

# March 26 Monthly Check-In Summary

	Milestone	Target Deadline	Notes	Risks
1	Onboard Taskforce Members	January 2020	Orientation completed Jan. 31	Minor administrative requirements outstanding (trainings, badging, and background)
2	Onboard Taskforce Support Staff	March 2020	3 staff started, 2 identified and will soon start, 3 outstanding	Search for qualified Analyst, Special Advisor, and Economist could impact support to TF members
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	RFI submitted to Front Office on 3/18; tentative plan is for public comment period to last from 3/24 thru 5/20	Anticipate requests from public to extend comment period due to impacts of COVID-19
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	Since the Listening Session were moved, the team now intends to discuss feedback from RFI at June ABC meetings.	March Meetings impacted due to COVID-19; rescheduled for June 17-19.
7	Bureau Meetings	April 2020	Numerous meetings with Bureau stakeholders (Markets, Financial Education, Innovation, etc) were held from March 10-13.	Final meetings for initial discovery to occur when members are scheduled to be onsite 4/27-29.

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Status Key	
Not started	No risk
At risk	Delayed
Complete	Cancelled

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8	Draft Working Table of Contents	April 2020	Updated Table of Contents included in Tab 2 of the briefing memo	Report contents will continue to evolve based on feedback from RFI and public listening sessions
9	Obtain all research needed to begin crafting full report	June 2020		Staffing delays have not yet impacted this milestone
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, but team will need to be mindful to ensure report does not read as though it was drafted piecemeal
11	Engage Federal and State Partners on potential recommendations	August 2020	Strategy for engagement to be developed	
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	Team moved deadline from 11/17 due to planned vacation.	Chose 11/24 (opposed to 11/10) to create report

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# Milestone Schedule

	Jan - Mar 2020	Apr - Jun 2020	Jul - Sep 2020	Oct - Dec 2020
<b>Initiation</b> 1. Onboard Taskforce Members 2. Onboard Taskforce Support Staff 3. Define all opportunities for review	Present - Mid-March			
<b>Prioritize, Learn, and Confirm</b> 4. Public Request for Information 5. Roundtables 6. ABC Listening Sessions 7. Bureau Meetings 8. Draft Working Table of Contents	February - April			
<b>Analysis</b> 9. Obtain Research needed to begin crafting full report 10. Draft topic and theme analyses	March - July			
<b>Recommendations</b> 11. Engage Federal and State Partners on potential recommendations 12. Draft recommendations base on intergovernmental engagement & research	July - November			
<b>Clear, Socialization &amp; Close Out</b> 13. Refine report contents 14. Submit initial draft to clearance 15. Final Report			☆ Report Enters Clearance 11/24 Late-November - Feb	

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## 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			