

Harborwren Family Care Team Meeting Agenda

A blank, practical worksheet for sharing updates, coordinating tasks, and naming next steps.

Meeting details:

Date: _____
 Time: _____
 Location or call link: _____
 Person receiving care: _____
 Facilitator or note-taker: _____

Attendees and roles:

Person 1: _____ Role or connection: _____
 Person 2: _____ Role or connection: _____
 Person 3: _____ Role or connection: _____
 Person 4: _____ Role or connection: _____
 Person 5: _____ Role or connection: _____

Shared focus:

Updates to share:

What changed:
 What is going well:
 Questions or concerns:

Task owners and coverage:

Task 1: _____	Owner: _____
Timing: _____	Backup: _____
Task 2: _____	Owner: _____
Timing: _____	Backup: _____
Task 3: _____	Owner: _____
Timing: _____	Backup: _____
Task 4: _____	Owner: _____
Timing: _____	Backup: _____
Task 5: _____	Owner: _____
Timing: _____	Backup: _____

Agreements and open questions:

Next steps:

Step 1: _____ Owner: _____ Due date: _____
 Step 2: _____ Owner: _____ Due date: _____
 Step 3: _____ Owner: _____ Due date: _____

Step 4: _____ Owner: _____ Due
date: _____

Follow-up:

Next meeting or check-in: _____

Notes or updates shared at: _____

Follow-up owner: _____

Use this worksheet to organize a family care-planning conversation. Keep the person receiving care and their preferences in view, and note questions to bring to the appropriate professional when needed.