**Best Practices – Tips for a Successful Transaction Record Task Team**

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The CGA is highly dependent on volunteers to handle the bulk of the committee work. This is particularly evident in the Best Practices committee. It is important to share experiences of success with those volunteers coming up who may be new to the process or leading a team for the first time. First: a quick look at the initial process.

Every time an identified potential practice is brought to the full committee, the stakeholders decide whether to form a task team to move forward. If the answer is "yes", a Transaction Record (TR) number is assigned, the task team is formed from volunteers and a Chairperson is named. At the time a task team is formed, the volunteers pledge their time to support the Chair in identifying language and references that reflect the industry best practice. Because the committee only meets face to face three times a year, the bulk of the work takes place behind the scenes by the task team.

Some of these teams are highly successful. Sometimes a TR goes through with minimal effort. But sometimes a TR can stretch on year after year without resolution. What contributes to a TR moving from inception to become a part of the Best Practices document? This article will deal with the "between the face to face meetings" work of the task teams to highlight experiences that can help anyone Chairing or serving on a task team.

**First Month**

Within the first 30 days the Chairperson should reach out to the volunteers that requested to work on the team. Thank them for participating. Inquire if the team believes there are any other stakeholders that should be included in the team. If there are additional people suggested, send them an invitation to participate. Evaluate the team you have. Is it "top heavy" with too many people representing a single stakeholder? Remember: the goal is to gain as broad a consensus as possible among the stakeholders and identify if there are any roadblocks or deal breakers in the language. Also it is extremely helpful if the people on the task teams have a good sense of the issues their other fellow stakeholders may have and that they are authorized to work on their behalf.

If you feel you have a well-rounded team, it is time to get started. Share with the team members the language that was submitted that prompted the creation of the TR. Any references should also be shared.

Review the submitted request to insure that there is a definitive statement. Remember, these practices revolve around action items. So as an example, a Best Practices statement is structured like, "When <stakeholder> <takes some action><under a specific circumstance>, the <stakeholder> shall <additional action>."

A simpler form might even be "<stakeholder> <takes an action>." For example, 6-17 "Accuracy of Location Information", Practice Statement: The project owner (stakeholder) provides accurate information (takes an action).

The Practice Description should support the statement with any additional clarification.

Any new TR must meet the requirements already established. Those requirements include:

1) Is the practice in use today?
2) Has it been demonstrated to reduce damages?
3) What references support these two criteria?

Once you have the team formed and the language formatted to match the Best Practices action statements, the task team is ready to work!

**Suggestions from a Retired Chairperson**

We have learned a few lessons we will share having both chaired task teams and served on them.

1) Keep track of all versions using some document that can be edited and shared. Any kind of collaborative form is good but many have issues with getting to some remote locations (i.e. Google docs, etc.) so good old Word with "track changes" (found under the "Review" tab) turned on helps immensely.
2) Keep an eye on any returned emails from your task teams. If it is undeliverable you may have a bad contact, the file you sent may be too big or there be some other stumbling block. People are always happy to fix an email transmission problem.
3) Keep the contact with your task team going! The first 30 day introduction and "getting started" email is a good start but the momentum must be kept going.
4) Almost everyone has access to some kind of conference bridge these days. It's best if you can keep a consistent means for the meetings to take place.
5) GoTo meetings or Join Me work well because if people can access it online you can make changes to language while everyone is on the call and they can be all seen at once.
6) Always close your meetings with a look ahead: what actions need to take place? Does another meeting need to be set up? Are there other stakeholders that are needed to help make the TR successful? Other experts?
7) No one wants to suffer "Death by Meeting." So make them as productive as possible. Be on time. Respect the time of everyone on the call.
8) Redistribute the latest version with a date and track changes on at the end of each called meeting.
9) When the language is completed, view "final" document and save as a PDF if possible.
10) Send to Erika for posting as early as possible.
11) If you are a Stakeholder Primary, distribute the language for comment just as quickly as you can. Try to make sure that any one opposed provides a reason for their opposition that can be discussed in the task team.
12) When you bring the language to the full committee meeting, be prepared to explain what has happened during the break and whatever significant changes were made to the language from the last meeting.

13) Leave your pride at the door. Understand that you may have to be flexible when it comes to editorial and also recognize that the 30 day window is there to gather any additional opposition or suggestions. This may come at the 11th hour so be prepared to potentially leave the meeting with some new suggestions.
14) Wash, Rinse, Repeat.

The good news is the final outcome is something that will be printed and shared with your peers in the damage prevention community and help to further protect people through education of the best practices.