The Fine Print: Best Practices for Basecamp

Wine Institute uses Basecamp, a project management platform, to support the work of approved committees and working groups. Effective July 2026, Wine Institute has adopted the following best practices to support effective governance and proper data management when using Basecamp.

Basecamp Compliance: An Overview

1) **Basecamp Project/Team Request Form**. To set up a project on Basecamp, complete the Basecamp Project/Team Request Form. Ensure the project has a defined purpose, will run for at least one year, and the project has at least five active participants. Also, designate a staff member to serve as the project manager (i.e., administratively oversee the Basecamp project).

2) **Basecamp Project Manager.** Creating a project on Basecamp is only the first step; it must be actively managed. Project managers should:

   (a) **Post Wine Institute's Policies.** Project managers should create a folder in Basecamps under "Docs & Files" labeled "Wine Institute's Policies – Please Read" and include the following files:

   - Basecamp Platform Use Policy. All participants must review and comply with Wine Institute's Basecamp Platform Use Policy, which sets forth requirements regarding account security, acceptable use of Basecamp, terms of use, antitrust compliance, confidentiality, and related obligations.

   - Antitrust Guidance. All participants must review and comply with Wine Institute's Antitrust Guidance, which describes types of lawful and unlawful communications and activities.

   - Speaker Guidelines and Guidance. Ensure you keep copies of Wine Institute's guidelines and guidance for external speakers, which provide an overview of off-limit topics and disclaimer language that can be shared with guest speakers.

   (b) **Audit the E-Mail List.** Conduct quarterly reviews of participants' e-mails to ensure Basecamp access is restricted to appropriate individuals, and communications are sent to authorized recipients. Address any bounce backs

promptly, and update or remove individuals as needed. As a courtesy, we recommend that you notify Wine Institute's Director of Member Relations of any member e-mail changes too.

(c) Monitor the Platform. Regularly monitor and review the platform to ensure project members are complying with Wine Institute's Basecamp Platform Use Policy and Antitrust Guidance. If you suspect any inappropriate or unlawful activity, please notify the Legal Department.

(d) Manage Files. All documents in Basecamp must adhere to Wine Institute's Document and Data Retention Policy. Project managers should regularly review documents and files saved in the project spaces to ensure compliance.

Why This Matters.

As a trade association, the Wine Institute is subject to antitrust laws and standards of care for cybersecurity, which require careful oversight of industry member communications and document sharing. We developed these best practices to ensure appropriate safeguards are in place. If you have any questions, please contact the Legal Department.

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Checklist: Best Practices for Basecamp	
☐ **Basecamp Project/Team Request Form**	• Did you complete a Basecamp Project/Team Request Form? Projects must support a Wine Institute committee or working group, have at least five participants, and be active for at least one year.
☐ **Project Manager**	• Have you designated a Wine Institute staff member to serve as a project manager? While member co-chairs and chairs may be involved in the day-to-day operations of the committee or working project, it is important that a staff member actively manages the Basecamp project to ensure compliance with Wine Institute's policies.
☐ **Key Policies: Basecamp Platform Use Policy; Antitrust Guidance, Speaker Guidelines and Guidance**	• Ensure participants are familiar with Wine Institute's Basecamp Platform Use Policy, Antitrust Guidance, Speaker Guidelines, and Speaker Guidance. Store these files in the "Docs & Files" section. Create a dedicated subfolder titled **"Wine Institute Policies – Please Read."** • Tip: When updates are issued by the Legal Department, the project manager should upload updated files. We recommend using Basecamp's versioning feature to ensure current versions are clearly maintained.
☐ **Audit the E-Mail List**	• The project manager should review the subscriber list quarterly to ensure all Basecamp users' names, e-mails, and affiliations are current and communications reach the right people. • Tip: We encourage you to notify Wine Institute's Director of Member Relations of any member e-mail changes as well.
☐ **Monitor the Platform**	• Regular monitoring is important. Online platforms, such as Basecamp, can be problematic grounds for unlawful antitrust communications and activity if not thoughtfully monitored. The project manager should

	remain aware of communications, chats, and documents posted within the project. If any issues arise, please immediately contact the Legal Department.
☐ **Document Management**	• Basecamp can hold project files temporarily, but it should not serve as a long-term repository. Any organizational critical files should be saved in SharePoint. Project managers should review documents saved to Basecamp and ensure compliance with Wine Institute's Document and Data Retention Policy.
☐ **No Legal Advice**	• Basecamp is NOT a forum for requesting legal advice. Also, documents and communications on Basecamp are not necessarily protected by attorney-client privilege. • All legal questions must be directed to the Legal Department by Wine Institute staff via e-mail, phone, or meeting, and you should clearly state that you are seeking legal advice.