

Taskforce Support Norms

1. Process for handling requests from members:
 - a. COS or designee will add new requests to the team's action list tracker
 - i. If you receive a request on the side, just forward it for record keeping
 - ii. Use judgement on what requests to add to the tracker
 1. Short, easy to answer requests need not be tracked
 2. In-depth requests for information we are sourcing or summarizing, or data sets we are obtaining or analyzing should be
 - b. Counsel will lead framing and coordinating answer to requests
 - i. David and Ashlie will divide chapters and will take lead in coordinating responses to requests based on which chapter the request most aligns to
 - ii. Counsel will clarify the request
 - iii. Identify where to get information
 - iv. Queue up emails requesting information to the appropriate division for Matt/Nat to send to that divisions TF POC
 - c. Counsel are accountable for responding to requests
 - i. When sending a response, the memo will go to the member who made the request and CC the full distribution list
 - ii. Counsel may tap team members to send the memo responses, but they are accountable for getting the responses to the TF in a timely manner
 - iii. Counsel will be on point to share status updates at team meetings if the turnaround times are lengthy
 - iv. Responses will use the memo format we recently developed
 - d. When responding, David and Ashlie will determine how to response
 - i. They may choose to provide summary/analysis in the initial response (if it will not significantly delay getting information to the TF)
 - ii. They may share source information with an offer to follow up with summaries/analysis in the initial response
 - e. David and Ashlie may tap team members for support in summarizing or analyzing information as needed
2. Records retention for information requests:
 - a. Requests will be added to an action item log that is stored here: Z:\External Affairs\Consumer Advisory Boards\Taskforce\Admin
 - b. Materials shared with TF members will be stored here: Z:\External Affairs\Consumer Advisory Boards\Taskforce\Research Docs
 - c. Memos send to TF members will be stored here: Z:\External Affairs\Consumer Advisory Boards\Taskforce\Memos\00. Internal to Taskforce

Delegations of authority

- 1.