questions. |
| * **Submit Proposal for approval** | C | 10/18/19 | 10/19/19 | 10/22/19 | Email sent to Michelle to receive clarification and approval. |
| * **Proposal approved by the client** | C | 10/21/19 |  | 10/22/19 | The final project proposal was sent to Michelle and team got approval to initiate the next phase. |
| * **Conduct research and on national ERM resources available for small businesses** | C | 10/22/19 |  | 10/22/19 | Each team member picked relevant search term to avoid overlap in research |
| * **Prioritize the resources gathered according to best quality of the resources** | C | 11/01/19 |  | 11/01/19 | Meeting was conducted to prioritize the resources. |
| * **Synthesize resources gathered along with the viability and applicability of these resources for small businesses** | C | 11/02/19 |  | 11/02/19 | Meeting was conducted to synthesize the resources. |
| * **Finalize the relevant and most useful resources** | C | 11/03/19 |  | 11/02/19 | The resources were finalized by the team. |
| **Prepare questions for the meeting with Binita** | C | 11/07/19 |  | 11/07/19 | Vedika set up the team meeting with Binita to get tips on giving a better presentation. |
| * **Draft Initial annotated presentation for story boarding** | C | 11/05/19 |  | 11/05/19 | The initial presentation was prepared and sent to Michelle. |
| * **Draft 1st revision of key findings from the resources** | C | 11/06/19 |  | 11/06/19 | Completed. |
| * **Draft 1st revision of executive summary** | C | 11/07/19 |  | 11/07/19 | Completed. |
| * **Draft 2nd revision of key findings from the resources** | C | 11/09/19 |  | 11/09/19 | Completed. |
| * **Draft 2nd revision of executive summary** | C | 11/10/19 |  | 11/10/19 | Completed. |
| * **Formulate suggestions for next steps** | C | 11/11/19 |  | 11/09/19 | The team discussed next steps and finalized the suggestions. |
| * **Develop an annotated bibliography** | C | 11/10/19 |  | 11/09/19 | The team created the annotated bibliography. |
| **Live rehearsal presentation** | C | 11/12/19 |  | 11/12/19 | Completed. |
| * **Final presentation to the client with Q&A session** | C | 11/19/19 |  | 11/19/19 | Completed. |
| * **Delivery of physical binder** | C | 11/19/19 |  | 11/19/19 | Completed. |
| * **Delivery of digital copy of the resources** | C | 11/19/19 |  | 11/19/19 | Completed. |
| * **Final revisions and project closure** | O | 12/03/19 |  | 12/03/19 |  |

Status – C = complete, O = Ongoing, PD = Past Due

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| Current Issues Being Resolved | | | | | | |
| **No.** | **Issue** | **Requester** | **Date Identified** | **Person Responsible** | **Issue Status** | **Date Resolved** |
| **1** | Project Proposal to be approved by client. | Vedika, Russell, Aditi, Andrew | 10/18/19 | Vedika, Russell, Aditi, Andrew | R | 10/23/19 |
| **2** | Search for free national level resources from different sources | Vedika, Russell, Aditi, Andrew | 10/22/19 | Vedika, Russell, Aditi, Andrew | R | 10/31/19 |
| **3** | Finding the right criteria for finalization of resources | Vedika, Russell, Aditi, Andrew | 10/31/19 | Vedika, Russell, Aditi, Andrew | R | 11/01/19 |
| **4** | Presentation to be approved by the team lead | Vedika, Russell, Aditi, Andrew | 11/09/19 | Vedika, Russell, Aditi, Andrew | R | 11/17/19 |
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Issue Status – R = Resolved, O = Outstanding

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| Actions Planned for Next Period |
| Final revisions as suggested by the client and project closure. |

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| General Information |
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