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PANDEMIC TOOLKIT: RETURN TO NORMAL

CONTENTS

If you have questions or need hands-on assistance with returning to normal business operations, please **book a meeting** with our team. We are here to help.

TOOLKIT OVERVIEW AND GUIDANCE

The purpose of this document is to provide a toolkit for managing an organization's return to normal following a pandemic event or wave of a pandemic. The information and tools located within this toolkit are meant to be a resource for assisting your organization with assessing impacts, determining considerations for returning to normal, and documenting lessons learned to drive continual improvement.

As a rule, this toolkit is meant to be a starting point for these steps and conversations with the broader business. While each of these tools provides information and considerations to assist you in this endeavor, these items should not be completed without significant input from organizational leadership and key department SMEs.

Each section in this toolkit will follow the same format as identified below:

- Tool Overview
- Guidance for Using the Tool
- Tool Template

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CONTENT OVERVIEW

The toolkit contains the following resources, which are explained further in the document regarding use and guidance:

RETURN TO NORMAL PLANNING GUIDE

The Return to Normal Planning Guide outlines considerations for returning to normal operations following the pandemic or following a wave of the pandemic. Guidance is aligned to government guidance on re-opening and includes considerations for the major operational areas of your organization. These considerations should be used in discussion with key stakeholders to develop specific actions for re-opening.

AFTER-ACTION REVIEW AGENDA AND FACILITATION GUIDES

The After-Action Review Agenda can be used in either a mid-event or after-action review setting to review impacts on the organization, discuss actions taken, and identify strategy gaps or improvement opportunities. These agendas can be used with both a Crisis Management Team or more tactical department sessions. In addition, the Facilitation Guide provides guidance for facilitating the conversation with each respective group.

RETURN TO NORMAL PLANNING GUIDE

TOOL OVERVIEW

The Return to Normal Planning Guide provides a structure for determining your organization's approach to returning to normal operations based on government and health authority guidance.

GUIDANCE FOR USING THE TOOL

Review the *Government Guidance* for the phase that provides high-level considerations for you as an employer and how to best support your employees returning to workplace. With that high-level information, begin to formulate the steps necessary for your organization to accomplish your goals by viewing the *Organizational Considerations*. After reviewing considerations, populate an action plan for the actions that need to be taken immediately (next two weeks), in the short-term (next month), and in long-term (one month+) to return the organization back to normal.

TOOL TEMPLATE: RETURN TO NORMAL PLANNING GUIDE

INTRODUCTION AND OVERVIEW

As many areas around the world begin to think about beginning the process of returning to normal following COVID-19, it is important for each organization to consider the details of how that return to normal will affect their own operations. This guide is meant to spur conversations within each organization on the steps needed to begin that transition and manage the transition back to normal effectively.

RETURN TO NORMAL CONSIDERATIONS

GOVERNMENT GUIDANCE

The United States government has provided guidance for employers in a three stage return to work approach. It should be noted that each region and state will need to determine when the appropriate time is to move between these phases, so it is critical to monitor state and local announcements. Phase guidance includes:

PHASE	GUIDANCE
PHASE 1	• Continue to encourage telework • If possible, plan on returning employees to the office in phases • Close common areas and enforce social distancing protocols • Minimize non-essential travel • Strongly consider special accommodations for vulnerable personnel
PHASE 2	• Continue to encourage telework • Close common areas or enforce social distancing protocols • Strongly consider special accommodations for vulnerable personnel • Non-essential travel can resume with caution
PHASE 3	• Resume unrestricted staffing of worksites

It should also be noted that government guidance across all phases is to monitor local guidance and develop organization policies regarding:

- Social distancing and protective equipment
- Temperatures checks
- Sanitation
- Use and disinfection of common and high-traffic areas
- Business travel

Across all planning phases, employers should continue to monitor the workforce for symptoms and ensure that symptomatic personnel do not physically return to work without clearance from a medical professional.

ORGANIZATIONAL CONSIDERATIONS

CRISIS MANAGEMENT TEAM CONSIDERATIONS

- Are there any policies or strategy changes that need to occur to adjust to the new normal (e.g., Travel, WFH, laptop permissions, vendor arrangements)?
- How will we continue communications during this transition to internal and external stakeholders?
- Are there any events later this year that we should cancel/adjust?
- Does our market look different following this pandemic? Do we need to change how we provide our products/services?
- How/when do we begin unwinding any strategies put in place (e.g., cutting employee pay, implementing alternate work schedules)?
- Are there any missed regulatory/compliance activities that need to be addressed?
- Are there any strategies that were implemented that should become permanent (e.g., employees equipped with laptops to work remotely)?
- How will we remember/honor any employees that were lost during the pandemic?
- Have we conducted an After-Action Review and begun planning for a potential second wave?
- What would trigger our organization to return to pandemic response strategies?
- What are lessons learned to apply to future waves/outbreaks?

📋 DEPARTMENT/OPERATIONS CONSIDERATIONS

- What employees need to return to the office, and which can continue working remotely?
- How can your department phase employees back into the office?
- What department considerations might we need to "unwind" as we return to normal?
- Is there any need to adjust priorities to recover from backlogs?
- What department strategies have unresolved gaps we should mitigate now?

🧍 PERSONNEL CONSIDERATIONS

- Which groups must return to the office, and which may be able to work remotely long-term?
- Can we delay re-opening offices based on WFH success?
- How will we decided when to allow travel for work?
- How can we phase employees back or rotate staff reporting to the office?
- Are there any special considerations for bringing back furloughed employees?

🏢 FACILITY CONSIDERATIONS

- How will we stock necessary equipment for returning to the workplace (e.g., masks, sanitizing wipes, thermometers)?
- Are there any adjustments that need to be made to the facility to allow for social distancing?
- How will facility cleaning need to be adjusted?
- Does any equipment at the facility need to be inspected as it has sat idle or with limited use?
- How will we close common areas to encourage social distancing?

🖥 IT CONSIDERATIONS

- Are there any adjustments to network or infrastructure to support employees returning to facilities?
- Is there any equipment that needs to be collected from employees (e.g., laptops, hotspots)?
- Does employee system access need to be adjusted to revoke any emergency permissions?
- Do any patches or updates need to occur before employees return to the office network?

📦 SUPPLY CHAIN CONSIDERATIONS

- Are there any "new" suppliers that were successful and should continue to be used?
- Do we need to adjust our contracts with existing vendors based on pandemic impacts?
- Is there any notification to vendors/customers regarding resumption of service?
- Are there any supply chain strategies that should be further developed (e.g., requiring vendors to have BC plans or identifying alternate suppliers)?

💲 FINANCIAL CONSIDERATIONS

- Are there any financial adjustments that should be made to better plan for future events (e.g., additional liquidity or "rainy day" fund)?
- Is there any insurance that may better protect us for future events?

ACTION PLAN

Based on the considerations noted above, what actions need to be taken to facilitate a return to normal?

IMMEDIATE ACTIONS (NEXT TWO WEEKS)	
ACTION DESCRIPTION	**OWNER**

SHORT-TERM ACTIONS (NEXT MONTH)	
ACTION DESCRIPTION	**OWNER**

LONG-TERM ACTIONS (ONE MONTH+)	
ACTION DESCRIPTION	**OWNER**

AFTER-ACTION REVIEW MATERIALS

TOOL OVERVIEW

The After-Action Review (AAR) Agendas provide a structure for reviewing the organization's response to COVID-19 either as a "hot wash" to review during the organization's response or following the formal response to the event.

This template outlines questions to encourage discussion on:

- What is working well in the response, and what is not
- Event impacts on the organization or its critical resources
- Plan effectiveness and potential improvements
- Strategy shortcomings and improvement opportunities

The answers to these questions should be documented in a Summary Report and form the basis for strategy improvements when planning for a second wave or future disruptions.

GUIDANCE FOR USING THE TOOL

When using the agenda, keep in mind the level of audience that you will be engaging for these sessions.

While the first agenda contains more detailed questions regarding impacts and strategy effectiveness, presenting to a higher-level of audience such as a steering committee or crisis management team may require the more strategic approach taken in the second agenda.

As you facilitate the meeting, ensure to capture feedback, action items, and opportunities for improvement.

TOOL TEMPLATE: EVENT AAR – 1:1 OR SMALL GROUP FEEDBACK SESSION (BC FOCUS)

GUIDE OBJECTIVES

- Provide guidance on conducting a review session with business continuity teams and/or department leadership
- Document additional discussion points and an agenda to assist with facilitating a review session and gathering appropriate response information

GENERAL NOTES

SESSION TIMING: ~30-60 Minutes

PREPARATION:

- Determine appropriate participants for debrief session(s)
- Schedule sessions and provide conference bridge for discussion
- Develop and distribute agenda to interviewees prior to the session

RESOURCES NEEDED:

- Conference line to facilitate
- Two individuals (if possible) – one to facilitate and one to note-take

FACILITATING THE SESSION

- Introduce the objectives of the session
- Discuss timing of the session
- Facilitate discussion using the agenda below

CAPTURING OUTCOMES

- Document findings to allow for consolidation
- Consider using the SWOT diagram on page 14 to organize thoughts and findings

AFTER-ACTION REVIEW MEETING AGENDA (BC FOCUS)

OBJECTIVES

The purpose of this session is to meet with those involved in the response to COVID-19 and conduct a review to identify strengths, weaknesses, and opportunities for improvement, relating to [Organization]'s response to the COVID-19 pandemic. Our goal is to capture what's working/not working, identify actions that may need to be taken if the event accelerates (or in preparation for a second wave), and generally improve continuity and resilience at [Organization].

OUTCOMES

Outcomes include transparency around the organization's response, development of recommendations to improve [Organization]'s handling of the event, as well as the identification of opportunities to improve existing response and recovery plans, and identification of considerations to develop a plan to "return to normal".

AUDIENCE

Business Continuity Teams

PREPARATION

There is very little preparation necessary for this discussion, however, to better provide answers to the areas above, consider the following questions:

1. What has been working well for your team in your response to COVID-19?

2. What hasn't been working well or has been the most challenging to adjust to?

3. What response and recovery strategies (including communication) have you had to invent "on the fly"?

4. Do you work with any third-parties that have been especially impacted by the event? If so, how have you managed those relationships, and do you have an opinion on the need for more robust supply chain continuity strategies?

5. Has your team leveraged its business continuity plans and training during the event? What would make your plans more useful during this event (or in general)?

6. Is your team having any issues when it comes to availability of work resources, materials, equipment? How have those issues been getting resolved?

7. How has the organization been doing in terms of communication? Are you getting the direction you need? What could make communication better? What thoughts do you have on the timeliness of management decisions?

8. If you think through the COVID-19 event so far (or if a second wave occurs), what are you particularly worried about? Is there anything keeping you from being able to work remotely indefinitely?

9. If conditions start to improve and you think through the organization starting to "return to normal" in the next few weeks, can you talk through any space/resource needs your team might have? Are there certain individuals/teams within your area you would want to prioritize?

10. Generally, what have you learned from the COVID-19 response that you want to see captured or documented?

AGENDA

- Introductions
- Purpose of the Meeting
- Discuss [Organization]'s Response to COVID-19 based on SWOT Analysis
  - o Strengths of Response
  - o Weaknesses of Response
  - o Opportunities to Improve Response in the Future
  - o Threats that may Impact Response as the Event Continues
- Discuss Open Actions / Specific Improvement Opportunities
- Next Steps

CONTACT INFORMATION

For more information, please contact [Insert Contact Information].

TOOL TEMPLATE: EVENT AAR – SWOT SESSION FACILITATION GUIDE (LEADERSHIP FOCUS)

GUIDE OBJECTIVES

- Provide guidance on preparing for an event review session with executive leadership or the Incident/Crisis Management Team
- Document additional discussion points to assist with facilitating a review session and gathering appropriate response information

GENERAL NOTES

SESSION TIMING: ~60-90 Minutes

PREPARATION

- Determine appropriate teams for debrief session(s) – e.g., Crisis Management Team, Senior Leadership
- Schedule sessions and provide conference bridge for discussion
- Develop and distribute agenda and questions below to interviewees prior to the session

RESOURCES NEEDED

- Conference line to facilitate
- Two individuals (if possible) – one to facilitate and one to note-take

FACILITATING THE SESSION

INTRODUCTIONS

- Introduce the objectives of the session
- Discuss timing of the session
- Introduce the concept of SWOT Analysis

SWOT DISCUSSION

Facilitate discussion with the broader group using SWOT – focusing on response strengths, weaknesses, opportunities for improvement, and ongoing threats to manage.

Using this broad structure, consider the following questions to encourage ongoing discussion:

QUESTIONS

DETAILED QUESTIONS	1. What response and recovery strategies (including communications approaches) have you had to invent "on the fly"?
	
	2. Consider actions for each area below. What are strengths, weaknesses, and improvement opportunities for each?
	
	    • Communications
	    • Human Resources
	    • Facilities and Health/Safety
	    • Supply Chain and Procurement
	    • Information Technology
	    • Business Operations
	    • Business Continuity / Crisis Management
	
	3. If you think through the COVID-19 so far (or if a second wave occurs), what are you particularly worried about? Is there anything keeping you from being able to work remotely indefinitely?
	
	4. Are there any resource requests your team has that would make it easier for you to work?
	
	5. Have you been using your plans at all? What would make them more useful during this event (or in general)?

BROADER QUESTIONS	1. What do you think has been working well in your response to COVID-19? 2. What hasn't been working well or has been the most challenging to overcome? 3. Are there changes to your response that need to become standard operating procedures? Do we need to add members to the team or make changes to its composition? 4. Are there organizational policies and procedures that need to be revisited as a result of the event? 5. Are there any emergency strategies that should become permanent (e.g., changes to remote work capabilities)? 6. If you think through the COVID-19 event so far (or if a second wave occurs), what is the group particularly worried about? For any improvement opportunities identified, do we need to address any of those now? 7. If conditions start to improve and you think through the organization starting to "return to normal" in the next few weeks, what considerations need to be addressed? 8. Generally, what have you learned from the COVID-19 response that you want to see captured or documented?

CAPTURING OUTCOMES

During the session, capture the items using the chart below for populating the After-Action Summary Report.

STRENGTHS	WEAKNESSES

OPPORTUNITIES	THREATS

GENERAL OBSERVATIONS

ACTIONS		
ACTION DESCRIPTION	OWNER	DUE DATE

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AUTOMATE ADMINISTRATIVE TASKS: Catalyst automates BIA and Plan update reminders and approval reminders, while simplifying program management tasks, so you can focus on activities that will move the program forward.

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ENABLE EFFORTLESS ANALYSIS: Catalyst automatically integrates all data entered into the system so you can easily view upstream and downstream dependencies, recovery gaps, and risks across the organization.

GENERATE METRICS THAT MATTER: Catalyst automatically generates program metrics that allow you to quickly understand the status of your program, identify critical risks, and drive meaningful engagement with stakeholders and increase support.

CREATE CONSISTENT PROCESSES: Catalyst provides the flexibility to capture unique data, while maintaining the capability to develop templates that ensure consistency across your BIA and planning efforts.

READY TO LEARN MORE?

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