

# March 26 Monthly Check-In Summary

	Milestone	Target Deadline	Notes	Risks
1	Onboard Taskforce Members	January 2020	Orientation completed Jan. 31	
2	Onboard Taskforce Support Staff	March 2020		Administrative issues with the Special Advisor detail need to be completed.
3	Define research approach and timeline	March 2020	A comprehensive list of topics and themes have been recorded, now the Members are refining topics and contents	Initial Table of Contents and assignments have been drafted
4	Request for Information (RFI)	April 2020	A 60-day public comment period will remain open through June 1, 2020.	Feedback from public may be limited due to COVID-19, so the team will relay heavily on Call for Evidence feedback as well.
5	Stakeholder Roundtables	March 10, 2020	March 12 Listening Session with Stakeholders was a success, and helped inform the RFI	
6	Advisory Committee Listening Sessions	March 12-13, 2020	COVID-19 has impacted the teams external engagement strategy. Alternative options are being discussed.	Team will seek to host one public hearing, non-public engagements with the advisory boards and councils, and potentially individual meetings with diverse stakeholders to supplement public feedback.
7	Bureau Meetings	April 2020	Discover meetings were unofficially completed virtually on April 28.	
				</

# March 26 Monthly Check-In Summary


	Milestone	Target Deadline	Notes	Risks
8	Draft Working Table of Contents	April 2020	Table of Contents for volume 1 is included in briefing memo, tab 1.	Report recommendations will be supported by analysis outlined in volume 1 as well as by feedback from RFI and public engagement.
9	Obtain all research needed to begin crafting full report	June 2020	Bureau partners in RMR and Supervision have been responsive and helpful.	
10	Draft topic and theme analyses	August 2020	Team has assigned chapters for each Taskforce member to lead drafting, and intends to review initial drafts internally when members are onsite 6/17-19	Members are writing concurrently to avoid delays. The Special Advisor will work with the Chair through duration of project to ensure the report reads as though it was drafted by a single author.
11	Engage Federal and State Partners on potential recommendations	August 2020	Strategy for engagement to be developed by end of May.	
12	Draft recommendations base on intergovernmental engagement & research	October 2020	Recommendations to be initially formulated while team is onsite 7/21-24, and refined when the team meets 9/15-18.	
13	Refine report contents	November 2020	Team will be onsite 11/16-20 to conduct final revisions of report.	
14	Submit initial draft to clearance	November 24, 2020	On schedule to enter clearance on 11/24.	

CONSUMER FINANCIAL PROTECTION BUREAU // DRAFT // PREDECISIONAL

Tear  
prod

Status Key	
Not started	No risk
At risk	Delayed
Complete	Cancelled

# Milestone Schedule

	Jan - Mar 2020	Apr - Jun 2020	Jul - Sep 2020	Oct - Dec 2020
<b>Initiation</b> <ol style="list-style-type: none"> <li>Onboard Taskforce Members</li> <li>Onboard Taskforce Support Staff</li> <li>Define all opportunities for review</li> </ol>	Present - Mid-March			
<b>Prioritize, Learn, and Confirm</b> <ol style="list-style-type: none"> <li>Public Request for Information</li> <li>Roundtables</li> <li>ABC Listening Sessions</li> <li>Bureau Meetings</li> <li>Draft Working Table of Contents</li> </ol>	February - April			
<b>Analysis</b> <ol style="list-style-type: none"> <li>Obtain Research needed to begin crafting full report</li> <li>Draft topic and theme analyses</li> </ol>	March - July			
<b>Recommendations</b> <ol style="list-style-type: none"> <li>Engage Federal and State Partners on potential recommendations</li> <li>Draft recommendations base on intergovernmental engagement &amp; research</li> </ol>	July - November			
<b>Clear, Socialization &amp; Close Out</b> <ol style="list-style-type: none"> <li>Refine report contents</li> <li>Submit initial draft to clearance</li> <li>Final Report</li> </ol>			 Report Enters Clearance 11/24	
			Late-November - Feb	

CONSUMER FINANCIAL PROTECTION BUREAU // DRAFT // PREDECISIONAL

## High Level Schedule

	Jan 2021	Feb 2021	Mar 2021	Apr 2021
<b>Socialization</b> 16. Provide Prudential Regulators a readout 17. Provide Bureau Stakeholders a readout 18. Publish Report 19. Conduct outreach on legislative recommendations	January 2021 – End of February			
<b>Closeout</b> 20. Ensure records management requirements are met 21. Taskforce Members Offboarding 22. Director reviews report 23. Create actionable plan to implement Taskforce recommendations 24. Taskforce Support Staff Offboarding 25. Taskforce Charter Expires	Early January 2021 – Mid-March			