

May 28 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	Final team member set to join on 5/25, and this will be marked as complete.	
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 as public research
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, and alternative engagement strategy has been developed and is being socialized	
7	Bureau Meetings	April 2020	Discover meetings were unofficially completed virtually on April 28.	

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Status Key	
Not started	No risk
At risk	Delayed
Complete	Cancelled

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 virtually 6/16-19.	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.
11	Engage Federal and State Partners on potential recommendations	September-October 2020	Strategy for engagement to be developed by end of May.	
12	Finalize recommendations	October 31, 2020	Refined milestone to simply state that the team is working to refine all recommendations by end of Oct.	
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.	Team working to develop clearance process

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Milestone Schedule

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