

Contingency Planning

Contingency Plan: A plan or procedure that will take effect if an emergency occurs.

Why is Contingency Planning important?

- It can reduce the risk associated with any emergency that could impact the organization, product, services, staff, colleagues, consultants, vendors, clients and community.
- By having a contingency plan, it will allow the organization to get back to the daily operations as quickly as possible.
- The plan also helps to protect resources by identifying how the work can continue using remote and off-site venues.
- It helps to reduce any major inconveniences to the client, customer and community and provides consistency of service.
- The plan provides a clear path through the uncharted territories of an emergency. Everyone will understand their role and how they will fulfil that role.

Instructions:

- Review the material provided in this Quick Reference Guide with your leadership team and management team.
 - Define who this plan represents:
 - Staff
 - Consultants
 - Vendors
 - Review which job responsibilities, if any, can be effectively completed remotely/off-site.
 - Discuss the expectations that the organization has with respect to working remotely/off-site.
 - Create an action plan for staff, colleagues, consultants, and vendors, working remotely/off-site:
 - Where will they be working?
 - Is it in a safe environment?
 - Can they easily get to the location and access the location?
 - Are there internet capabilities where they will be working?
 - Is it public? Confidentiality issues will need to be considered.

- Are there any tasks associated with their role that they will be unable to complete remotely/off-site?
- The objective of the worksheet is to help start the discussion with your staff, colleagues, consultants, and vendors about how the organization can continue to provide products and services during an extreme event.
 - Suggestion: Provide the following worksheet to your staff, consultants, and vendors. Ask them to use their own lessons learned based on their individual experiences.

Discussion Topics for the Leadership Team:

- **Timeline of activities:**
 - **Today:**
 - Draft and send the first email communication to the staff, colleagues, consultants, and vendors indicating that the contingency plan is going into effect on XX/XX/XXXX and will stay active until further notice.
 - Review of the organizational decision tree -
 - Determination of what decisions need to be made.
 - Who will be impacted by those decisions and how?
 - When do those decisions need to be made - the timing of the decisions?
 - Who owns the decision-making process?
 - Who will be responsible for communicating the decisions to the staff, colleagues, consultants, and vendors?
 - Review of equipment needs for staff, colleagues, consultants, and vendors. What equipment is necessary in order to be effective remotely/off-site. This will differ depending on the role of the individual and business unit. Create a matrix, by role, team, or business unit, to help understand what equipment is required in order to be productive remotely.
 - Equipment provided by the organization (discuss):
 - Laptop/computer/tablet
 - Phone
 - Web-conferencing capabilities/subscription
 - Audio conferencing capabilities/subscription
 - Equipment provided by the employee (discuss):
 - Internet access
 - Phone
 - Safe location for working remotely

- Compilation of all support resources available to the staff, colleagues, consultants, and vendors. This list may differ depending on the role of the individual (e.g. staff vs. vendor).
 - Employee Assistance Program (EAP)
 - Other organizational services and programs
 - Community based services
 - Share the attached worksheet with staff, colleagues, consultants, and vendors.
 - Provide a deadline. Provide instructions for actionable answers - observations that can be addressed.
 - **This week:**
 - Consider setting up an email address for staff, colleagues, consultants, and vendors to ask questions of the leadership team regarding the emergency.
 - Use the questions submitted to create a Frequently Asked Questions document that can be posted to the Intranet, or Internet, in an effort to provide consistency and clarity to the situation.
 - Consider providing trial memberships to staff and colleagues for a meditation site to help with any anxiety or concerns. For instance, Headspace.com, Calm.com, InsightTimer.com
 - Determine the communication schedule for staff, colleagues, consultants, vendors, clients, and the community.
 - **This month** - Determine what will need to be communicated over the next few weeks. Begin to compile the results of the worksheet into the framework for your new contingency plan.
 - **Next month** - Discuss how will the scheduled communications change next month vs. this month? Solidify the contingency plan based on the input from the staff, colleagues, consultants, and vendors.
 - **Quarterly** - Review the contingency plan with the leadership team on a quarterly basis. Don't forget to incorporate any input from the staff, colleagues, consultants, and vendors based on their worksheets and questions submitted.
 - **Annually** - Set up a test of the program for all staff, colleagues, consultants, and vendors. Let the organization know in advance and reiterate the use of the contingency plan that they helped to validate and solidify through their input.

- **Communication planning** – health and safety of staff are the top priority
 - The company will be communicating with the internal stakeholders (staff, consultants, and vendors) in the following manner (discuss):
 - Email alert / status / updates
 - Phone calls
 - Intranet site / SharePoint / OneDrive
 - Meetings via web conferencing / teleconferencing
 - Email address established for critical issues stemming from the emergency.
 - The company will be communicating with the external stakeholders (customer base, regulatory agencies, financial institutions and community) in the following manner (discuss):
 - Email alert / status / updates
 - Website updates with a link on the homepage to a separate page listing the extreme event and contingency planning protocols that are in affect.

Worksheet

Objective: Based on your individual experiences during this emergency please share with us your lessons learned in an effort to solidify our contingency plan. We appreciate your candid, and actionable, insights and observations.

- What worked well when planning for the remote/off-site working arrangements?

- What could be improved in the process?

- Was there anything that you needed in order to be more effectively remotely/off-site that we can plan for next time?

- If I had _____ it would have made my work transition easier. (fill in the blank)

Thank you for your contributions. Please return this worksheet to (e.g.) contingencyplanning@yourcompany.com