

July 23 Monthly Check-In Summary

	Milestone	Target Deadline	Notes	Risks
4	Request for Information (RFI)	April 2020	Summaries completed on 7/17	Feedback from public may be limited due to COVID-19, so the team will relay heavily on Call for Evidence feedback as well as public research
6	Advisory Committee Listening Sessions	March 12-13, 2020	New milestones have been added to this document account for an updated public engagement plan.	Pandemic impacted the teams external engagement strategy. An updated public engagement plan was released via blog.
9	Obtain all research needed to begin crafting Volume I	June 2020	Only targeted ad hoc inquiries remain.	
10	Draft topic and theme analyses (i.e. Vol I of the report)	August 2020	Secondary peer review is being conducted July 21.	Members are writing concurrently to avoid delays. The team paralegal will serve as a copy editor to ensure the report reads as though it was drafted by a single author as much as possible
11	First Draft Recommendations (i.e. Vol II)	October 2020	July 22-24 team will develop a majority of recommendations	
12	Public hearing	July 16, 2020		State and Federal engagement event scheduled

Status Key	
Not started	No risk
At risk	Delayed
Complete	Cancelled

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13	ABC Listening Session	September 3, 2020	Recently added public engagement event. Details to be shared prior to finalization.	This will replace the March 13 ABC Listening Session, and will be used to refine final recommendations.
14	Engage Federal and State Partners on potential recommendations	September-October 2020	Strategy for engagement in final stages and will be shared.	
15	Finalize recommendations	November 1, 2020	Team plans to be onsite 10/5-9 for last meeting to add new content	
16	Refine report contents	November 2020	Team plans to be onsite 11/16-20 to conduct final revisions of report.	
17	Submit initial draft to clearance	November 24, 2020	On schedule to enter clearance on 11/24.	Team working to develop clearance process by early fall.
18	Final report delivered to Director	January 29, 2021		
19	Provide Bureau Stakeholders a readout	January 8, 2021	This will not be the first time Bureau stakeholders have gotten to see the report, but it will be the first it is shared in totality.	The team will work to avoid details leaking.
20	Provide Prudential Regulators a readout			
21	Publish Report	End of January 2021		

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Complete	Cancelled

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Milestone Schedule

	Jan - Mar 2020	Apr - Jun 2020	Jul - Sep 2020	Oct - Dec 2020
Initiation 1. Onboard Taskforce Members 2. Onboard Taskforce Support Staff 3. Define all opportunities for review	Present - Mid-March			
Prioritize, Learn, and Confirm 4. Public Request for Information 5. Roundtables 6. ABC Listening Sessions 7. Bureau Meetings 8. Draft Working Table of Contents for Volume I	February - April			
Analysis 9. Obtain Research needed to begin crafting full report 10. Draft topic and theme analyses (i.e. Volume I of the report) 11. Draft Recommendations (Vol II)	March - October			
Recommendations & Engagement 12. Public Hearing 13. ABC Listening Sessions 14. Engage Federal and State Partners on potential recommendations 15. Finalize recommendations	July - November			
Clear, Socialization & Close Out 16. Refine report contents 17. Submit initial draft to clearance 18. Final Report				☆ Report Enters Clearance 11/24 October - February

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High Level Schedule

	Jan 2021	Feb 2021	Mar 2021	Apr 2021
Socialization 19. Provide Bureau Stakeholders a readout 20. Provide Prudential Regulators a readout 21. Publish Report 22. Send report to Hill offices 23. Conduct outreach on legislative recommendations	January 2021 – End of February			
Closeout 24. Ensure records management requirements are met 25. Taskforce Members Offboarding 26. Director reviews report 27. Create actionable plan to implement Taskforce recommendations 28. Taskforce Support Staff Offboarding 29. Taskforce Charter Expires	Early January 2021 – Mid-March			